WHO IS HAPPY IN TAIWAN?
THE DEMOGRAPHIC CLASSIFICATIONS OF THE HAPPY PERSON

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The aim of this study ($N = 24,012$) was to explore sex and age differences in a Taiwanese national sample. We found that women, married, middle-aged, below-averagely and very-highly educated people reported higher happiness. In addition, sex interacted with marital status and education, while age interacted with marital status. Specifically, (1) men were worse off than women when widowed or divorced; (2) women with senior high school education were happier than men, but the trend reversed when they obtained graduate level education; and (3) married people were happier than their single counterparts during the suitable marrying age.

Key words: SWB, sex differences, age differences, marital status, education, Chinese

Over the centuries, philosophers and ordinary people have pondered what kind of life is worth living. Subjective well-being (SWB) thus reflects the full range of things that make life worth living. In this paper, I will adopt the customary terminologies used by most current scholars and researchers (c.f. Argyle, 2001; Diener, 1984) and use happiness interchangeably with SWB. Happiness is now defined as a predominance of positive over negative affect, and as satisfaction with life, consisting of people’s general evaluations of their life, affective and cognitive.

Psychologists have tried to identify correlates of SWB with concerted efforts for over four decades. While personality and attitudinal factors such as extraversion, neuroticism, optimism, internal control, and cultural individualism have been confirmed as important psycho-social correlates of happiness, major reviews almost uniformly concluded that “objective” external indicators such as demographical variables had rather small effects on SWB (Andrews & Withey, 1976; Argyle, 2001; Diener, Suh, Lucas, & Smith, 1999; Myers & Diener, 1995, 1996). For instance, basing on U.S. data, Myers and Diener (1996) claimed that “even distribution of happiness cuts across almost all demographic classifications of age, economic class, race and education level” (p. 54). Diener et al.’s (1999) subsequent review though did point out that in general “young, well-educated and well-paid” represent the personal profile of the happy person.

One possible reason for such inconsistencies in the extant literature may be that demographic variables were seldom the foci of psychological research, which concerns itself more with psychological constructs such as personality, attitudes, and values. Thus,
tests of age and sex differences in happiness were usually reported in passing without further probing and explanations. In contrast, demographic classifications or social stratifications were traditionally the foci of sociological studies, including those concerning SWB. This particular subdivision in sociology is termed social indicators research. However, existing social indicators research tended to use single-item global measure of SWB, which may miss out on the rich flavor of happiness as subjectively experienced by people along cognitive and affective dimensions.

Another weakness of the existing happiness research is its heavy dependence on Western data and methodologies. Recent cross-cultural comparisons (Diener, Diener, & Diener, 1995; Veenhoven, 1995, 2000) revealed substantial national differences on avowed happiness, showing that members of Western societies were happier than their counterparts in the East. Furthermore, the conception of SWB is intricately culture-bound (Christopher, 1999; Ng, Ho, Wong, & Smith, 2003). I have systematically analyzed the Chinese conceptualization of happiness (Lu, 2001; Lu & Gilmour, 2006), and explored cultural and psychological correlates of happiness for the Chinese people (Lu, 2005, 2006, 2008). In this paper, I will explore sex and age effects and their interactions with marital status and education to clarify the demographic profile of the happy Chinese, which has not yet been reported.

A brief comment on Chinese studies in SWB is in order here. There is no doubt that the study of SWB has received increasing interest among scholars in mainland China (the PRC), Hong Kong, and Taiwan, the three major Chinese societies. As reviewed by Chen and Davey (2008), since 1999, there have been more than 800 research papers published in mainland China. The volume is less impressive in Taiwan, 17 papers published in local journals and 141 degree dissertations completed (1992–2007) (Lu, 2010). No systematic review is available for Hong Kong, however, scholars there habitually publish their works in international journals, unlike those in Taiwan and especially in mainland. Despite the apparent interest and flourishing volume of publication, both Chen and Davey and Lu noted with some disappointment, that almost all of these research adopted theoretical frameworks/constructs developed in the Western literature, used augmented versions of Western scales, and merely attempted to test Western formulated theories or to replicate established relationships among Chinese populations. Chen and Davey further pointed out that the research field in mainland China is “limited currently by its infancy, overuse of student samples, inadequate descriptions of research methodology, and isolation from studies published outside the country” (p. 589). As general in-depth analysis and critiques of research on SWB for the Chinese people with a cultural thrust are already available in the international literature (e.g., Ng et al., 2003 drew mainly on research conducted in Hong Kong, while Lu, 2010 drew mainly on research conducted in Taiwan), I will attempt to focus on demographic correlates of SWB in this paper, as a finer-grained analysis to bridge some knowledge gaps, making the best use of large sample Taiwanese data that are available to me.

Sex differences

Although Wilson (1967) claimed that happiness did not differ between the two sexes,
recent reviews have challenged such a conclusion. For instance, Haring, Stock, and Okun (1984) showed that men were slightly happier than women, although the magnitude of this difference was very small (mean $r = .04$). In a rare analysis of two large international survey data, Lucas and Gohn (2000) found that women experienced more unpleasant affect than men in the majority of nations studied. In contrast, Wood, Rhodes, and Whelan (1989) showed that women were slightly happier than men, but again it was a rather small effect size in the meta-analysis. Similarly, Mookherjee (1997) later found that women were more satisfied with life than men, using the 10-year General Social Survey data in the U.S. Other studies confirmed that women usually report higher SWB (e.g., Inglehart, 1990; White, 1992).

Few studies offer definitive answers regarding the causes of sex differences in SWB. Nolen-Hoeksema and Rusting (1999) reviewed a number of possible mechanisms and concluded that personality explanations and social context explanations are the most promising. Gender roles and stereotypes about masculinity and femininity appear to influence emotional behaviors in which men and women engage, emotional attitudes that men and women hold, and emotion stereotypes. All these psycho-social factors seem to result in more intense general emotional experience on the part of women, and in particular making them more susceptible to unpleasant internalizing emotions, such as depression and anxiety.

Unfortunately, most studies of sex differences in SWB have been undertaken in Western countries, and the generalizability of sex differences is not known. One rare exception is an intra-culture comparison using nationwide survey data collected in Taiwan and Hong Kong (Liao, Fu, & Yi, 2005). Using ordinal regression, researchers reported a significant sex effect of happiness in Hong Kong but not in Taiwan. However, happiness in the study was measured with a single-item “Taking all things together, would you say you have a happy life these days?” (rated on a 1-3 scale), thus leaving some doubts on methodological rigor.

Though direct evidence of sex differences in Chinese societies is scarce, researchers have found considerable consistency in ideas and stereotypes of gender as socially prescribed roles in Taiwan compared to those in Western countries (Yi & Kao, 1986). Furthermore, emotional attitudes and emotion stereotypes associated with gender roles were found to contribute to Taiwanese women’s intense emotional experiences (Lu & Wu, 1998). We thus expected that Chinese women would report higher SWB than men (the main effect of sex).

In addition, existing research has suggested that sex differences in SWB may not be uniform for various demographic classifications. For instance, Wood et al. (1989) found that married women reported higher happiness than married men, but the trend reversed for single men and women, suggesting an interactive effect between sex and marital status. In the Chinese cultural context, the married women were found to report similar levels of happiness compared with married men (Lu & Lin, 1998). However, the breakdown of marriage may be more devastating for Chinese men than women. In the Chinese tradition, a married woman is expected to take care of her husband and children. In fact, to be a caring wife and a nurturing mother (“xiang fu jiao zi”) is the central role prescription for
married Chinese women. However, Chinese men are not expected to reciprocate in marriage. Thus research has revealed that Taiwanese men were more dependent on their wives for tangible and emotional support, while married women solicited more support from sources outside the wedlock (Li, 1995; Lu, 2000). One study further found that bereaved men were more distressed and took longer to adjust than bereaved women (Huang & Lu, 2005). We thus expected that although married or single men and women may not differ in happiness, widowed/divorced men would be less happy than women of the same circumstance (the interactive effect of sex and marital status).

Finally, education attainment may be another neglected dimension that needs to be considered to understand sex differences in SWB. Although the advantage of education in SWB has been generally recognized (Diener et al., 1999), it may be even greater for women than men in the Chinese cultural context. Taiwan’s fast expanding higher education institutions in recent years have not only resulted in much higher female college enrollment, but also a shift of values towards independence and individuality among young women (Lu & Kao, 2002; Lu & Yang, 2006). Independence and individuality as values have been linked to personal happiness for the Taiwanese (Lu, 2006, 2008). However, the Chinese society is yet to come to terms with high-achieving females (Bowen, 2003; Lin & Liu, 1997). We thus expected that although well-educated women may be happier than men, extremely high-achieving women may be less happy than men of the same position (interactive effect of sex and education).

Age differences

Compared to studies investigating sex differences in SWB, fewer studies have looked at age differences. Although Myers and Diener (1996) claimed no age differences in SWB for the Americans, recent studies seem to converge on the finding that life satisfaction often increases, or at least does not drop, with age (Herzog & Rodgers, 1981; Horley & Lavery, 1995; Stock, Okun, Haring, & Witter, 1983). These trends have also been verified in several international studies (Diener & Suh, 1999; Lucas & Gohm, 2000). Although the aforementioned Taiwan-Hong Kong comparison (Liao et al., 2005) found no age effects in either sample, the over-simplistic SWB measure may hinder the trustworthiness of the results. Earlier Lu (1998) used a multi-item standardized SWB scale and found that older Taiwanese people reported higher SWB than their younger counterparts. Such an age effect on SWB may be explained by the fact that older people are healthier, more positive towards aging, and living more actively in every domain of life than ever before (Bass, 1995). This is true too for Chinese older people (Lu & Chen, 2002; Lu, Kao, & Hsieh, 2010). Older people further enjoy the benefits of filial piety which is still the prevailing value in a Chinese society (Lee, 1988). We thus expected that older Chinese adults would be happier than their younger counterparts (main effect of age).

As family is the core of social institution in a Chinese society (Lee, 1988), getting married at the right age is a strong social imperative for Chinese men and women. Entering wedlock is regarded as a rite for fulfilling one’s social duties and the completion of the self. We thus further expected that single people of suitable marrying age may be
less happy than those of single status but outside the marrying age range (interactive effect of age and marital status). As this study is not a planned hypothesis testing one, only descriptive analysis were used.

**METHOD**

**Data & Participants**

Data were pooled from 39 independent studies conducted between 1993 and 2009 in Taiwan, with a total of 24,012 respondents involved (A full list of these studies can be obtained from the author). These studies all used the “Chinese Happiness Inventory” (CHI) to measure happiness. This ensured methodological equivalence for pooling the data, and ruled out some alternative explanations for results obtained with different measures of happiness. While 19 of these studies used student samples, the other 20 targeted a wide range of the general population. The author obtained data on CHI and demographics from contributing researchers through informed consent, as a condition for using CHI. As each individual study had its own design and purposes, the present paper is thus essentially based on a secondary data analysis. I will restrict my analysis here to comparing the uniformly measured happiness score across different groups based on demographic variables of sex, age, marital status, and education attainment.

The sample for the present paper was 41.1% male and 58.9% female, with a mean age of 27.33 (SD = 13.31, range = 13–91). Mean years of formal education was 12.85 (SD = 3.72). The majority (58.6%) was single, 39.3% was married, and the rest (2.2%) widowed or divorced. All were cultural Chinese (Han) living in Taiwan.

**Measures**

In most cases, structured questionnaires were used to collect data, while face-to-face home interviews were also used in a few instances to solicit data from older participants.

**Happiness**

The Chinese Happiness Inventory (CHI, Lu, 1998) was developed to measure general experiences of SWB for the Chinese people. Adopting the conception of happiness as a predominance of positive over negative affect, and as satisfaction with life, 28 items were adapted from existing measures such as the Oxford Happiness Inventory (OHI, Argyle & Lu, 1990) to represent etic dimensions of SWB. New items (20) were written based on findings from a qualitative study probing the sources of happiness for Chinese people in Taiwan (Lu & Shih, 1997), representing emic dimensions of SWB. To sum, the CHI was specifically developed for the Chinese people, not intended to be equivalent with most established measures based on the Western conception of happiness (c.f. Lu, 2010; Ng et al., 2003), and no cross-cultural comparison of our data using CHI with reported data using other scales is feasible. However, over its development and refinement process, psychometric steps were taken to ensure reliability and validity of the CHI (summarized below). In fact, all 39 independent studies contributing data to this paper gave support to the usability of CHI for Taiwanese Chinese at least.

Though CHI was composed of multiple items, some from a popular Western scale (OHI), some generated from interviews with Taiwanese informants, factor analytical evidence showed that all 48 items blended into one general factor for a large representative sample of Taiwanese subjects (N = 494, Lu, 1998). This general factor accounted for 68.9% of variance, while every item loaded on it (> .40). Later studies repeatedly confirmed this one-factor structure for the CHI with married young mothers (N = 600), college students (N = 1,844), high school students (N = 890), and junior school students (N = 607) (see Lu, 2005; 2006; 2008 for reviews).

Almost all studies using CHI tested its reliability and some aspects of validity. The internal consistency alpha was reported to range between .88 and .96, suggesting that the one-factor structure as mentioned above is reasonable. Several studies reported split-half reliability to be .92–.94, and test-retest reliability to be .66 (one-month) and .40 (2.5-year), all with community samples. As for concurrent validity, CHI has demonstrated convergent validity with joy (r = .52), positive affect (r = .48), life satisfaction (r = .67), self-acceptance (r = .45), friendship (r = .49), family atmosphere (r = .45), leisure satisfaction (r = .50), social support satisfaction (r = .53), and self-reported health (r = .45). All the above correlations
were statistically strongly significant at $p < .001$. As for discriminant validity, CHI was distinct from social desirability ($r = .20$), conceptions (not perceived level) of happiness ($r = .06$–.22 across three samples), and psychological symptoms ($r = -.36$). All the above correlations were statistically not significant or weakly significant at $p < .05$.

To suit different research purposes, shorter versions of CHI (with 20 and 10 items) have been developed, and validated against the full-length scale (Lu & Lin, 1998; Lu, 2006). Correspondence between brief versions and the 48-item version was high ($r = .92$ and .91 respectively). The internal consistency reliability alpha has mostly been reported at around .90. Studies contributed data for this paper used 48-, 20-, and 10-item versions of CHI, thus standardized scores (original aggregate scale score/no. of items in the scale) × 100 were computed, adjusting for different length of scales used.

Every item in the CHI has a group of four statements from which the respondents choose. Each statement represents a different level of subjective experience of happiness, which is then coded as 0, 1, 2, or 3. Such an unusual format of response is designed to capture the positive skewed nature of the happiness construct (Diener, 1984). Thus, the CHI taps subjective experiences of SWB, pertaining to positive affect, (lack of) negative affect, and global life satisfaction, as well as culture-bound aspects tailored for the Chinese people. Items of the 10-item version CHI are given in the Appendix.

Demographics

Information on sex, age, marital status (coded as married, single, widowed/divorced), and education attainment were recorded. Five age groups (younger than 30, 30–39, 40–49, 50–59, older than 60) and four education attainment groups (up to junior high, senior high, college, graduate) were formed. Argyle (2001) depicted the curve of happiness throughout the adulthood; happiness dips soon after marriage, leveling off through middle-age, and finally picked up in older years. The average age of first-time marriage is now around 30 in Taiwan (Directorate-General of Budget, 2009). Our five age groups thus corresponded with years before marriage (younger than 30), soon after marriage (30–39), middle-age (40–49, 50–59), and older age (older than 60). The four education groups are commonly used in large-scale social surveys in Taiwan (Fu & Chang, 2007). Finishing junior high school is now the statutory requirement in Taiwan, while higher education in the country has expanded in recent years (Directorate-General of Budget, 2009). Thus our four-level education attainment grouping reflects Taiwan’s current education landscape.

RESULTS

As data from the 39 contributing studies were collected across 16 years (1993–2009), possible “time effects” on happiness scores were first checked. A variable named “time” was created to represent the number of years elapsed since the data were collected, e.g., for data collected at 1993, the value for “time” was 16. Pearson correlation coefficient between “time” and CHI score was not significant ($r = .04, ns$). Thus, data were pooled for further analysis.

A series of one-way ANOVA were conducted to compare happiness between males and females, among five age groups, three marital groups, and four education groups. Findings are summarized in Table 1. We found that females, middle-aged (40–49, 50–59), married, and people who were educated up to junior high or at graduate level avowed higher happiness.

We then conducted two series of two-way ANOVA, to test for possible interaction effects of sex and age with education and marital status. We found that all three hypothesized interactions were statistically significant. The sex and marital status interaction ($F = 5.15, df = 2, p < .01$) showed that men were much worse off than women when widowed or divorced (plotted in Figure 1a). The sex and education interaction ($F = 9.49, df = 3, p < .001$) showed that women with senior high school education were
Table 1. Demographic Differences in Happiness: One-way ANOVA.

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<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<th>F</th>
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<td>Male</td>
<td>9039 140.31 53.36</td>
<td>12978 142.28 49.44</td>
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<td>7.96**</td>
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<td>Female</td>
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<td>&lt;30</td>
<td>12009 142.14 52.03</td>
<td>3269 139.43 50.38</td>
<td>2428 146.26 52.67</td>
<td>1056 148.59 55.83</td>
<td>725 142.01 58.69</td>
<td>9.68***</td>
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<td>30–39</td>
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<td>C=D&gt;A=E&gt;B</td>
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<td>40–49</td>
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<td>3. Marital status</td>
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<td>Married</td>
<td>6963 145.53 51.35</td>
<td>10611 142.19 50.99</td>
<td>358 122.46 61.43</td>
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<td>38.34***</td>
<td>2,17929</td>
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<td>Single</td>
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<td>Widowed/Divorced</td>
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<td>4. Edu</td>
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<td>Junior high</td>
<td>6438 146.91 56.03</td>
<td>4372 142.45 48.44</td>
<td>9241 136.22 48.48</td>
<td>1264 148.09 52.90</td>
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<td>64.39***</td>
<td>3,21311</td>
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<td>Senior high</td>
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<td>A=D&gt;B&gt;C</td>
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<td>College</td>
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<td>Graduate school</td>
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* p < .05, ** p < .01, *** p < .001
much happier than men of the same education attainment, but the trend reversed for men and women when they obtained graduate level education (plotted in Figure 1b). The age and marital status interaction ($F = 10.77, df = 8, p < .001$) indicated two things (plotted in Figure 2): first, those widowed/divorced people seemed to be the least happy group across the entire age span, especially when they were younger (30–39); second, married people were happier than their single counterparts throughout most of the adulthood, but this gap in happiness gradually closed up when people grew older and finally the beneficial effect of marriage diminished after the age of 60.
Using a large sample pooled from diverse independent sub-samples, the primary aim of this research was to explore sex and age differences in general SWB in the cultural context of a Chinese society. Although Western research and international studies have looked at demographical differences in SWB, definitive conclusions are yet to be drawn. The present study may be the first time that we obtained evidence showing sex and age differences as well as their variations across other demographic classifications of marital status and education, in a heterogeneous Chinese sample. Our findings clearly showed an advantage for women, middle-aged, below-averagely educated, as well as very-highly educated people. This was observed in a sample of large size, wide age range, and diverse educational background, clearly demonstrating that happiness for Chinese people does not distribute evenly across different demographic classifications, as claimed by Western scholars (e.g., Argyle, 2001; Myers & Diener, 1995; 1996; Wilson, 1967).

It is more interesting to observe interactive effects of sex and age with marital status and education attainment. Breakdown of marriage through death or divorce seem to claim a heavier cost on happiness for men than women. This corroborates the view that marriage has more psychic values for Chinese men (Huang & Lu, 2005; Li, 1995; Lu, 2000). Across cultures, men are socially trained to present a tough image and suppress feelings when in distress (Bem, 1975). Chinese men have to further protect their face and avoid shame in public (Hwang, 2001), thus, often refrain from seeking help when in need (Lu, 1995). Our results help to identify the high risk group of widowed or divorced men for unhappiness. To solve this real-life problem, social planning agents should allocate more resources to counsel and support for these men in risk, and at the same time, social education agents should work on lowering attitudinal barriers (e.g., the masculinity myth) for them to seek help.

Another interesting finding from the present study is that very high education (above
college-level) may bring benefits for men and damages for women. The patriarchal social structure (Lee, 1988) and traditional gender values (Yi & Kao, 1986) in Taiwan conspire to exercise great pressure on hard-driving and high-achieving Taiwanese women (Lin & Liu, 1997). Living up to images of traditional Chinese women has caused contemporary Taiwanese women great tension between personal achievement and homemaking (Lu & Lin, 1998; Yi & Kao, 1986), likely resulting in the backfire effects of high education for them as observed here. Relating this finding to the real life in Taiwan, I urge that merely allowing women to have high education and to work is not social progress. The deeply held assumptions about the appropriate roles of men and women and the socially sanctioned gender demarcation at home and at work should be challenged to allow real social progress to occur (Davies & Thomas, 2000). Social education agents can help to promote gender equality values, in order to remove attitudinal barriers to women’s pursuit of career advancement. Organizations can also help to enhance women’s quality of work life by establishing gender-equitable work practices (Lu, Hsieh, & Pan, 2009).

To conclude, demographic variations in happiness as observed in the present nationwide Taiwanese sample should enable us to better understand the ups and downs of life for various classifications of people. Noting limits of the secondary analysis, the tentative conclusion is that Taiwanese people have diverse experiences of SWB. Documenting the existence of such differences are contributions of this study.

REFERENCES


WHO IS HAPPY IN TAIWAN?


(Manuscript received December 22, 2009; Revision accepted March 8, 2010)
On this questionnaire are groups of statements. Please read each group of statements carefully. Then pick out the one statement in each group which best describes the way you have been feeling in the past week, including today! Circle the number (0, 1, 2, 3) beside the statement you have picked. Please be sure to read all the statements in each group before making your choice.

<table>
<thead>
<tr>
<th>Item #</th>
<th>Score</th>
<th>Content</th>
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<tbody>
<tr>
<td>1</td>
<td>0</td>
<td>I do not have fun with other people.</td>
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<tr>
<td></td>
<td>1</td>
<td>I sometimes have fun with other people.</td>
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<td></td>
<td>2</td>
<td>I often have fun with other people.</td>
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<td></td>
<td>3</td>
<td>I always have fun with other people.</td>
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<td>2</td>
<td>3</td>
<td>I always have a cheerful effect on others.</td>
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<td>3</td>
<td>3</td>
<td>My life is totally meaningful and purposive.</td>
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<td>4</td>
<td>3</td>
<td>I think I look exceptionally attractive.</td>
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<td>5</td>
<td>3</td>
<td>I get on excellently with friends.</td>
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<td>6</td>
<td>3</td>
<td>I am always praised by others.</td>
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<td>7</td>
<td>3</td>
<td>My job always gives me a sense of achievement.</td>
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<td>8</td>
<td>3</td>
<td>My performance is always recognized.</td>
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<td>9</td>
<td>3</td>
<td>I can always commit to my job.</td>
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<td>10</td>
<td>3</td>
<td>I am never found out when making mistakes.</td>
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</tbody>
</table>

Notes:

1. The above 10 items form the brief version of CHI which is now the most popular version used in studies.
2. To save space, only the statement scoring for “3” points for Items 2–10 are presented here. Readers can view the full set for four statements in Item 1 as a template for all the other items in CHI.