

## Insight bites

# HEALTH AND WELLNESS IN CHINA TODAY

The following WAVEMAKER study focus on the health issues influencing 19-50-year-old Chinese consumers across 1-5 tier cities. The study includes both qualitative and quantitative findings. In the qualitative stage, in-home-visits were conducted with both consumers and industry experts. In the quantitative stage, an online survey was used for data collection to quantify and validate our findings.

In the following, we will go through the findings and look at how brands can leverage the insights through the different stages of their consumers' purchase journeys.

## The rising momentum of the Chinese health market

Health has always been a top-of-mind issue for Chinese people. Today, their health needs are rapidly evolving. Chinese consumers' lack confidence in their general status of wellbeing, there is growing attention to detail in broader health related categories, consumers are more willing to pay for prevention. They increasingly seek to verify health information instead of blindly following advice or custom and are gradually realizing the necessity of finding better or "right" health solutions.

Even so there are still elements of traditional thinking that remain unchanged. The ingrained culture of Traditional Chinese Medicine (TCM) tracing back to the Spring and Autumn Period (770–476), so profoundly shaped their concept of health that it continues to influence needs and practices today.

For brands, leveraging health trends in China represents huge business potential. With the rapid growth of supplements and sports categories, through to the travel industry promoting packages related to health examination and Zen meditation, many categories are attempting to understand and attract health conscious consumers.

Only through a comprehensive understanding of what has changed and what remains the same, can we thoroughly understand the Chinese consumer's concept of health.

WAVEMAKER is publishing "Health & Wellness Today in China", a study that focuses on health issues influencing 19-50-year-old Chinese consumers across 1-5 tier cities. The study includes both qualitative and quantitative findings. In the qualitative stage, in-home-visits were conducted with both consumers and industry experts. In the quantitative stage, an online survey was used for data collection to quantify and validate our findings.

## A Chinese & Western Integrated View on Health

"Qi-blood", "yin-yang" "meridians" and many other TCM terms were constantly brought up during our interviews. In fact, TCM retains a major role in the health market and greatly shapes Chinese's concept of health regardless of the effectiveness of western treatments. When asked about their ingredient preferences for health supplements, 38% of the respondents prefer traditional ingredients (e.g. jujube, donkey-hide gelatin, ginseng) while only 30% prefer modern/western ingredients (e.g. proteins, calcium, vitamins). For consumers TCMs are believed to have little impact in the short-run but to deliver effects in the long-run. So, consumers recognize the necessity of taking TCM products even though the effect is not instant nor notable.

## VERY DIFFERENT PERCEPTIONS OF CHINESE & WESTERN MEDICINE

中国人眼中的中西医学

**Traditional Chinese Medicine**  
传统中医

A thorough cure to get at the root  
治本

- Systemic & holistic view
- Consideration of balance in diagnosis & treatment
- Natural herbal remedies

• 全身整体性  
• 诊疗时讲究平衡  
• 天然草本“药食同源”

**Modern Western Medicine**  
现代西医

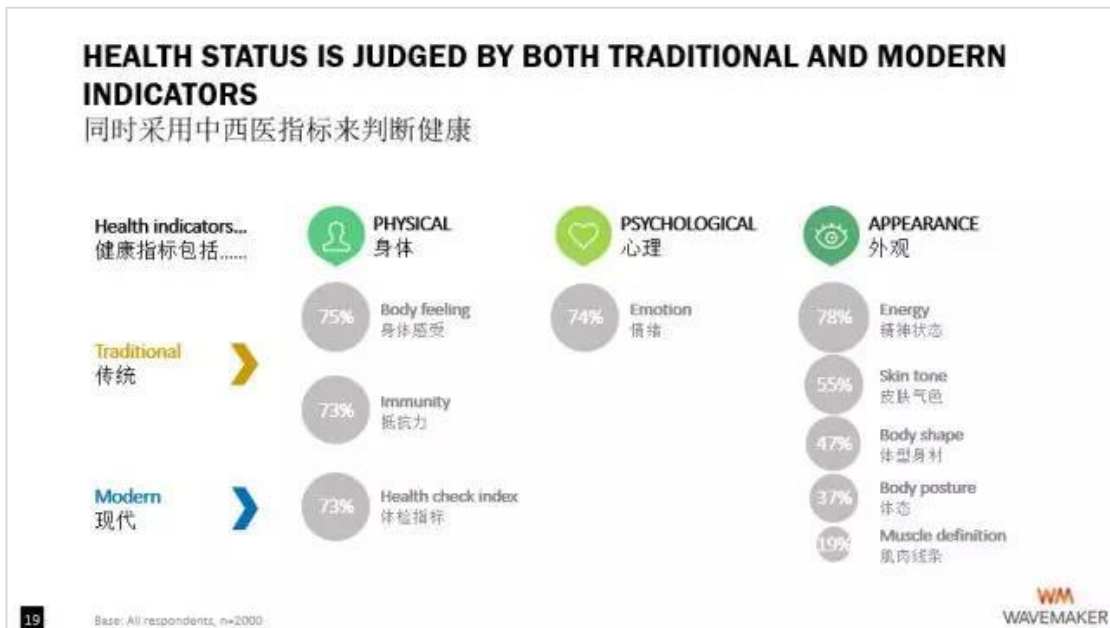
An efficient solution to treat symptoms  
治标

- Based on anatomy
- Symptomatic diagnosis & treatment
- Chemical based medicines

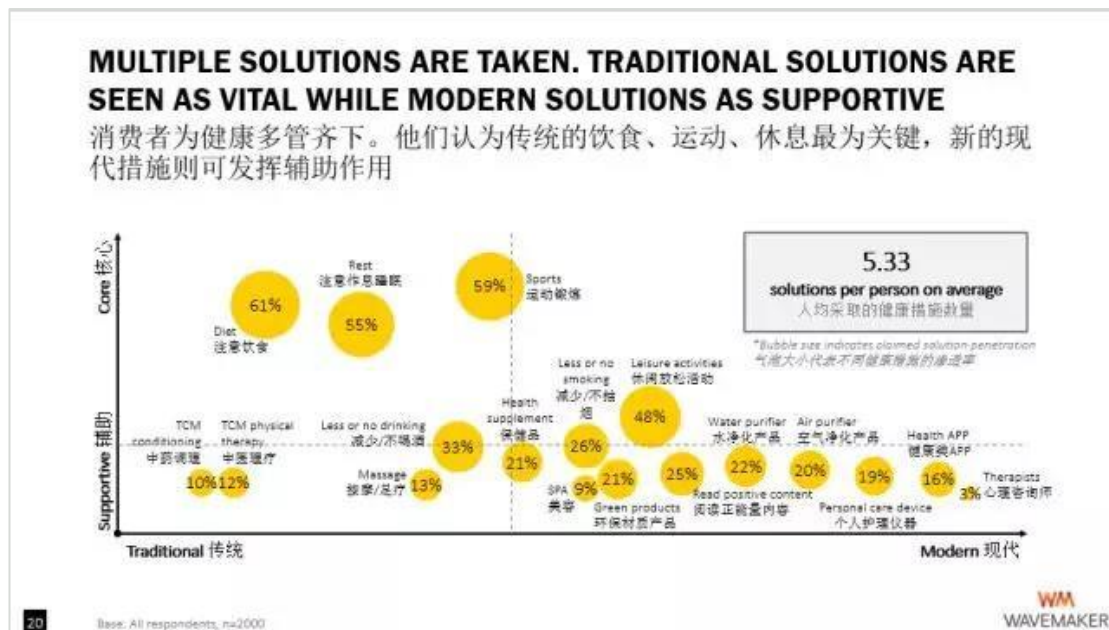
• 基于解剖学  
• 指标诊断及对症治疗  
• 成分药

15 Consumer & expert interviews

WM WAVEMAKER

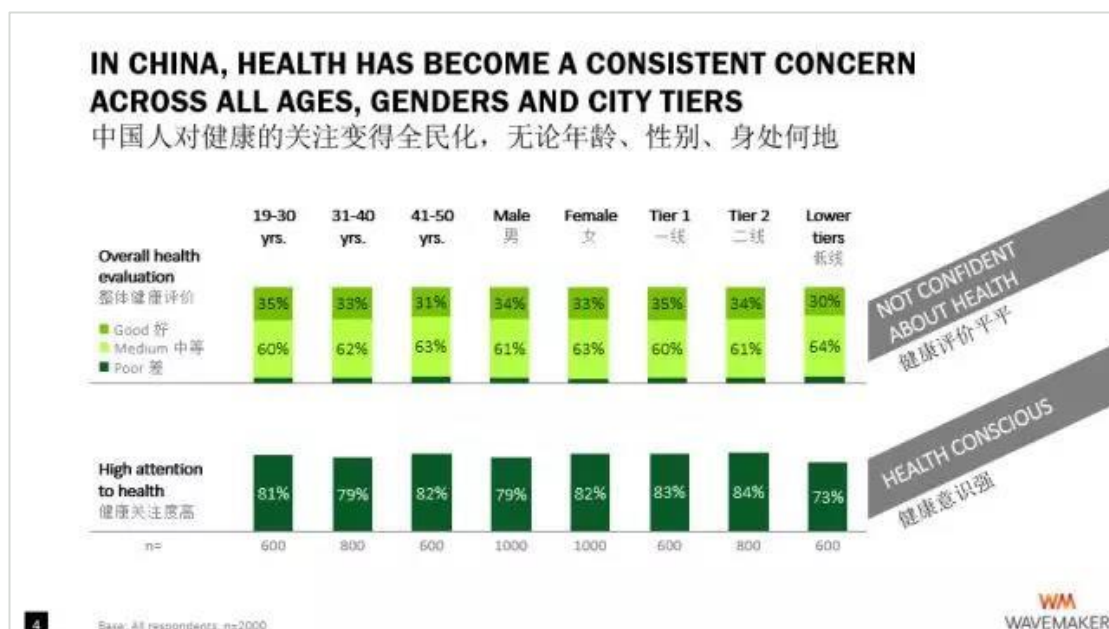


A combination of both traditional and modern solutions is used to improve health. Consumers can take TCM as a part of a traditional lifestyle while at the same time, relying on western supplements and devices for immediate or additional support. Moreover, new products such as powdered Codonopsis (one kind of ginseng) and cereals with yam and jujube integrate Chinese and Western medicines.



### Potential opportunities across many consumer segments

It is short-sighted to focus solely on elder consumers as younger consumers also possess great potential. As reflected in our study, Chinese people today have low confidence on their health status regardless of age and gender. Only 35% of age 19-30s perceive themselves as healthy.



## Preventative healthcare creates new triggers for brands

Consumers are paying more attention to minor symptoms that would reflect their health status such as checking gums and eyesight. In addition, consumers have increasing expectations of their health, shifting from being 'not sick' to 'strong immunity', 'optimistic', 'young and good looking', 'fit' and 'energetic'.

More Chinese have started to take precautions to improve their health. 82% agree that they are consciously taking action to prevent disease. 95% claim to have done something to improve their health while 59% have tried different approaches to improve their health.



## Awakening attention to health education

Consumers are getting more sophisticated, realizing the importance of doing the right thing, the right way.

Chinese consumers have great passion for health but are lacking in knowledge. There were many cases where people tried to do the right thing, but in the wrong way. We met people who ended up hurting themselves after too much intense training, also people who regularly take over 10 different supplements and TCMs at the same time.

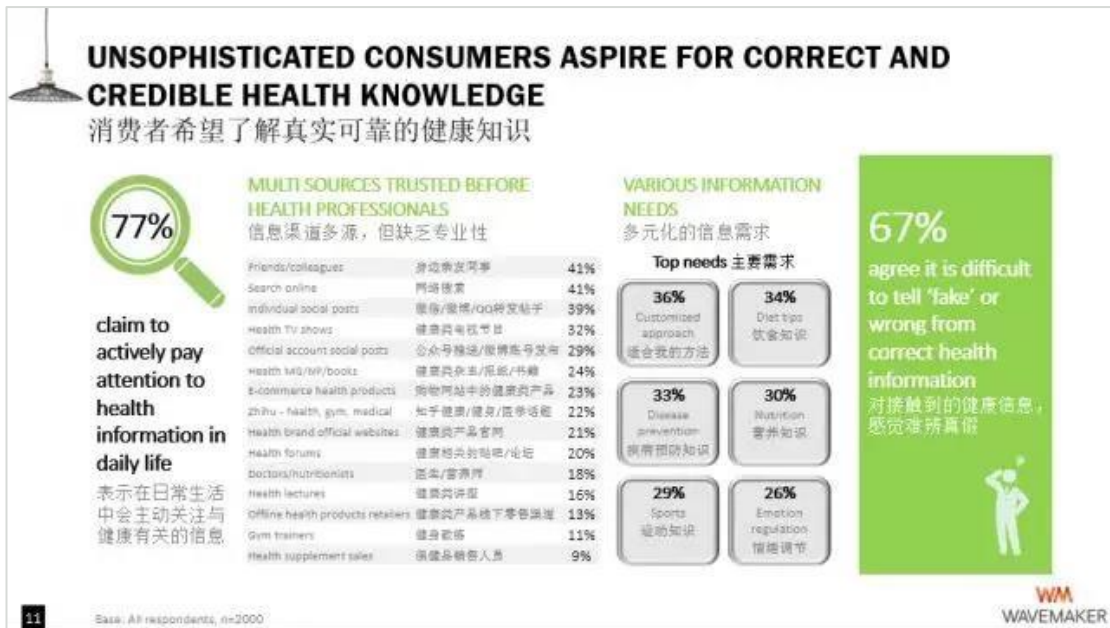
There are three main barriers:



There is an awareness of this education gap. 77% of the respondents take the initiative to seek out health-related information. Still, 67% of respondents are having difficulties in identifying misleading health information, given the fact that they mainly obtain information from non-professional sources (e.g. peers/colleagues, internet search, social posts).

Another challenge is that, even though people obtain sufficient knowledge, they often fail to achieve their goal due to lack of perseverance. Referring to our survey, 83% of respondents admit that they were having a hard time carrying out their health plans. 47% failed their plan due to lack of perseverance while 32% failed due to work/lifestyle restrictions. Other than trying their best to be self-disciplined, technological supports including Apps, with functions like measurement, reminder, tracking, guiding and interaction, are also adopted by certain consumers to aid and motivate them live a healthier lifestyle, the right way.





## Implications for brands

1

People in China have a Chinese & Western integrated view on health perception, judgement and solution, however TCM plays a fundamental role. Bias towards TCM solutions remains higher than for Western medicines or ingredients. It is crucial for brands to understand how Chinese consumers' needs come from these strong cultural influences, to define their brands positioning and strategy.

2

In China, attention towards health has become universal, regardless of gender, age or city tier. Also, health needs are becoming more comprehensive and more upgraded. This indicates a wider audience group with more diversified demographics, and opportunities in more fragmented markets (e.g. for specific gender/age, for specific health issues). Meanwhile, it will be more and more challenging for brands to keep up with health trends in this fast-growing market with fierce competition.

3

Preventative healthcare creates new triggers for brands and can help to expand category use. Brands need to further drive health & prevention consciousness and motivate consumers to take consistent action.

4

While health market is booming in China, it is still chaotic, filled with various levels of products/services and types of information. There are lots of misunderstandings to be corrected and needs gaps to be bridged. Whilst the health industry in China is being improved with new rules & standards, brands can help to provide consumers with right & professional guidance, more personalized and easy-to-do solutions. Education is critical particularly in the active stage when consumers are trying to address a problem.

5

The growing awareness of current and preventive health concerns signifies the importance of strong brand salience and education also in the Priming Stage, where consumers are not actively looking to purchase but can nevertheless still be influenced by brand communications. In the Priming Stage, consumers do not have purchase needs yet, however, consumers can still be educated and triggered through clear benefits and lifestyle solutions. It is worth noting that other than providing additional product assurance and education, we should think about how we can bring different categories to open-minded audiences to expand business opportunities.



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