

Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN 2024 results announced

Responses where each country ranked first:

Japan: I have a gloomy image of my future (40.0%)

China: Work comes before family life (39.5%)









Thailand: I desire freedom (37.8%)

Continuing from last year, Hakuohodo Institute of Life and Living (HILL), in partnership with Hakuohodo Institute of Life and Living Shanghai (HILL Shanghai) and Hakuohodo Institute of Life and Living ASEAN (HILL ASEAN), completed the Chronological Lifestyle Survey on *Sei-katsu-sha** in Japan, China and ASEAN 2024. This survey was designed to identify the lifestyles and behaviors of *sei-katsu-sha*—Hakuohodo’s term for the holistic person—in Japan, China, and six ASEAN countries. It took the form of an online survey of 11,000 males and females aged 15–59. (See p. 10 for an overview.)

Where did each of the eight countries rank highest or lowest? This news release presents the most revealing data as selected by researchers based in Japan, China and ASEAN, along with their analyses. We hope it helps deepen your understanding of *sei-katsu-sha* in each country.

* “*Sei-katsu-sha*” is a term we use to describe people not simply as consumers, but as fully rounded individuals with their own lifestyles, aspirations and dreams.

Responses where each country ranked first

		2024	2023
	Japan I have a gloomy image of my future This may reflect the pessimistic keywords characterizing Japanese society (depopulation, super-aging, etc.).	40.0%	(43.7%)
	China Work comes before family life Under the current economic circumstances, priority is placed on ensuring a stable livelihood and income from work.	39.5%	(31.6%)
	Thailand I desire freedom This seems to reflect the desire of the Thai people to be set free from financial difficulty or enjoy life with their family.	37.8%	(41.2%)
	Vietnam Young people are the leaders of society The younger generation is a driving force for progress, believing that tomorrow will be better than today.	34.0%	(37.5%)
	Indonesia I have money to spare Besides being financially comfortable, Indonesians feel the highest level of happiness. Their feeling of prosperity appears to come from their religious devotion and their strong affection and feeling of connection with their family.	84.6%	(86.1%)
	Philippines I'm satisfied with the good relationship with my family The Philippine people tend to seek love, particularly in their family life.	63.5%	(68.5%)
	Malaysia I think money is the most important thing after my life Malaysians are very strict about money, partly because of their sense of obligation to support their family in case of need.	32.0%	(30.1%)
	Singapore Husbands have less authority over their wives than they did in the past In Singapore, men and women are more equal than in other ASEAN countries.	25.0%	(28.3%)

I have a gloomy image of my future

Local researcher's comment



Japan ranked first at 40.0%. This may reflect the pessimistic keywords characterizing Japanese society (depopulation, super-aging, falling birth rate, social isolation, etc.). While the downgrading of COVID-19 to a Class 5 disease has helped the Japanese regain the status quo, new challenges for livelihood including successive price hikes may have contributed to the pessimistic views of Japanese *sei-katsu-sha*. The Japanese also lead Asia in the answer: "I am worried about my pension" (44.9% in 2024, ranked first).



I use the loyalty programs offered by companies on a daily basis

Local researcher's comment



Japan ranked first at 28.5%. The spread of online shopping with the digitization of living, coupled with the widespread use of contactless payment during the COVID-19 pandemic, has led to the expansion of collecting points when shopping (accumulating and using loyalty points through shopping and other consumption behaviors). Japanese *sei-katsu-sha* seem to be more active not only in saving money by not spending it, but also in getting loyalty points by spending money, compared with their peers in other countries.

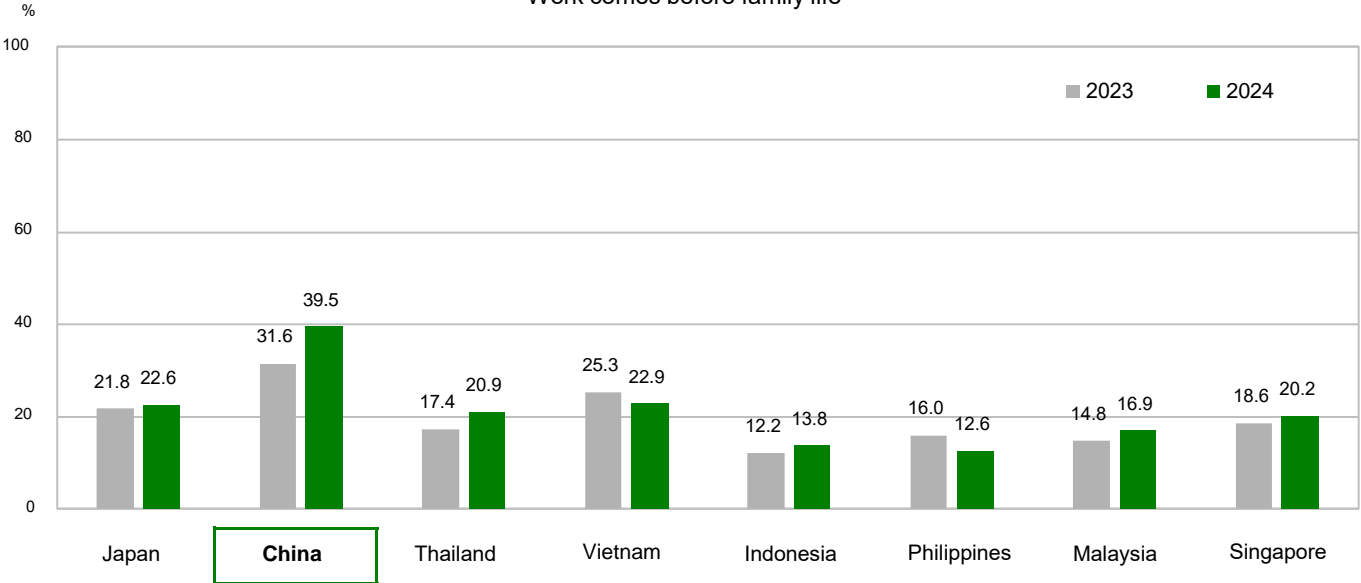


Work comes before family life



China ranked first at 39.5%. Under the current economic circumstances, priority is placed on ensuring a stable livelihood and income from work. The emergence of new jobs such as web-based voice actors (non-professional voice actors primarily active on the internet) and dog-walkers and the increase in the number of people engaging in side jobs apparently attest to the rising trend of placing top priority on work among Chinese *sei-katsu-sha*.

Work comes before family life

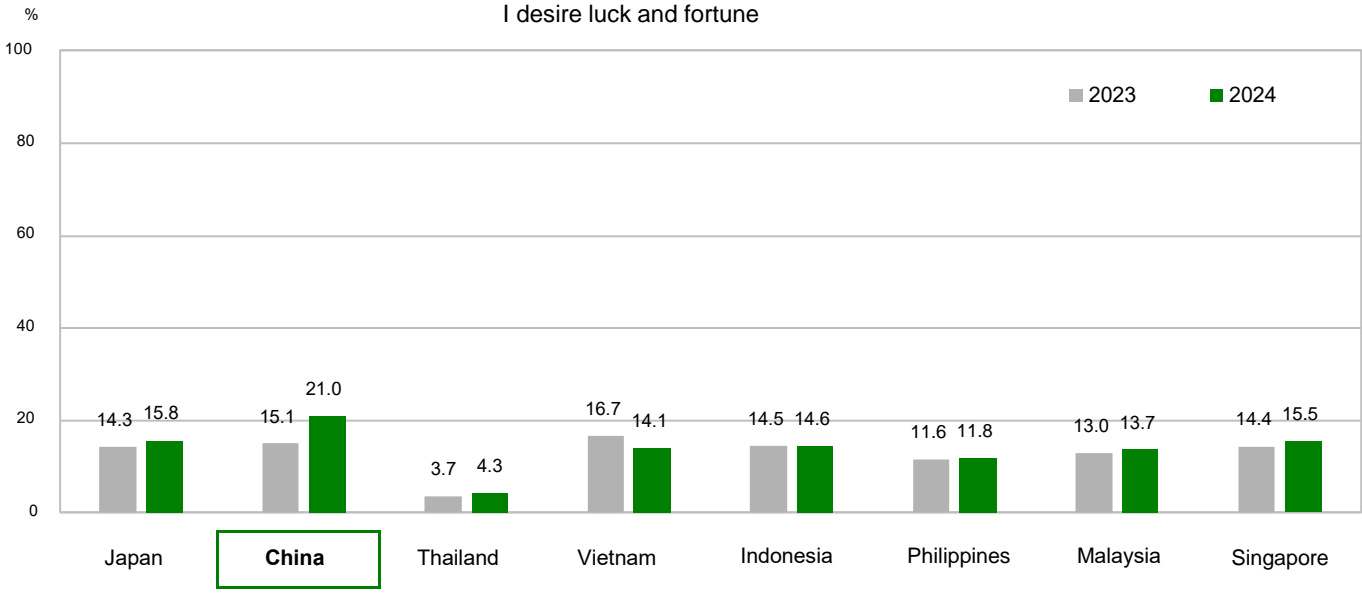


I desire luck and fortune



China ranked first at 21.0%. While placing priority on work, Chinese *sei-katsu-sha* seemingly want to minimize stress and fatigue from work and become successful without putting too much pressure on themselves. This may be one of the reasons why they tend to rely on luck and fortune for success. The fact that more people are visiting temples and playing lotteries shows that *sei-katsu-sha* are searching for luck and fortune.

I desire luck and fortune

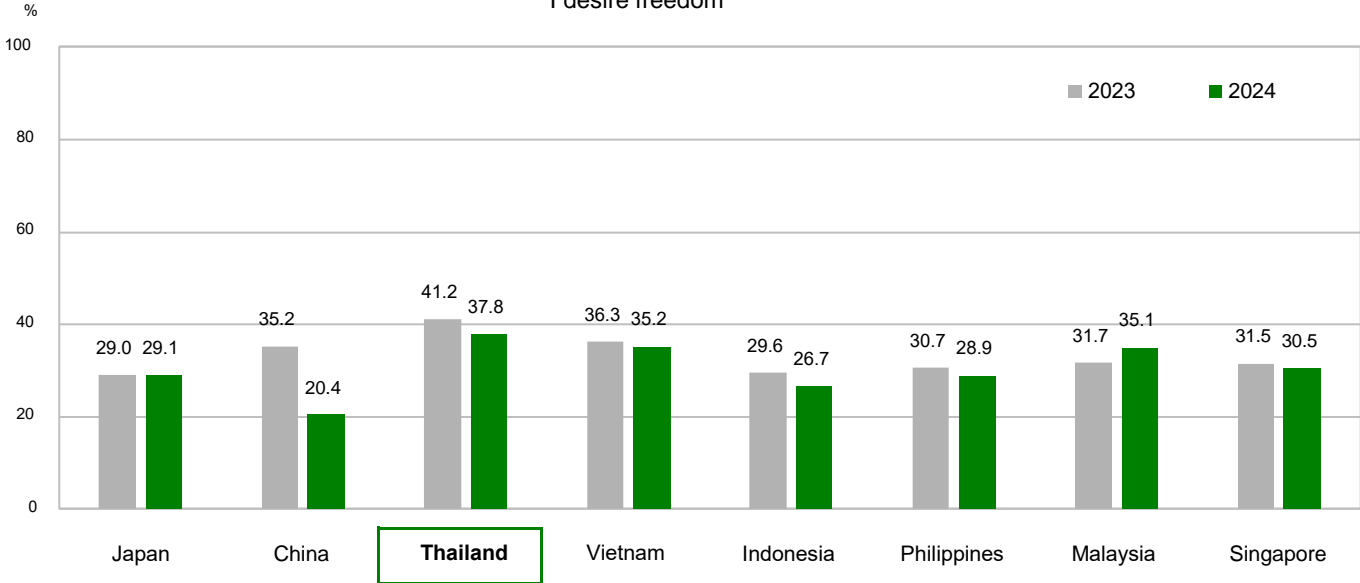


I desire freedom



Thailand ranked first at 37.8%. Since public opinion against socioeconomic opacity is not usually considered at the policy level in Thailand, Thai *sei-katsu-sha* appear to have given up hope. This may be why the result indicates their desire for freedom—freedom to express their own opinion, freedom from financial difficulty, freedom to enjoy life with family.

I desire freedom

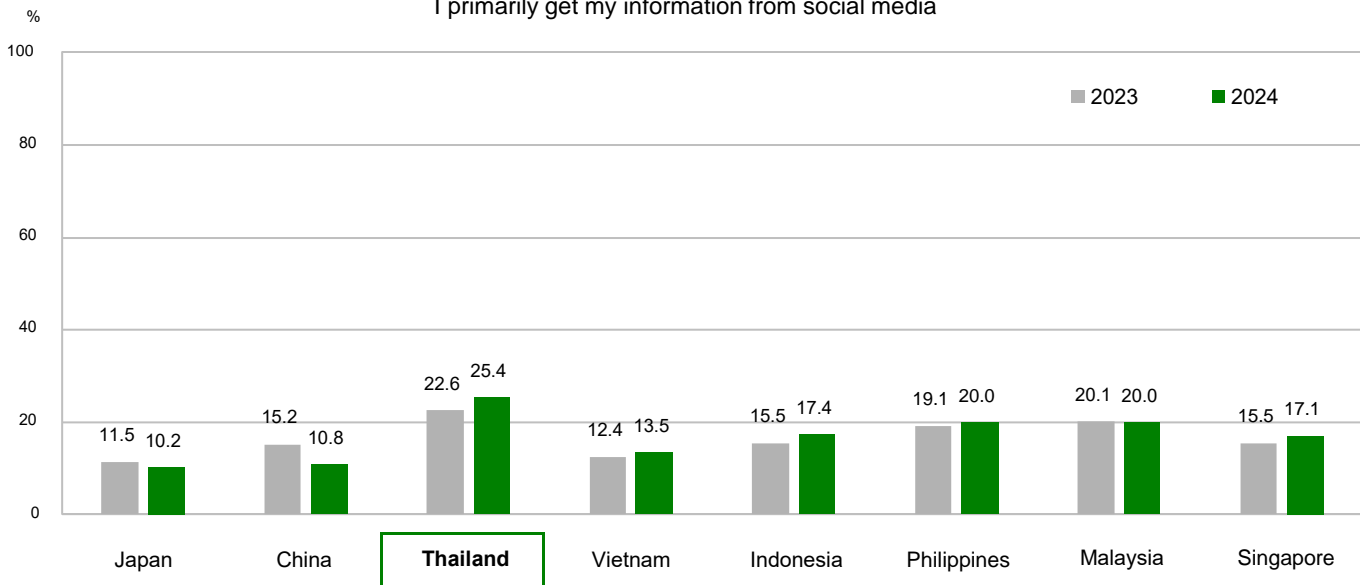


I primarily get my information from social media



Thailand ranked first at 25.4%. Thai *sei-katsu-sha* watch videos on smartphones and converse with chatting apps on a daily basis, even at work. This makes social media a major source of information. Indeed, Thai *sei-katsu-sha* utilize almost every function available on Facebook and other social media (posting articles, sharing news, messaging, shopping, etc.). This is why TV stations often post news information and content to social media including Facebook.

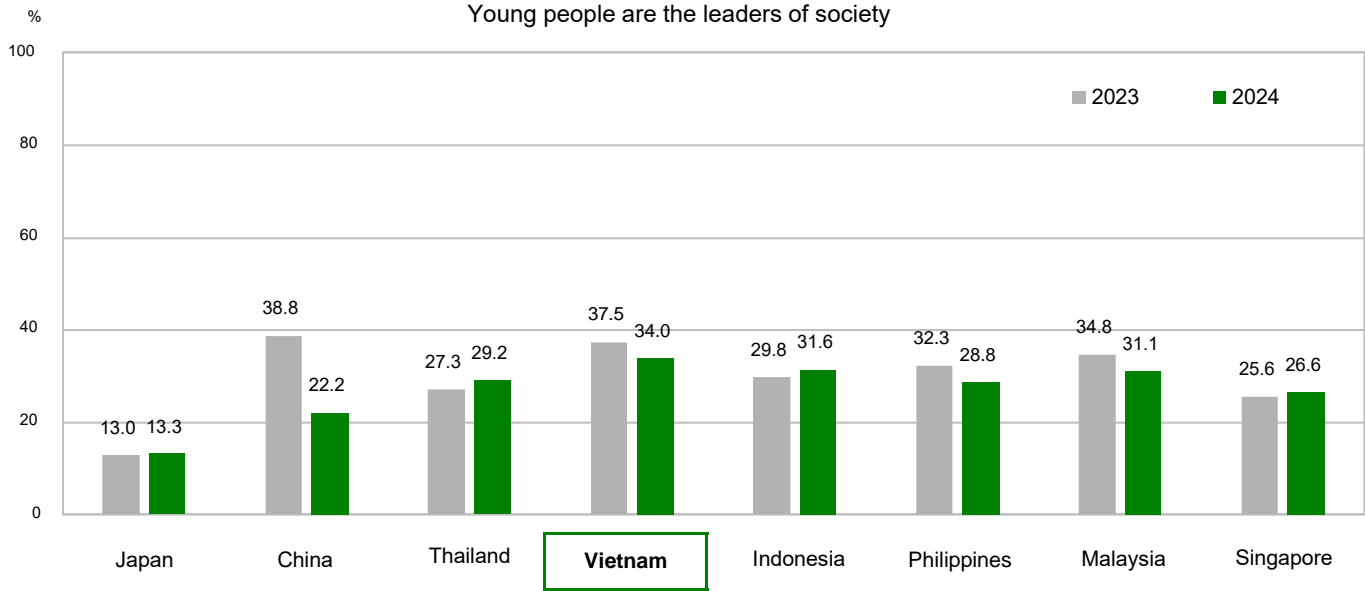
I primarily get my information from social media



■ Young people are the leaders of society



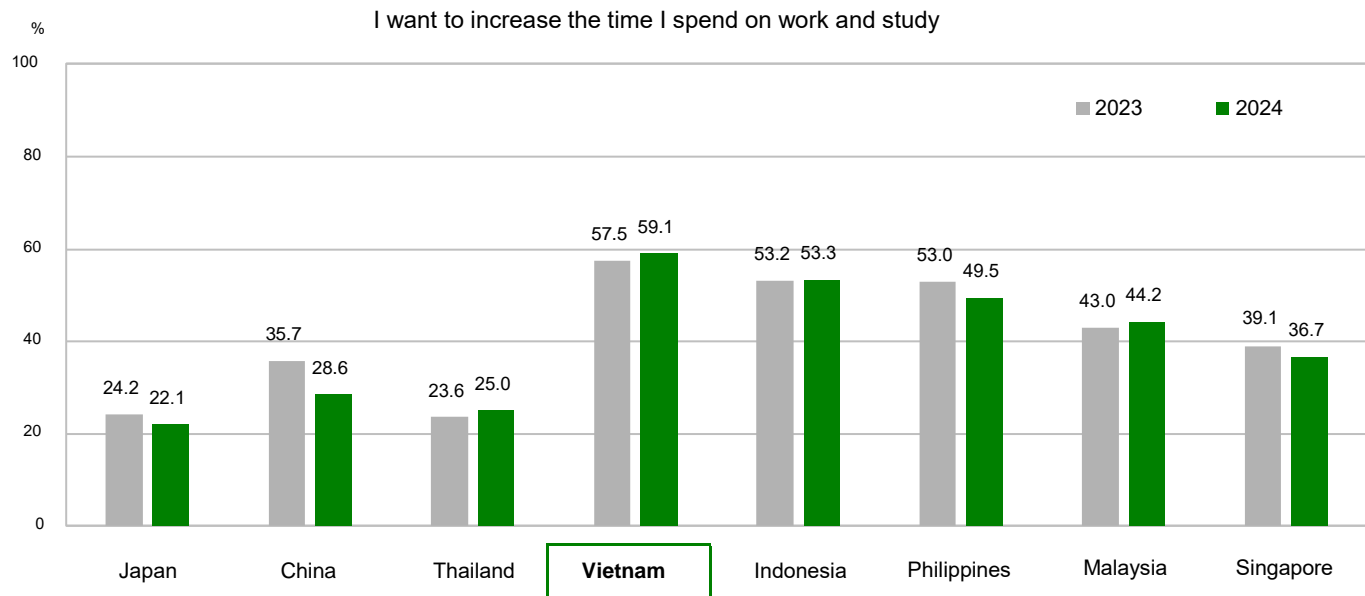
Vietnam ranked first at 34.0%. In the midst of rapid economic growth, *sei-katsu-sha* in Vietnam invariably believe that tomorrow will be better than today. The younger generation is a driving force behind this optimism. In Vietnam, many young people are aspiring to upgrade their skills, make more money, be filial to their parents, and contribute to the growth of their country. Vietnam also ranked first with the response “I desire youth” (18.0% in 2024), showing the heightened interest among Vietnamese *sei-katsu-sha* in youth. This might reflect the trend in Vietnam mentioned above.



■ I want to increase the time I spend on work and study



Vietnam ranked first at 59.1%. Vietnamese *sei-katsu-sha* are generally diligent. As can be deduced from the response “I’m satisfied with my personal academic background” (30.9% in 2024, ranked first), the Vietnamese highly value academic background as evidence of their efforts and social status. The data also highlight the desire of *sei-katsu-sha* to expand their opportunities by studying further to add to their existing academic background, as indicated by the response “I want to move up the career ladder within my company” (those with jobs only) (39.8% in 2024, also ranked first).



I have money to spare

Local researcher's comment



Indonesia ranked first at 84.6%. Coupled with the response “I’m happy” (90.4% in 2024, also ranked first), the result indicates that Indonesian *sei-katsu-sha* are the happiest and most financially comfortable people among the eight countries. From these responses, it appears their feeling of prosperity in life comes from their religious devotion and their strong affection and feeling of connection with their family.

I have money to spare



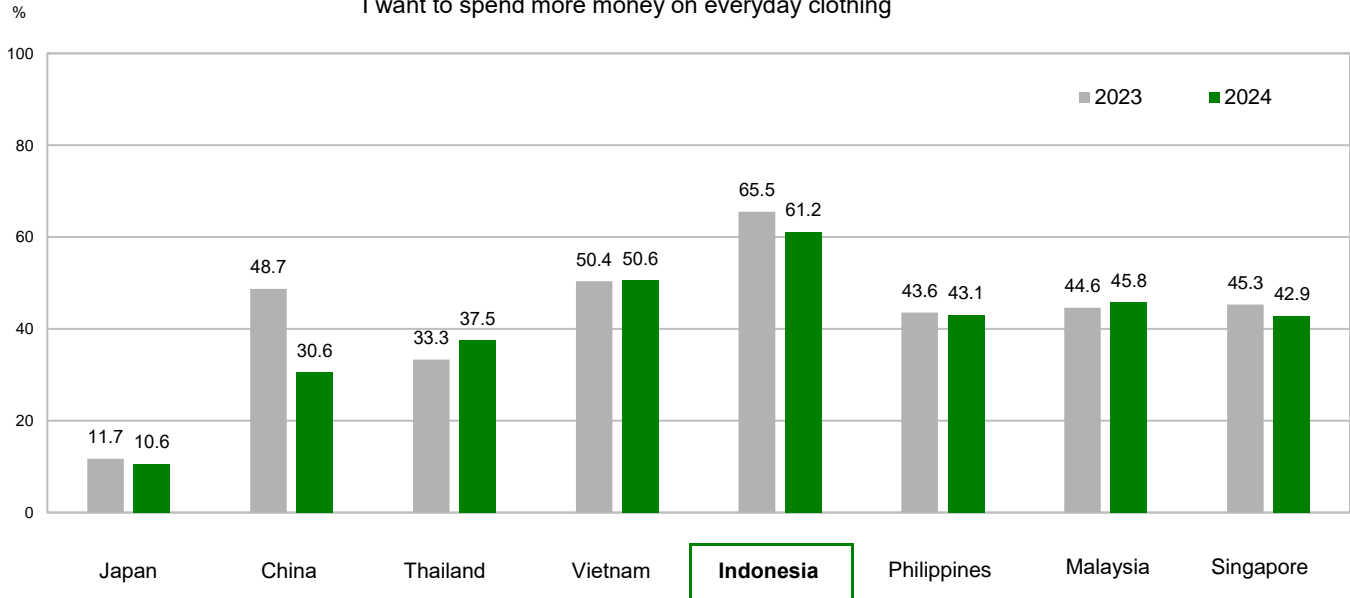
I want to spend more money on everyday clothing.

Local researcher's comment



Indonesia ranked first at 61.2%. The country also comes in first in the intention to spend money on “housing such as interior decorations and furnishing” (47.6% in 2024), and “vehicles” (52.4% in 2024). The result indicates that the Indonesians are more likely to spend money on something that makes their daily family life more comfortable and rich. In contrast, they mostly want to cut back spending on special occasions including “street clothes” (42.2% in 2024) and “concerts, events and festivals” (35.1% in 2024). It would be safe to say that Indonesian *sei-katsu-sha* typically prioritize daily life over special occasions when it comes to spending money.

I want to spend more money on everyday clothing





I'm satisfied with the good relationship with my family

Local researcher's comment



The Philippines ranked first at 63.5%. As exemplified by the response "I desire love" (42.3% in 2024, ranked first), the Philippine people tend to look for love in general. In particular, they often emphasize love in their family life as a larger percentage of people chose the response "I want to spend as much of my days off as possible with my family" (62.9% in 2024, also ranked first).

I'm satisfied with the good relationship with my family



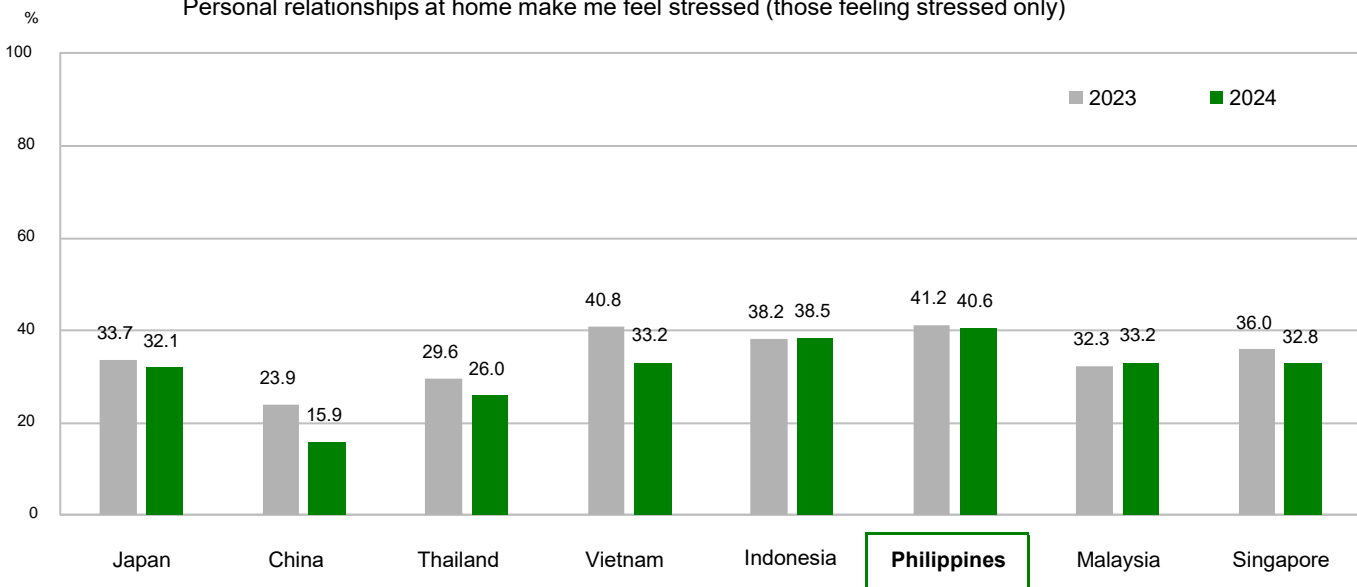
Personal relationships at home make me feel stressed (those feeling stressed only)

Local researcher's comment



The Philippines ranked first at 40.6%. Whereas *sei-katsu-sha* in the Philippines attach importance to relationships, and want to spend more time with their family, many of them also responded that personal relationships at home made them feel stressed. Keeping good family relationships requires tolerance and compromise by each member, which implies that someone has to suffer in silence.

Personal relationships at home make me feel stressed (those feeling stressed only)



I think money is the most important thing after my life



Local researcher's comment: Malaysia ranked first at 32.0%. The data indicate that Malaysians are very strict about money. In terms of social security, the response "Children should provide economically for their parents when they grow old," (43.5% in 2024, also ranked first) supports the finding of a survey conducted by HILL ASEAN* that their strong sense of obligation to support their family in case of need translates into the willingness of Malaysians to pursue studying and upgrade their skills to make money. Thus, the keen interest of Malaysians in economic matters is no surprise.

*Findings from the quantitative/qualitative surveys in ASEAN *Sei-katsu-sha* Studies 2023: Emerging Affluent

I think money is the most important thing after my life

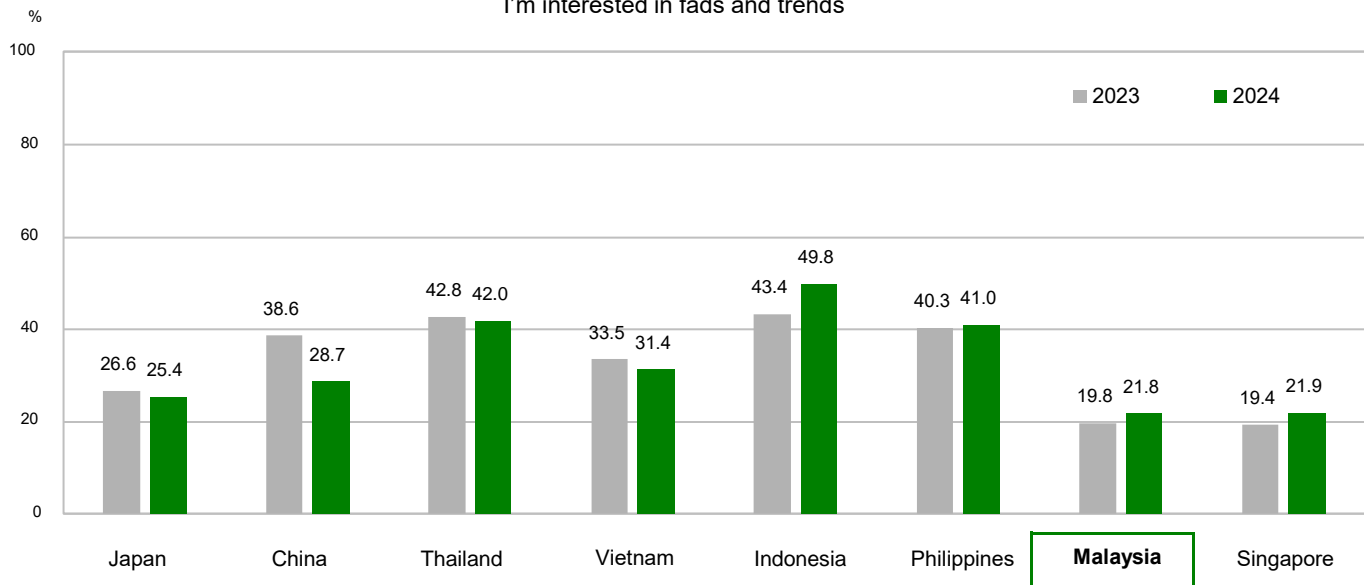


I'm interested in fads and trends



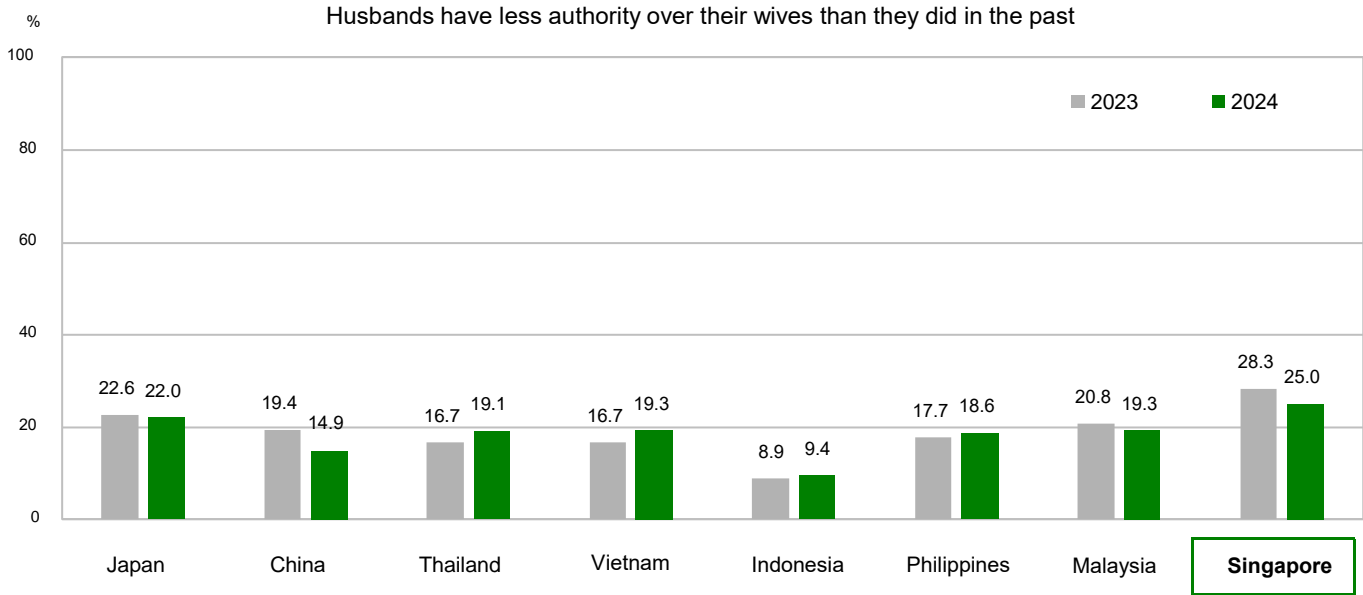
Local researcher's comment: Malaysia ranked last at 21.8%. As exemplified by the response "I want to cut back on money spent on everyday clothing" (35.1% in 2024, ranked first), Malaysians tend to be strict about money in daily life. They might avoid taking an interest in fads and trends in an effort to cut back on spending.

I'm interested in fads and trends



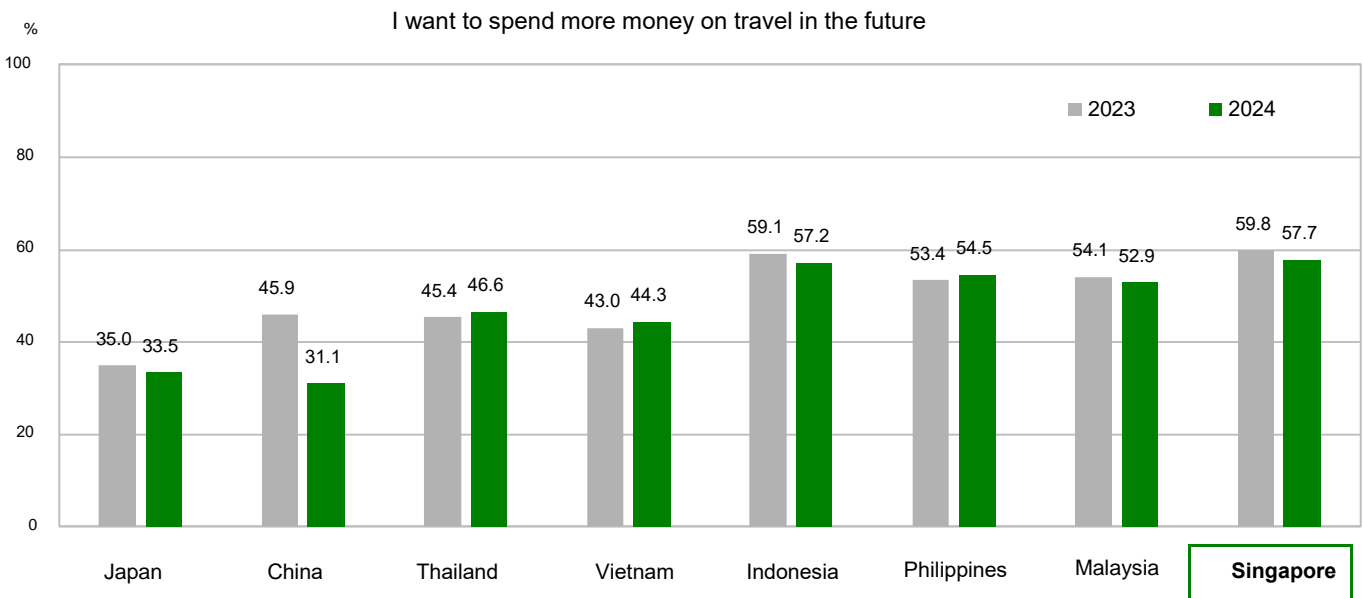
Husbands have less authority over their wives than they did in the past

Local researcher's comment
 Singapore ranked first at 25.0%. In Singapore, men and women are more equal than in other ASEAN countries as indicated by the response "I think it's acceptable if women take the lead in male-female relationships" (37.0% in 2024, also ranked first). Amid intense competition, men and women in Singapore are required to learn, work hard and keep winning. This might be one of the reasons why *sei-katsu-sha* feel that women have come to enjoy more authority in their relationship with their spouse or partner.



I want to spend more money on travel in the future

Local researcher's comment
 Singapore ranked first at 57.7%. Since Singapore is a small country, *sei-katsu-sha* enjoy traveling abroad just like moving around within the country. They refresh themselves by experiencing various things abroad to work even more energetically or behave even more actively. Traveling abroad is indispensable for Singaporean *sei-katsu-sha*, who sustain/are required to sustain significant economic growth.



What is the Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN?

- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN identifies the traits of *sei-katsu-sha* in different countries by asking them questions covering some 480 items relating to all aspects of life, including consumption, money matters, information, recreation, work, health, family, love, and marriage. These are based on the questions used in the Seikatsu Teiten Survey conducted in Japan since 1992 by the Hakuhodo Institute of Life and Living.
- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN will be conducted annually. Analyzing trends over time will make it possible to trace changes in attitudes, values, and behavior patterns in different countries.
- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN findings will be shared with the media through news releases such as this. They will also be utilized by the Hakuhodo Group when drawing up marketing proposals for Japan, China, and ASEAN.

Overview of the Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN

Survey area: Japan (Greater Tokyo and Hanshin regions)
 China (Beijing, Shanghai, Guangzhou)
 ASEAN (Thailand, Vietnam, Indonesia, Philippines, Malaysia, Singapore)

Sample size: 11,000 (11 areas, 1,000 people per area)

Respondents: Males and females aged 15–59
 (in the ASEAN countries, filtered by household income)

Allocation:

	Japan		China			Thailand	Vietnam	Indonesia	Philippines	Malaysia	Singapore
	Greater Tokyo	Hanshin	Beijing	Shanghai	Guangzhou						
Total	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Male	500	500	500	500	500	500	500	500	500	500	500
Female	500	500	500	500	500	500	500	500	500	500	500
Aged 15–19	110	110	110	110	110	110	110	110	110	110	110
Aged 20–29	222	222	222	222	222	222	222	222	222	222	222
Aged 30–39	224	224	224	224	224	224	224	224	224	224	224
Aged 40–49	224	224	224	224	224	224	224	224	224	224	224
Aged 50–59	220	220	220	220	220	220	220	220	220	220	220

Survey period: January 15–31, 2024
 January 10–31, 2023 (Reference data)

Survey method: Online survey

Design and analysis: Hakuhodo Institute of Life and Living

Implementation and tabulation: H.M. Marketing Research, Inc.
 Macromill China Insight, Inc.

*Please note that the 2023 data for China are only presented for reference as different research agencies and panels were used for the 2023 and 2024 survey.

Survey cooperation: Hakuhodo Institute of Life and Living Shanghai
 Hakuhodo Institute of Life and Living ASEAN

Hakuhodo Institute of Life and Living Shanghai

Hakuhodo Institute of Life and Living Shanghai, a wholly-owned subsidiary of Hakuhodo Inc. of Japan, is a think-tank established in Shanghai in 2012 to serve the Hakuhodo Group in China. Leveraging *sei-katsu-sha* research know-how amassed in Japan, the Institute supports companies' marketing activities in China, while developing local insights and making proposals on future ways of living in China.

Key activities:

- The Dynamics of Chinese People: Research that identifies the true desires of *sei-katsu-sha* and puts forward ideas for new ways of living
- Research on specific themes: Analysis of specific product categories including automobiles and cosmetics, and of specific *sei-katsu-sha* segments such as young people and high net worth individuals
- Consulting and recommendations: Advice on *sei-katsu-sha* insight-based marketing activities

<https://www.shenghuozhe.cn>

Hakuhodo Institute of Life and Living ASEAN

Established as an in-house think tank studying *sei-katsu-sha* in 2014, HILL ASEAN was incorporated in Thailand in March 2017. It supports clients' marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

Location: Bangkok, Thailand

Research and other activities: Research and analysis from the local perspectives of each ASEAN nation, forums held in ASEAN countries

Details of the findings of this study, commentary on the research content and implications for marketing can be found on a dedicated page on the Hakuhodo Institute of Life and Living ASEAN website:

<https://hillasean.com/>



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JAPAN / CHINA / ASEAN

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