



HILL Summer Seminar 2025

**Going Digital to
Grow, Going
Analog to Believe**

Increasingly Versatile *Sei-katsu-sha*

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Remote drinking sessions

Online food delivery

Telehealth visit

Virtual property previews

***Sei-katsu-sha* have generally embraced digitalization since the COVID-19 pandemic, complying with social distancing recommendations.**

Cooking videos

Online classes

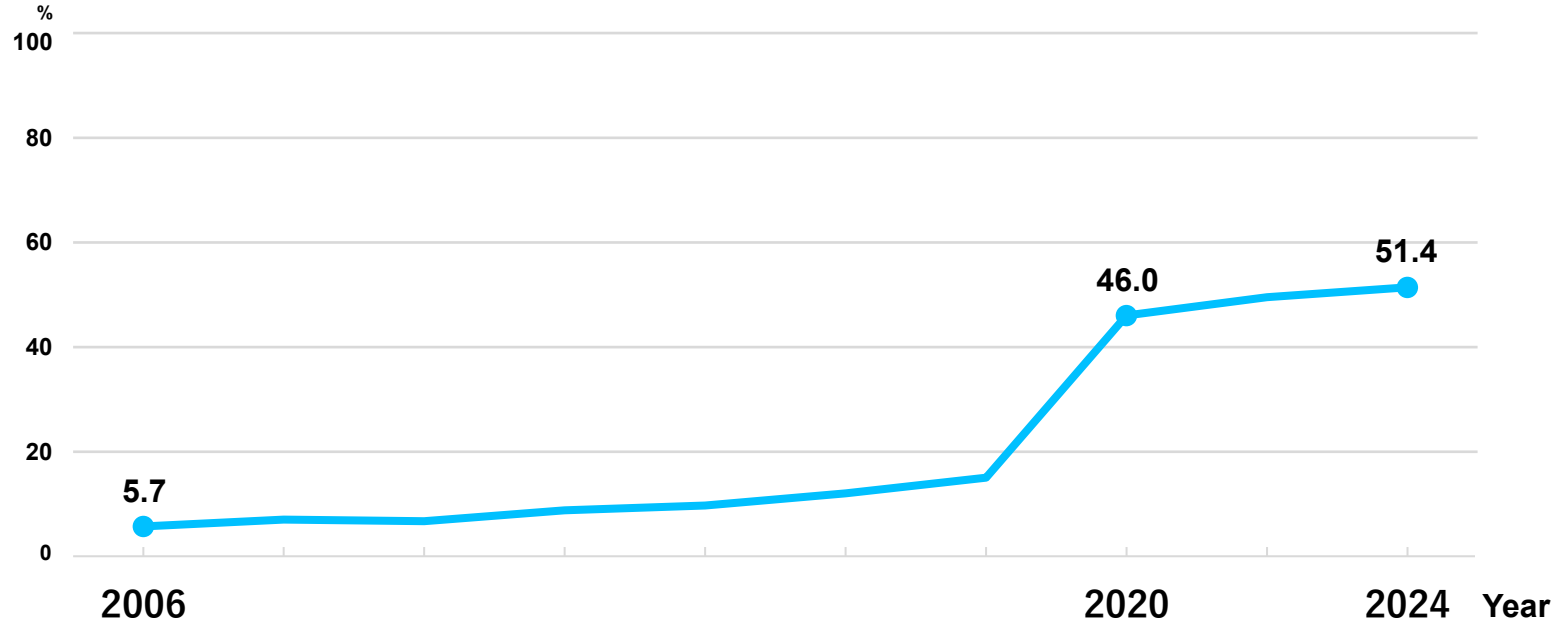
QR payment

Online shops

E-comics

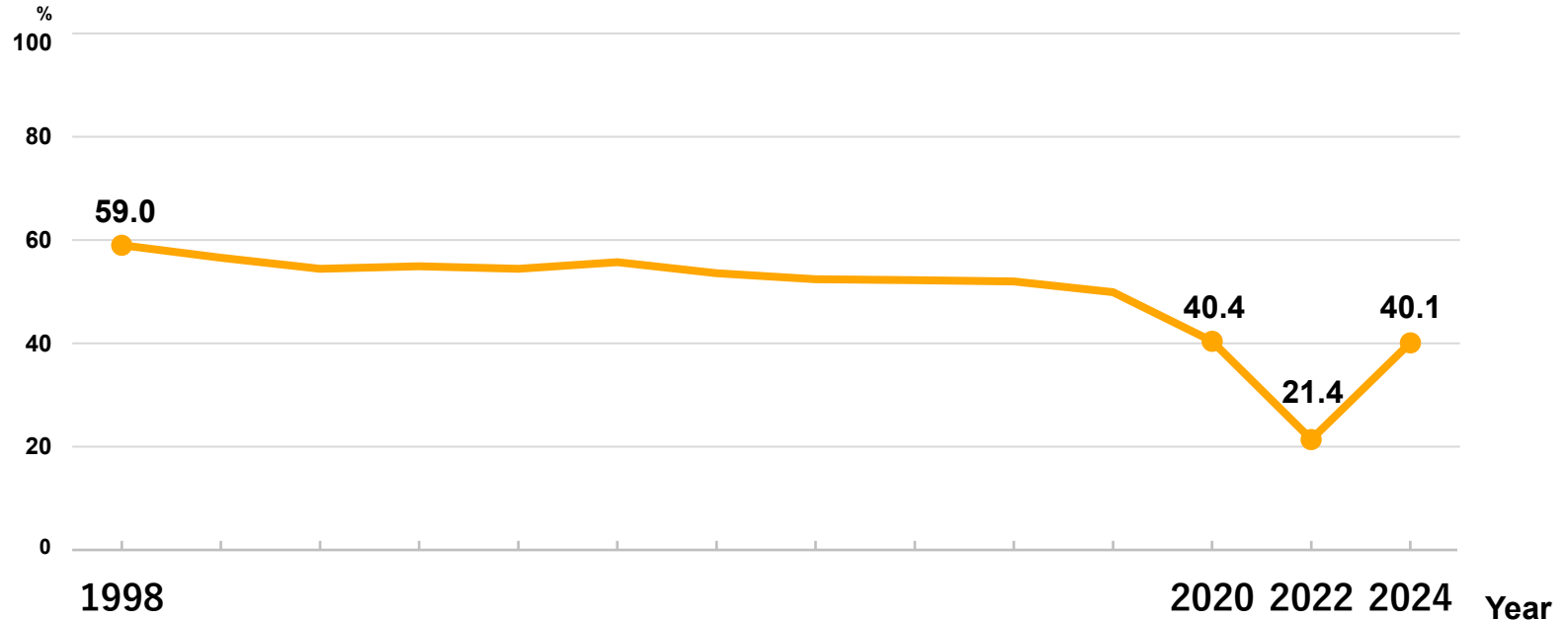
Substantial growth of videoconferencing in 2020

I use a videoconferencing service.



With the gradual return to normality since 2023, some people are resuming the analog behavior they had lost.

I have joined a New Year's party in the last 12 months.



The background of the slide is a collage. On the left, there's a grid of various digital technology icons including AI, VPN, a brain, a padlock, a lightbulb, a gear, a speech bubble, a magnifying glass, a bar chart, and a document. On the right, there's a wooden bookshelf filled with numerous books of various sizes and colors. The overall theme is the choice between digital and analog.

Accelerate digitalization OR **Return to analog**

Will life digitalize further?

Or, will there be a trend of returning to analog?

Part 1 Dual sides of digitalization

Part 2 Going digital to grow, going analog to believe

Wrap-up



Part 1

Dual sides of digitalization

Digital in living: 30 years of change

Phase 1

Dawn of digital (1995–2007)

1995 ————— 1997 ————— 1999 ————— 2000 —————

Windows 95 Rakuten Market i-mode
2 Channel Google (Japanese ver.)
Amazon (Japanese ver.)

Phase 2

Penetration of digital (2008–2014)

2008 ————— 2010 ————— 2011 ————— 2013 —————

iPhone 3G Instagram LINE Mercari
Twitter (Japanese ver.)

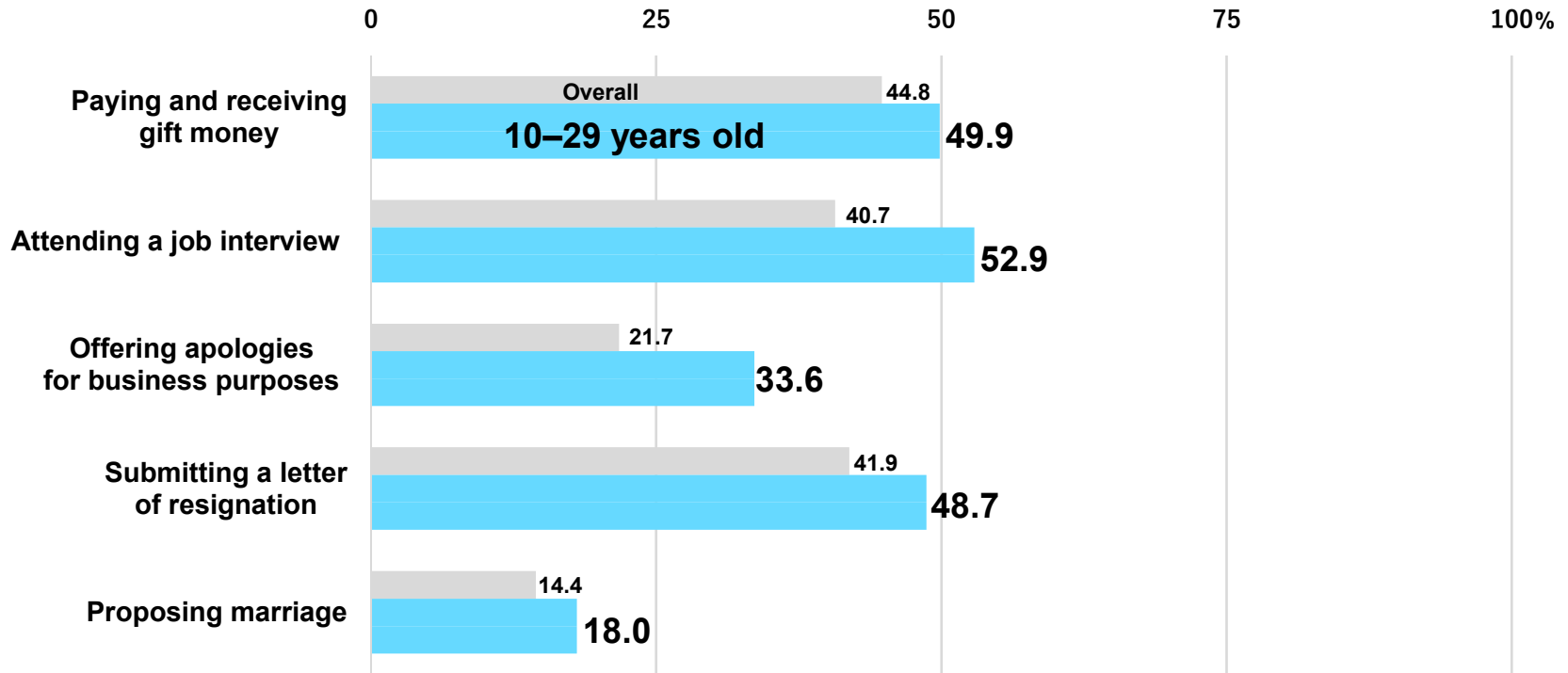
Phase 3

Expansion of digital (2015–)

2016 ————— 2017 ————— 2019 ————— 2021 ————— 2022 —————

Spotify TikTok PayPay Uber Eats ChatGPT
Zoom
(Japanese corporation) national rollout

Almost half of young people do not mind paying gift money, attending an interview or submitting a letter of resignation online.



*Figures for submitting a letter of resignation and offering apologies for business purposes are for employed respondents only.

Outline of the 2nd Chronological Lifestyle Survey on DX

Objective	Analyze the reality of digital living in general, including how people are switching between digital and analog in 30 areas of behavior
Area	Nationwide
Target	Males and females aged 15–69
Sample size	5,000
Period	March 3–5, 2025 (1st survey: March 22–25, 2024)
Method	Online survey

Classification of digital and analog behavior

Digital behavior

Analog behavior

Online

(websites, apps, e-commerce, etc.)

Offline

(home, office, brick-and-mortar stores, etc.)

Screen

(e-books, e-comics, voice)

Paper

(printed books, printed comics)

Virtual

(virtual makeup, e-payment, etc.)

Physical

(in-store makeup, cash payment, etc.)



Survey on distribution of digital/analog behavior

Digital behavior ratio

50+%

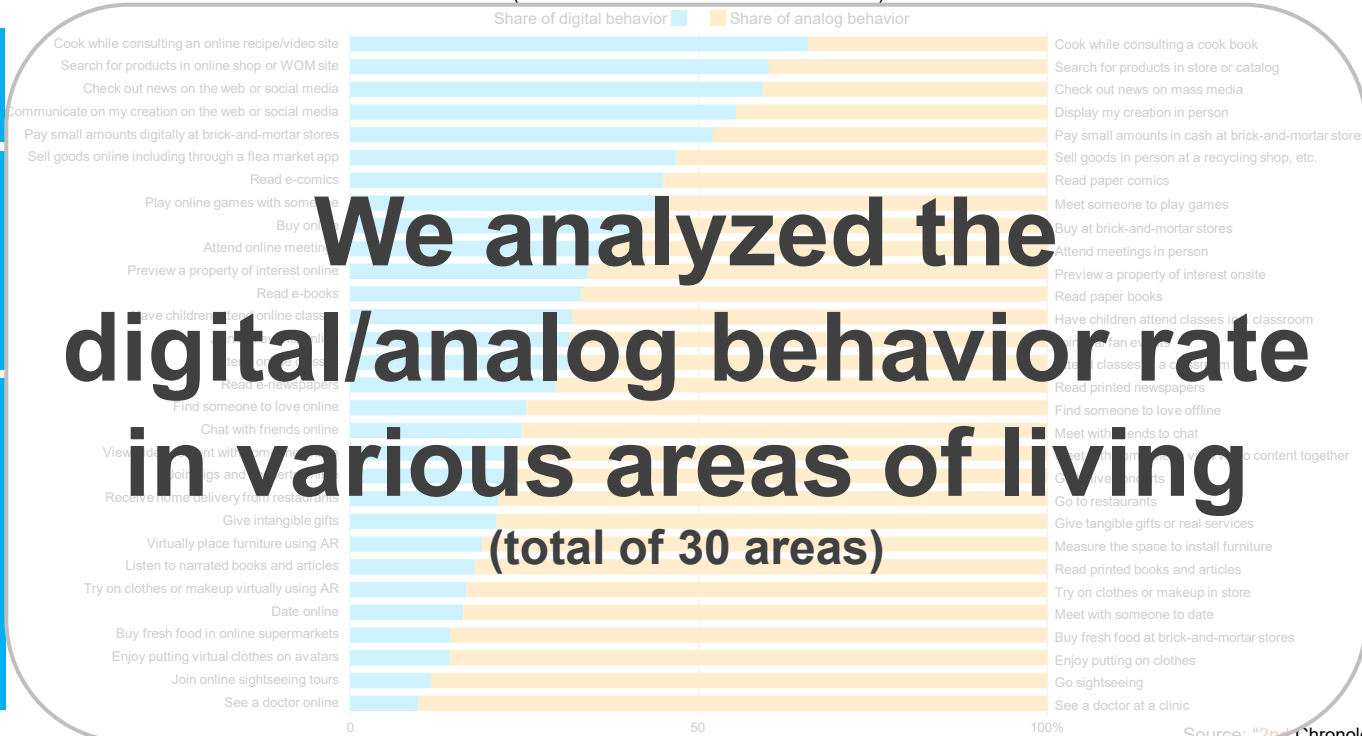
30–40%

Less than 30%

Mean value of digital/analog behavior ratio

(actors in each area over the last 12 months)

Share of digital behavior ■ Share of analog behavior ■



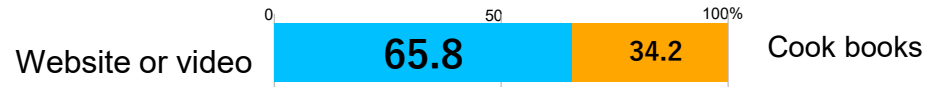
We analyzed the digital/analog behavior rate in various areas of living (total of 30 areas)

Digital behavior ratio exceeds 50% in information gathering/dissemination, and payment

Digital behavior ratio

50+%

Consult cooking recipes



30–40%

Search for products



Less than 30%

Communicate on creation



Pay small amounts of money in store



Digital ratio also exceeds 30% for property previews and fan events

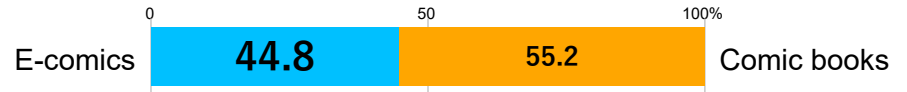
Digital behavior ratio

50+%

30–40%

Less than 30%

Read comics



Participate in a meeting



Preview a property



Participate in a fan event



Digital behavior ratio is still under 30% in half of the areas

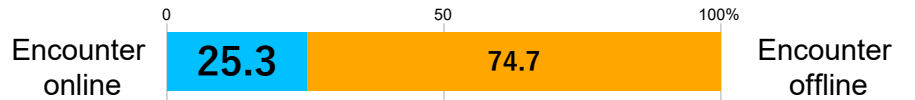
Digital behavior ratio

50+%

30–40%

Less than
30%

Search for someone to love



Try on clothes or makeup



Go on a trip



See a doctor



Living is being digitalized gradually

Digital behavior ratio

50+%

30–40%

Less than 30%

- Cook while consulting an online recipe
- Search for products in online stores
- Check out news on the internet
- Communicate on my creation on the internet
- Buy small amounts digitally at brick-and-mortar stores
- Sell goods online including through social media
- Play online games
- Attend a meeting online
- Preview a property online
- Find solutions to problems online
- Check out news on the internet
- View video content on the internet
- Join an online community
- Receive home delivery
- Virtually place furniture using AR
- Listen to narrated audiobooks
- Try on clothes or make-up virtually
- Buy fresh food in a grocery store
- Enjoy putting virtual stickers on photos
- Join online classes

From 2024 to 2025, the digital behavior ratio...

Rose in 26 areas

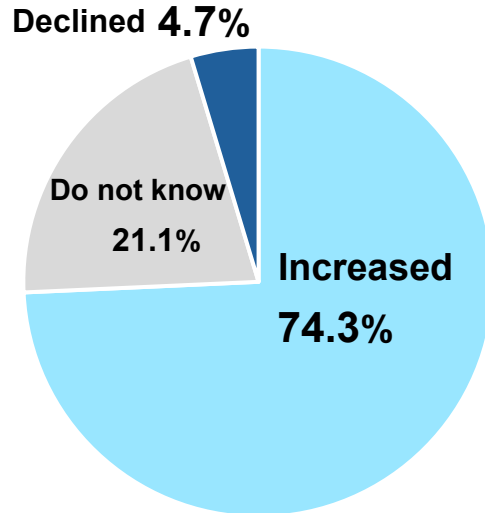
Declined in 4 areas

Have children take extra-curricular classes online	+4.1 pts
Virtually place furniture using AR	+3.7pts
Preview a property online	+3.4 pts
Attend a meeting online	+2.8 pts
⋮	
Cook while consulting a recipe online	+0.5 pts
<hr/>	
Participate in a fan event online	-0.4 pt
Join a concert online	-0.5 pt
Pay a small amount electronically	-0.9 pt
Sell an item online	-2.4 pts

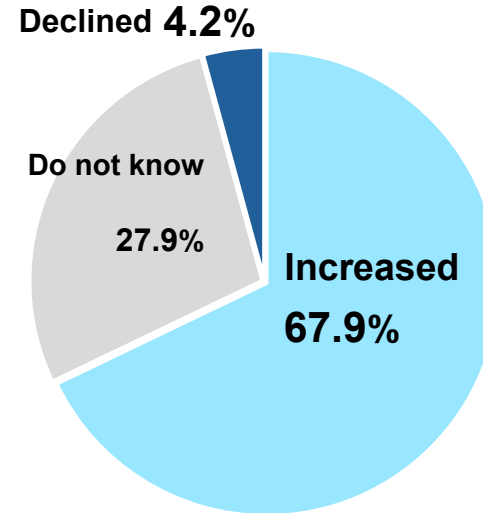
Around 70% feel greater convenience and efficiency

Change in living due to digitalization

Convenience



Efficiency

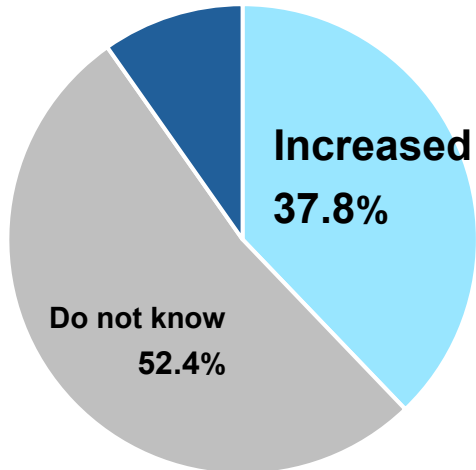


People are more sensitive to information, with a widening range of interests and greater time efficiency

Change in living due to digitalization

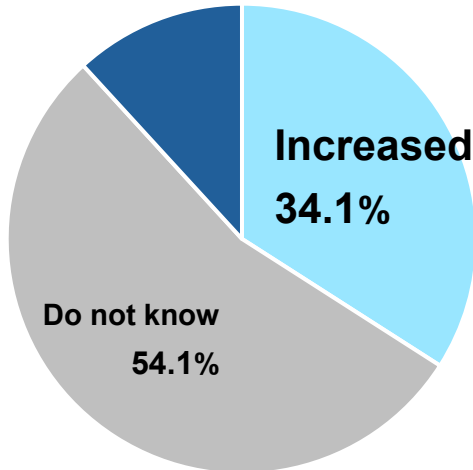
Sensitivity to information

Declined **9.8%**



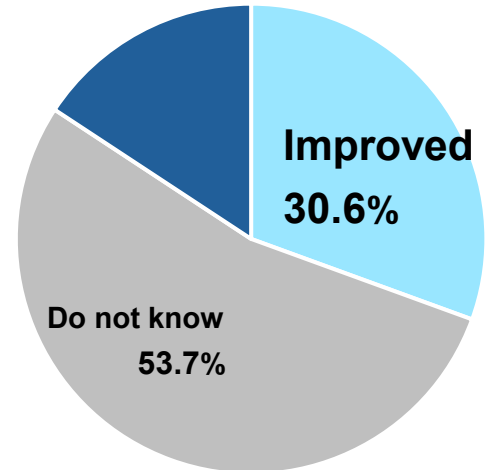
New hobby or interest

Declined **11.8%**

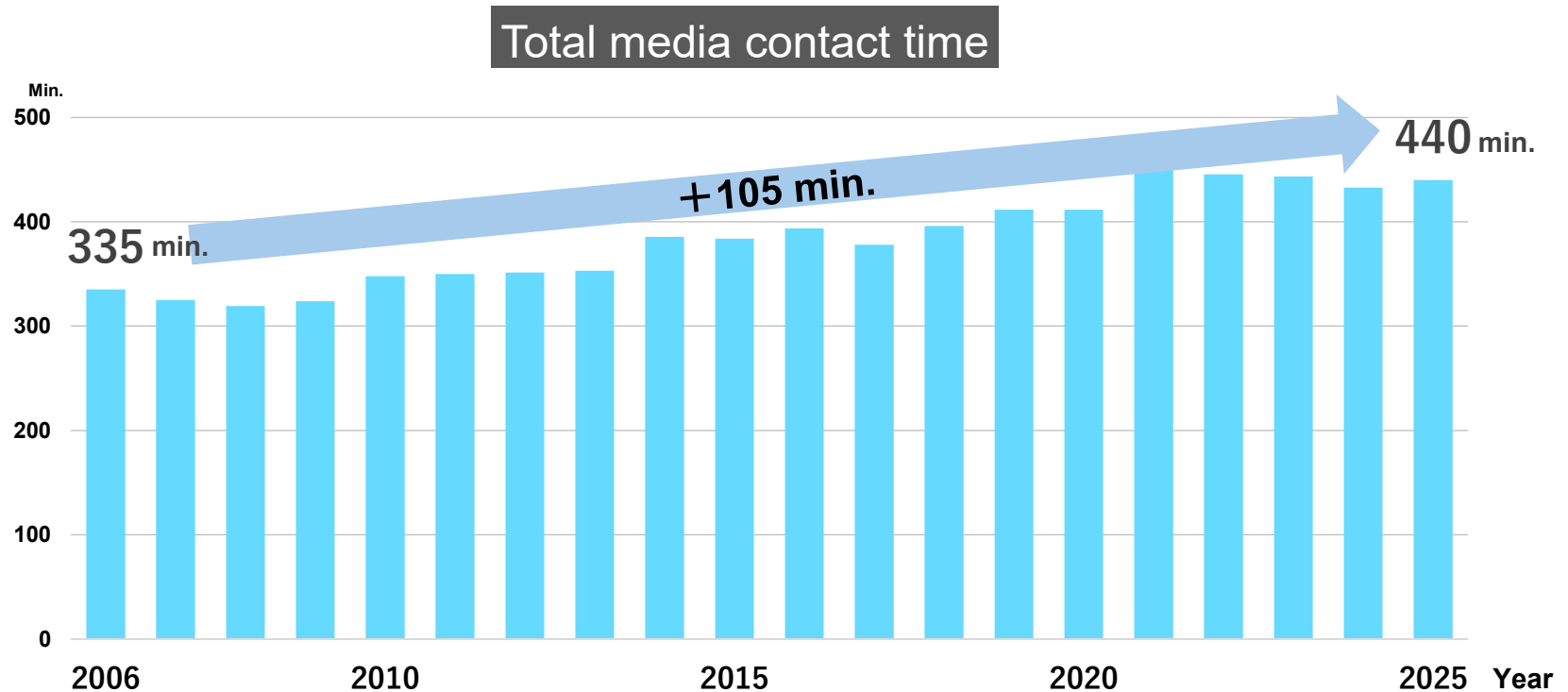


Time management

Declined **15.7%**



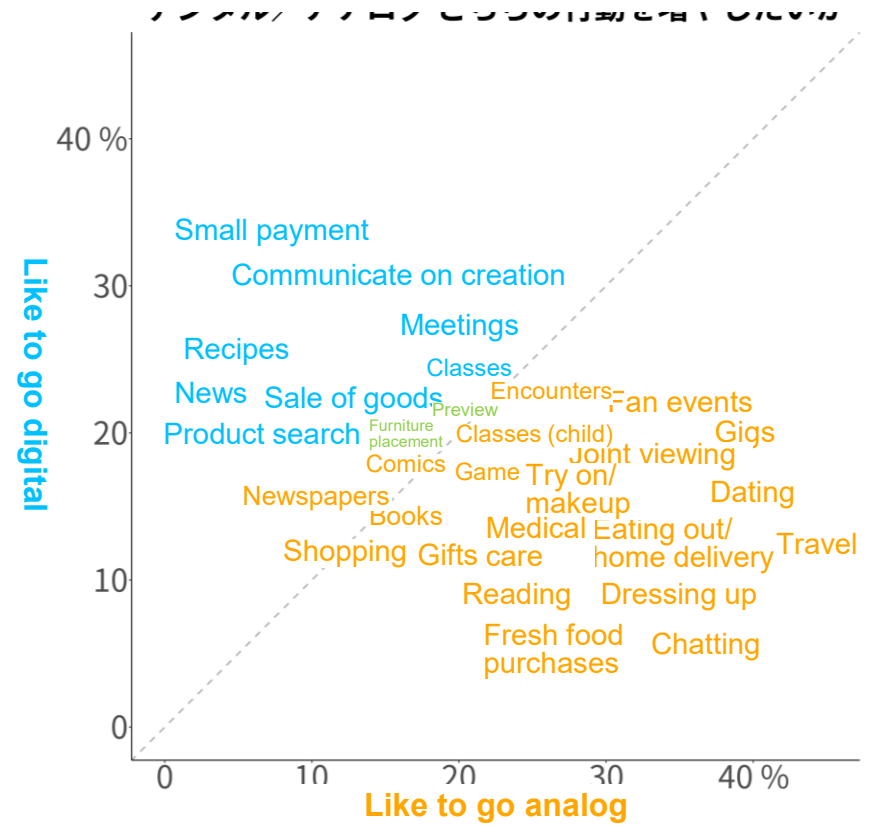
Total media contact time has risen



**Will *sei-katsu-sha* continue
to shift their behavior from
analog to digital?**

People want to increase their **analog behavior** more than **digital behavior** in many areas

Which way do you want to go, digital or analog?



Source: "2nd Chronological Lifestyle Survey on DX"

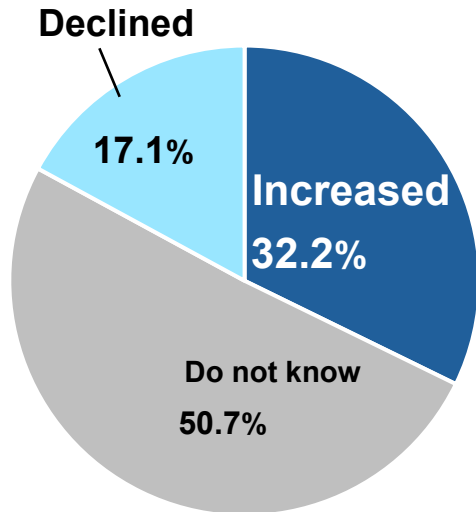
**Living is increasingly digitalized
but *sei-katsu-sha* are not fully
proactive about it**

(On the contrary, they would rather go analog...)

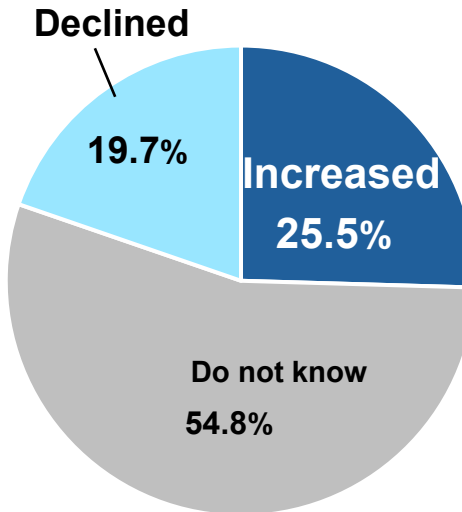
Too much information is making *sei-katsu-sha* weary

Digitalization-induced changes in living

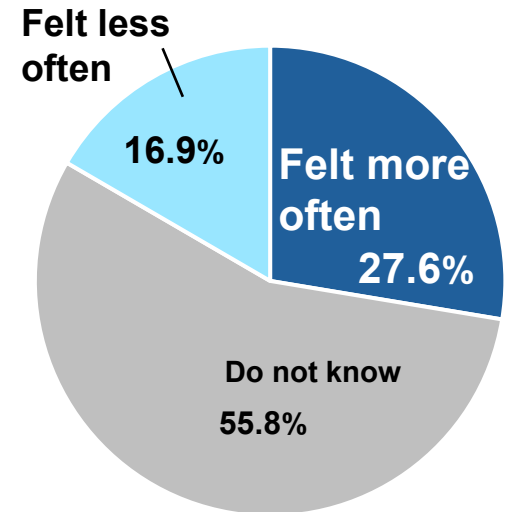
Frequency of being overwhelmed by information



Stress



Fatigue



Digitalization-induced changes in purchasing behavior

Buying less-known products more often

17.1%



20.6%

Buying well-known products more often

Increased trial purchasing

17.7%



22.7%

Increased repeat purchasing

Source: "2nd Chronological Lifestyle Survey on DX"

People should be better informed with wider ranges of interest, but...
are increasingly choosing well-known over less-known products,
and repeat rather than trial purchasing



I always check the reviews of previous purchasers when buying clothes.
(Female in her 30s)



I bought this supplement because word-of-mouth said I should.
(Male in his 40s)



There's a huge range of products but I end up buying the same clothes as everybody else, following the opinions of reviewers.
(Female in her 20s)

I watch track and field videos more often because they match my interest and so are recommended to me.
(Male in his 40s)



I'm surprised to find so much information that matches my interests and concerns. I always feel like somebody's watching me.
(Female in her 60s)



I'm lazy, so I purchase the same products as soon as the store notifies me they are back in stock.
(Female in her 30s)



Review information and the spread of recommend functions contribute to behavior becoming routine

Increase in available information

🎯 Increased options and broader interests

BUT

⚠️ Impossible to process everything

Visualization of reviews

🎯 Knowledge of “safe bets” to avoid making the wrong choice

BUT

⚠️ Always playing safe

Development of recommend functions

🎯 Increased convenience with prior recommendations

BUT

⚠️ Less casual encounters

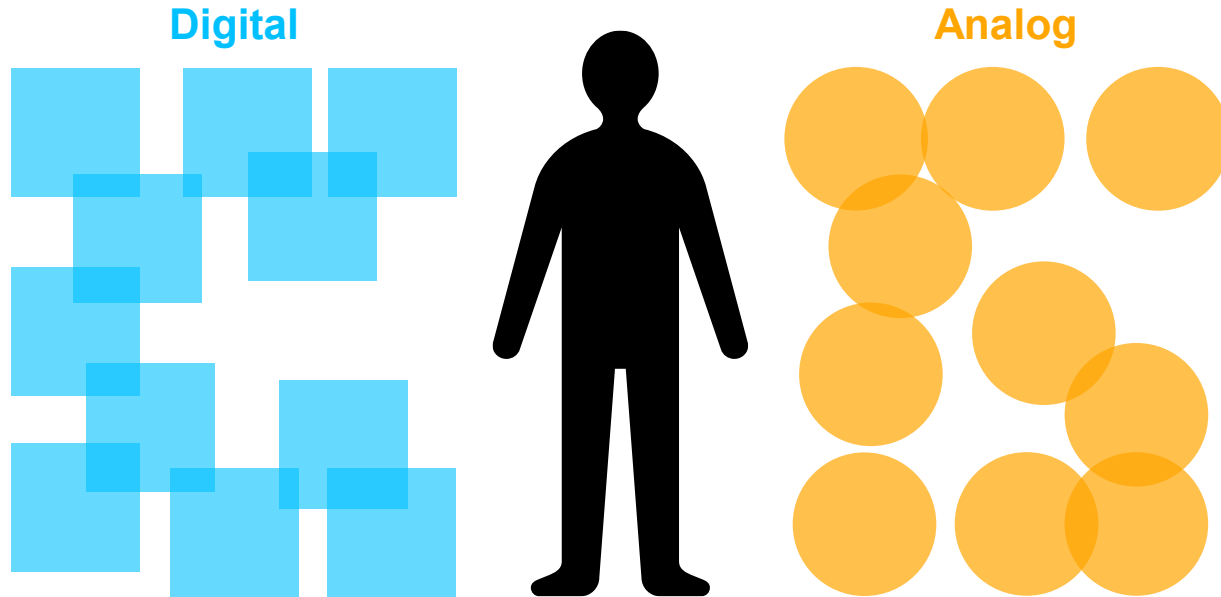
The benefits of digitalization might be adversely affecting fulfillment and agency



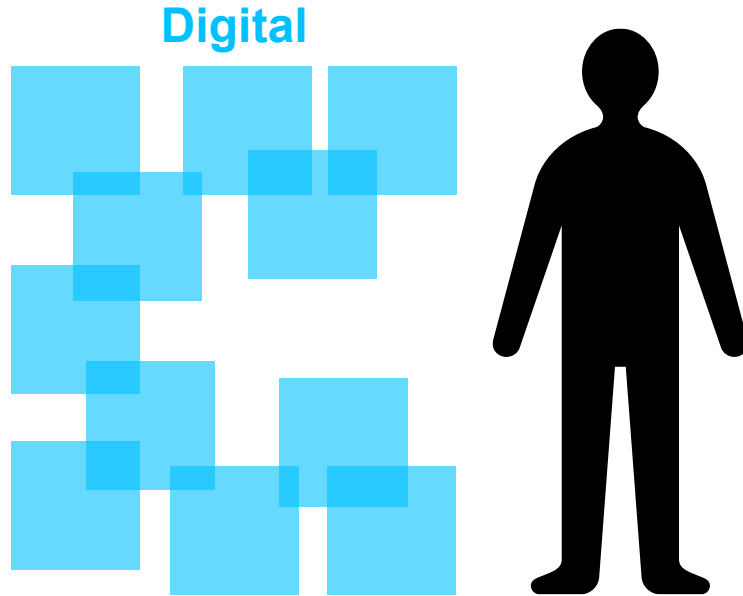
Part 2

Going digital to grow, going analog to believe

***Sei-katsu-sha* are switching between digital and analog to evolve their desires.**



How are people evolving their desires with digital?



Interview survey of *sei-katsu-sha*

Target	<i>Sei-katsu-sha</i> who feel their life is changing with digital
Method	Depth interview (in-person/online)
Sample size	32 (primarily recruited by snowball sampling)
Area	Greater Tokyo, Kansai, Tohoku, Taiwan
Period	December 2024–June 2025

Evolving desires with digital

Doubting the job-hunting behavior of a
sister who is a university student

I search for my career in a different way



Female high school student

Evolving desires with digital



I can only be sure of finding the right answer by exploring on my own, rather than deferring to “efficient” recommendations.

1 Freedom from recommendations

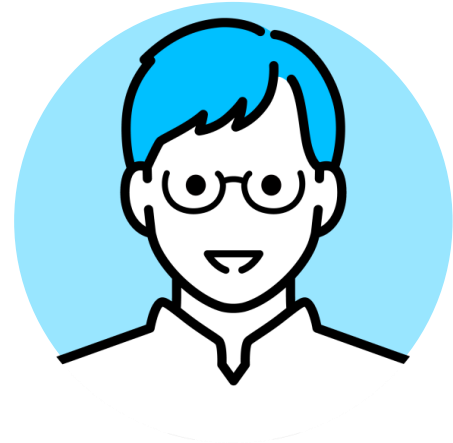
Recommendations are useful, but...

**I want to struggle to find the
right answer**

Evolving desires with digital

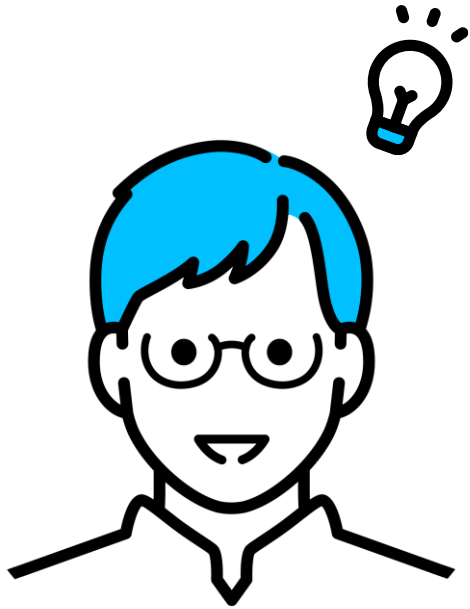
Listen to digital radio

Record my favorite program for
repeat listening



Male in his early 40s

Evolving desires with digital



Listening to the same program over and over again allows information to “ripen” inside me and helps me find new meanings and interpretations.

2 **Freedom from timelines**

Rather than inputting the ideas and conclusions of others...

I want to dig deeper

Evolving desires with digital

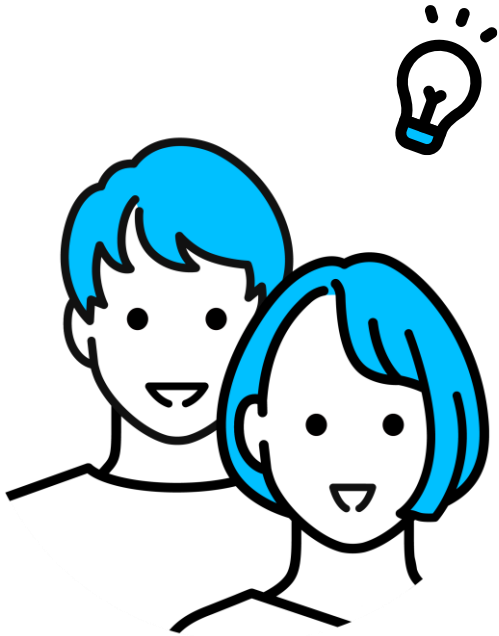
Share location data on an app

Find each other's travel history



Couple in their early 20s

Evolving desires with digital



Efficiency does not leave us with memories; it is inefficiency that makes us tolerant of errors. That's how mere records become memories.

3 Freedom from “cost/time-performance”

It's acceptable to act efficiently, but...

Want to appreciate waste

- ✔ **Want to struggle to find the right answer**
- ✔ **Want to dig deeper**
- ✔ **Want to appreciate waste**

People are going digital to **grow**
their own sensitivity.

“Digital to grow” as observed among *sei-katsu-sha* in China

Want to dig deeper

Visiting low-rated shops



Intentionally choose restaurants that have poor reviewer ratings

Contrarian travel



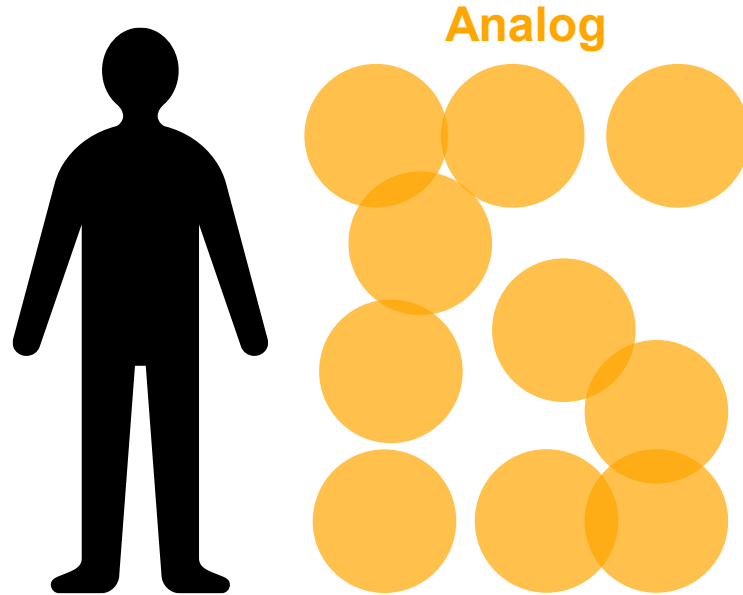
Intentionally select unfrequented places over popular tourist sites

Emerging behavior among *sei-katsu-sha*

Digital to grow

Going digital to grow one's own sensitivity

How are people evolving their desires with analog?



Evolving desires with analog

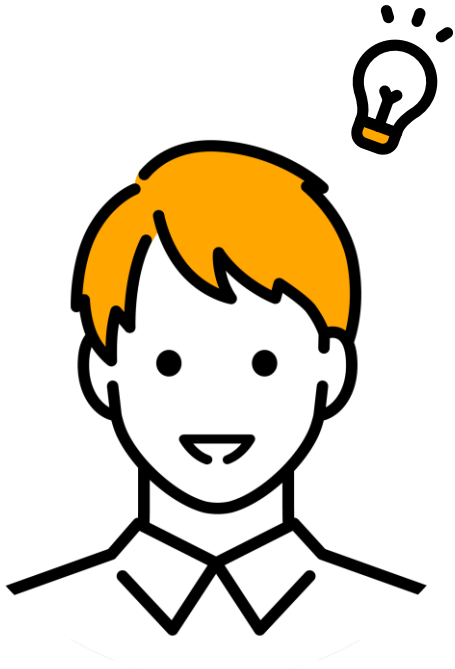
Always study using paper books

Never buy secondhand books even
with a flea market app



Male high school student

Evolving desires with analog



Wear & tear is a living testimony to the time and effort I have spent.

It gives me a unique sense of achievement and confidence.

1 Freedom from “no degradation”

Nothing is wrong with squeaky-clean e-books, but...

**Want to register my
aspirations**

Evolving desires with analog

Shocked by my first experience of
a live performance

Discovered attractiveness in something
other than the heavy sound



Male high school student

Evolving desires with analog



Appreciating the presence of friends
is completely different from getting
high on numbers.

2 Freedom from “foes”

Creating a buzz on social media is acceptable, but...

Want to be with real friends

Evolving desires with analog

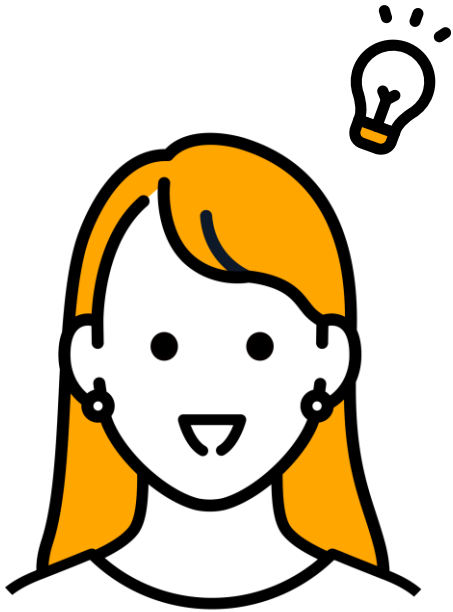
Stuffed animal researcher

Operates a stuffed animal nursery



Hana Kaneko

Evolving desires with analog



One-click purchasing is easy but does not help encounter something special. I want to create a unique experience just for me.

3 Freedom from “one click”

The shortest purchasing process may be attractive, but...

Want to make casual encounters my destiny

 **Want to register my aspirations**

 **Want to be with real friends**

 **Want to make casual encounters my destiny**

Going analog to **believe** in one's
own energy

“Analog to believe” as seen among *sei-katsu-sha* in Europe and America

Want to register my aspirations

Inheritance of vintage watches



Learn about history and technology to customize old watches

Cabinet-making at DIY workshops



Build large furniture on one's own

Emerging behavior among *sei-katsu-sha*

Analog to believe

Going analog to believe in one's own energy

Digital to grow

one's own sensitivity



Want to struggle to find the right answer



Want to dig deeper



Want to appreciate waste

Evolving
desires



Analog to believe

in one's own energy



Want to register my aspirations



Want to be with real friends



Want to make casual encounters my destiny

Evolving
desires

Evolving desires in digital/analog

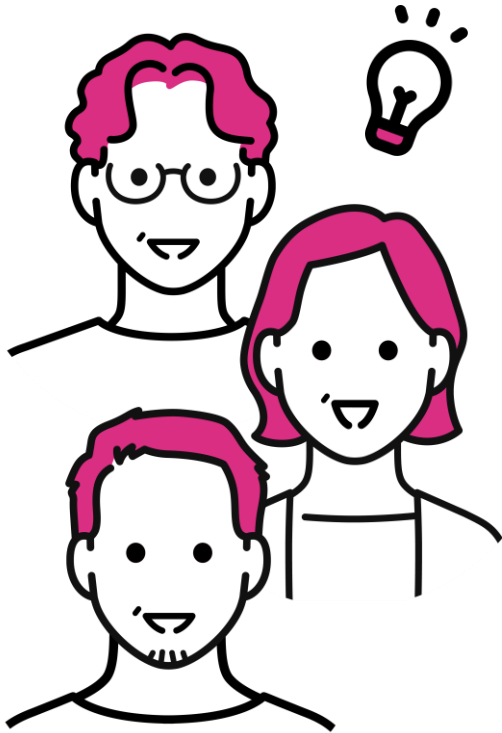
Sketch a captured street view

Travel to that place



Rikan

Evolving desires in digital/analog



I draw a sketch, and then I travel to that place.

It thus becomes my own destination, not someone else's.

Digital to grow

one's own sensitivity

- ✓ Want to struggle to find the right answer
- ✓ Want to dig deeper
- ✓ Want to appreciate waste

Evolving
desires

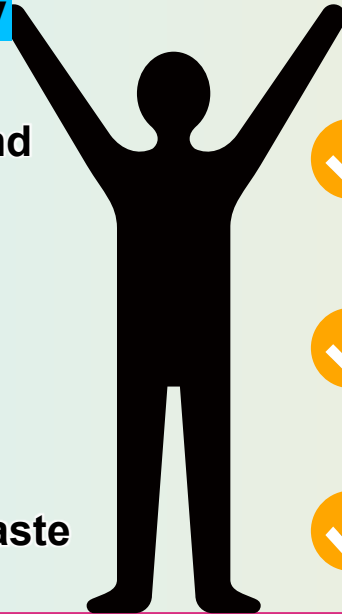
Analog to believe

in one's own energy

- ✓ Want to register my aspirations
- ✓ Want to be with real friends
- ✓ Want to make casual encounters my destiny

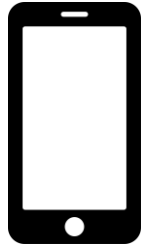
Evolving
desires

Increasingly versatile *sei-katsu-sha*

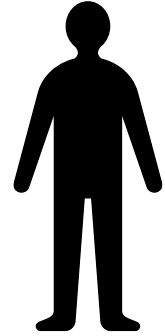


Wrap-up



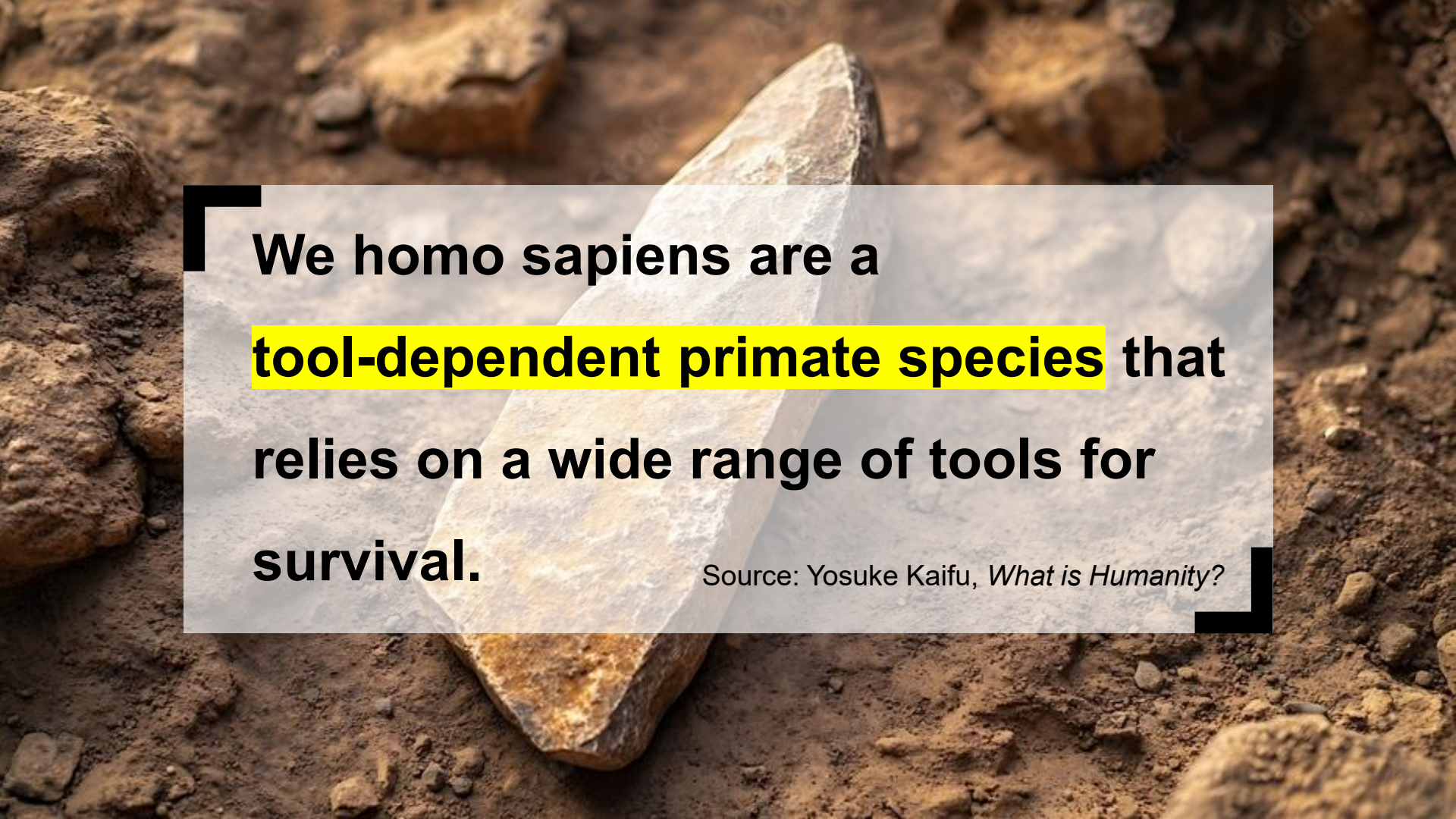


**How is technology
related to humans?**





**For humans, technology is a
means of augmenting their
abilities to achieve something.**

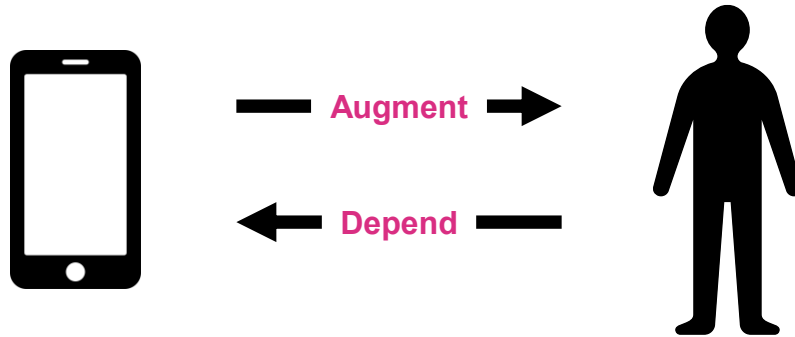


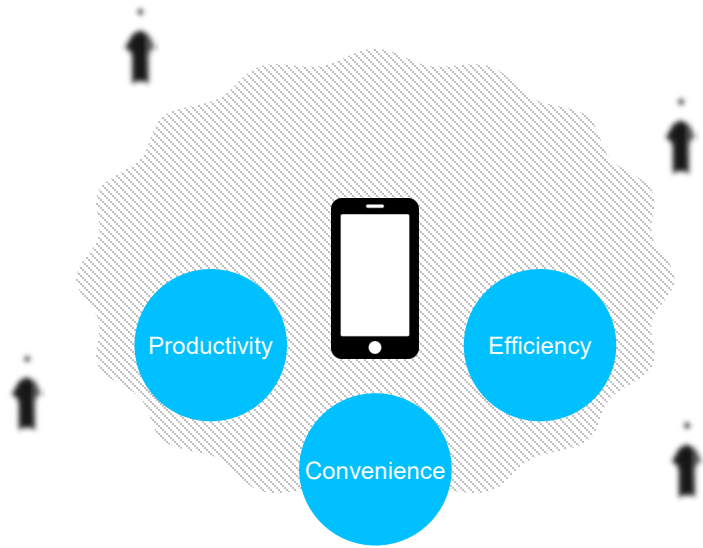
**We homo sapiens are a
tool-dependent primate species that
relies on a wide range of tools for
survival.**

Source: Yosuke Kaifu, *What is Humanity?*

Technology has a dual nature for humans.

A means of **augmenting the ability** of humans
while **making them dependent** on it

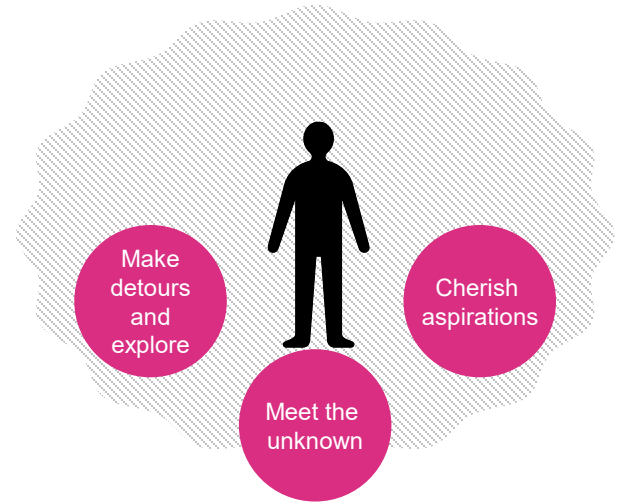
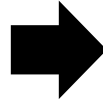




Technology-led

Pursuit of ability augmentation

Facilitation of dependence



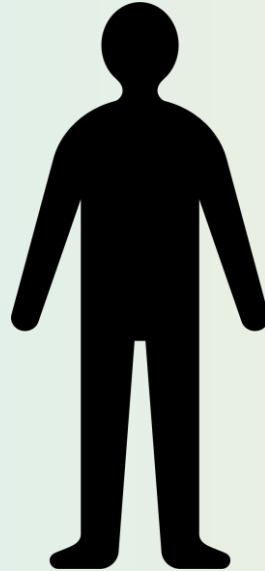
Human-led

Pursuit of fun

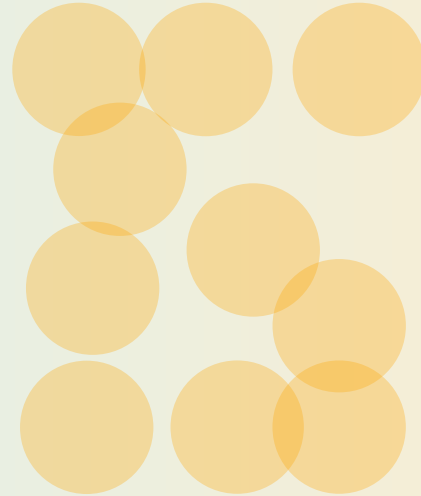
Autonomous balance

Today we highlighted the realities of *sei-katsu-sha*
who are beginning to exercise agency
in switching between digital and analog.

Digital to grow



Analog to believe



Increasingly versatile *sei-katsu-sha*

Shifting from choosing between digital and analog to making the best of both

