HAPPY DAYS?
A LOOK AT THE HAPPINESS LEVELS IN ASIA
QUARTER 3 2013
ASIA PACIFIC
About the Study

Coverage
5 markets in APAC
Fieldwork period
16 – 25/7/2013
Singapore, Malaysia, Hong Kong, S. Korea and China

Respondents
Male & Female
18 - 50 years old

Methodology
Online Survey

• Online panel and platform provided by Toluna*.
• Soft quotas were set on age, gender and income.
• Data are further weighted to match the national age/gender ratios.
About the Study

For more information, please contact:

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In China

Happiness Index – Total

19% Very Happy
67% Rather Happy
12% Not Very Happy
1% Not Happy at all

TOTAL HAPPY: 86%

Q1. Taking all things together, would you say you are...
In Hong Kong

Happiness Index – Total

12% Very Happy
67% Rather Happy
19% Not Very Happy
1% Not Happy at all

TOTAL HAPPY: 79%

Q1. Taking all things together, would you say you are...
In Singapore

Happiness Index – Total

19% Very Happy
62% Rather Happy
16% Not Very Happy
3% Not Happy at all

TOTAL HAPPY: 81%

Q1. Taking all things together, would you say you are...
In Korea

Happiness Index – Total

12% Very Happy
66% Rather Happy
20% Not Very Happy
2% Not Happy at all

TOTAL HAPPY: 78%

Q1. Taking all things together, would you say you are...
In Malaysia – happy people!

Happiness Index – Total

32% Very Happy
58% Rather Happy
9% Not Very Happy
1% Not Happy at all

TOTAL HAPPY: 90%

Q1. Taking all things together, would you say you are...
Between Mars and Venus

Between the men and women, all markets are generally comparable in perspectives. A few exceptions:

- **Singapore** - 26% of women more readily admitting that they are very happy vs just 12% of men.
- **Hong Kong** - we see the region’s highest proportion of unhappy citizens among the men at 24%.
- **China** - there are about half as many unhappy women at 8% as there are unhappy men at 16%.

<table>
<thead>
<tr>
<th>Country</th>
<th>Male</th>
<th>Female</th>
<th>Very happy</th>
<th>Rather happy</th>
<th>Not very happy</th>
<th>Not happy at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>China - Male</td>
<td>20%</td>
<td>19%</td>
<td>63%</td>
<td>72%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>China - Female</td>
<td>19%</td>
<td>13%</td>
<td>72%</td>
<td>60%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Hong Kong - Male</td>
<td>12%</td>
<td>13%</td>
<td>62%</td>
<td>71%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Hong Kong - Female</td>
<td>12%</td>
<td>13%</td>
<td>62%</td>
<td>71%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Malaysia - Male</td>
<td>13%</td>
<td>32%</td>
<td>60%</td>
<td>56%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Malaysia - Female</td>
<td>32%</td>
<td>32%</td>
<td>60%</td>
<td>56%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Singapore - Male</td>
<td>12%</td>
<td>26%</td>
<td>65%</td>
<td>59%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Singapore - Female</td>
<td>26%</td>
<td>26%</td>
<td>59%</td>
<td>60%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>South Korea - Male</td>
<td>14%</td>
<td>14%</td>
<td>64%</td>
<td>69%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>South Korea - Female</td>
<td>14%</td>
<td>14%</td>
<td>64%</td>
<td>69%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>
Among the Young (18 – 29 years old)

- Young Malaysians are significantly happier than their Asian counterparts with 38% of them stating that they are very happy.
- Young S. Koreans however, are somewhat less happy with 22% stating that they are not very happy or not happy at all.
Among those in their 30s (30 – 39 years old)

- Significantly high happiness levels among Malaysians (35%) right into their 30s.
- In Hong Kong (20%) and Singapore (22%), this group is relatively unhappier.

<table>
<thead>
<tr>
<th>Country</th>
<th>Very happy</th>
<th>Rather happy</th>
<th>Not very happy</th>
<th>Not happy at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>22%</td>
<td>63%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Hong Kong</td>
<td>18%</td>
<td>61%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Malaysia</td>
<td>35%</td>
<td>50%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>21%</td>
<td>55%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>South Korea</td>
<td>12%</td>
<td>74%</td>
<td>12%</td>
<td></td>
</tr>
</tbody>
</table>

Legend:
- Very happy
- Rather happy
- Not very happy
- Not happy at all
Among those in their 40s (40 – 50 years old)

- S. Koreans have a significantly higher proportion of unhappy citizens among those in their 40s (29%). A direct contrast against the same age group in Malaysia (4%).
Contributing Factors to the State of Happiness

• After rating their overall level of happiness, we asked, “what does or could make you, personally, happiest in your life...”

• Respondents were asked to identify their **Top 5 factors** out of a randomly rotated list of 28 possible factors:

  - My relationship with my partner/spouse (1)
  - Having a child (2)
  - My relationship with my child/children (3)
  - Having more friends / My relationship with my friends (4)
  - My relationship with my parents (5)
  - Being forgiven for something I did (6)
  - Forgiving someone for something (7)
  - Finding someone to be with (8)
  - My living conditions (water, food, housing) (9)
  - My personal safety and security (10)
  - My health/physical well-being (11)
  - The health/well-being of my family/friends (12)
  - My sex life (13)
  - Having a meaningful job (14)
  - Having an enjoyable job (15)
  - Performing well in my job (16)
  - Feeling that my life has meaning (17)
  - Feeling in control of my life (18)
  - Being recognized as a successful person (19)
  - Freedom to express my beliefs (20)
  - My religious or spiritual well-being (21)
  - My personal financial situation (22)
  - My material possessions (e.g., computer, fashion items, car) (23)
  - The state of the economy (24)
  - My hobbies/interests/entertainment/sports (25)
  - The amount of time or money I donate to charity/help others (26)
  - The well-being of my country (27)
  - Moving to another country (28)
A CLOSER LOOK AT THE HAPPY
Across 5 Asian Markets:
China
Hong Kong
Malaysia
S. Korea
Singapore
Main factors of Happiness - APAC

Among those who said they were **rather happy or very happy**, these were the top 3 most cited factors and 3 least cited factors contributing to their happiness.

**TOP 3**

- 42% My health & physical well-being
- 45% My relationship with my partner/spouse
- 36% The health & well-being of my family/friends

**BOTTOM 3**

- 5% Moving to another country
- 6% Being recognized as a successful person
- 4% The amount of time or money I donate to charity/help others
What gives you greatest happiness?

- Of those who are happy/rather happy, the top happiness boosters are primarily their health and health of their family, their relationship with their spouse as well as basic needs such as their living conditions.

<table>
<thead>
<tr>
<th></th>
<th>HK</th>
<th>CHINA</th>
<th>SINGAPORE</th>
<th>KOREA</th>
<th>MALAYSIA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOP 3</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>54% MY HEALTH</td>
<td>59% MY HEALTH</td>
<td>40% MY HEALTH</td>
<td>44% SPOUSE</td>
<td>53% SPOUSE</td>
</tr>
<tr>
<td></td>
<td>41% SPOUSE</td>
<td>43% SPOUSE</td>
<td>42% SPOUSE</td>
<td>35% LIVING CONDITIONS</td>
<td>46% RELATIONSHIP WITH PARENTS</td>
</tr>
<tr>
<td></td>
<td>39% FINANCES</td>
<td>41% HEALTH OF FAMILY/FRIENDS</td>
<td>38% HEALTH of FAMILY/FRIENDS</td>
<td>35% MY HEALTH</td>
<td>41% HEALTH OF FAMILY/FRIENDS</td>
</tr>
</tbody>
</table>

| **BOTTOM 3** |          |           |           |           |           |
|              | 3% CHARITY | 4% EXPRESS BELIEFS | 5% CHARITY | 4% COUNTRY WELLBEING | 6% CHARITY |
|              | 3% COUNTRY WELLBEING | 3% LEAVE COUNTRY | 4% LEAVE COUNTRY | 3% CHARITY | 5% SOCIAL RECOGNITION |
|              | 2% LEAVE COUNTRY | 2% CHARITY | 3% SOCIAL RECOGNITION | 4% LEAVE COUNTRY | 1% LEAVE COUNTRY |

Q2. Earlier we asked you, taking all things together, if you would say you are very happy, rather happy, not very happy or not happy at all. What we now want to know is what does or could make you, personally, happiest in your life. For each of the following, please indicate what does or could bring the happiness in your life.
A CLOSER LOOK AT THE LESS HAPPY

Across 5 Asian Markets:
China
Hong Kong
Malaysia
S. Korea
Singapore
Among those who said they were not very happy or not happy at all, these were the top 3 most cited factors and 3 least cited factors contributing to their state of happiness or could bring about happiness in their lives.

**TOP 3**
- 57% My personal financial situation
- 38% My health & physical well-being
- 36% My living conditions (water, food, housing etc)

**BOTTOM 3**
- 5% Moving to another country
- 3% The amount of time or money I donate to charity/help others
- 5% The well-being of my country
Q2. Earlier we asked you, taking all things together, if you would say you are very happy, rather happy, not very happy or not happy at all. What we now want to know is what does or could bring the happiness in your life. For each of the following, please indicate what does or could make you, personally, happiest in your life.

- Of those who not very happy/not happy at all, the factors contributing to their current level of happiness are primarily their personal financial situation followed by their health and their living conditions.
OTHER MARKET HIGHLIGHTS
SINGAPORE HIGHLIGHTS
Singapore Highlights

Singaporeans’ top contributing factors to happiness

Happiness Levels in SG

SG MEN vs SG WOMEN

Women more readily admit that they are very happy.

34% Personal financial situation more important to men than women

11% Having an enjoyable job more important to men than women

My relationship with my partner/spouse

My health/physical well-being

My personal financial situation

My living conditions (water, food, housing)

The health/well-being of my family/friends

% indicates proportion of SG males /females who identified this as 1 of their top 5 happiness factors.
Base: SG Males = 238; SG Females = 231
HONG KONG HIGHLIGHTS
If marriage doesn’t make you happier – divorce does!

Very Happy:

11% Single

13% Married

26% Divorced/separated

Total happy

80%

80%

79%
27

Women are happier than men

Total Happy

By Gender

74% 84%

24% of men consider themselves “not very happy”, against only 16% for women
Workers are happy, homemakers even more!

Total Happy:

79% Working Full Time

70% Working Part Time

82% Student

90% Homemaker
Main factors of Happiness – Different Age Group-China

- All age groups regard personal health as the biggest happiness boosters;
- Except personal health, among those are 18-29 years old, the happiness boosters are health of family/friends and living conditions; the happiness boosters for 30-39 years old group are health of family/friends and personal financial situation, and the happiness boosters for 40-50 years group are relationship with partners/spouse and personal financial situation;

<table>
<thead>
<tr>
<th>18-29 Years old</th>
<th>30-39 Years Old</th>
<th>40-50 Years Old</th>
</tr>
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<tbody>
<tr>
<td>47% MY HEALTH</td>
<td>59% MY HEALTH</td>
<td>65% MY HEALTH</td>
</tr>
<tr>
<td>45% HEALTH OF MY FAMILY/FRIENDS</td>
<td>38% HEALTH OF MY FAMILY/FRIENDS</td>
<td>55% SPOUSE</td>
</tr>
<tr>
<td>37% LIVING CONDITIONS</td>
<td>35% FINANCES</td>
<td>37% FINANCES</td>
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</table>

**TOP 3**

**BOTTOM 3**

Q2. Earlier we asked you, taking all things together, if you would say you are very happy, rather happy, not very happy or not happy at all. What we now want to know is what does or could make you, personally, happiest in your life. For each of the following, please indicate what does or could bring the happiness in your life.
Main factors of Happiness – Gender-China

- Both male and female Chinese respondents regard personal health as the biggest happiness boosters;
- However, except personal health, among male Chinese, the happiness boosters are relationship with partners/spouse (42%) and living conditions (40%), the happiness of female Chinese are primarily boosted by health of family/friends (48%) and relationship with partners/spouse (39%);

<table>
<thead>
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<th>Female</th>
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</thead>
<tbody>
<tr>
<td>62% MY HEALTH</td>
<td>53% MY HEALTH</td>
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<tr>
<td>42% SPOUSE</td>
<td>48% HEALTH OF MY FAMILY/FRIENDS</td>
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<td>40% LIVING CONDITIONS</td>
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<tr>
<td>5% SPIRITUAL WELLBEING</td>
<td>4% LEAVE COUNTRY</td>
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<tr>
<td>4% LEAVE COUNTRY</td>
<td>3% SOCIAL RECOGNITION</td>
</tr>
<tr>
<td>3% CHARITY</td>
<td>1% CHARITY</td>
</tr>
</tbody>
</table>

Q2. Earlier we asked you, taking all things together, if you would say you are very happy, rather happy, not very happy or not happy at all. What we now want to know is what does or could make you, personally, happiest in your life. For each of the following, please indicate what does or could bring the happiness in your life.
MALAYSIA HIGHLIGHTS
• Regardless of age, Malaysians consider the relationship with their loved ones to be the most important contributing factor to their happiness

• Malaysians deem individualistic values such as personal recognition as not being important to being happy
S. KOREA HIGHLIGHTS
The happiness level for S. Koreans is the lowest among the 5 countries. One key factor that this can be attributed to is the highly competitive Korean society.

1 out of every 5 Koreans aged 18 – 29 years old are unhappy. South Korea’s college entrance rate is over 90%. In this society which is highly focused on education, everyone tends to attend college just as they would attend elementary school. Starting from a young age, they strive to enter a good university and to find a good job. It is very difficult to get accepted into enviable companies like Samsung, Hyundai, and LG where out of every 100 applicants, only 3 to 4 get accepted. Even after joining the company, working from morning until late at night is usually expected and required.

The number of unhappy Koreans rises to 1 out of every 3 as they pass 40. Korea’s society is rapidly ageing. The current expected life span of Koreans is 81 years old but the average retirement age is currently around 53 years old. Due to the long retirement period, many Koreans are anxious about their economic well-being in their later years.
About Ipsos

Founded in France in 1975, Ipsos is the only independent market research company that is controlled and managed by research professionals. In October 2011, Ipsos completed the acquisition of Synovate. The combination forms the world’s third largest market research company.

With offices in 85 countries, Ipsos has the resources to conduct research wherever in the world our clients do business. Working both on a global scale and in local markets, our expert teams give our clients the benefit of high value-added business solutions including qualitative, forecasting, modeling, market knowledge and consumer insights.

Ipsos professionals deliver insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management. Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1.789 billion in 2012.

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About Toluna

With 18 offices in Europe, North America and Asia Pacific, Toluna works with many of the world’s leading market-research agencies, media agencies and corporations. Toluna's survey research has informed stories in the Financial Times, Advertising Age and Time Magazine.

Toluna pioneered a one-of-a-kind approach to recruiting and engaging members through Toluna.com, its online social voting community. Recently the company launched SmartSelect™, a sophisticated respondent selection methodology for assuring sample representativeness and increasing response accuracy.

Toluna provides the industry’s leading survey technology suite, enabling hundreds of organisations worldwide to create online and mobile surveys, manage panels and build their own online communities. Toluna products include PanelPortal™ Online Communities and Toluna QuickSurveys™.

Visit www.toluna-group.com for more information.
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