

The nation's awareness of life and work satisfaction, and consumer expectations

The "KAITEKI" Study Group

Institute of Economic and Social Systems (IESS)

April 8, 2020

1. Purpose of the survey

Recently people have become more interested in efforts, such as SDGs, of improving "environmental and social sustainability." Institute of Economic and Social Systems (IESS) conducted this survey in January 2020 to gain better grasp of the nation's awareness of "social issues" in aspects of life, work, and consumption.

We hope the result of this survey will lead to greater understanding of the nation's awareness in Japan and help policy making and corporate decision-making.

This survey will be conducted once every year.

*When using the result of this survey, the source of information should be clearly cited by referring to "KAITEKI Study Group" of Institute of Economic and Social Systems (IESS.)

2. Method of the survey

The survey area: Japan (nationwide)

The number of samples: 1,200 individuals aged between 15 to 79 (6 respondents per spot in 200 spots)

The sampling methods: Households are chosen from the housing map database and individuals are selected based on the distribution of gender, age and living district of the "Basic Resident Register."

The contents of the survey:

Theme A: "Life satisfaction"

Theme B: "Work satisfaction" and "Consumer expectations"

Theme C: "Recent innovation by AI and robots"

Respondents' attributes: gender, age, occupation (of the individual or of the head of the household), annual income (of the household or of the individual), marital status, educational backgrounds, family configuration, etc.

The survey period: between 6th January 2020 and 18th January 2020

The survey method: Placement method (surveyors visit respondents to leave questionnaires and re-visit to collect the response)

The field survey company: Nippon Research Center, Ltd.

Distribution of respondents' attributes (by district, gender, and age)

"District" (the first row: number of respondents, the second row: composition ratio (%))

Total	Hokkaido and Tohoku	Kanto including Tokyo	Central and Hokuriku	Kinki including Osaka	Chugoku, Shikoku and Kyushu
1,200	132	444	192	192	240
100.0	11.0	37.0	16.0	16.0	20.0

"Gender" (the first row: number of respondents, the second row: composition ratio (%))

Total	Male	Female
1,200	592	608
100.0	49.3	50.7

"Age" (the first row: number of respondents, the second row: composition ratio (%))

Total	15 ~ 19	20 ~ 29	30 ~ 39	40 ~ 49	50 ~ 59	60 ~ 69	70 ~ 79
1,200	74	148	187	221	186	225	159
100.0	6.2	12.3	15.6	18.4	15.5	18.8	13.3

3. Summary

< Life Satisfaction >

- ◇ The average of "total life satisfaction" was 5.8 out of 10, which slightly exceeded the simple average of 5.5. (A-1)
- ◇ The most important element for "life satisfaction" was "health", followed by "income and assets" and "reliable family, friends, and communities." "Sustainable environments, economy, and society" scored relatively low, to which the old people attached higher value than the young people did. (A-2)
- ◇ Many considered that development of Japan as well as the world would have some impact on the individual's life satisfaction. (A-3)
- ◇ Most respondents regarded that "national and local governments" should be responsible for building a better environment and society, while many thought "individuals" and "corporations" also responsible. (A-4)

< Work satisfaction >

- ◇ Many answered that they expect from their work "salary," "work-life balance," and "motivation and self-respect" more than "contribution to sustainable economy and society" and "contribution to sustainable environments." (B-1)
- ◇ "Regular employment" gained high score as a ideal working life, followed by "compatible with life," "use of own skills and knowledge" and "no relocation." (B-2)

- ✧ Many felt the contribution to “social issues” by their working company would improve their “motivation” and “attachment to the company”. (B-3)

< Consumer expectations >

- ✧ Many consumers paid strongest attention to “price and quality” when purchasing a product or a service. “Corporate misconducts” and “Negative conducts to environments, economy, and society” of the companies providing a product or a service also gathered high attention. It was more remarkable among the senior people. (B-4)
- ✧ As to the opportunities of getting corporate information, almost 60% answered “occasionally,” while around 20% “rarely.” This indicates that corporate information did not reach consumers enough. (B-5)
- ✧ Many young people obtained corporate information through “the internet,” “blogs,” and “SNS,” while the seniors did through “newspapers and magazines.” (B-6)
- ✧ Many respondents regarded that corporations should contribute to “social issues” as far as profit was not sacrificed. (B-7)

<Recent innovation by AI and robots >

- ✧ Positive assessments (“expect better products and services,” “expect better efficiency of economy and society”) exceeded negative ones (“concerned about reduced salary and job openings,” “concerned about violation of privacy”). Many young people worried about “reduced salary and job openings,” while seniors concerned “violation of privacy.” (C-1)
- ✧ “Innovation providing solutions to social issues” gained highest points as a desirable future innovation. It gained higher points by the senior people than by the young people. (C-2)

4. Results of the survey

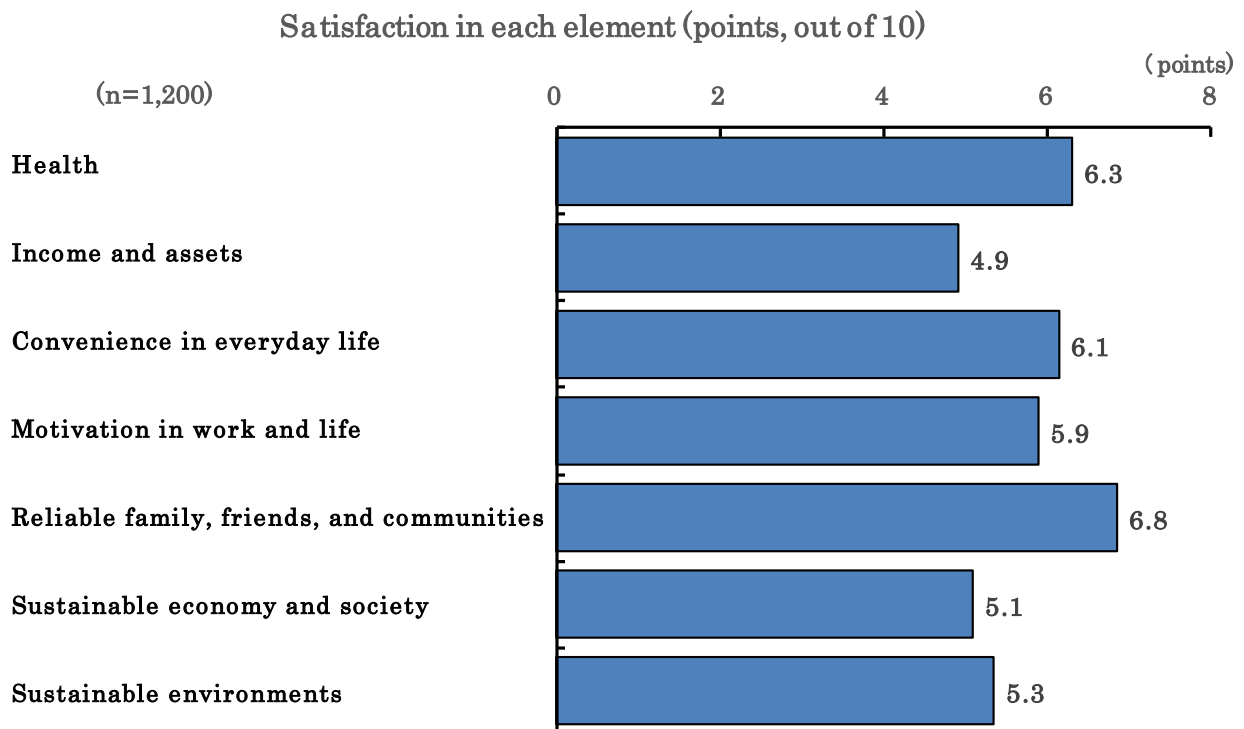
Theme A "Life Satisfaction"

A-1

How satisfied are you in your everyday life?

(1) Satisfaction in each element

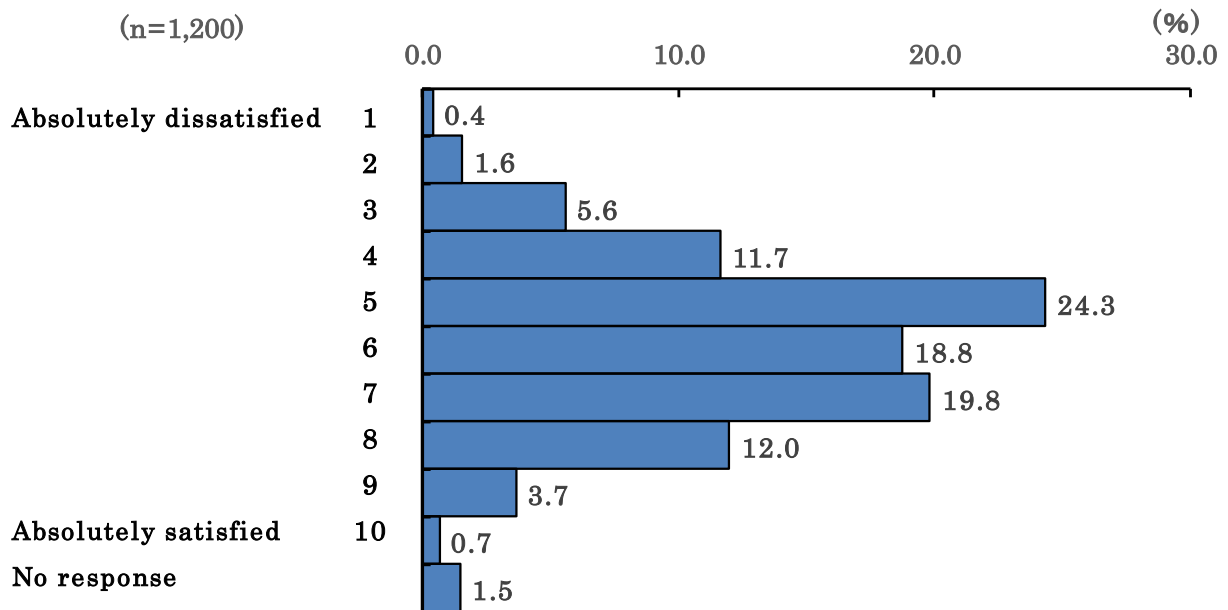
- ✧ *Near and dear* elements gained high score, such as "health," "convenience of everyday life," and "reliable family, friends, and communities." The score of other elements, such as "income and assets," "sustainable economy and society," and "sustainable environments," was relatively low.



(2) Total life satisfaction

◇ The average of total life satisfaction was 5.8 which slightly exceeded the simple average of 5.5.

Distribution of total life satisfaction (composition ratio (%))



◇ By age, respondents in their 50s and 60s attached lower score than the other age groups did.

◇ The higher the household income was, the higher the score was.

The total life satisfaction (by age)

Age	Total	15 ~ 19	20 ~ 29	30 ~ 39	40 ~ 49	50 ~ 59	60 ~ 69	70 ~ 79
Number of respondents	1,200	74	148	187	221	186	225	159
Average points	5.8	7.0	6.1	5.7	5.8	5.6	5.6	5.9

The total life satisfaction (by household income (thousand yen))

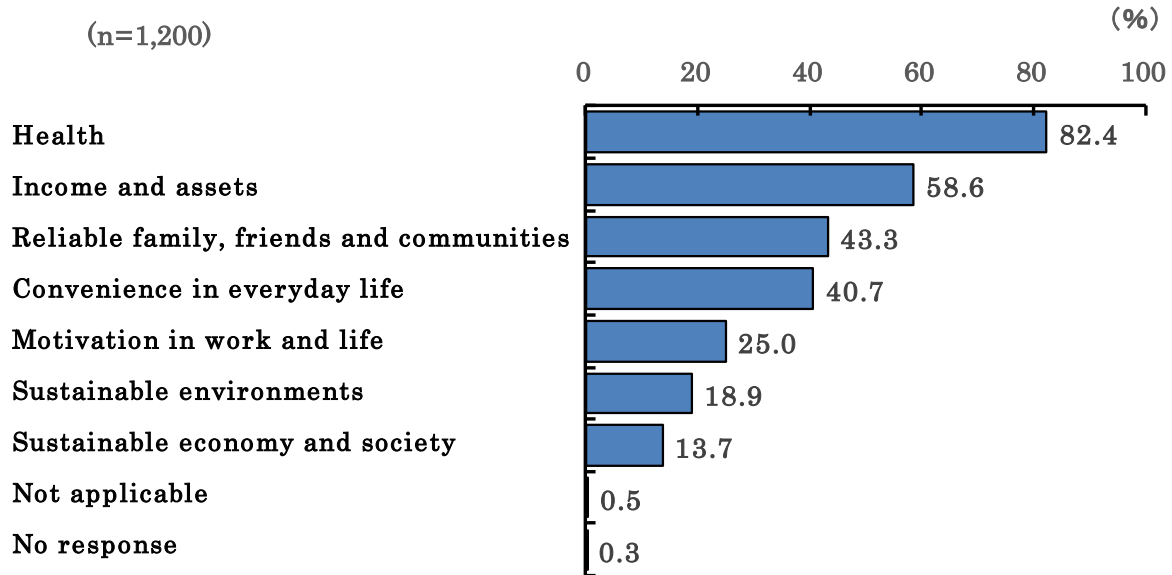
Annual household income	Total	Less than 3,000	~ 4,000	~ 5,000	~ 6,000	~ 7,000	~ 8,000	~ 10,000	~ 12,000	12,000 or above.
Number of respondents	1,200	185	139	128	137	108	97	132	64	47
Average points	5.8	5.5	5.5	5.7	5.7	5.9	6.0	6.0	6.1	6.8

A-2

What are the key elements of you life satisfaction ?

- ✧ “Health” gained highest score, followed by “income and assets” and “reliable family, friends, and community.” “Sustainable environments” and “sustainable economy and society” marked relatively low.

**What are the key elements of you life satisfaction ?
(multiple answer up to three, in descending order)**



- ✧ By age, respondents over 50 years old attached great importance to “health,” while over 60 regarded “sustainable environments” important.

What are the key elements of you life satisfaction ? (by age)

Age	Total	15~ 19	20~ 29	30~ 39	40~ 49	50~ 59	60~ 69	70~ 79
Number of respondents	1,200	74	148	187	221	186	225	159

(%)

Health.	82.4	62.2	66.9	72.2	81.0	92.5	93.3	93.1
Income and assets	58.6	37.8	58.8	67.4	69.7	69.4	52.9	37.7
Reliable family, friends and communities	43.3	58.1	40.5	46.0	40.3	39.2	41.8	46.5
Convenience in everyday life	40.7	51.4	45.3	44.4	41.2	30.6	38.2	41.5
Motivation in work and life	25.0	23.0	39.2	32.1	28.5	22.6	16.0	15.1
Sustainable environments	18.9	16.2	12.8	10.2	13.1	21.5	25.3	32.1
Sustainable Economy and Society	13.7	10.8	14.9	15.5	12.2	12.4	16.0	11.9
Not applicable	0.5	1.4	1.4	-	0.5	-	-	1.3
No response	0.3	1.4	-	1.1	-	-	-	-

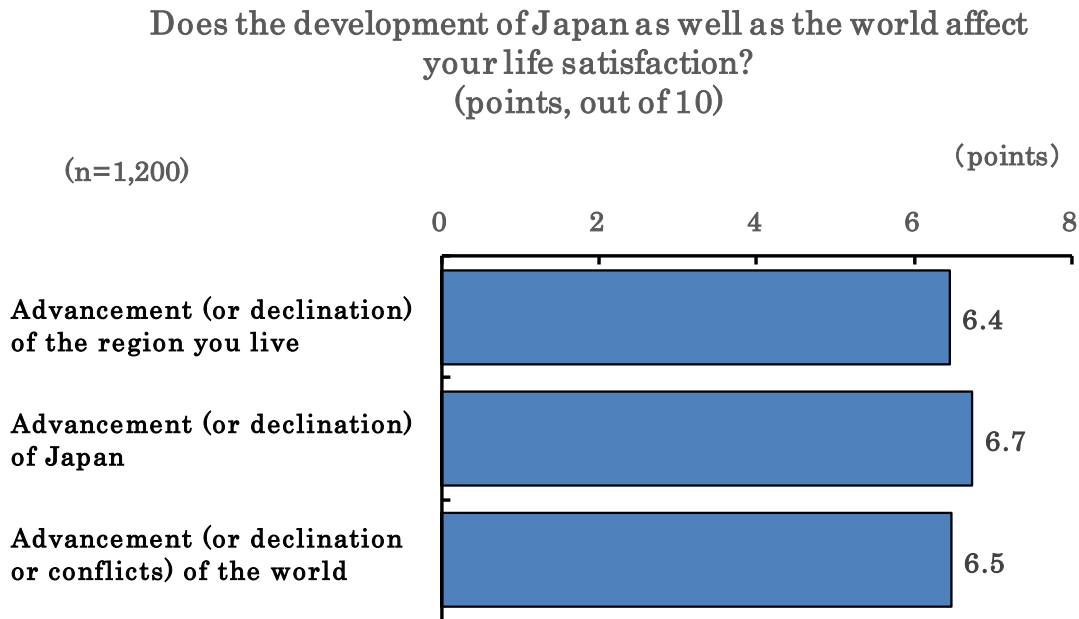
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A-3

Does the development of Japan as well as the world affect your life satisfaction?

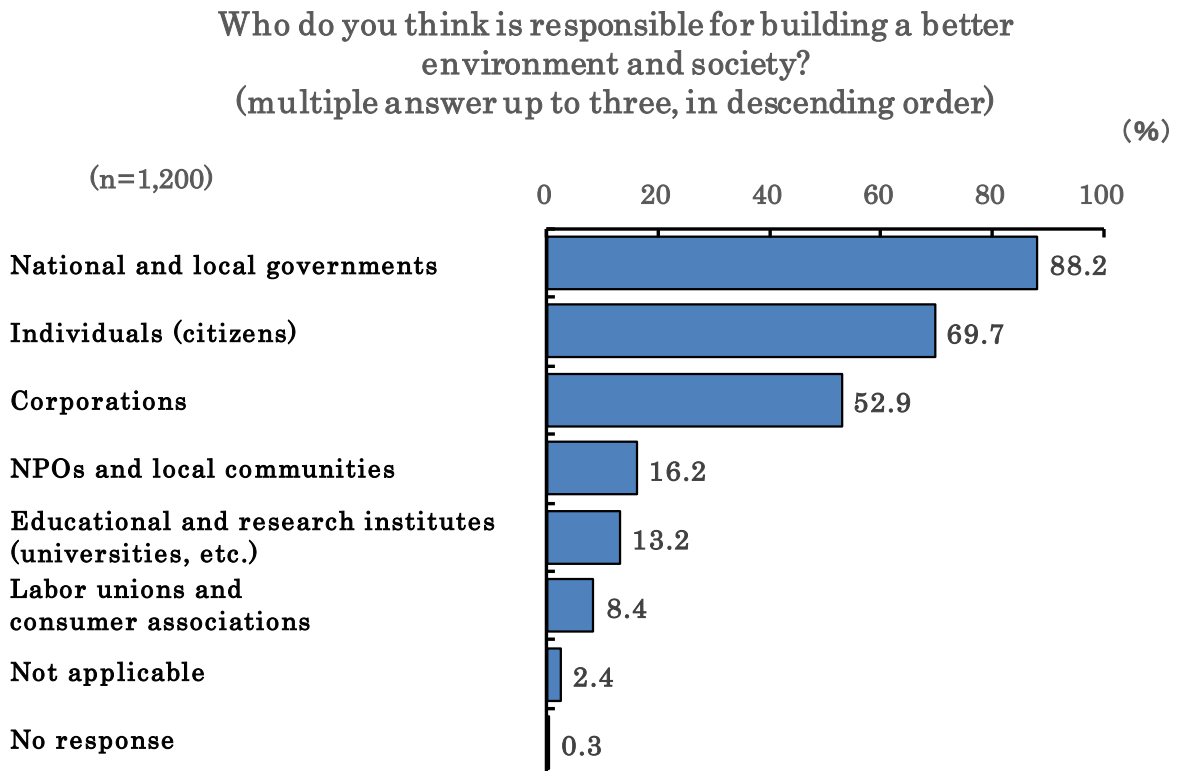
◇ Many considered that the development of Japan as well as the world would have some impact on the individual's life satisfaction.



A-4

Who do you think is responsible for building a better environment and society?

◇ “National and local governments” were regarded most responsible, while many respondents thought “individuals” and “corporations” also responsible.



- ✧ By age, more respondents in their 60s chose “individuals” in comparison with the young people especially under 30.

Who do you think is responsible for building a better environment and society? (by age)

Age	Total	15～ 19	20～ 29	30～ 39	40～ 49	50～ 59	60～ 69	70～ 79
Number of respondents	1,200	74	148	187	221	186	225	159

(%)

National and local governments	88.2	83.8	87.8	90.9	89.6	87.1	87.6	87.4
Individuals (citizens)	69.7	60.8	63.5	66.3	69.7	67.2	81.3	69.8
Corporations	52.9	44.6	56.1	56.1	53.8	59.7	50.2	44.7
NPOs and local communities	16.2	9.5	12.2	15.5	14.5	14.0	19.6	23.9
Educational and research institutes (universities, etc.)	13.2	29.7	17.6	8.6	14.9	8.1	10.7	13.8
Labor unions and consumer associations	8.4	9.5	10.8	16.0	8.1	6.5	4.9	4.4
Not applicable	2.4	1.4	2.0	1.1	1.8	2.7	1.8	6.3
No response	0.3	1.4	0.7	-	-	-	0.9	-

Note: The different colors show deviation from the average as below.

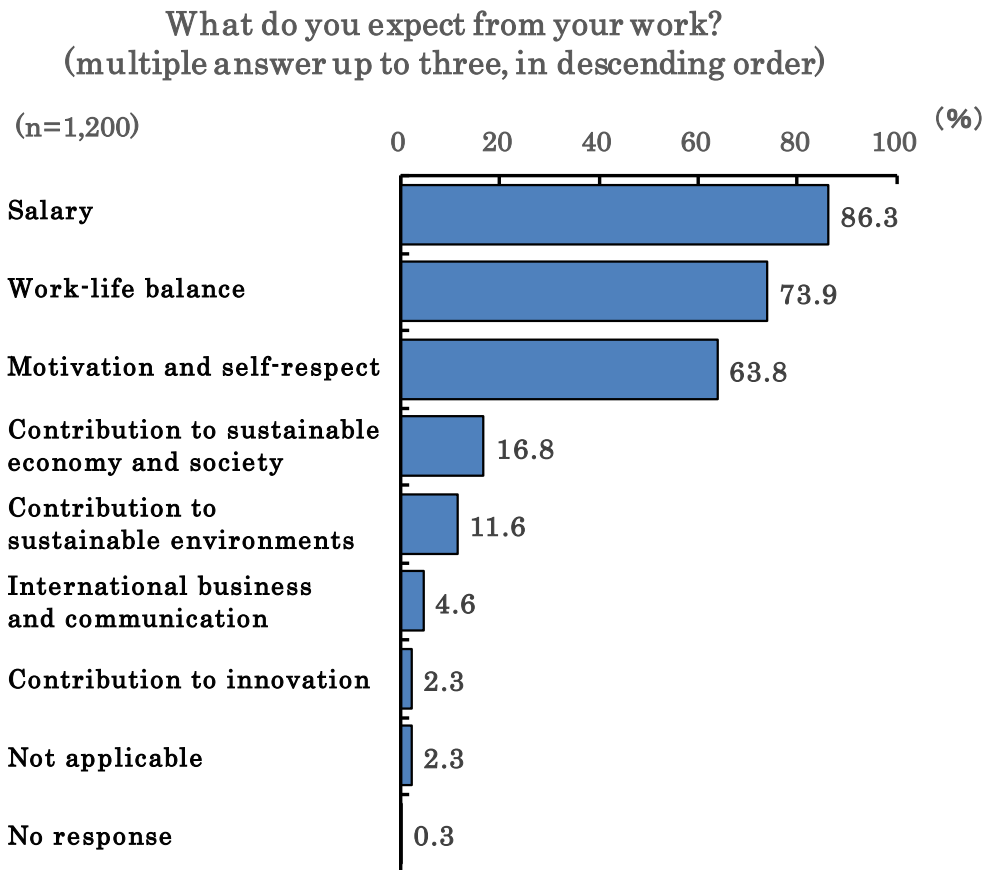
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Theme B “Work satisfaction” and “Consumer expectations”

B-1

What do you expect from your work?

- ✧ Many prioritized “salary,” “work-life balance,” and “motivation and self-respect.” “Contribution to sustainable economy” and “contribution to sustainable environments” scored relatively low scores.



- ✧ By gender and age, male respondents from 20 to 59 prioritized “salary,” while female chose “work-life balance.” The senior people rated “contribution to sustainable environments” and “contribution to sustainable economy and society” higher, while many respondents under 20 preferred “international business and communication.”

What do you expect from your work? (by gender and age)

(Male)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	592	37	75	95	111	93	109	72

(%)

Salary	88.3	81.1	92.0	98.9	95.5	91.4	83.5	66.7
Work-life balance	68.9	56.8	70.7	72.6	67.6	69.9	67.9	70.8
Motivation and self-respect	63.3	64.9	56.0	67.4	67.6	59.1	60.6	68.1
Contribution to sustainable economy and society	19.4	10.8	16.0	20.0	21.6	17.2	21.1	23.6
Contribution to sustainable environments	11.1	10.8	14.7	7.4	4.5	11.8	10.1	23.6
International business and communication	5.6	18.9	8.0	3.2	6.3	4.3	2.8	4.2
Contribution to innovation	3.2	2.7	4.0	5.3	2.7	1.1	4.6	1.4
Not applicable	2.7	-	2.7	-	0.9	4.3	4.6	5.6
No response	-	-	-	-	-	-	-	-

(Female)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	608	37	73	92	110	93	116	87

(%)

Salary	84.2	83.8	90.4	88.0	92.7	87.1	79.3	67.8
Work-life balance	78.8	62.2	82.2	81.5	79.1	79.6	81.9	74.7
Motivation and self-respect	64.3	75.7	68.5	65.2	60.0	63.4	62.1	64.4
Contribution to sustainable economy and society	14.3	2.7	11.0	17.4	10.9	10.8	20.7	18.4
Contribution to sustainable environments	12.0	5.4	4.1	8.7	4.5	10.8	25.0	18.4
International business and communication	3.6	13.5	5.5	3.3	1.8	3.2	-	5.7
Contribution to innovation	1.5	2.7	1.4	1.1	0.9	-	1.7	3.4
Not applicable	2.0	2.7	1.4	1.1	1.8	-	0.9	6.9
No response	0.7	2.7	1.4	-	-	1.1	0.9	-

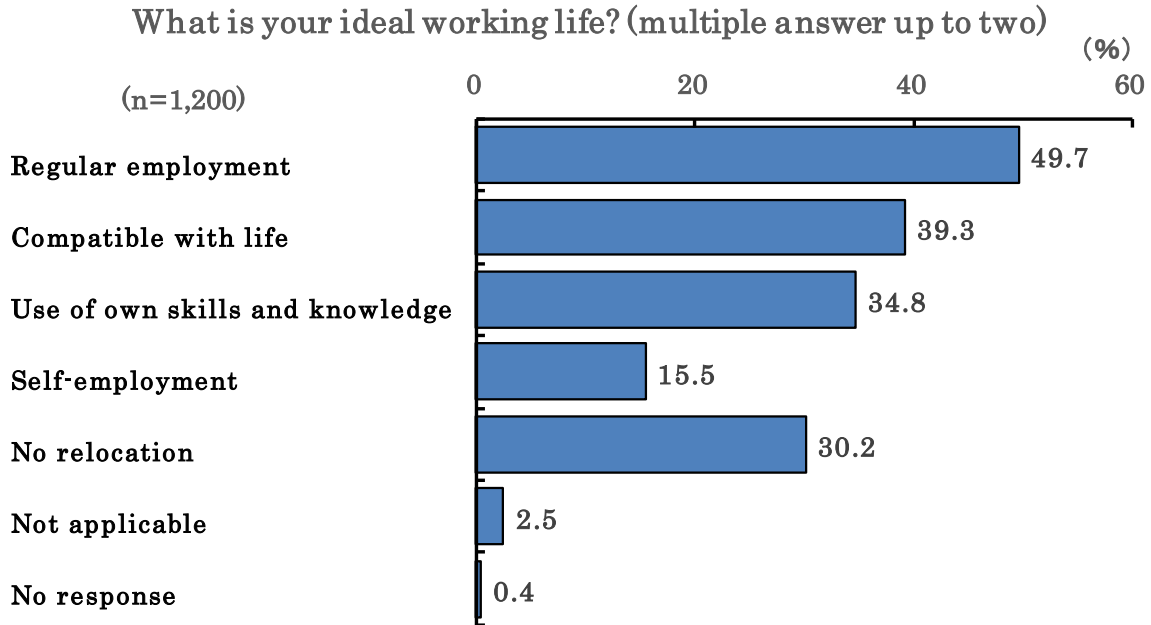
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B-2

What is your ideal working life?

- ◇ “Regular employment” gained high score, followed by “compatible with life,” “use of own skills and knowledge” and “no relocation.”



- ◇ By gender and age, male respondents under 60 prioritized “regular employment,” while “use of own skills and knowledge” were also assessed high. Female respondents in their 20s evaluated “regular employment,” while their 30s to 60s prioritized “compatible with life.” “No relocation” was assessed low among the young females, while rated high among the senior females.

What is your ideal working life? (by gender and age)

(Male)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	592	37	75	95	111	93	109	72

(%)

Regular employment	59.3	78.4	65.3	73.7	63.1	60.2	42.2	43.1
Compatible with life	24.3	35.1	25.3	20.0	17.1	19.4	28.4	34.7
Use of own skills and knowledge	40.9	35.1	33.3	41.1	42.3	44.1	45.9	37.5
Self-employment	18.1	5.4	13.3	17.9	26.1	19.4	15.6	19.4
No relocation	27.9	18.9	33.3	22.1	21.6	23.7	33.0	41.7
Not applicable	2.7	-	1.3	2.1	0.9	3.2	4.6	5.6
No response	0.2	-	-	-	-	-	0.9	-

(Female)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	608	37	73	92	110	93	116	87

(%)

Regular employment	40.3	67.6	63.0	35.9	29.1	33.3	29.3	50.6
Compatible with life	53.8	32.4	41.1	69.6	68.2	52.7	58.6	33.3
Use of own skills and knowledge	28.8	24.3	28.8	29.3	21.8	31.2	31.9	32.2
Self-employment	13.0	10.8	12.3	10.9	16.4	17.2	9.5	12.6
No relocation	32.4	10.8	17.8	31.5	29.1	39.8	43.1	36.8
Not applicable	2.3	5.4	1.4	-	2.7	-	2.6	5.7
No response	0.7	2.7	1.4	-	-	1.1	0.9	-

Note: The different colors show deviation from the average as below.

+10	+5	-5	-10
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B-3

Does the contribution to “social issues” by your working company improve your motivation and attachment to the company?

✧ Many felt the contribution to “social issues” by their working company would improve their “motivation” (average 6.5 out of 10) and “attachment to the company”(average 6.4). It was remarkable among the senior people.

Does the contribution to “social issues” by your working company improve your motivation and attachment to the company? (points, out of 10, by age)

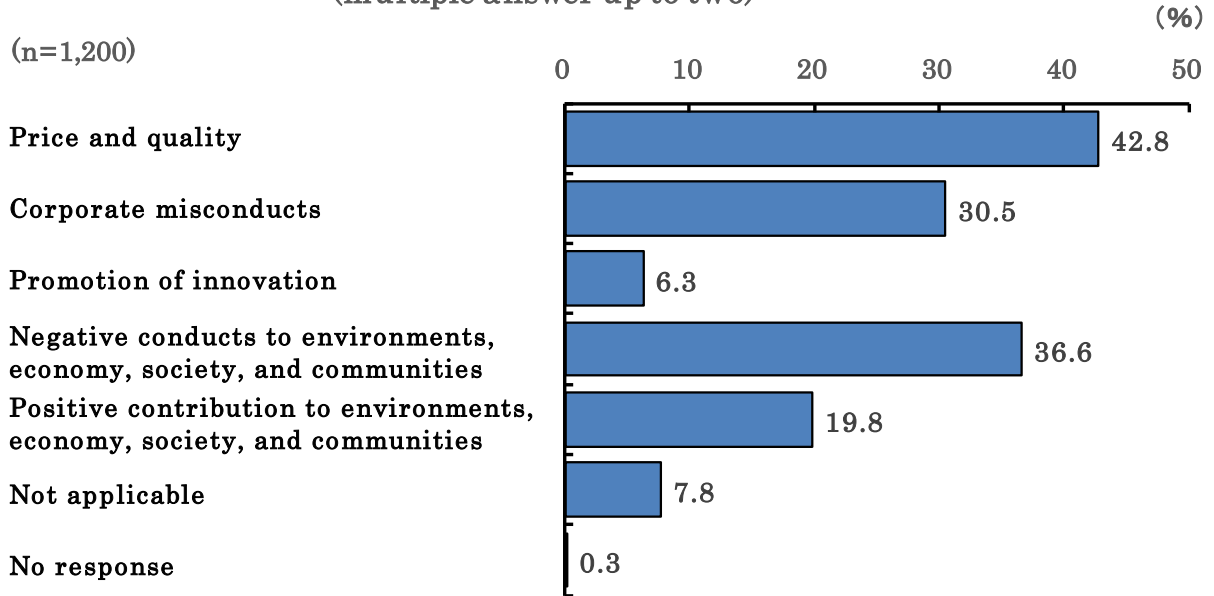
Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	1,200	74	148	187	221	186	225	159
Motivation at work	6.5	6.6	6.0	6.0	6.3	6.6	6.7	7.1
Attachment to the company	6.4	6.5	5.9	6.0	6.4	6.5	6.6	7.0

B-4

What do you pay attention to, when purchasing a product or a service?

- ✧ 43% of the respondents pay attention to “price and quality.”
- ✧ “Corporate misconducts” and “negative conducts to environments, economy, society, and communities” of the providing companies also gathered high attention. It was remarkable among the senior people.

**What do you pay attention to, when purchasing a product or a service?
(multiple answer up to two)**



What do you pay attention to, when purchasing a product or a service? (by age)

Age	total	15~ 19	20~ 29	30~ 39	40~ 49	50~ 59	60~ 69	70~ 79
Number of respondents	1,200	74	148	187	221	186	225	159

(%)

Price and quality	42.8	43.2	53.4	46.5	42.1	42.5	36.4	38.4
Corporate misconducts	30.5	29.7	29.1	31.6	32.6	28.0	31.6	29.6
Promotion of innovation	6.3	8.1	4.7	6.4	5.4	7.5	7.6	5.0
Negative conducts to environments, economy, society, and communities	36.6	25.7	23.6	35.8	34.8	40.3	40.4	47.2
Positive contribution to environments, economy, society, and communities	19.8	9.5	9.5	16.6	17.2	21.0	28.0	28.9
Not applicable	7.8	13.5	6.8	7.5	6.3	7.5	8.4	7.5
No response	0.3	1.4	0.7	-	-	0.5	-	-

Note: The different colors show deviation from the average as below.

+10	+5	-5	-10
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B-5

How often do you obtain corporate information?

- ✧ Almost 60% answered “occasionally,” while around 20% “rarely.”
- ✧ Male respondents over 50s answered “often” more than the other groups did.

How often do you obtain corporate information? (by gender and age)

(Male)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	592	37	75	95	111	93	109	72

(%)

Often	59.3	2.7	9.3	17.9	17.1	22.6	25.7	30.6
Occasionally	24.3	64.9	61.3	58.9	64.9	61.3	51.4	55.6
Rarely	40.9	32.4	29.3	20.0	16.2	15.1	20.2	11.1
No response	18.1	-	-	3.2	1.8	1.1	2.8	2.8

(Female)

Age	Total	15~19	20~29	30~39	40~49	50~59	60~69	70~79
Number of respondents	608	37	73	92	110	93	116	87

(%)

Often	40.3	-	6.8	9.8	9.1	11.8	14.7	19.5
Occasionally	53.8	64.9	58.9	58.7	62.7	67.7	63.8	56.3
Rarely	28.8	32.4	27.4	29.3	24.5	19.4	19.0	23.0
No response	13.0	2.7	6.8	2.2	3.6	1.1	2.6	1.1

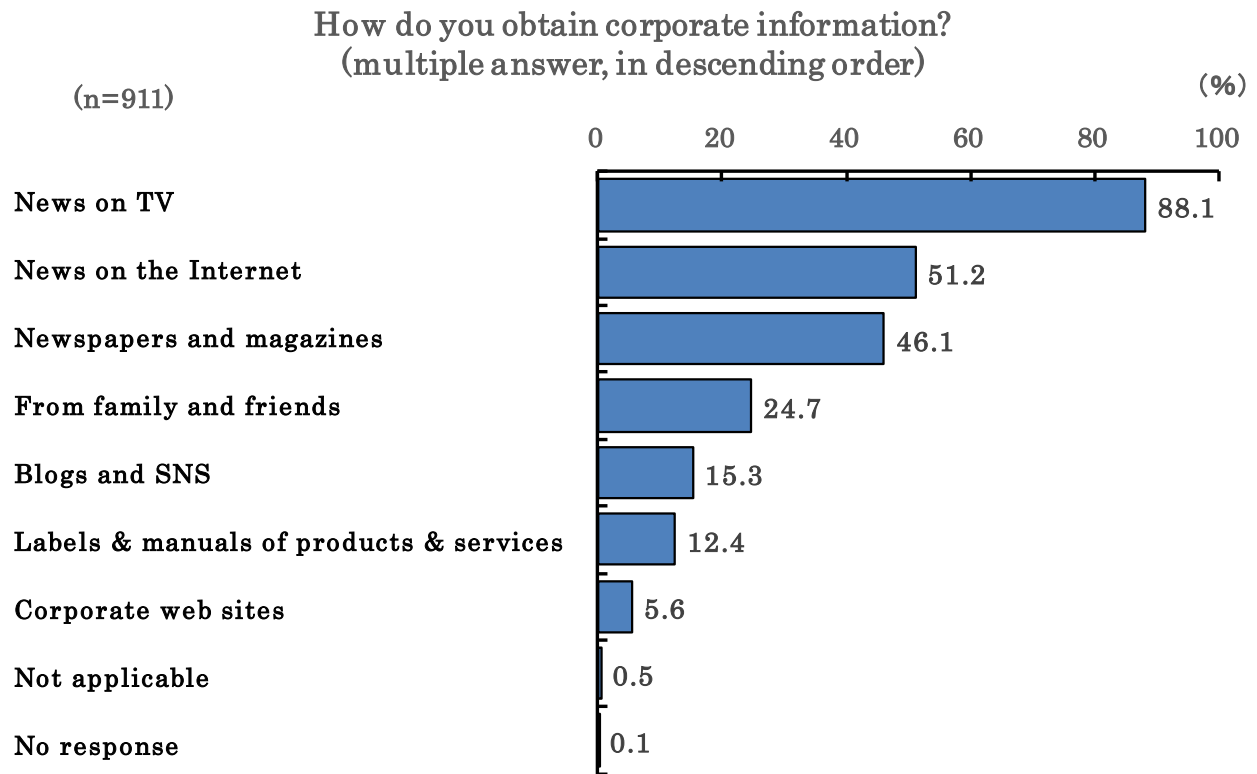
Note: The different colors show deviation from the average as below.

+10	+5	-5	-10
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B-6

How do you obtain corporate information? (Question to those who answered “often” and “occasionally” in B-5)

- ✧ Respondents accessed information through “news on TV,” “news on the Internet,” and “newspapers and magazines.”



- ◇ “The Internet” and “blogs and SNS” scored high among the young people, while “newspapers and magazines” did among the seniors.

How do you obtain corporate information? (by age)

Age	total	15～ 19	20～ 29	30～ 39	40～ 49	50～ 59	60～ 69	70～ 79
Number of respondents	911	49	101	136	170	152	175	128

(%)

News on TV	88.1	87.8	78.2	83.1	85.9	91.4	94.3	92.2
News on the Internet	51.2	53.1	71.3	65.4	64.7	54.6	37.7	15.6
Newspapers and magazines	46.1	22.4	22.8	33.1	37.1	55.3	61.1	68.0
From family and friends	24.7	16.3	17.8	15.4	24.1	26.3	28.6	36.7
Blogs and SNS	15.3	36.7	36.6	22.8	17.1	7.9	6.3	0.8
Labels and manuals of purchased products and services	12.4	6.1	13.9	13.2	13.5	14.5	10.9	10.9
Corporate web sites	5.6	6.1	5.9	10.3	5.3	3.3	5.7	3.1
Not applicable	0.5	-	1.0	-	0.6	2.0	-	-
No response	0.1	-	-	-	-	-	-	0.8

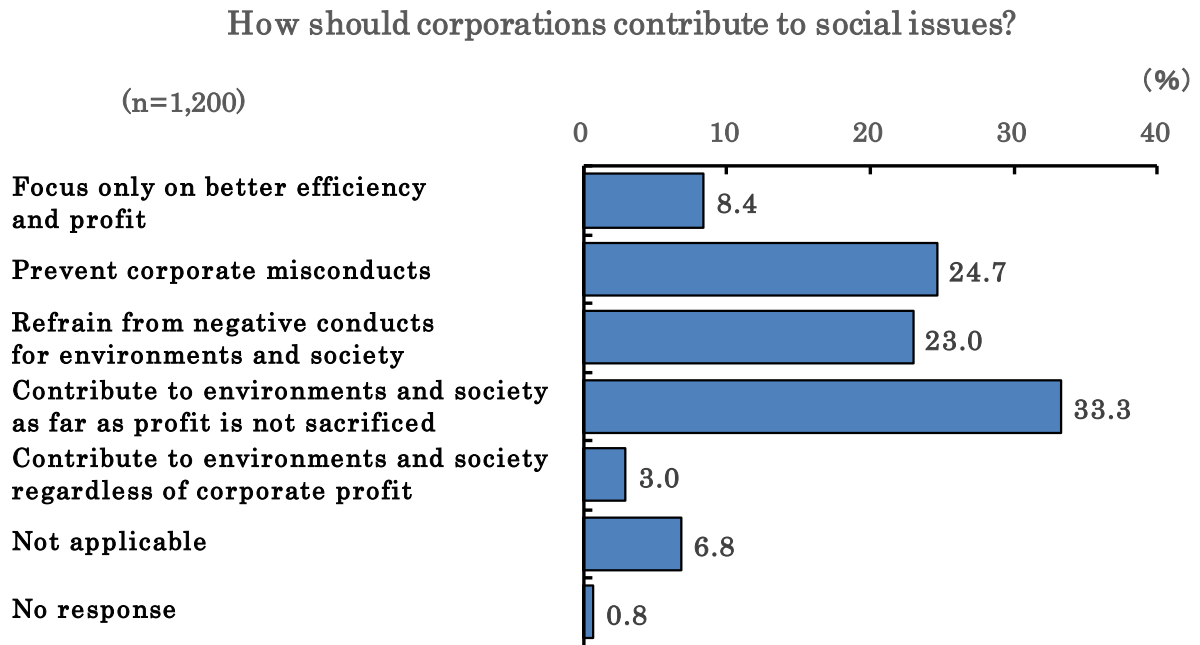
Note: The different colors show deviation from the average as below.



B-7

How should corporations contribute to social issues?

- ✧ More than 30% of respondents considered that corporations should contribute to “social issues” as far as corporate profit was not sacrificed, while only 8% considered that corporations should focus only on better efficiency and profit.

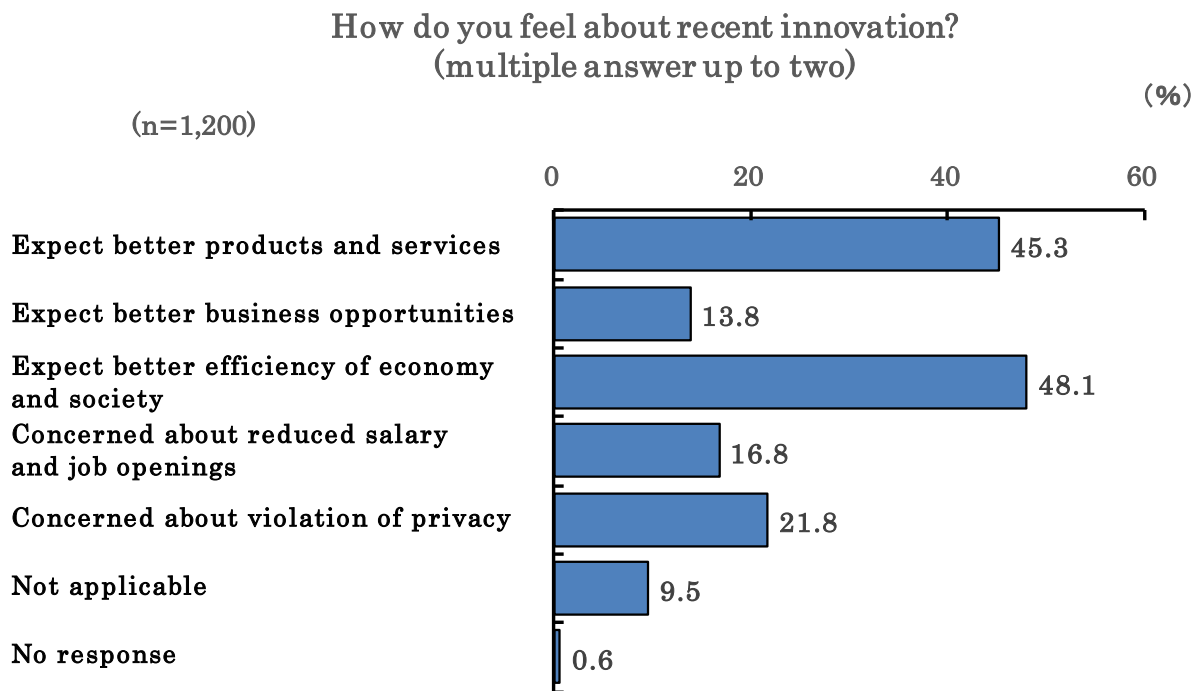


Theme C “Recent innovation by AI and robots”

C-1

How do you feel about recent innovation?

- ✧ Positive assessments (“expect better products and services,” “expect better efficiency of economy and society”) exceeded negative ones (“concerned about reduced salary and job openings,” “concerned about violation of privacy”).
- ✧ As to concerns, many young people chose “Concerned about reduced salary and job openings,” while many seniors selected “concerned about violation of privacy.”



How do you feel about recent innovation? (by age)

Age	total	15~ 19	20~ 29	30~ 39	40~ 49	50~ 59	60~ 69	70~ 79
Number of respondents	1,200	74	148	187	221	186	225	159

(%)

Expect better products and services	45.3	37.8	41.9	49.7	47.1	46.8	46.7	40.3
Expect better business opportunities	13.8	16.2	17.6	15.0	14.0	14.5	8.9	13.8
Expect better efficiency of economy and society	48.1	29.7	50.0	49.7	53.4	47.3	52.4	40.3
Concerned about reduced salary and job openings	16.8	39.2	22.3	16.0	18.1	14.5	9.8	12.6
Concerned about violation of privacy	21.8	12.2	16.2	17.1	17.2	25.3	26.7	32.1
Not applicable	9.5	8.1	5.4	10.7	6.8	8.6	9.8	17.0
No response	0.6	1.4	0.7	-	0.9	0.5	0.9	-

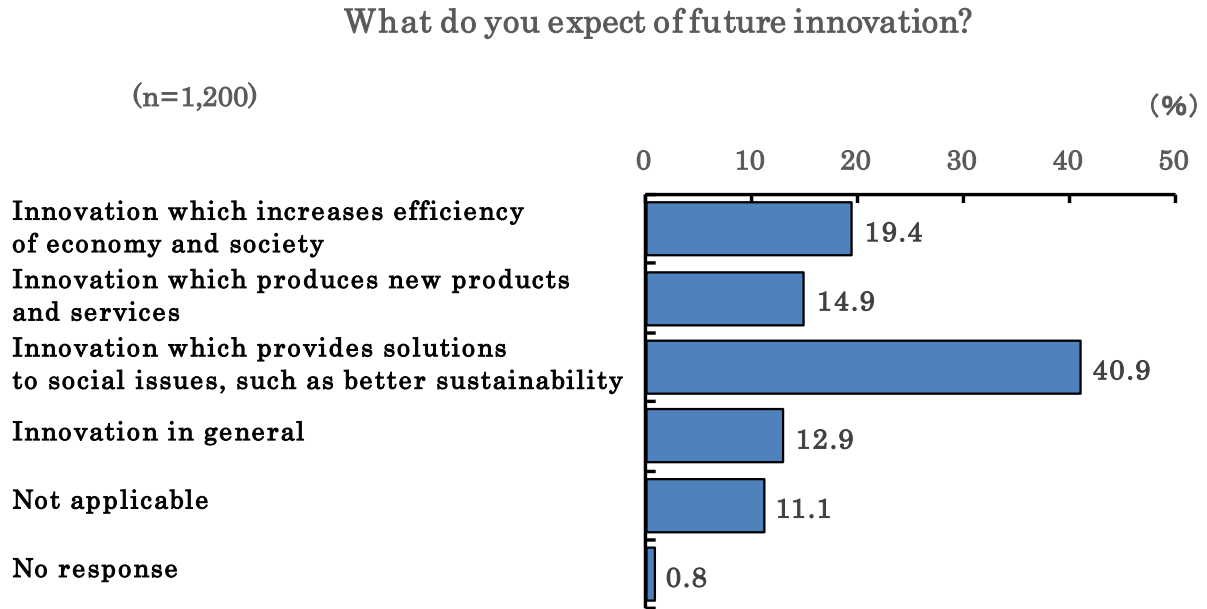
Note: The different colors show deviation from the average as below.

+10	+5	-5	-10
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C-2

What do you expect of future innovation?

- ✧ “Innovation providing solutions to social issues, such as better sustainability” gained highest points as a desirable future innovation.
- ✧ It gained higher scores by the senior people than by the young.



What do you expect of future innovation?

Age	total	15~ 19	20~ 29	30~ 39	40~ 49	50~ 59	60~ 69	70~ 79
Number of respondents	1,200	74	148	187	221	186	225	159

(%)

Innovation which increases efficiency of economy and society	19.4	27.0	31.1	26.2	24.9	10.8	10.7	11.9
Innovation which produces new products and services	14.9	13.5	21.6	17.6	18.1	14.5	10.2	8.8
Innovation which provides solutions to social issues, such as better sustainability	40.9	28.4	27.0	31.6	34.8	52.2	50.7	52.2
Innovation in general	12.9	12.2	12.2	16.0	13.1	11.8	15.6	7.5
Not applicable	11.1	16.2	7.4	8.6	7.7	9.7	12.4	19.5
No response	0.8	2.7	0.7	-	1.4	1.1	0.4	-

Note: The different colors show deviation from the average as below.

+10	+5	-5	-10
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