



HAPPY DAYS?

A LOOK AT THE HAPPINESS LEVELS IN ASIA

QUARTER 3 2013

ASIA PACIFIC



Total Sample Size
 $n = 2,378$

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

3

China: n=450

South Korea: n=543

Hong Kong: n=450

Singapore: n=469

Malaysia: n=466

For more information, please contact:

Tammy Ho
Business Development Manager
Ipsos Singapore
tammy.ho@ipsos.com
Tel: +65 6501 9840

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...

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...

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...

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...

Happiness Index – Total



32%

Very Happy

58%

Rather Happy

9%

Not Very
Happy

1%

Not Happy
at all

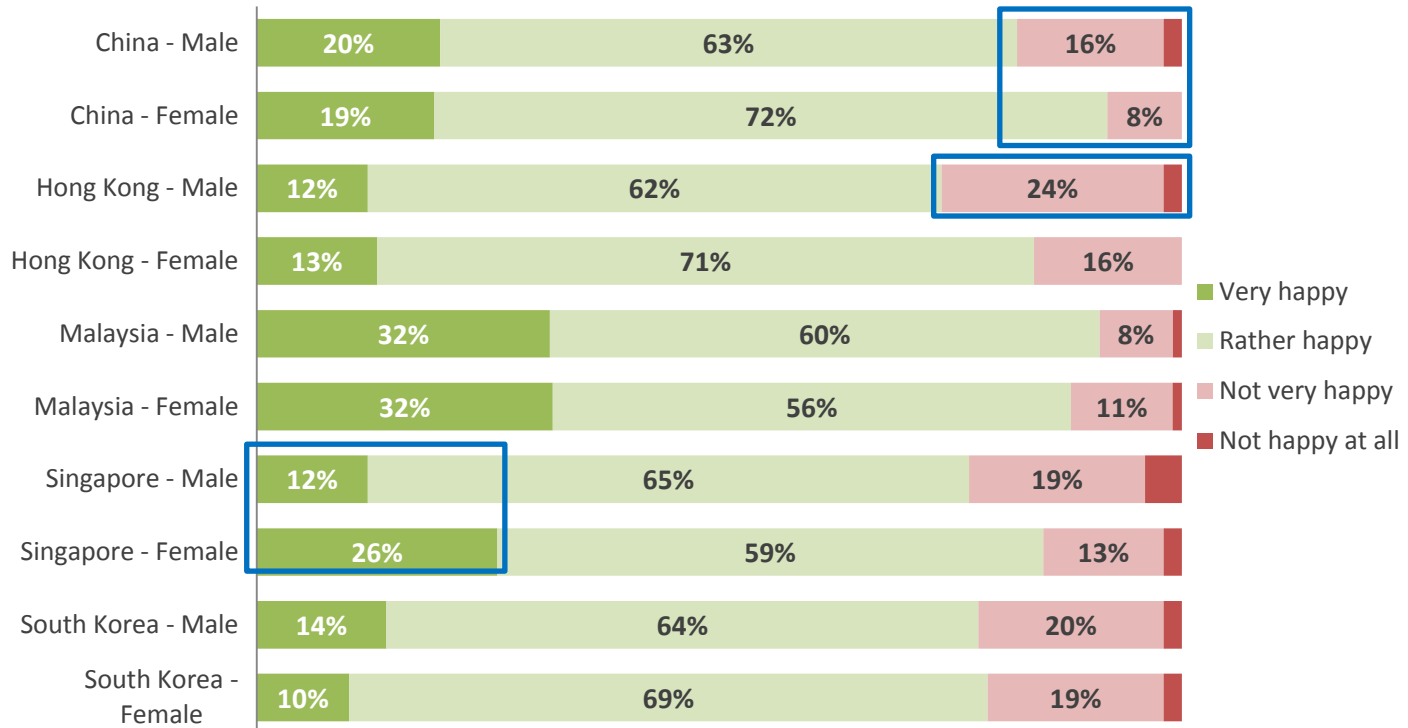
TOTAL HAPPY: 90%

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

Between Mars and Venus

11

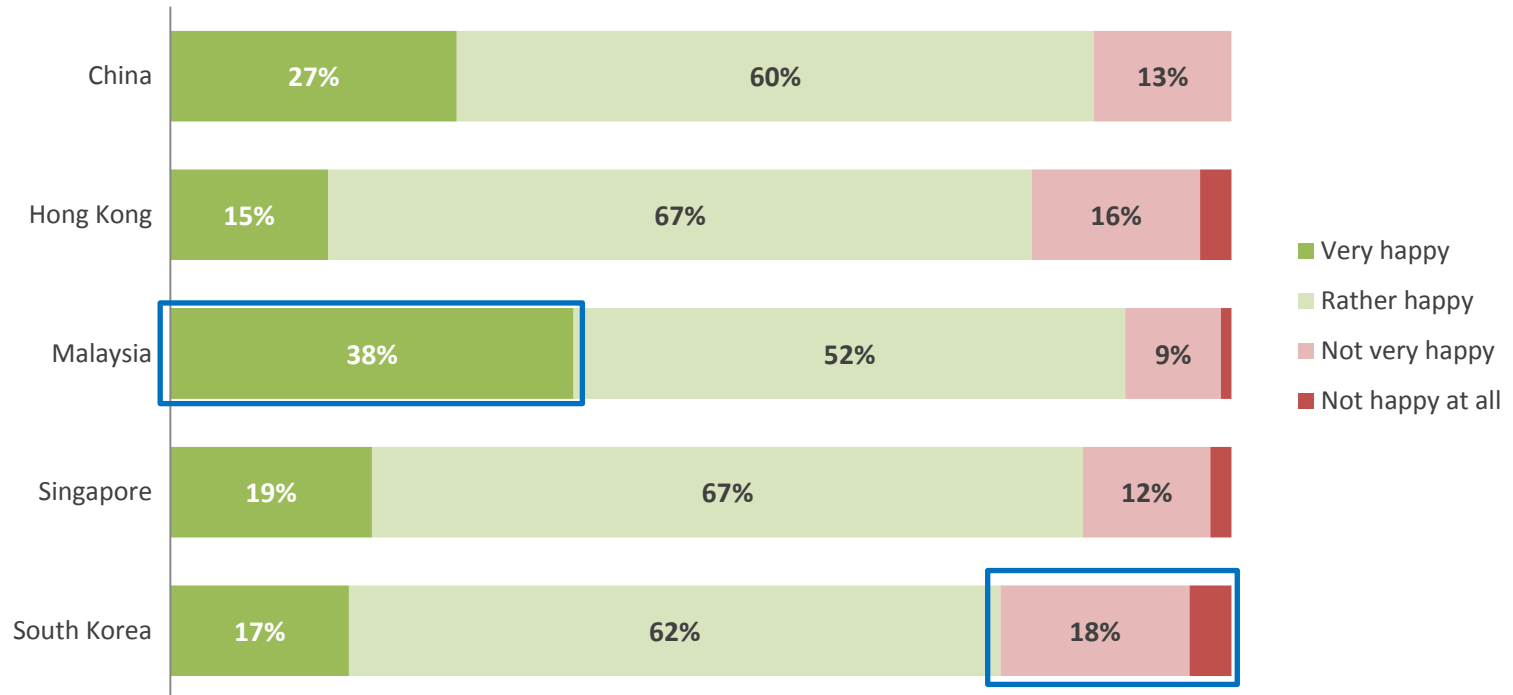
- **Between the men and women, all markets are generally comparable in perspectives. A few exceptions:**
 - **Singapore** - 26% of women more readily admitting that they are very happy vs just 12% of men.
 - **Hong Kong** - we see the region's highest proportion of unhappy citizens among the men at 24%.
 - **China** - there are about half as many unhappy women at 8% as there are unhappy men at 16%.



Among the Young (18 – 29 years old)

12

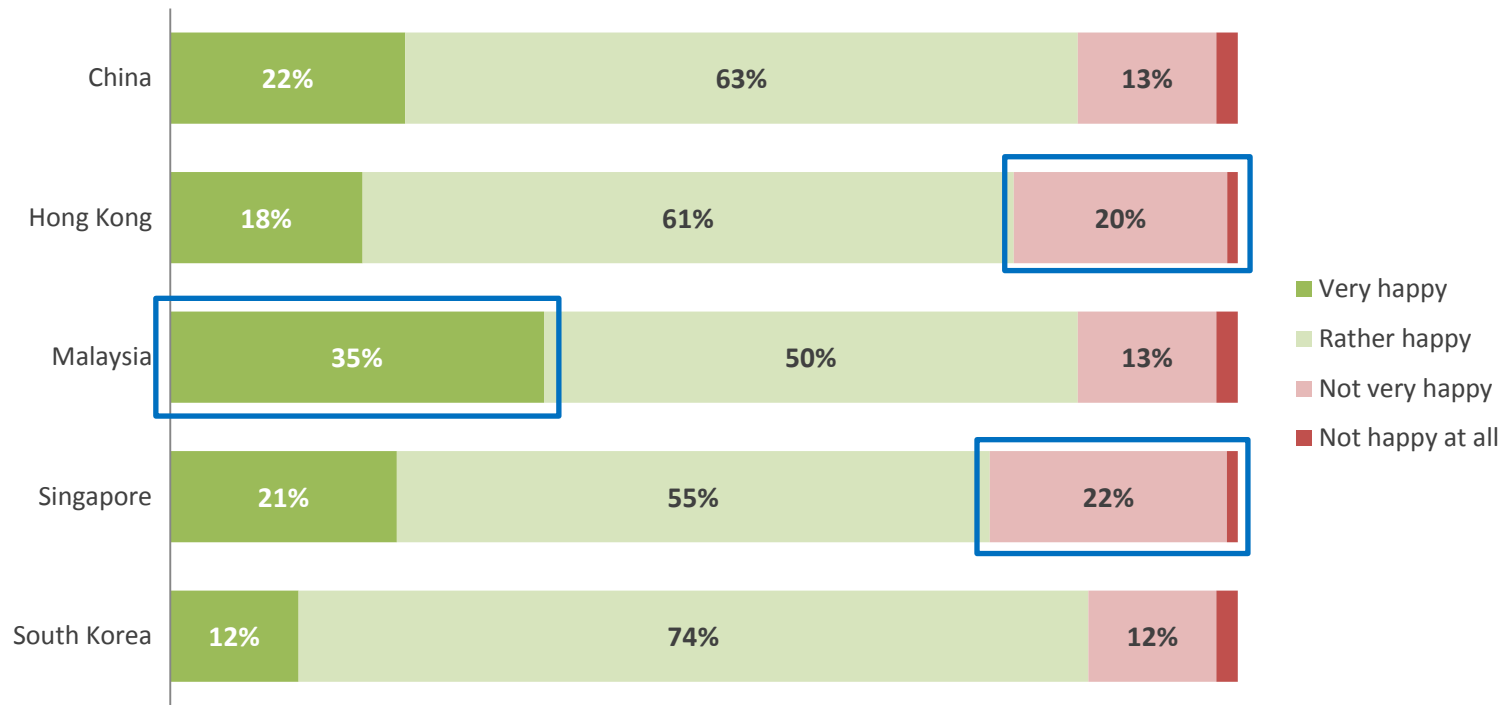
- Young Malaysians are significantly happier than their Asian counterparts with 38% of them stating that they are very happy.
- Young S. Koreans however, are somewhat less happy with 22% stating that they are not very happy or not happy at all.



Among those in their 30s (30 – 39 years old)

13

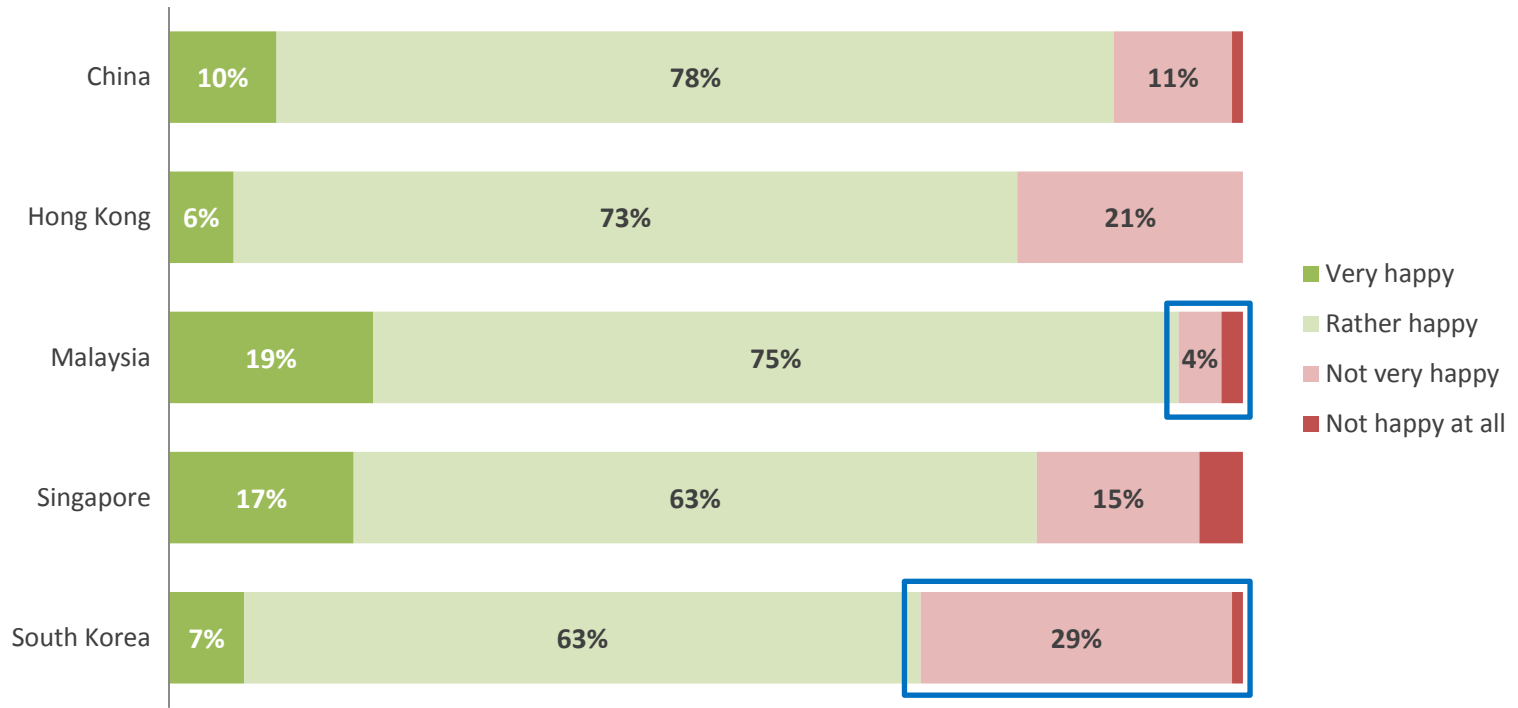
- Significantly high happiness levels among Malaysians (35%) right into their 30s.
- In Hong Kong (20%) and Singapore (22%), this group is relatively unhappier.



Among those in their 40s (40 – 50 years old)

14

- 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

15

- 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



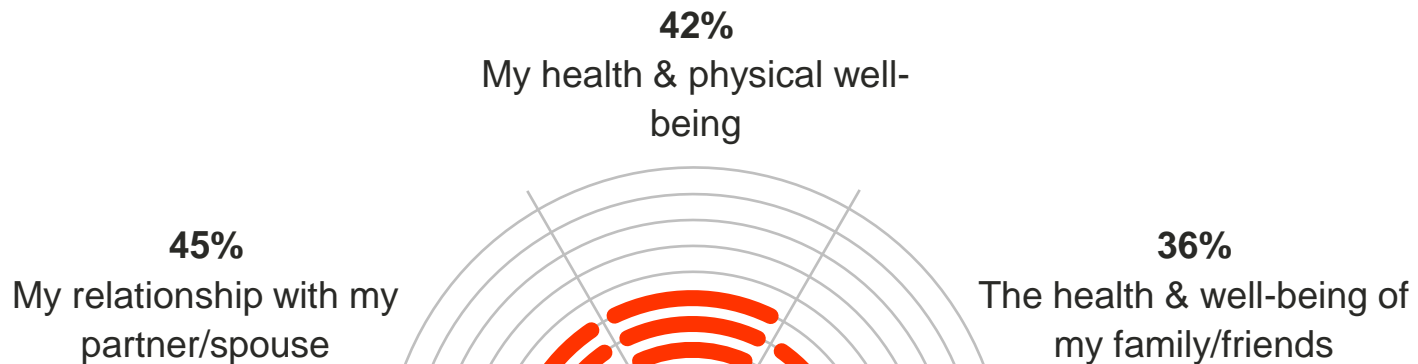
Main factors of Happiness - APAC



17

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



BOTTOM 3



What gives you greatest happiness?



18

- 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.

HK

 **54%**
MY HEALTH

 **41%**
SPOUSE

 **39%**
FINANCES

CHINA

 **59%**
MY HEALTH

 **43%**
SPOUSE

 **41%**
HEALTH OF
FAMILY/FRIENDS

SINGAPORE

 **40%**
MY HEALTH

 **42%**
SPOUSE

 **38%**
HEALTH OF
FAMILY/FRIENDS

KOREA

 **44%**
SPOUSE

 **35%**
LIVING
CONDITIONS

 **35%**
MY HEALTH

MALAYSIA

 **53%**
SPOUSE

 **46%**
RELATIONSHIP
WITH PARENTS

 **41%**
HEALTH OF
FAMILY/FRIENDS

TOP 3

BOTTOM 3

 **3%**
CHARITY

 **3%**
COUNTRY WELLBEING

 **2%**
LEAVE COUNTRY

 **4%**
EXPRESS BELIEFS

 **3%**
LEAVE COUNTRY

 **2%**
CHARITY

 **5%**
CHARITY

 **4%**
LEAVE COUNTRY


 **3%**
SOCIAL REGONITION

 **4%**
COUNTRY WELLBEING

 **3%**
CHARITY

 **2%**
LEAVE COUNTRY

 **6%**
CHARITY

 **5%**
SOCIAL RECIOGNITION

 **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



Main factors of Unhappiness - APAC



20

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



BOTTOM 3

5%
Moving to another country

5%
The well-being of my country

3%
The amount of time or money I donate to charity/help others

What could make you happy?



21

- 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.

HK

CHINA

SINGAPORE

KOREA

MALAYSIA



54%
FINANCES



58%
FINANCES



68%
FINANCES



50%
FINANCES



61%
FINANCES



42%
LIVING CONDITIONS



55%
LIVING CONDITIONS



47%
MY HEALTH



34%
ENJOYABLE JOB



40%
HEALTH of
FAMILY/FRIENDS



38%
MY HEALTH



50%
MY HEALTH



33%
SPOUSE



33%
HEALTH



38%
LIVING CONDITIONS

TOP 3

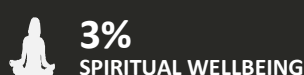
BOTTOM 3



4%
CHARITY



3%
CHARITY



3%
SPIRITUAL WELLBEING



4%
SPIRITUAL WELLBEING



2%
SOCIAL RECOGNITION



3%
EXPRESS BELIEFS



3%
COUNTRY WELLBEING



3%
CHARITY



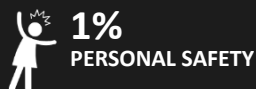
3%
CHARITY



1%
PERSONAL SAFETY



1%
COUNTRY WELLBEING



1%
PERSONAL SAFETY



3%
COUNTRY WELLBEING



0%
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

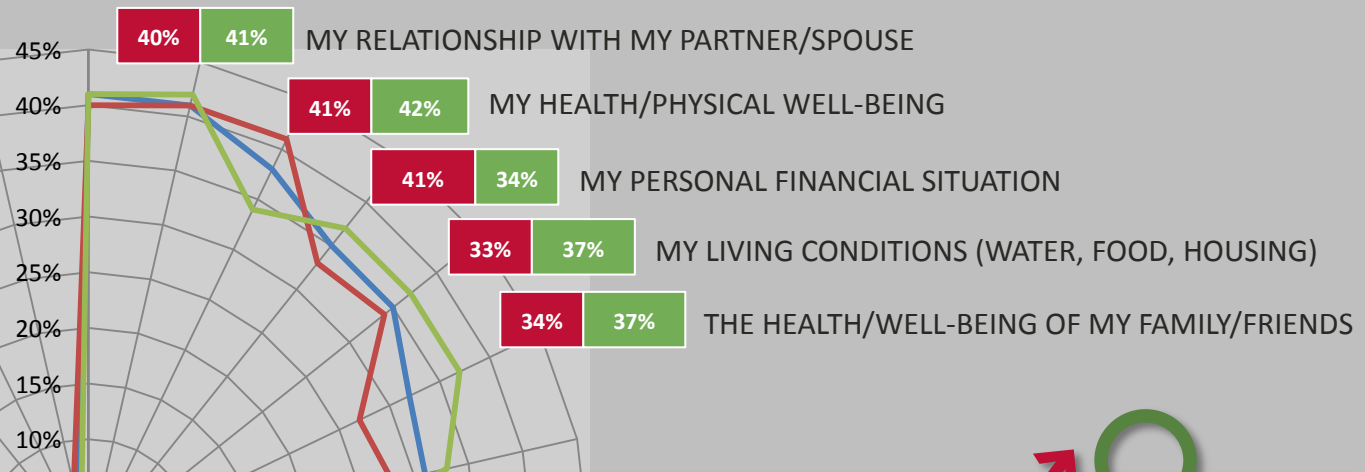
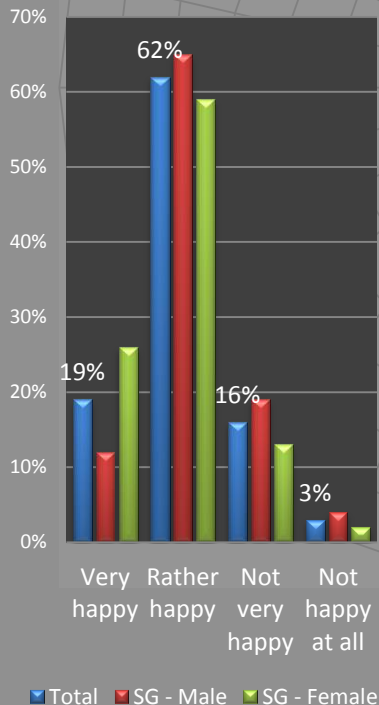
OTHER MARKET HIGHLIGHTS



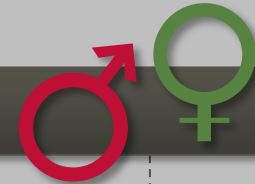
SINGAPORE HIGHLIGHTS

Singaporeans' top contributing factors to happiness

Happiness Levels in SG



SG MEN vs SG WOMEN



26%
Women more readily admit that they are very happy.

12%

34%
Personal financial situation more important to men than women

41%



37%
Relationship with their parents more important to women than men

27%

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

17%



Their sex life more important to men than women

6%



21%

% 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!

26

Very Happy:

11%

Single



Total happy
80%

13%

Married



Total happy
80%

26%

Divorced/
separated



Total happy
79%

Women are happier than men

27



24% of men consider themselves “not very happy”, against only **16%** for women

Workers are happy, homemakers even more!

28

Total Happy:

79%

Working
Full Time



70%

Working
Part Time



82%

Student



90%

Homemaker





CHINA HIGHLIGHTS

Main factors of Happiness – Different Age Group-China

30

- 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;

18-29 Years old



47%
MY HEALTH



45%
HEALTH OF MY FAMILY/FRIENDS



37%
LIVING CONDITIONS

30-39 Years Old



59%
MY HEALTH



38%
HEALTH OF MY FAMILY/FRIENDS



35%
FINANCES

40-50 Years Old



65%
MY HEALTH



55%
SPOUSE



37%
FINANCES

TOP 3

BOTTOM 3



5%
COUNTRY WELLBEING



2%
CHARITY



1%
LEAVE COUNTRY



6%
LEAVE COUNTRY



4%
COUNTRY WELLBEING



3%
CHARITY



4%
LEAVE COUNTRY



1%
CHARITY



1%
FINDING SOMEONE TO BE WITH

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

31

- 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%);

Male



62%
MY HEALTH



42%
SPOUSE



40%
LIVING CONDITIONS



5%
SPIRITUAL WELLBEING



4%
LEAVE COUNTRY



3%
CHARITY

Female



53%
MY HEALTH



48%
HEALTH OF MY FAMILY/FRIENDS



39%
SPOUSE



4%
LEAVE COUNTRY



3%
SOCIAL RECOGNITION



1%
CHARITY

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

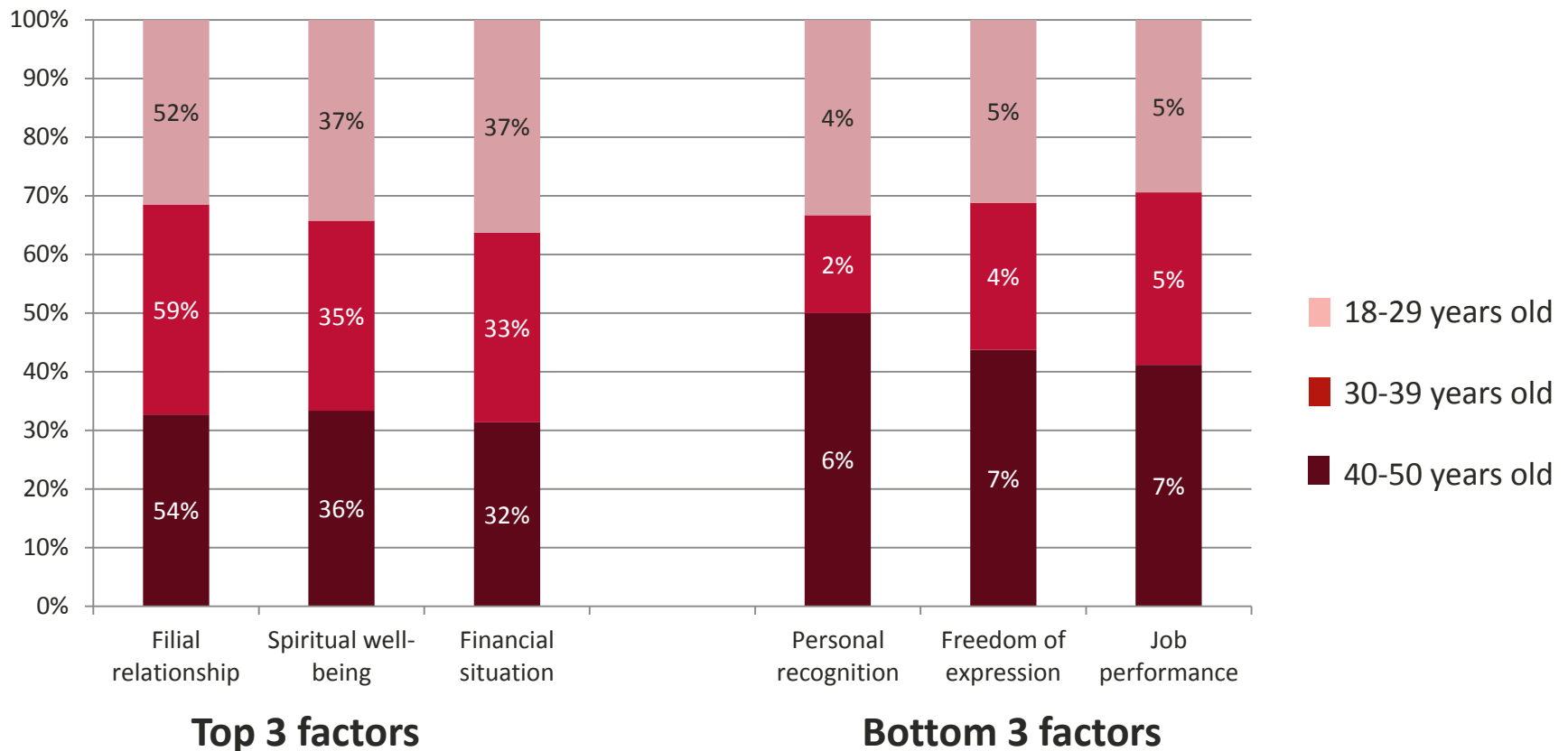


MALAYSIA HIGHLIGHTS

Other Malaysia Highlights – Differences across ages

33

- 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

S. Korea Highlights – A Competitive Society

35

22%

**Of young S.
Koreans
Unhappy**



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.



30%
**40+ years old
S. Koreans
Unhappy**

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.

Visit www.ipsosasiapacific.com to learn more about Ipsos' offerings and capabilities.



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.



