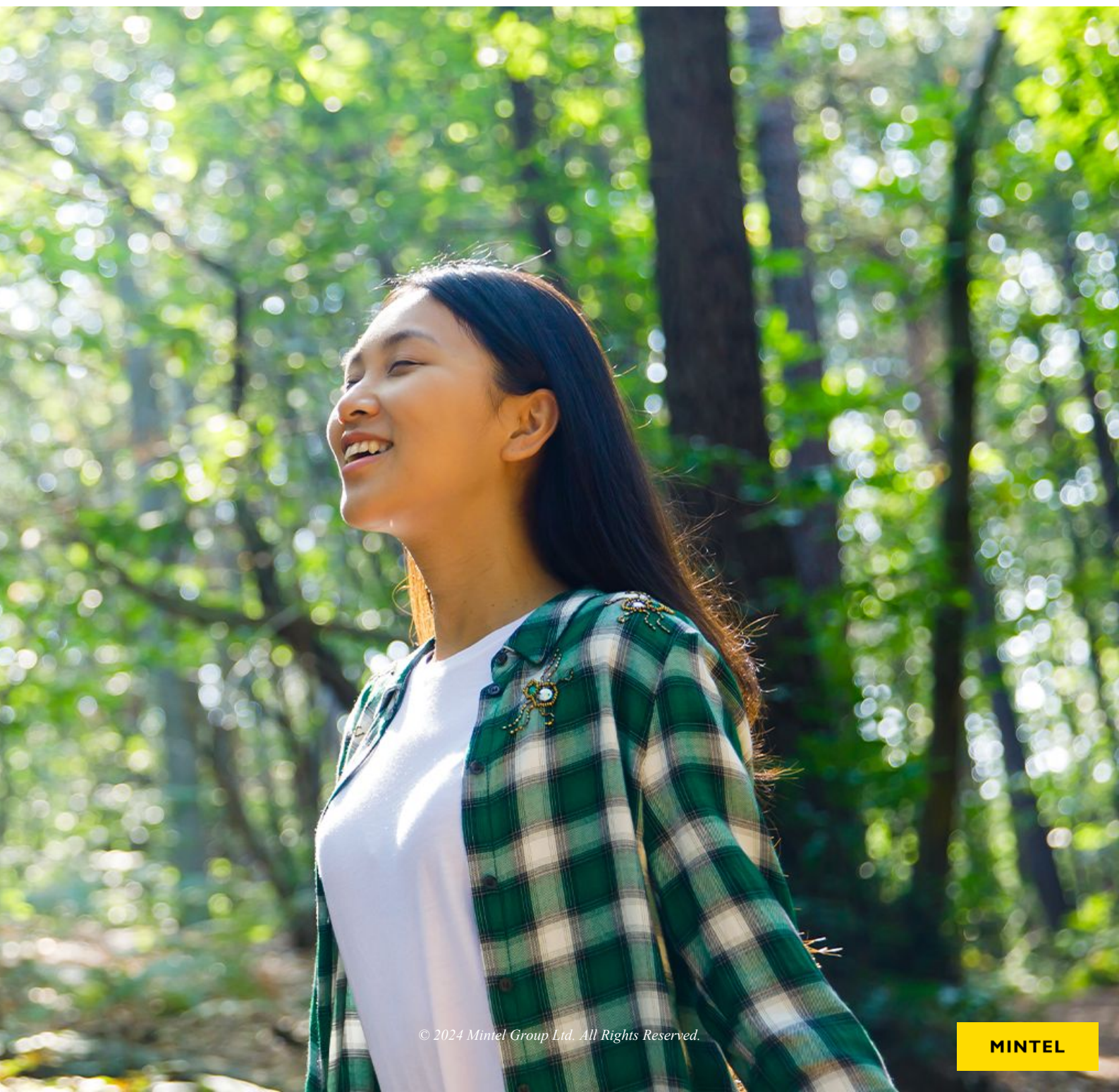


HEALING AND RELAXATION – CHINA – 2024

Tapping into consumers' diverse healing and relaxation needs can help brands go beyond the functional value of products and services, creating stronger resonance by catering to their needs for emotional release and support.



Gloria Gan, Senior
Analyst, China Insights



Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definition
- What you need to know

The market

- Market factors: changing relationships and technologies drive a pluralistic approach to stress relief
 - Graph 1: changes in spending compared to the previous month – non-CPG (consumer packaged goods), 2022-24
- Marketing activities
- New product trends

The consumer

- Consumers' anxiety levels have declined across the board
 - Graph 2: changes in anxiety levels, by gender, 2022-23
- Significant disparities exist in preferred stress-relieving activities
 - Graph 3: effective de-stressing activities – women, 2023
 - Graph 4: effective de-stressing activities – men, 2023
- Indulging in aesthetics, fragrances and alcohol
 - Graph 5: categories that provide emotional value – women, 2023
 - Graph 6: categories that provide emotional value – men, 2023
- Nature holds the most therapeutic appeal
 - Graph 7: attractive product elements and experiential services, by gender, 2023
- Beautiful scenery and food soothe the mind
 - Graph 8: healing advertising styles, 2023
- Rising awareness of conscious consumption guides ethical choices
 - Graph 9: consumer behaviours and intentions, 2023
- Recognise personal aesthetics and independent decision-making
 - Graph 10: changes in independent thinking, 2023

Issues and insights

What we think

THE MARKET

Market factors

- Amid steady economic recovery, spending on dining out and travel surges
 - Graph 11: changes in spending compared to the previous month – non-CPG (consumer packaged goods), 2022-24
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 - Graph 12: census data for size and proportion of one-person households, 2000-20
 - Graph 13: marriages and divorces registered, 2022 vs Q1-Q3 2023
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 - Graph 14: average weekly working hours of employees nationwide*, 2020-24
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 - Graph 15: % of consumers* who agree that "maintaining good mental health is key to overall wellbeing", 2023-24
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 - Graph 16: social media* engagement with select trending/emerging ways to relieve stress, 2022-24
 - Graph 17: social media* engagement with select conventional ways to relieve stress, 2022-24
- AI is impacting the real world and redefining the emotional healing space

Marketing activities

- Combine sports with art and creativity for a new approach to exercise-based stress relief
- Leverage the connection between nature and culture to transform brand events and stores into healing spaces
- Fuse cultures to create a zen healing experience
- 'Co-brand' with animals to unleash the healing power of cute companions
- Spread the joy by leveraging DIY crafts for healing and positivity

New product trends

- Co-brand with nostalgic IPs to launch products that are 'just right for adults'
- Tap into the healing magic of nature with the 'botanical lifestyle' aesthetic
- Promote relaxation with 'meditation drinks'
- New products go 'mad'
- Make technology products more approachable by offering emotional support

THE CONSUMER

Stress levels

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 - Graph 18: changes in anxiety levels, by gender, 2022-23
- Feelings of social anxiety have increased
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- Graph 20: issues of concern – men, 2023-24
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 - Graph 24: effective de-stressing activities – women, 2023
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 - Graph 25: select de-stressing activities – energetic, by age, 2023
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 - Graph 27: meditation/mindfulness as a de-stressing activity, by city tier and age, 2023

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 - Graph 28: categories that provide emotional value – men, 2023
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 - Graph 30: select categories that provide emotional value, by city tier and gender, 2023
 - Graph 31: select categories that provide emotional value, by city tier and gender, 2023
- Most men drink for pleasure rather than drowning their sorrows
 - Graph 32: select categories that provide emotional value, by anxiety level and gender, 2023
 - Graph 33: select categories that provide emotional value, by anxiety level and gender, 2023

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 - Graph 34: attractive product elements and experiential services, by gender, 2023
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 - Graph 35: select attractive experiential services, by gender and age, 2023
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Healing advertising styles

- Nature and food soothe the mind
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 - Graph 39: select healing advertising styles, by age, 2023

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 - Graph 40: healing advertising styles, by anxiety level, 2023

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 - Graph 45: changes in independent thinking, 2023
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ISSUES AND INSIGHTS

Warm-hearted companionship: evoke emotions through sights and sounds

- Become a comforting travel companion and evoke deep resonance through emotion-filled scenes
- Next-level content marketing: leverage radio for subtle product placement, long-term companionship and a strong connection

The healing power of family: promote understanding and rebuild bonds

- Address the lack of love by portraying family as a pillar of affection
- Parent-child communication in the digital age: encourage younger people to become fans of their parents

Fuelling inner strength: share stories and kindness

- Unlock inner potential through everyday growth narratives with an emotional impact
- Spread healing and kindness through fashion that links art with philanthropy

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology

- Abbreviations

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