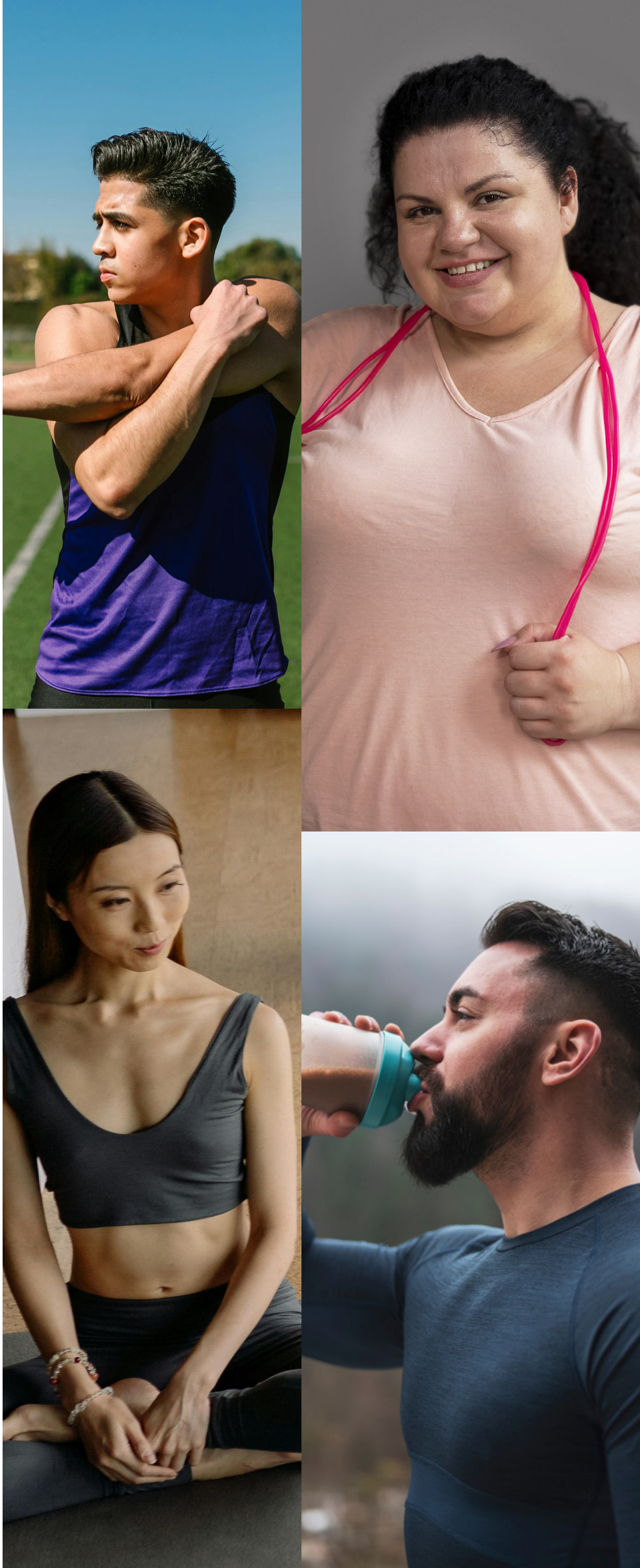
NielsenIQ

Global State of Health & Wellness 2025 Regional Insights Companion: Asia Pacific (APAC)



Overall health and wellness landscape in APAC: Trends to watch that are shaping today's industry

Featured countries

China

India

Indonesia

Aging population

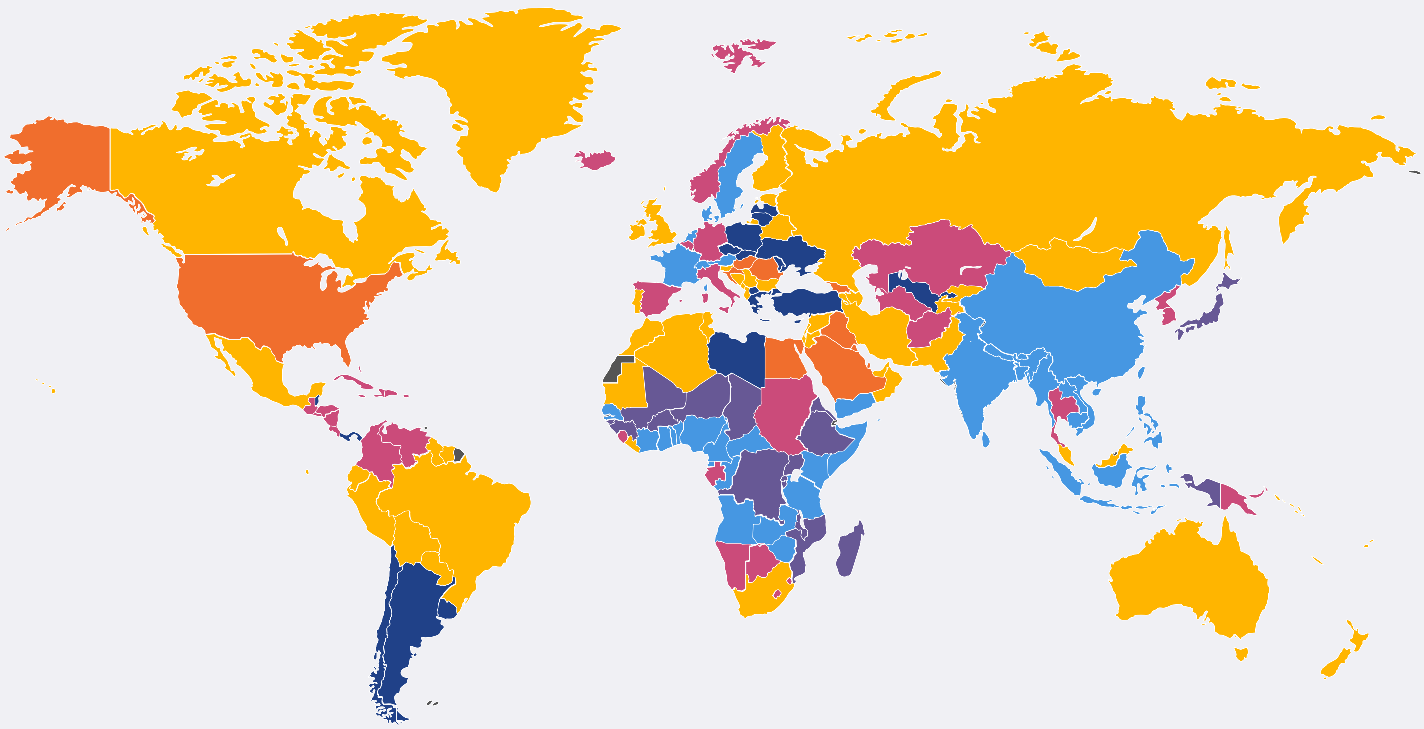
- APAC's senior population is growing due to people living longer and having fewer children.
  - In China, for example, those aged 60 or over already make up 20% of the population, and that is expected to double by 2050. One of the reasons for this is the cost—many Chinese families don't want to have a second child because it's so expensive. The price of baby formula in China is such that Chinese people are buying it during trips abroad and selling it in China for a profit.
  - In India, however, people are having children. But according to the United Nations Population Fund, India's elderly population is predicted to double by 2050, overtaking the number of children in the country.
  - In Indonesia, the government has been trying to persuade its citizens to have fewer children to control population growth. Projections indicate that those aged 65 and older will account for 20% of the country's population by 2045.
- Over half (55%) of consumers in China, India, and Indonesia say that taking proactive steps to ensure active and healthy senior years is more important to them now than it was five years ago. This is comparable to the global average of 57%.
- Within APAC, social norms make it likely to have elderly parents living in their children's house and being supported financially by their children. This contrasts with Western culture, where parents are more normally expected to have made money to fund their own retirement.

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

Health equity

- Both India and China have large populations of approximately 1.4 billion people, with disparities in health and wellness trends between rural (lower-income) and urban (higher-income) residents.
- Physical distance is a factor for many countries in the region, producing disparity in people's easy access to a health center.
- The quality and cost of healthcare provision also varies between APAC countries. For example, hospital costs in India are notably cheaper than elsewhere. This has led to "health tourism," where APAC consumers are traveling to other markets within the region for medical treatment or to buy their health and beauty products.

Obesity

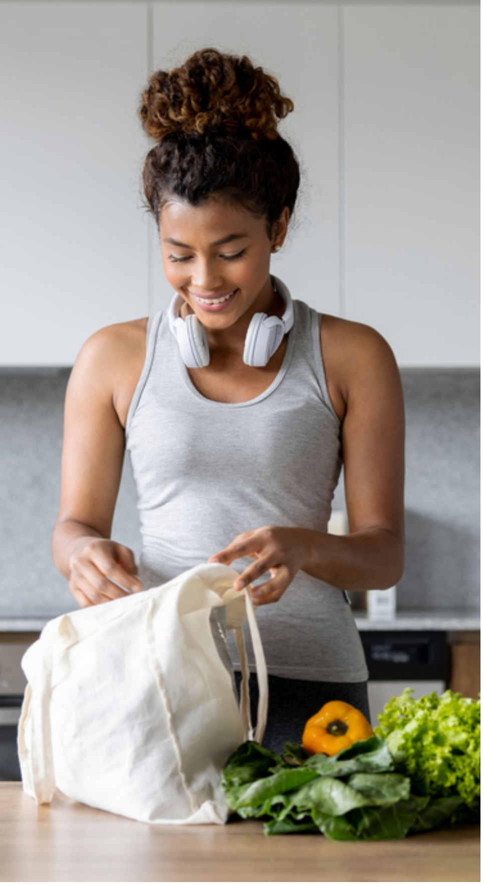


Obesity Rate (WHO) 2022

0% 10% 20% 30% 40% 50% 60% 70% 80%

Source: The World Health Organization (WHO), Obesity Rates by Country. WHO defines obesity as a body mass index (BMI) greater than or equal to 30 kilograms per square meter of body area (BMI ≥30kg/m²).

Reports in The Lancet show that obesity and hypertension (high blood pressure) have surged in Asia. However, the prevalence of obesity varies widely between countries, ranging from over 30% in New Zealand and Australia to just 5% in Japan (World Health Organization 2022 data).



China, India, and Indonesia health and wellness focus (vs. global benchmarks)

Audience engagement

- Consumers across China, India, and Indonesia are much more likely than in other regions to see themselves as proactive in doing things to improve their health and wellness on a regular basis (e.g., exercising, monitoring my health metrics, watching what I eat)—with 46% agreeing strongly in describing themselves this way vs. 28% globally.
- 75% plan to do more physical exercise in the coming 12 months, and 59% plan to take more vitamins/supplements
- Nearly half (49%) say seeking out the latest health and wellness products, diets, and routines is more important to them now than five years ago.

Barriers

- Cost, while still very important, is less of a barrier than in many other regions. Across China, India, and Indonesia, 46% cite the cost of healthier alternatives compared with the standard product as being a major barrier—notably lower than the global average of 54%.
- On the other hand, difficulty finding healthy alternatives is more widely complained about than in other regions, with 44% saying this is holding them back from making healthier choices (vs. 31% globally).
- Labeling, too, is a bigger barrier than in many regions, with 33% finding product labeling confusing and too complex, compared with 21% globally.

Trust and influence

- Lack of trust that products will be effective is much higher across China, India, and Indonesia than globally, with 37% citing this as a major barrier holding them back from making healthier life choices (vs. 25% global average).
- Potentially due to this, more consumers here place importance on getting detailed information when deciding which health and wellness products to buy.
    - o 59% say that the availability of detailed information on a product's usage, performance claims, and application is a significant influence in deciding which

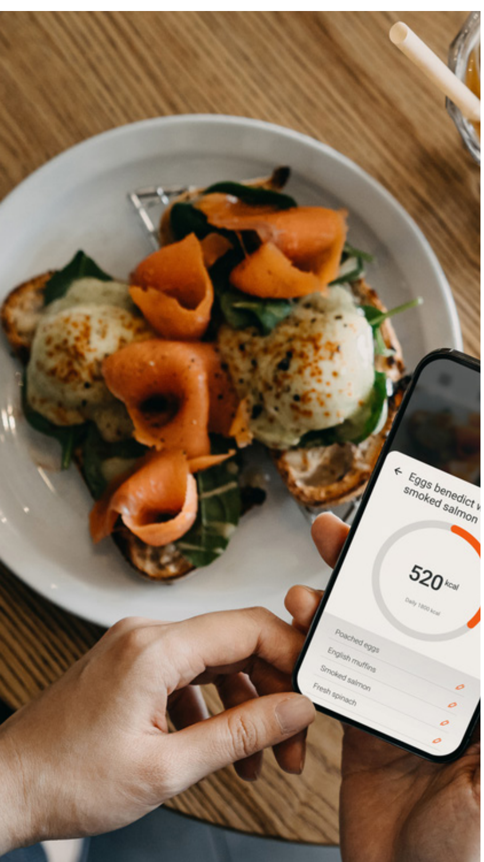
health products to buy (vs. 45% global average)

    - 53% say the same for being able to ask questions and get expert advice from sales or medical representatives (vs. 39% global average)

- Social media has a much wider influence on consumers here (compared with other regions), with 32% saying that sponsored ads and recommendations by influencers or celebrities on social media channels have significant influence on their health and wellness purchase decisions. The global average is just 18%.

Mental health and well-being

- This is a priority for APAC consumers: 69% of respondents across China, India, and Indonesia say looking after their emotional or mental health is more important to them now than it was five years ago (vs. 63% global average).
- Sleep and relaxation is also a big issue in these countries: People in Asia Pacific report worse sleep than their counterparts in Europe and North America. They go to sleep later, have shorter sleep, and have lower-quality sleep than those in other parts of the world. Additionally, their sleep during the work week is more variable, and they do not extend their sleep as much on weekends.
    - 71% across China, India, and Indonesia say getting good sleep is more important now than it was five years ago (vs. 63% global average)
    - 42% would pay over 10% more for a product that offers relaxing or calming properties, vs. the standard product



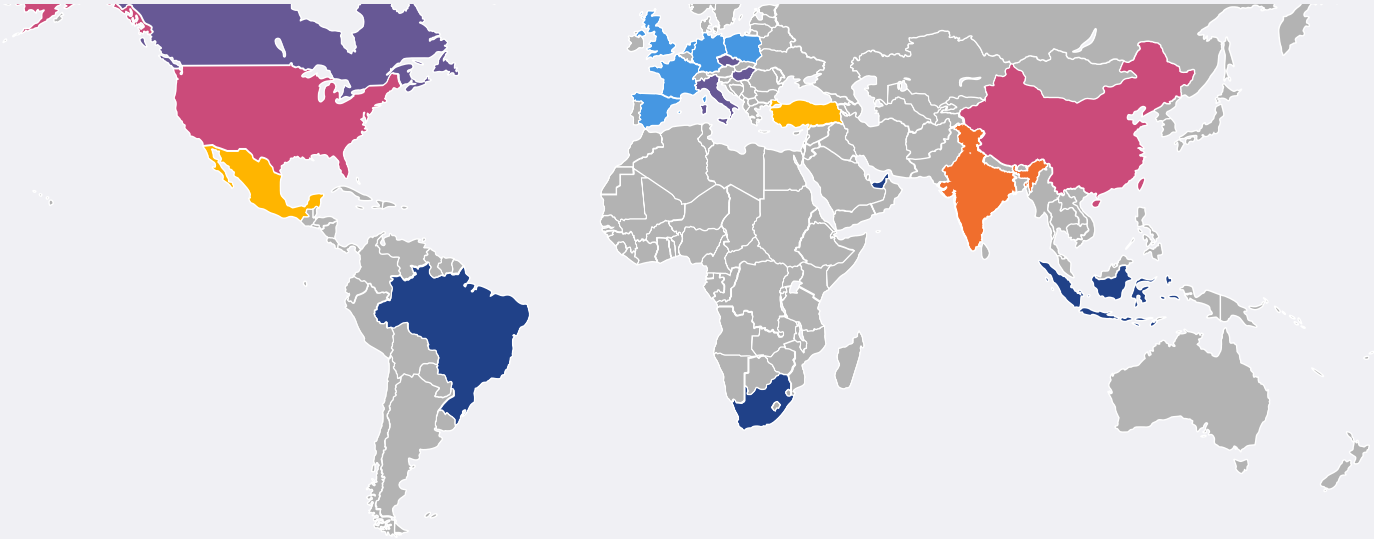
Nutrition

- 69% across China, India, and Indonesia say healthy nutrition is more important to them now than five years ago (vs. 58% globally)
- At the same time, consumers aren't opposed to ultra-processed foods, with noodles being a food staple across many APAC countries:
    - 48% across China, India, and Indonesia hold a positive perception of ultra-processed foods (vs. 31% global average)
    - Only 5% have a "very negative" perception of ultra-processed foods (vs. 15% global average).
- Gut health:
    - Probiotic drinks, pills, and yogurts are big here: 54% across China, India, and Indonesia say they plan to buy more probiotic foods in the next 12 months (vs. 39% global average).
    - 72% plan to buy more high-fiber foods (vs. 53% global average)
    - 56% plan to buy more superfoods (vs. 42% global average)

Weight loss

- Exercise and body weight are becoming increasingly important among most consumers across China, India, and Indonesia.
    - Exercise and cardio/heart fitness is more important for 64% of consumers now than it was five years ago.
    - Having a healthy body weight/shape/muscle tone is more important for 56% now.
- 83% say that health reasons are a "very important" motivator for them in maintaining a healthy body weight, followed by appearance (50%)
- Looking across China, India, and Indonesia, familiarity and positive perception of weight loss drugs are both higher than in many regions, with nearly half (49%) seeing these drugs positively (vs. 31% globally). However, this is driven heavily by consumers in India and Indonesia.
- When it comes to the percentage of people currently using a weight loss drug or willing to use them in the future if recommended by a health professional, all three countries surveyed are higher than the global average.

Percentage holding "very positive" views of weight loss drugs



26.a) "Very positive" NIQ 2025 Global Health & Wellness survey results

[2% to 5%] [5% to 8%] [8% to 12%] [12% to 17%] [17% to 19%] 32%

Source: NIQ's 2025 Global Health & Wellness survey, fielded Jan.–Feb. 2025, 19 countries
Map visualization is powered by NIQ Partner Network member Mapidea

Conscious buying

- Awareness of, and support for, "conscious buying" when making health and wellness purchases is especially high vs. other regions.
  - Across China, India, and Indonesia, 37% are "*very* familiar" with the concept of conscious buying (vs. 22% globally)—and a further 39% are "*somewhat* familiar."
  - 42% say it's "*very* important" to them that the health and wellness products they buy are also ethical or eco-friendly—and a further 40% say it's "important"
  - The most common motivations for conscious buying are personal wellness benefits (83% citing this), followed by environmental sustainability (64%) and ethical considerations such as fair trade or cruelty-free (51%). These are all higher than the global averages by 10% or more.
- Related to the primary motivation for conscious buying being personal wellness benefits, 47% "agree *strongly*" that they worry that environmental issues (e.g., pollution and climate change) are having an adverse impact on their current and future health and wellness.
  - That's 18 percentage points higher than the global average, making this a key issue in the region.
- 40% are willing to pay over 10% more (compared with a standard product) for cruelty-free or higher animal welfare products—significantly higher than the global average of 30%
- 52% are willing to pay over 10% more for products that are organic, non-GMO, or made from all-natural products, vs. 31% globally

Health tech

- Consumers in China, India, and Indonesia display a high affinity for heath-focused technology products:
  - 50% say they'd "definitely" prefer a technology product that offered extra health and wellness features over one that did not; an additional 37% say they would also prefer these options (dependent upon price)
  - Examples of such technology include health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, or products with more effective air/water filtration.
  - 84% believe health-focused technology products are effective in helping them improve their health and wellness—well above the global average of 63%, making this a key opportunity in the region
- The leading drivers for consumers in China, India, and Indonesia for buying health tech include:
  - Improving mental health and well-being: 56%
  - Monitoring physical activity: 54%
  - Cooking more healthily: 48%
  - Improving sleep quality: 47%

Opportunities for manufacturers and retailers selling in China, India, and Indonesia

Health equity, particularly with a focus on making healthier options accessible and affordable to all, is a key area in which brands can differentiate themselves and win consumer share. APAC countries include large portions of lower-income consumers struggling to afford products such as vitamins and higher-nutrition foods, as well as a growing middle class focused on overall wellness and aging well. Despite these differing needs, an overwhelming majority of 85% across China, India, and Indonesia believe that companies have an obligation to ensure health-focused products are as affordable and readily available as unhealthy ones. Additionally, 44% say that difficulty finding healthy alternatives is a major barrier. Companies that can position themselves as successfully addressing these issues will gain significantly in consumer perception and loyalty.

Appetite for the convenient self-tracking of core health metrics is strong—providing good opportunity for sales of home diagnostics and wearables. This is especially true in communities where access to health centers may be limited or difficult:

- Mannings has opened "health pods" in their stores so people can walk in and check their blood pressure, heart rate, and body fat. These pods also include a "Colgate tooth area" to check tooth health.
- Demand for wearables and home diagnostics across China, India, and Indonesia is well above the global average:
  - 47% say they've bought wearables (e.g., fitness trackers, smartwatches) in the last 12 months (vs. 28% global average), and 39% say they plan to buy these in the next 12 months (vs. 21% global average)
  - 41% say they bought personal diagnostics (e.g., blood pressure monitor, blood sugar monitor, digital thermometer) in the last 12 months (vs. 24% global average), and 36% say they plan to buy these in the next 12 months (vs. 18% global average)
  - 45% say they bought smart scales for monitoring body weight (vs. 23% global average), and 30% plan to buy them in the next 12 months (vs. 17% global average)
  - 34% say they "find health-focused technology products fun to use" (vs. 18% global average)
  - 81% say they would allow a company to access some personal health data (e.g., weight, blood pressure, heart rate, average daily steps) to help make healthier decisions (vs. 57% global average)

Finally, manufacturers and retailers must invest in building consumer trust, focusing on specific areas that consumers have identified as important to them. Trust is a key challenge within the highly competitive and increasingly crowded wellness market, with significant numbers of consumers admitting that they don't believe that health and wellness products will be effective. To address that, companies can focus on promoting a strong health and wellness focus across their entire product portfolio—with a huge majority (88%) of consumers across China, India, and Indonesia saying they are more likely to buy from companies that have that holistic claim. Additionally, over half say that having access to detailed information—or the ability to inspect, trial, or sample a product—significantly influences their purchase decision. Manufacturers and retailers that can convince consumers of their genuine and holistic commitment to delivering improved health and wellness will win trust—and can translate this into repeat purchases and positive word-of-mouth recommendations.

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About NIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

For more information, please visit www.niq.com