

Global Chronological Lifestyle Survey on *Sei-katsu-sha* 2026 Results announced across 9 countries including Japan, China, ASEAN and India

Quantitative survey conducted each January since 2023 covering 9 countries.

Responses showing substantial increases in 2026 vs. 2023 compared to other countries include:

Japan: I'd rather give up on what I want than cut something from my current lifestyle (51.4%, ranked 1st, up 4.1 pts vs. 2023).

China: Even if you don't have money, you can be happy (58.0%, ranked 1st, up 6.0 pts vs. 2023).

Indonesia: The man of the house should pay for living expenses (64.9%, ranked 1st, up 8.5 pts vs. 2023)

Since 2023, Hakuhodo Institute of Life and Living (HILL), in partnership with Hakuhodo Institute of Life and Living Shanghai (HILL Shanghai), Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) and Hakuhodo International India, has been conducting an annual Global Chronological Lifestyle Survey on *Sei-katsu-sha*, designed to identify the lifestyles and behaviors of *sei-katsu-sha*—Hakuhodo's term for the holistic person—in nine countries including Japan, China, ASEAN and India. The fourth, most recent survey was conducted this year as Global Chronological Lifestyle Survey 2026 (online survey of 14,000 males and females aged 15–59; see p. 11 for an overview). In this news release, researchers based in Japan, China, ASEAN and India analyze salient features of each country through responses showing the largest increases or decreases in score between 2023 and 2026 in comparison with other countries (only comparison of 2026 data with other countries for India).

Salient responses emerging from comparison among the nine countries

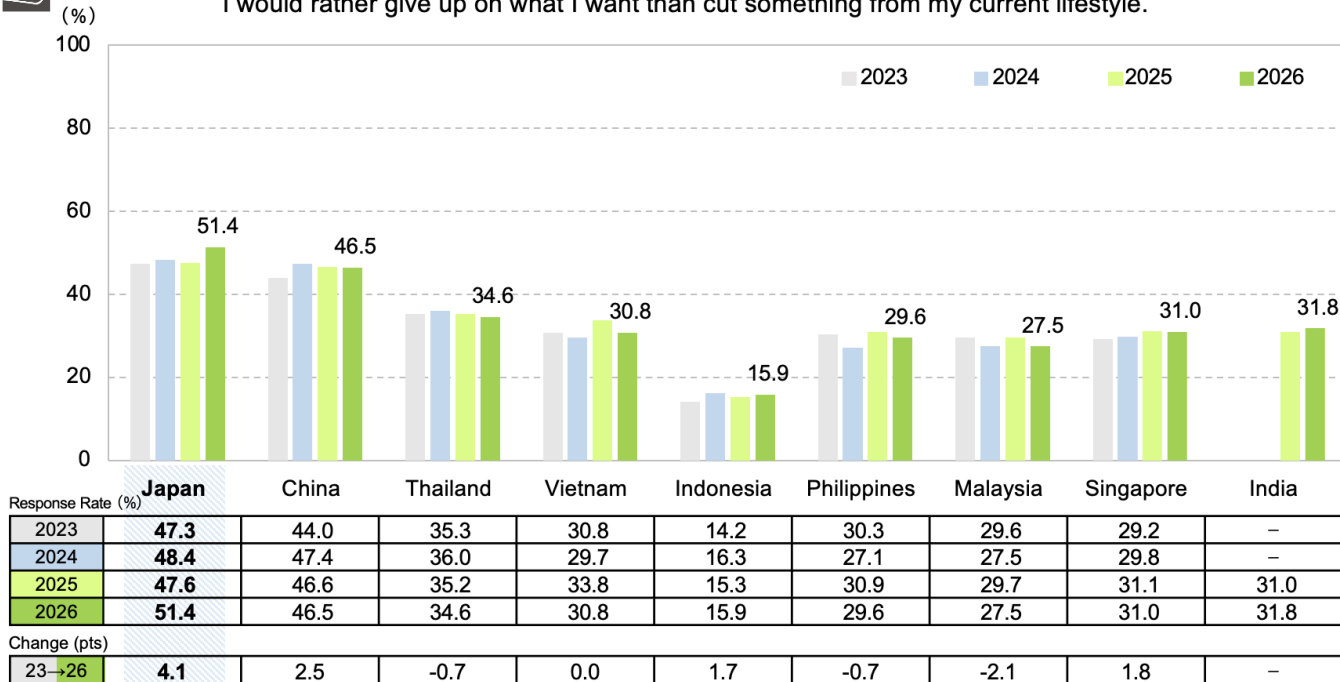
		Change (2026 vs. 2023) (rank among the 9 countries)	Response rate in 2026 (rank among the 9 countries)
	Japan I'd rather give up on what I want than cut something from my current lifestyle.	Up 4.1 pts (1st)	51.4% (1st)
Japanese <i>sei-katsu-sha</i> have no living expenses left to cut due to stagnant real wage growth and persistent inflation recently.			
	China Even if you don't have money, you can be happy.	Up 6.0 pts (1st)	58.0% (1st)
Chinese <i>sei-katsu-sha</i> are increasingly defining happiness in non-economic terms such as health, emotions and personal relationships, and not in terms of money-making.			
	Thailand What I want to cut back on (or continue to cut back on) in the future: Money spent eating out	Up 4.6 pts (1st)	35.6% (7th)
Thai <i>sei-katsu-sha</i> are more inclined to save money in view of the delay in post-pandemic economic recovery and social insecurity.			
	Vietnam I place importance on function over design when purchasing things.	Up 7.0 pts (1st)	71.2% (4th)
Given more choices, Vietnamese <i>sei-katsu-sha</i> are wisely selecting what is really valuable for them, and not out of ostentation.			
	Indonesia The man of the house should pay for living expenses, even in a household where both partners are working.	Up 8.5 pts (1st)	64.9% (1st)
A return to a pious lifestyle is one of the reasons for upholding the traditional value of husband as the main breadwinner.			
	Philippines I'm conscious of the brand when I buy things.	Up 4.5 pts (1st)	25.8% (1st)
Consumer price inflation makes people more defensive about "buying incorrectly," hence their greater trust in brands.			
	Malaysia I want products that are a little better than the mainstream products, even if the price is higher.	Up 6.3 pts (1st)	32.8% (6th)
Malaysian <i>sei-katsu-sha</i> are willing to pay more for the solid value of premium product, particularly in the upper-middle class.			
	Singapore My family has common hobbies or interests.	Up 4.2 pts (1st)	21.9% (7th)
Singaporean <i>sei-katsu-sha</i> have more time to spend with their family as they increasingly go home without working overtime or work from home under the guidelines established by the government.			
	India I prefer to enjoy the outdoors rather than stay in the house.	— (Survey started in 2025)	46.6% (1st)
In a culture strongly characterized by collectivism, more Indian <i>sei-katsu-sha</i> are going out in search of time and space to be themselves.			

Largest 2023–26 score increase among the 9 countries: I'd rather give up on what I want than cut something from my current lifestyle.



The score for this response rose most in Japan over the 2023–26 period compared to other countries. People in Japan appear to be increasingly defensive in their living, as real wages stagnate amid persistent inflation and rising social security costs. The chronological data point to the voice of *sei-katsu-sha*: “We’ve cut back on living expenses as much as we can, but prices keep on rising. There is no financing what we want to buy.”

I would rather give up on what I want than cut something from my current lifestyle.



Response Rate (%)

Change (pts)

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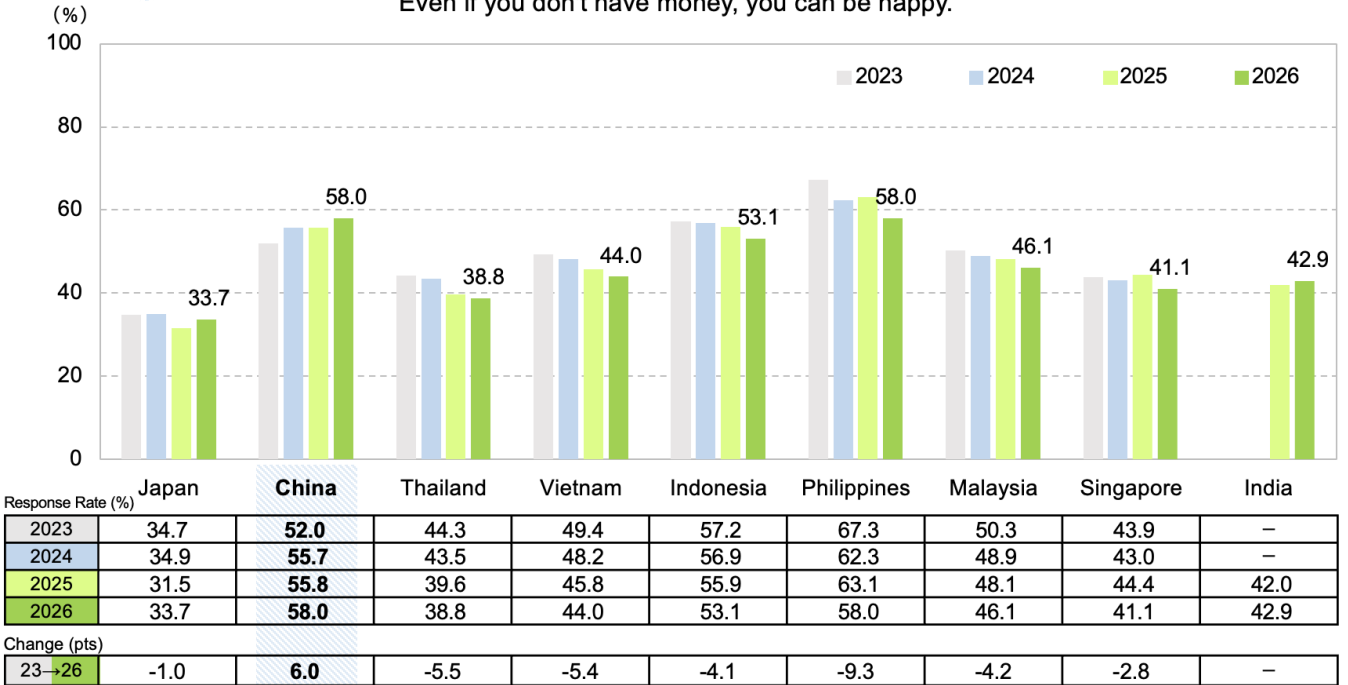
Largest 2023–26 score increase among the 9 countries: Even if you don't have money, you can be happy.

Local researcher's comment



The score for “Even if you don't have money, you can be happy” increased by 6.0 pts in the period 2023–26. As the rapid economic growth loses momentum, China is now entering a new stage of building a “spiritually prosperous” society. Chinese *sei-katsu-sha* now define happiness in non-economic terms such as health, emotions, and personal relationships rather than money-making, pointing to a shift in criteria of happiness from “what you have” to “whether you are spiritually fulfilled.” China is in a transitional period when people are finding new forms of happiness to replace the traditional material success.

Even if you don't have money, you can be happy.



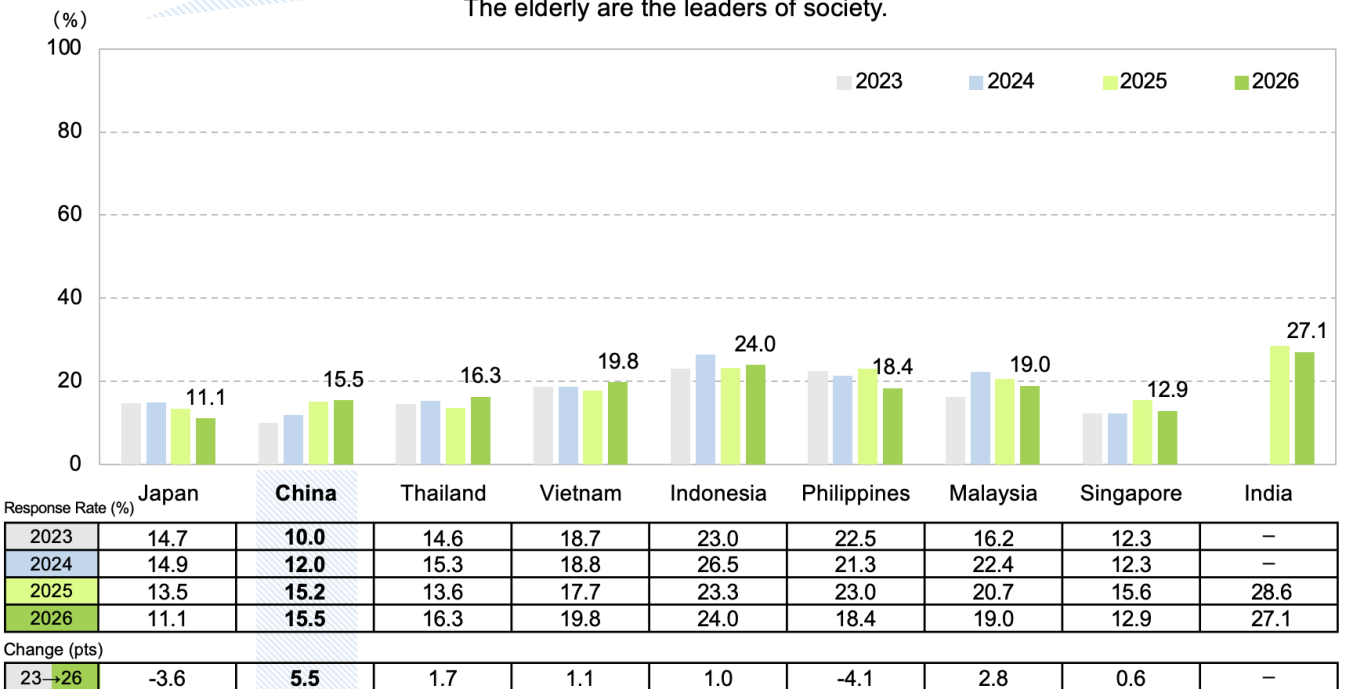
Largest 2023–26 score increase among the 9 countries: The elderly are the leaders of society.

Local researcher's comment



The share of respondents who think “The elderly are the leaders of society” rose 5.5 pts in the 2023–26 period. Government statistics tell us that China became a moderately aging society by the end of 2024, when the population aged 60 or over reached 310 million (22.0% of the total population). Having built their wealth (in real estate in particular) with the benefit of the “reform and opening-up” policy, many “active seniors” are hitting the town and trail, enjoying travel and social occasions, funded by their ample pension benefits. The government also promotes elderly-oriented industries as a pillar for domestic demand. This takeover in the leadership of consumption seems to be reflected in the rising score. In contrast, the score for the same response has been dropping in Japan, a super-aging society where population aging tends to be considered negatively as a problem to be addressed. Whereas the elderly in China enjoy their life with ample assets, Japanese seniors are finding themselves in a completely opposite position, leading defensive lives out of concern about the future.

The elderly are the leaders of society.



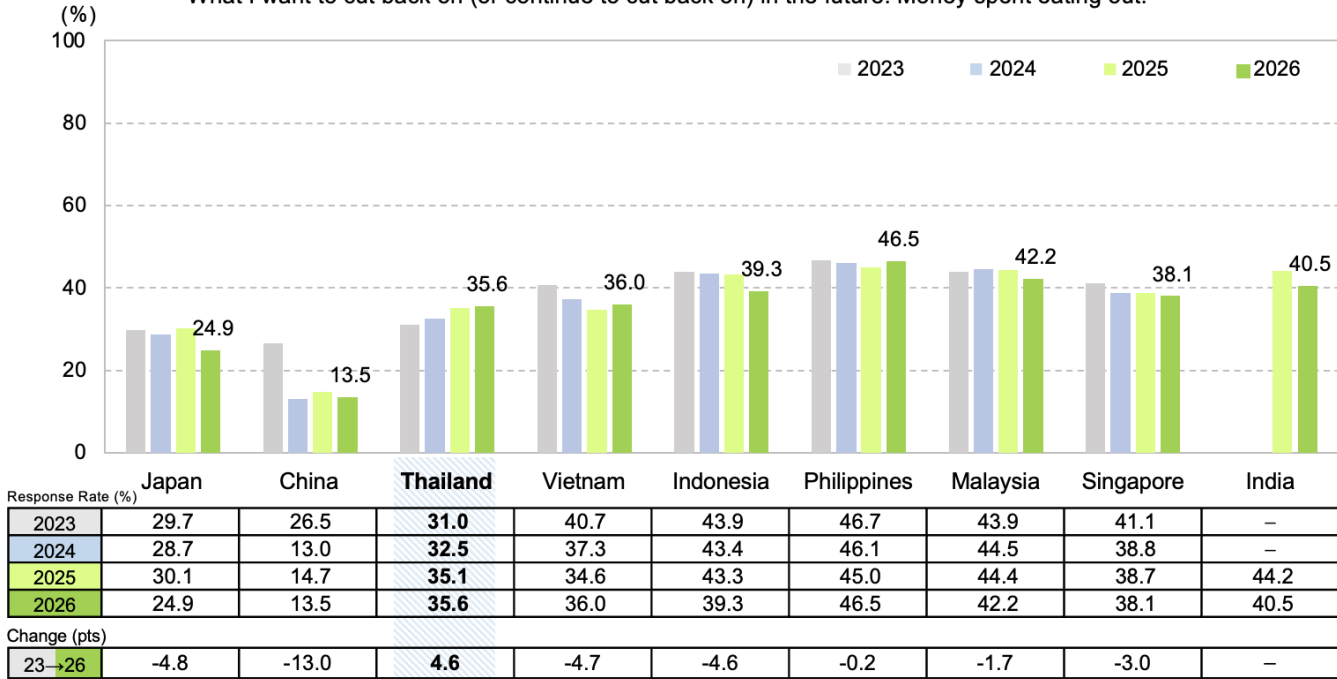
Largest 2023–26 score increase among the 9 countries: What I want to cut back on (or continue to cut back on) in the future: Money spent eating out.

Local researcher's comment



The score for "I want to cut back on money spent eating out" has constantly increased across the three-year period, from 31.0% in 2023 to 35.6% in 2026. Eating out at restaurants or food stalls has been a common practice in Thailand over the years, but it appears that people are increasingly inclined to curtail spending thereon against the backdrop of rising uncertainties over life in the future, largely due to the delay in post-pandemic economic recovery and ongoing insecurity in recent years. In addition, demand for "home-meal replacements" may be emerging in Thailand, as attested by the everyday use of food delivery services triggered by the COVID-19 pandemic and the wider use of chilled and frozen foods due to the concentration of population in urban areas and increase in single-member households in recent years. For *sei-katsu-sha* in Thailand, eating out may be gradually changing from daily practice to an experience to be enjoyed with family and friends on special occasions.

What I want to cut back on (or continue to cut back on) in the future: Money spent eating out.



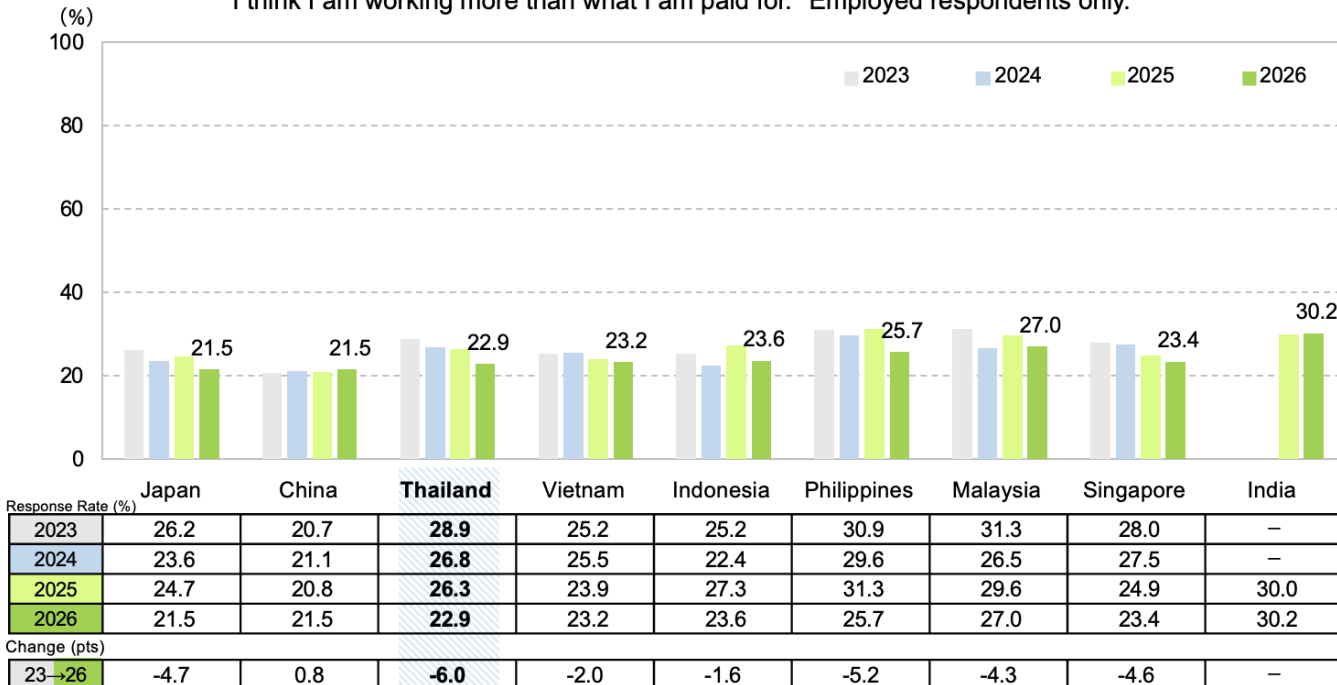
Largest 2023–26 score decrease among the 9 countries: (Employed respondents only) I think I am working more than what I am paid for.

Local researcher's comment



Thai *sei-katsu-sha* work 42.5 hours a week (ILO, as of 2024), longer than the Japanese, who work 36.5 hours a week (MHLW, as of 2024). The workplace culture that appreciates stretching out the assigned work scope, including availability to supervisors all the time and staying long hours at the office, has been shaped by the *kreejcaj* (considerate) mentality and hierarchical social structure specific to Thailand. However, Thais, particularly Gen Z Thais, are now more focused on work–life balance or drawing a line between public and private life, thus questioning the necessity of working more than they are paid for. With the provision for the "right to refuse contact" under the amended labor law, the attitude of workers is changing steadily, despite some die-hard practices.

I think I am working more than what I am paid for. *Employed respondents only.



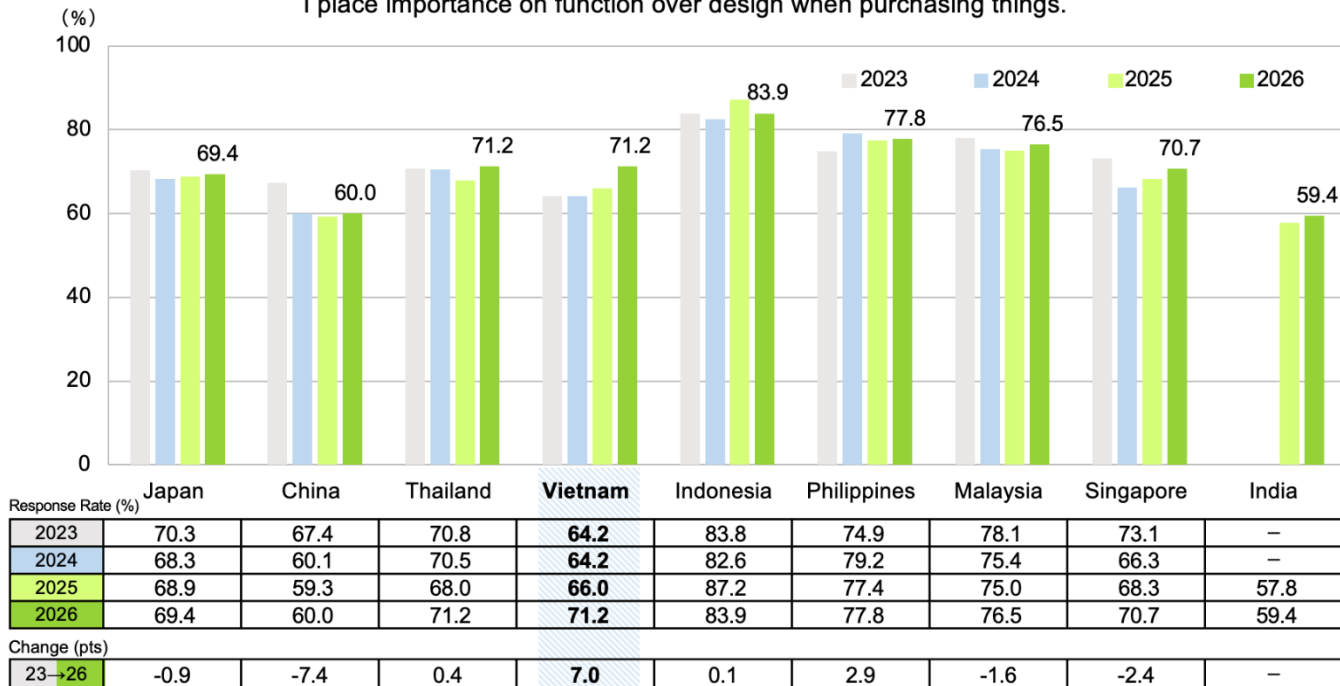
Largest 2023–26 score increase among the 9 countries: I place importance on function over design when purchasing things.

Local researcher's comment



The rising score of this response, from 64.2% in 2023 to 71.2% in 2026, attests to the changing attitude among Vietnamese *sei-katsu-sha* toward intrinsic value. Influenced by Confucian ethics, Vietnamese people used to place emphasis on appearance and made a display of their social status with their possessions, particularly in the north. On the back of global inflation, however, Vietnamese are increasingly choosy about value for money. Although a NielsenIQ survey found that almost 90% of Vietnamese *sei-katsu-sha* support national brands not necessarily out of patriotism but a sense of trust toward national brands as being more knowledgeable about the needs of the population. Given wider options in the market, rather than looks, they are seeking to wisely select what is really of value to them.

I place importance on function over design when purchasing things.



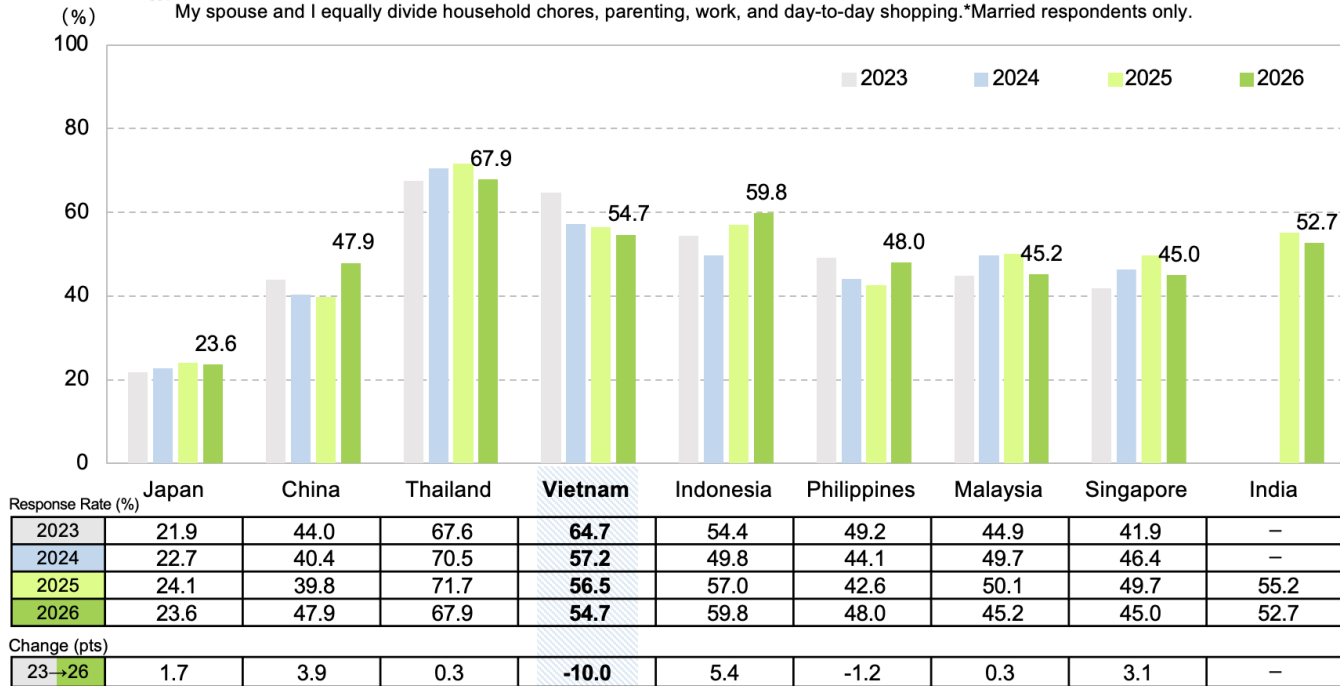
Largest 2023–26 score decrease among the 9 countries: (Married respondents only) My spouse and I equally divide household chores, parenting, work, and day-to-day shopping.

Local researcher's comment



The score for this item dropped by 10 points in the three-year period, from 64.7% to 54.7%, pointing to an “equality fatigue.” Despite one of the higher female labor participation rates in the world (ILO), traditional values deeply rooted in Confucianism have effectively imposed the harsh double burden of “perfectly balancing work and housework” on Vietnamese women under the banner of gender equality. Regarding the same question, the response “My spouse and I take care of household chores whenever one of us can” increased almost 4 pts in the same period (from 23.6% to 27.5%), while “The wife is in charge of household chores, while the husband is in charge of nondomestic roles” rose more than 5 pts (from 10.8% to 16.2%). Thus, the ideal of equality across the board seems to have given way to diversification of role sharing depending on practical benefit and the situation of the household concerned.

My spouse and I equally divide household chores, parenting, work, and day-to-day shopping.*Married respondents only.



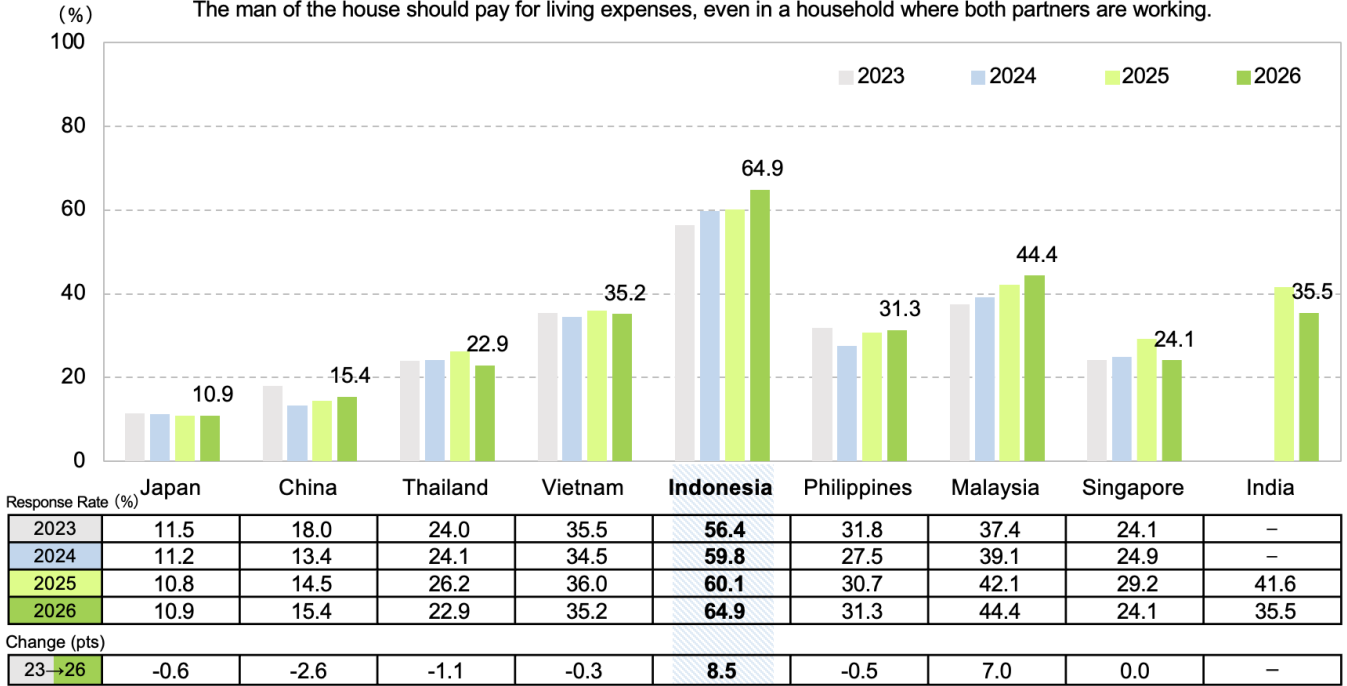
Largest 2023–26 score increase among the 9 countries: The man of the house should pay for living expenses, even in a household where both partners are working.

Local researcher's comment



The score for this response increased by almost 9 pts from 56.4% in 2023 to 64.9% in 2026 to reach the highest level by far among the nine countries. This has much to do with the norms of Islamic law (Shariah), imposing the duty of support on the husband, while granting the “right to be supported” to the wife as a traditional value. Although double-income households—husband and wife both working for self-fulfillment—have been on the rise in Indonesia on the back of economic growth in recent years, middle class couples are increasingly leaning toward religious norms to assert their identity. In particular, the return to a pious lifestyle, particularly salient among younger generation as observed in the Hijrah movement (to return to living as more pious Muslims), is considered to be a factor for reembracing traditional gender roles including the husband as the primary breadwinner.

The man of the house should pay for living expenses, even in a household where both partners are working.



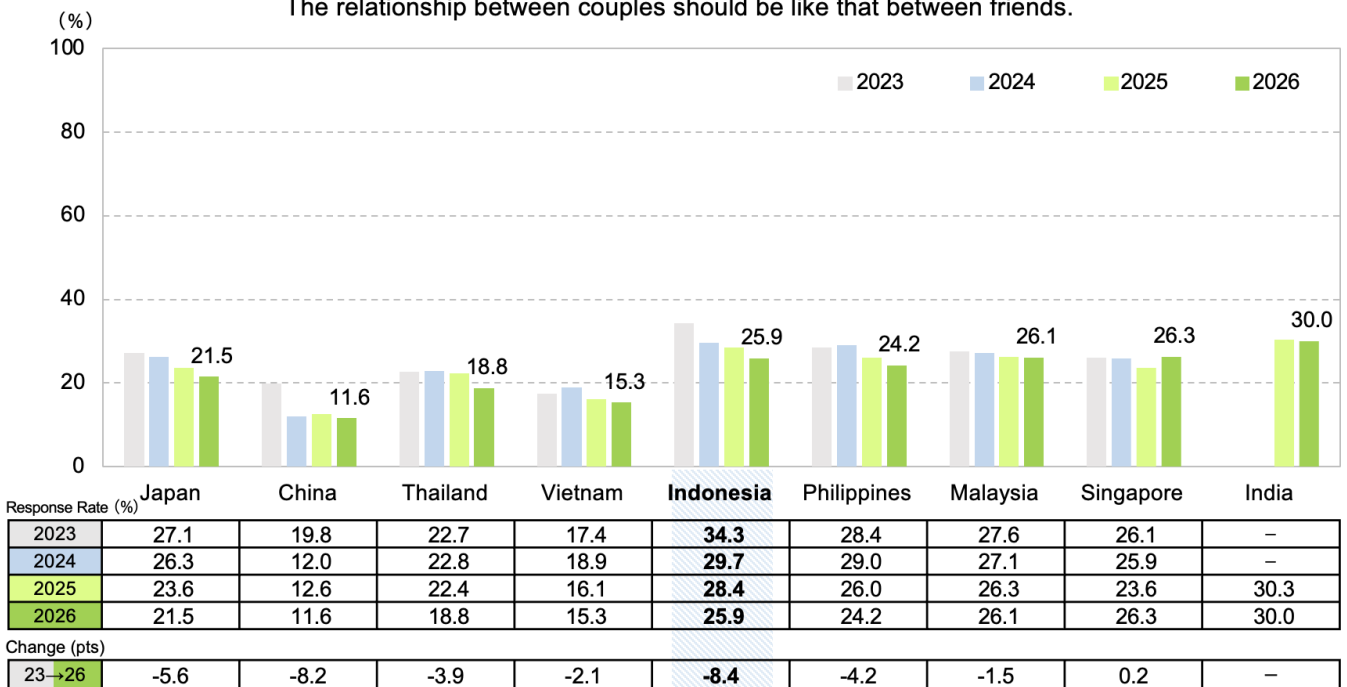
Largest 2023–26 score decrease among the 9 countries: The relationship between couples should be like that between friends.

Local researcher's comment



Although similar trends around this response may be observed in other countries, the downtrend is most marked in Indonesia, from 34.3% in 2023 to 25.9% in 2026. As mentioned above, Hijrah (return to the teachings of Islam) has emerged as a social phenomenon in recent years particularly among Gen Z and Millennials. Islam defines marriage as a sacred contract with clear-cut role sharing, rather than a casual relationship between friends. Indeed, the number of influencers who promote this norm as a virtue is reportedly on the rise. Concern about the future of social security in Indonesia may have much to do with the attitude of people seeking to realize familial wellbeing under a more solid husband-wife relationship, and not as friends.

The relationship between couples should be like that between friends.

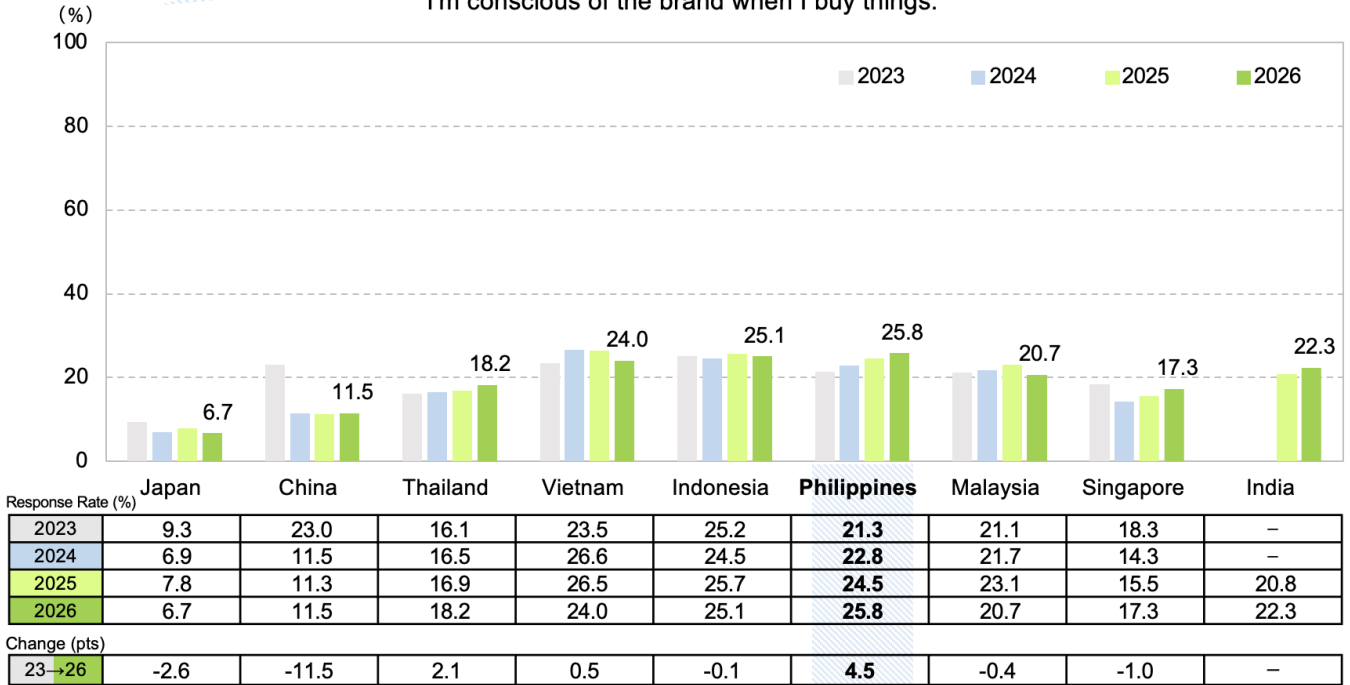


Largest 2023–26 score increase among the 9 countries: I'm conscious of the brand when I buy things.



The score for this response has been rising constantly, from 21.3% in 2023 to 25.8% in 2026. Other money-related responses also show a large increase in the three-year period, with “Without money, you can’t be happy” rising almost 10 pts from 32.7% to 42.0%, and “I desire money” increasing more than 7 pts from 38.3% to 45.7%. All this is happening against the backdrop of record-level inflation since 2023. As prices rise, many are afraid of making wrong purchasing decisions, thus placing their trust in major brands. Furthermore, live commerce and influencers are having a huge impact on Filipino *sei-katsu-sha*, who are among the world’s leading social media users. Those are indirect factors for boosting brand consciousness.

I'm conscious of the brand when I buy things.

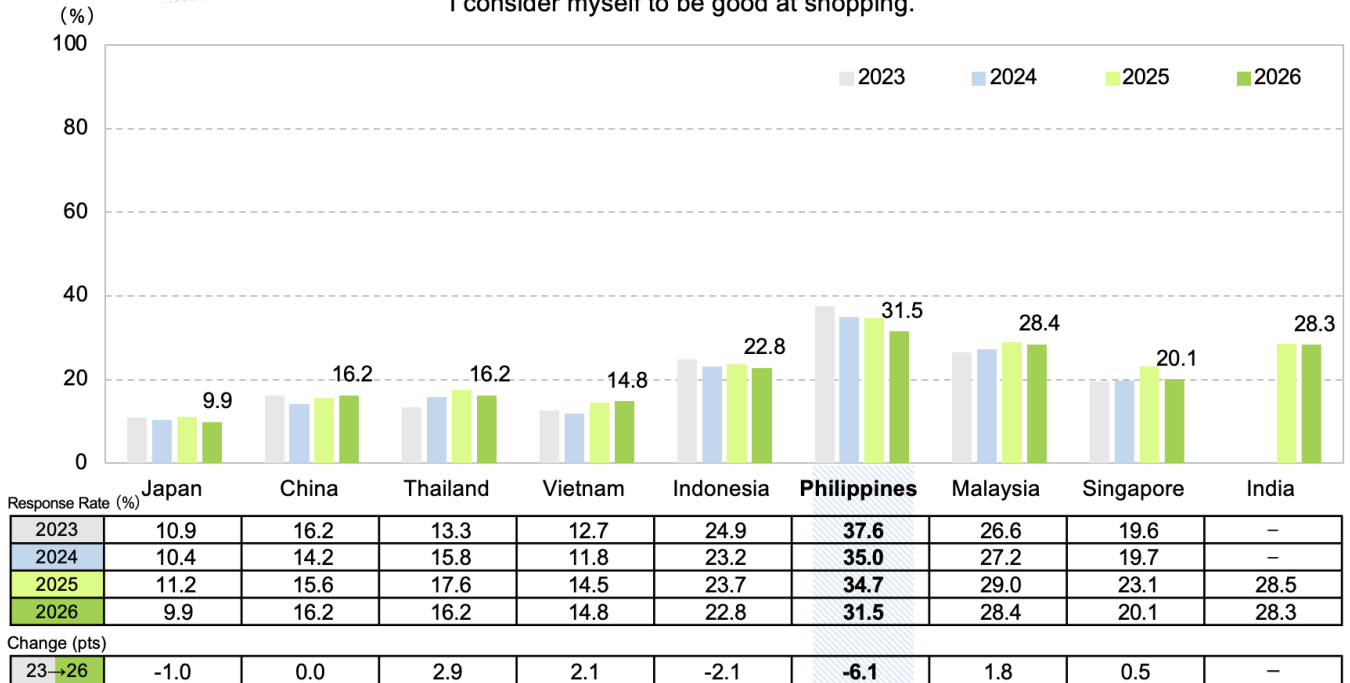


Largest 2023–26 score decrease among the 9 countries: I consider myself to be good at shopping.



The score for this response fell from 37.6% in 2023 to 31.5% in 2026 on the back of stagnating real income growth, implying that households are having a hard time catching up with rising prices. At the same time, the spread of online shopping and delivery facilitating price comparison can easily result in buyer’s remorse: “I could have bought it cheaper.” It seems that Filipino *sei-katsu-sha* are in search of a smarter purchasing method. It is also true however that despite consecutive declines year after year, the Philippines score for this response is still the highest among the nine countries.

I consider myself to be good at shopping.

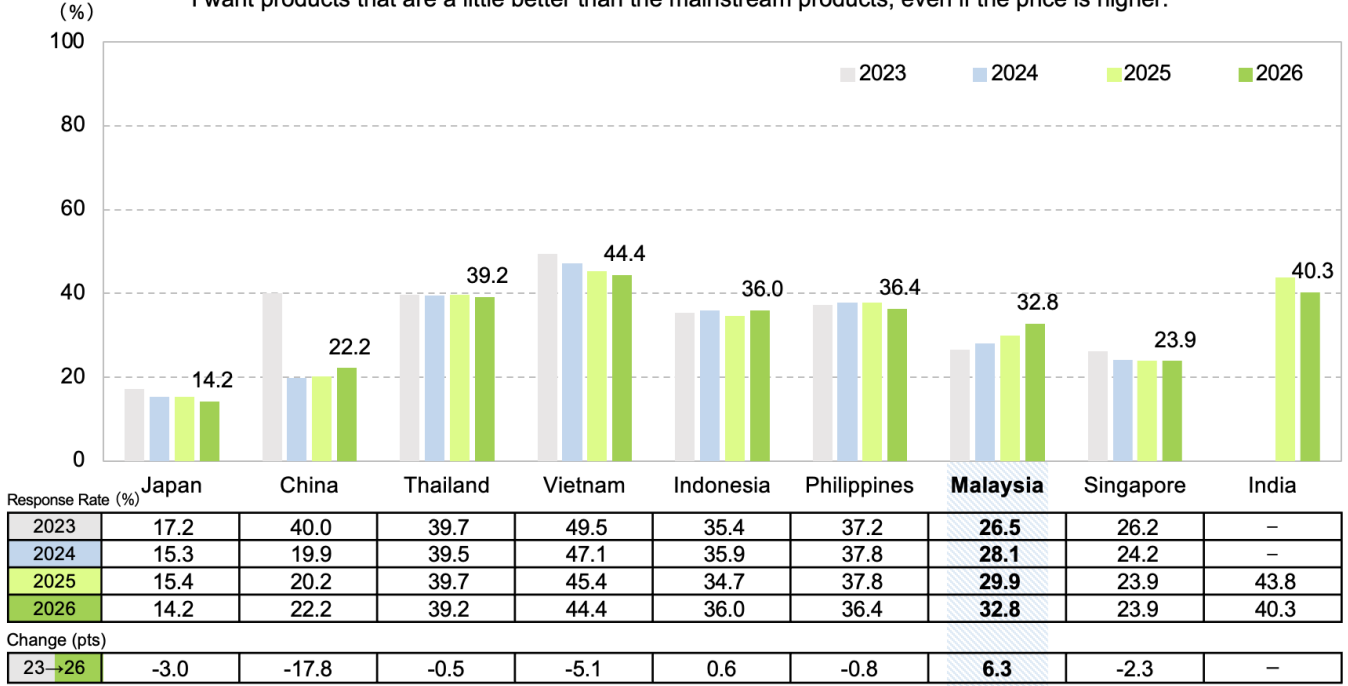


Largest 2023–26 score increase among the 9 countries: I want products that are a little better than the mainstream products, even if the price is higher.



The response to this attitude item shows a unique trend in Malaysia as compared with other countries, rising from 26.5% in 2023 to 32.8% in 2026. Malaysia has been witnessing an expansion of the upper middle class on the back of stable economic growth in recent years. Reportedly, “comprehensive value” spells product quality in their view. That concept includes brand credibility and differentiation, in addition to physical elements such as product durability and specifications. Preference for premium products has been emerging among upper-middle-class Malaysians, who consider value for money from a total viewpoint, even if it means paying higher prices.

I want products that are a little better than the mainstream products, even if the price is higher.

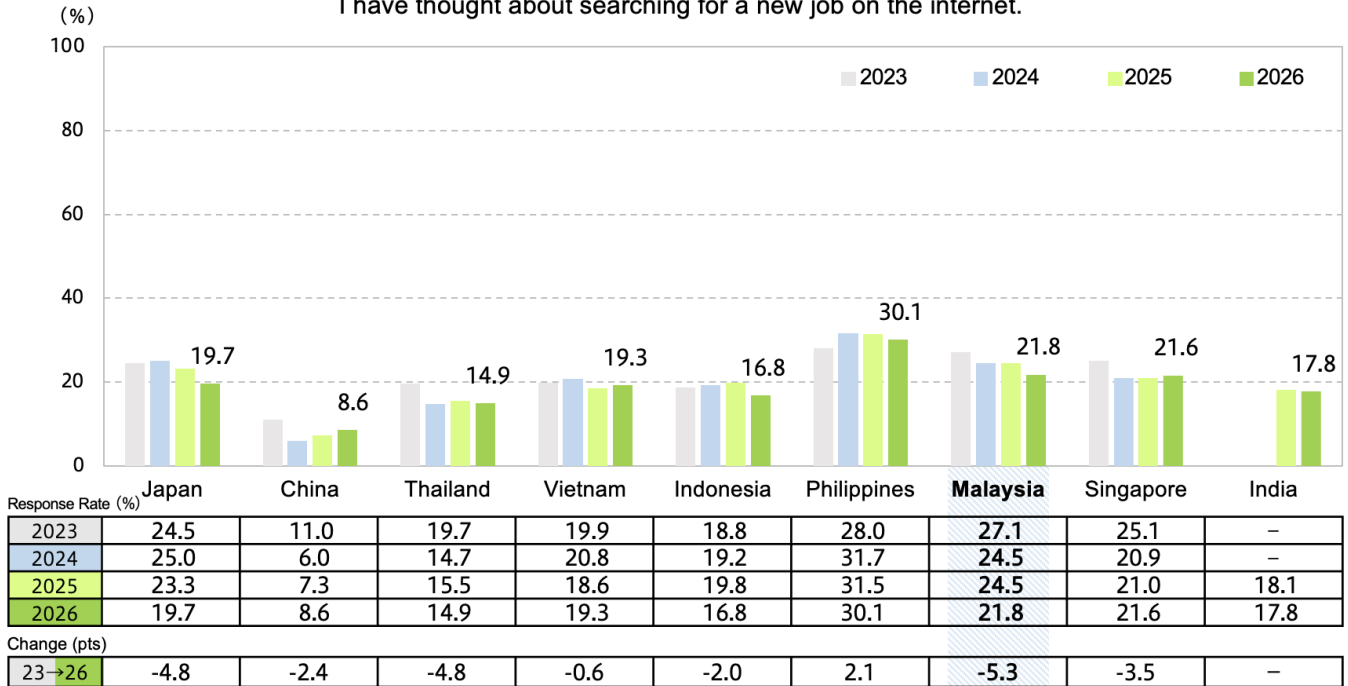


Largest 2023–26 score decrease among the 9 countries: I've thought about searching for a new job on the internet.



The score for this response dropped from 27.1% in 2023 to 21.8% in 2026 against the backdrop of the stable economic conditions in Malaysia marked by the low jobless rate and the settling down of active job-seeking activities in the aftermath of the COVID-19 pandemic. The promulgation of the Gig Workers Act 2025 is another key factor. The coverage of public pension and social security was widened to include the platform-based labor category (rideshare drivers, delivery workers, etc.), formerly treated as sole proprietors with weak legal protection, effectively transforming them from temporary jobs to a stable form of employment. As a result, people now do not need to keep searching for new jobs, thus raising retention and reducing the score for this response.

I have thought about searching for a new job on the internet.



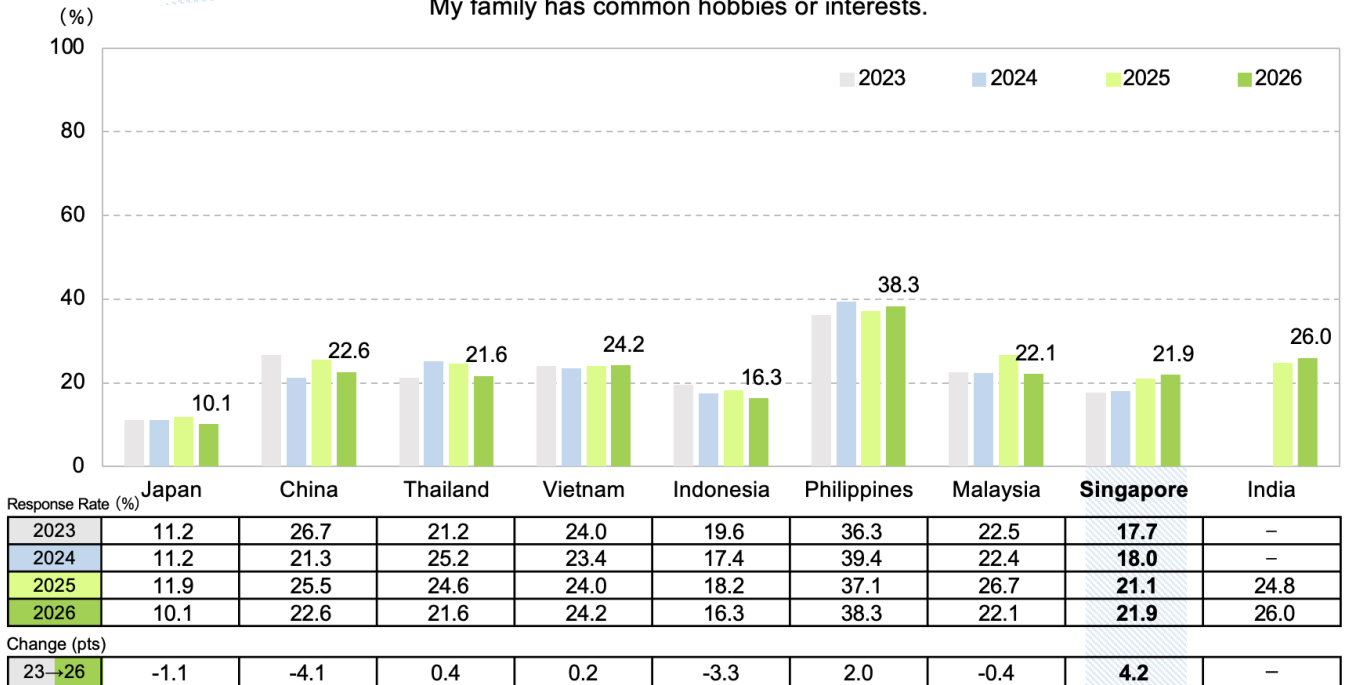
Largest 2023–26 score increase among the 9 countries: My family has common hobbies or interests.

Local researcher's comment



The score for “My family has common hobbies or interests” rose from 17.7% in 2023 to 21.9% in 2026, in all likelihood driven by the social security reform by the government to address the declining birthrate and population aging. Indeed, Singapore is the most aged society by far among the ASEAN countries. To address the critical situation where the fertility rate falls below 1.0, the government accelerated measures to eliminate isolation and support childcare. With the implementation of the Flexible Work Arrangements guidelines introduced in 2024, Singaporean *sei-katsu-sha* are increasingly going home at the end of their regular working hours or even working from home. It seems that the “quality of time” has also improved as they spend more time with their children and partner more often, and enjoy common hobbies in their family.

My family has common hobbies or interests.



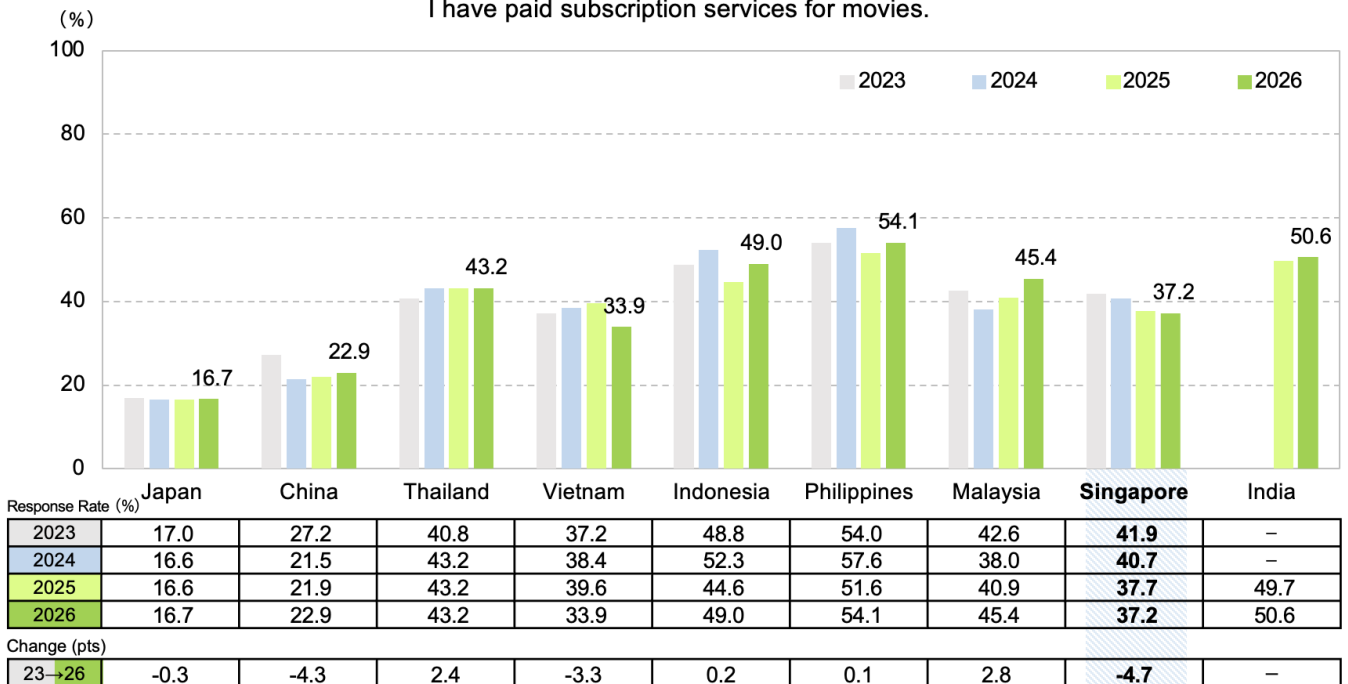
Largest 2023–26 score decrease among the 9 countries: I have paid subscription services for movies (Netflix etc.).

Local researcher's comment



The score for this response has been constantly dropping, from 41.9% in 2023 to 37.2% in 2026, against the backdrop of successive price hikes due to the increase of goods and services tax (GST) to 9% in 2024 and heavier taxation on overseas digital services. In view of the increased burden on household budgets, subscription services have become a “luxury item to be reviewed,” prompting a shift toward video content provided for free. An attitude of cherishing time spent with family may have something to do with this, as observed in the post-pandemic return to real experiences and the rising score of “My family has common hobbies or interests,” mentioned above.

I have paid subscription services for movies.



*For India, as the survey only began in 2025 making it impossible to identify a three-year trend, responses ranked first and ninth among the nine countries are shown.

Ranked first among the 9 countries in the 2026 survey:

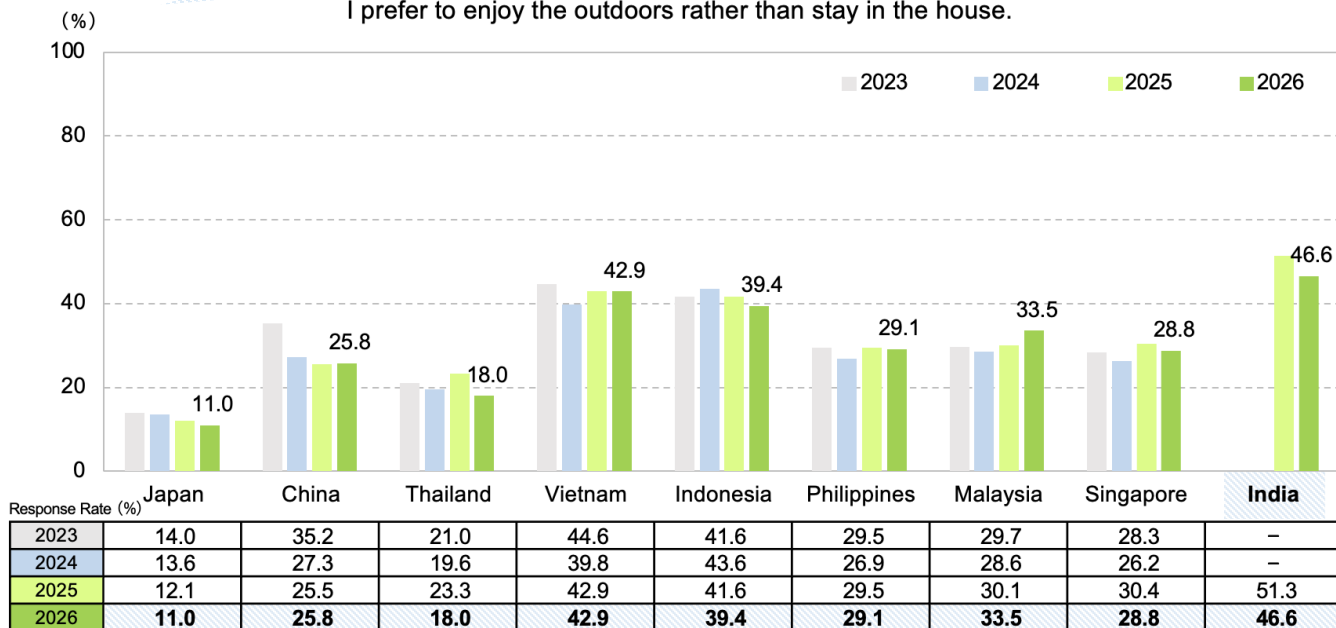
I prefer to enjoy the outdoors rather than stay in the house.

Local researcher's comment



With a culture rooted in collectivism, it is difficult to secure individual privacy in India while living in a big family. Under these circumstances, many Indian *sei-katsu-sha* seem to be going out to find the time and space of their own, free from established roles and obligations at home. In this case, however, going out does not necessarily involve any special experience or activity. They also value casual moments, spending time in the park or enjoying a walk. For example, local people can enter tourist spots such as World Heritage sites at a discount, around US\$0.25. We thus see many couples and families chilling in quiet places.

I prefer to enjoy the outdoors rather than stay in the house.



Ranked last among the 9 countries in the 2026 survey:

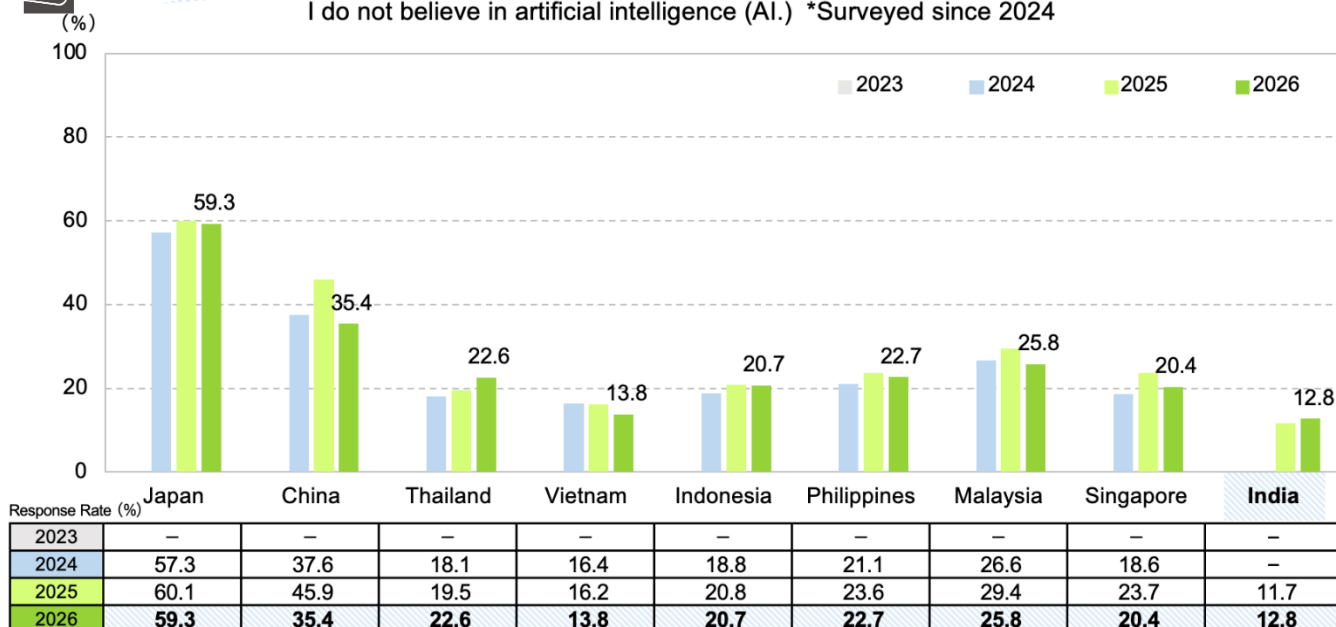
I do not believe in artificial intelligence (AI) *Item surveyed since 2024

Local researcher's comment



Recognized widely as an IT giant, India has an affinity to digital technology in general. The rapid spread of an online payment system called Unified Payments Interface (UPI) is a case in point. The penetration of such a digital culture can be considered as a factor behind the lack of discomfort with AI. The national trait of finding practical value in anything "fast and simple" might have something to do with the ready acceptance of AI among the Indian population.

I do not believe in artificial intelligence (AI.) *Surveyed since 2024



What is the Global Chronological Lifestyle Survey on *Sei-katsu-sha*?

- The Global Chronological Lifestyle Survey on *Sei-katsu-sha* 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 Global Chronological Lifestyle Survey on *Sei-katsu-sha* 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 Global Chronological Lifestyle Survey on *Sei-katsu-sha* 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, ASEAN, and India.

Overview of the Global Chronological Lifestyle Survey on *Sei-katsu-sha*

Survey area: Japan (Greater Tokyo and Hanshin regions)
 China (Beijing, Shanghai, Guangzhou)
 ASEAN (Thailand, Vietnam, Indonesia, Philippines, Malaysia, Singapore)
 India (Delhi, Mumbai, Bengaluru, Surat, Kanpur, Visakhapatnam)
 *India was added to the survey in 2025.

Sample size: 14,000 (17 areas in nine countries)

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

Allocation:

	Japan		China			Thailand	Vietnam	Indonesia	Philippines	Malaysia	Singapore	India					
	Greater Tokyo	Hanshin	Beijing	Shanghai	Guangzhou							Delhi	Mumbai	Bengaluru	Sulat	Kanpur	Visakhapatnam
Total	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	668	666	666	334	334	332
Male	500	500	500	500	500	500	500	500	500	500	500	334	333	333	167	167	166
Female	500	500	500	500	500	500	500	500	500	500	500	334	333	333	167	167	166
Aged 15-19	110	110	110	110	110	110	110	110	110	110	110	74	74	74	36	36	36
Aged 20-29	222	222	222	222	222	222	222	222	222	222	222	148	148	148	74	74	72
Aged 30-39	224	224	224	224	224	224	224	224	224	224	224	148	148	148	76	76	76
Aged 40-49	224	224	224	224	224	224	224	224	224	224	224	148	148	148	76	76	76
Aged 50-59	220	220	220	220	220	220	220	220	220	220	220	150	148	148	72	72	72

Survey period: January 8–28, 2026
 January 6–31, 2025
 January 15–31, 2024
 January 10–31, 2023 (reference data)

*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 surveys.

Survey method: Online survey

Planning & analysis: Hakuhodo Institute of Life and Living (HILL)

Implementation & tabulation: QO, Inc. (formerly H.M. Marketing Research, Inc.)
 Macromill China Insight, Inc.

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

■ HakuHodo Institute of Life and Living Shanghai

HILL Shanghai, a wholly owned subsidiary of HakuHodo Inc. of Japan established in 2012, is the HakuHodo Group's think tank 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, cosmetics and foodstuffs, and of specific *sei-katsu-sha* segments such as young people and high net worth individuals
- Consulting and recommendations: Advice on *Sei-katsu-sha* Centric Mindset-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.

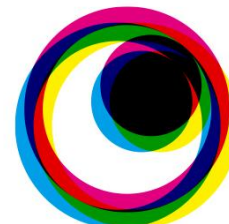
It supports clients' marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

Location: Bangkok, Thailand

Research and other activities: Research and analysis from the local perspectives of each ASEAN nation and the organization of forums across ASEAN

Details of the present survey, briefings on research subjects and foresight into marketing are available on the dedicated page of the HILL ASEAN website.

<https://hillasean.com/>



HakuHodo Institute of Life and Living
JAPAN / CHINA / ASEAN

■ About HakuHodo

Founded in 1895, HakuHodo is an integrated marketing solutions company headquartered in Tokyo, Japan. With offices in 20 countries and regions, and over 10,000 specialists working in Japan and around the world, the company is the core agency of HakuHodo DY Holdings, one of the world's top 10 largest agency companies according to *Ad Age's* "Agency Report 2025."

Sei-katsu-sha Centric Mindset (people-first mindset) is the foundation for HakuHodo's thinking, planning, and brand building. It reminds us that consumers are more than shoppers performing an economic function. They have heartbeats. They are individuals with distinct lifestyles. HakuHodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

With *Sei-katsu-sha* Centric Mindset as its cornerstone, HakuHodo combines creativity, integrative capabilities, and data and technology to play a leading role in evolving companies' marketing activities and generating innovation for the completely digitalized era. This enables the company to impact and provide value to *sei-katsu-sha* and society.

Renowned for its creativity, HakuHodo has won the Grand Prix at Cannes Lions International Festival of Creativity twice, and was named Network of the Year at ADFEST 2021.

To learn more, visit: www.hakuhodo-global.com

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