

SENIORS' WELLBEING – CHINA – 2024

Under the trend of Thriving with Age, targeting the evolving interests of older people and their differentiated needs, and conducting precision marketing communications and product development that are age-friendly are the keys to further penetrating the existing market and expanding the capacity of the incremental market.



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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Definition
- What you need to know

The market

- Market factors

Companies and brands

- Marketing activities
- New product trends
- Examples of marketing activities and products that reflect the above

The consumer

- Consumers with eye issues, the 'three highs' and bone and joint issues have the highest treatment willingness
 - Graph 1: seniors' health conditions , 2024
- Most older people are facing barriers to eating caused by reduced oral function and physical fitness
 - Graph 2: barriers to eating, 2024
- Older people are generally active in managing their lifestyles
 - Graph 3: health management behaviours, 2024
- Compared to physical ageing, older consumers care more about having a sharp mind and a young heart
 - Graph 4: definition of older people, 2024
- Older consumers mainly seek physical and mental harmony to achieve healthy ageing
 - Graph 5: healthy ageing expectations, 2024
- When it comes to managing ageing, older people trust holistic lifestyle for internal adjustment more
 - Graph 6: perceived effectiveness in ways to deal with ageing, 2024
- Older consumers are generally cautious in their perception and purchasing behaviours regarding anti-ageing ingredients
 - Graph 7: age management ingredient awareness, 2024

Issues and insights

What we think

THE MARKET

Market factors

- China will see the greatest retirement wave under the moderate ageing trend
 - Graph 8: size and proportion of population aged 65 and above, 2013-22
- The released Opinions on Developing the Silver Economy and Improving the Well-being of Older People focus on both physical and mental health and the anti-ageing industry
 - Graph 9: definition of older people, with the following factors selected as the top three factors, 2024
- The necessity of taking dietary supplements as the 'fourth meal for nutrition' is emphasised

COMPANIES AND BRANDS

Marketing activities

- Respond to society's new concept of 'active ageing' from multiple perspectives
- Attract older consumers who are eager to change their eating habits with whole-family nutrition
- Earn the trust of older people through offline professional events

New product trends

- Products with a 'seniors' claim still have a low market share but the ratio remains stable
 - Graph 10: share of new products** using a 'seniors' claim*, 2019-24
- Adding disease management as a selling point may be able to attract more older consumers
 - Graph 11: category distribution of products in food, drinks, healthcare, beauty and personal care products with a 'seniors (aged 55+)' claim, 2021-24
- Ride on the precision healthcare trend and provide precise nutrition solutions for older people
- Most food and drink products for seniors focus on balanced nutrition and fortification...
 - Graph 12: selling points communicated by food and drink products using a 'seniors' claim, 2021-24
- Examples of marketing activities and products related to a well-balanced diet and fortification
- ... consumers tend to seek functionality in health supplements, especially to maintain cardiovascular and cerebrovascular function
- Sarcopenia in older people gives rise to a series of new products featuring small-molecule proteins and amino acids
- Health products targeting female menopause may have greater room for innovation

THE CONSUMER

Seniors' health conditions

- Eye issues and high blood sugar, high blood pressure and high blood cholesterol still have the highest incidence rates, while the awareness of treating bone and joint issues is among the top three
- Eye issues and the three highs still have the highest incidence rates, while the awareness of treating bone and joint issues is among the top three

Seniors' Wellbeing – China – 2024

- Graph 13: seniors' health conditions, 2024
- Graph 14: seniors' health conditions – % of consumers who didn't have it but are actively preventing it currently, 2023-24
- Older people are not sufficiently aware of health conditions and the importance of managing them, indicating that there is still enormous room for science education in the market
 - Graph 15: seniors' health conditions – % of people with this issue vs % of people with this issue and are currently managing/treating it, 2024
 - Graph 16: seniors' health conditions – % of people with this issue, 2023-24
- Women are more likely to suffer from multiple health issues within years after menopause
 - Graph 17: seniors' health conditions – have the issue and are currently managing/treating it, by age and gender, 2024

Barriers to eating

- Most older people are facing barriers to eating caused by reduced oral function and physical fitness...
 - Graph 18: barriers to eating, 2024
- ... and the two issues often go hand in hand
- Those who are actively managing their eye issues are more likely to experience taste/smell issues and mouth dryness or thirst
 - Graph 19: barriers to eating (selected), by management of eye issues, 2024

Health management behaviours

- Older people are generally active in managing their lifestyles...
 - Graph 20: health management behaviours, 2024
- ... and there is a significant increase compared to last year
 - Graph 21: health management behaviours – % of people who answered 'important and have been doing it regularly', 2023-24
- Older people with family responsibilities pay more attention to healthy diet management
 - Graph 22: health management behaviours – % of people who answered 'important and have been doing it regularly', by family responsibilities, 2024
- Understand the hidden needs of older people who are not actively seeking medical treatment and provide differentiated communication and product strategies
- Older people who are not active in managing eye issues have more potential demands for technology and medical services
 - Graph 23: health management behaviours among consumers with eye issues, 2024
- Older people who are not active in managing the 'three highs' are motivated to adjust their lifestyles but do not have the resources for it
 - Graph 24: important but I haven't done enough, 2024
- Older people who are not active in managing bone and joint issues need more guidance on maintaining a regular diet and seeking medical services
 - Graph 25: important but I haven't done enough, 2024
- Examples of food and drink products for bone and joint issues

Healthy ageing expectations

- The definition of 'seniors' is quietly changing as consumers still focus on the youthfulness of their minds and hearts
 - Graph 26: definition of seniors, with the following factors selected as the top three factors, 2024
 - Graph 27: definition of seniors, ranked first, 2022 vs 2024
- Older people mainly want to achieve self-consistency in the body and mind in ageing healthily...
 - Graph 28: healthy ageing expectations, 2024
- ... especially older people who live with younger family members
 - Graph 29: healthy ageing expectations (selected), by living situation, 2024
- Expectations related to appearance vary drastically between genders
 - Graph 30: healthy ageing expectations (selected), by gender, 2024

Perceived effectiveness in ways to deal with ageing

- To fight against ageing, older people trust holistic lifestyle for internal adjustments more...
 - Graph 31: perceived effectiveness in ways to deal with ageing, 2024
- ... especially those who expect better physical function in the future
 - Graph 32: perceived effectiveness in ways to deal with ageing, by healthy ageing expectation, 2024
- People aged 55-59 have a clearer understanding of the effectiveness of anti-ageing methods, especially in dietary management
 - Graph 33: perceived effectiveness in ways to deal with ageing, by age, 2024

Awareness of anti-ageing ingredients

- Older people have a low awareness of most anti-ageing ingredients and are generally conservative in their purchasing behaviours
 - Graph 34: age management ingredient awareness, 2024
- Adopt differentiated communication and product strategies based on the differences in purchase behaviours and awareness of each ingredient
- Brands can emphasise the benefits of hyaluronic acid for the joints and eyes to transform the purchasing power in existing and incremental markets
 - Graph 35: seniors' health conditions – 'had it and are currently managing/treating it', by age management ingredient awareness – 'have heard of hyaluronic acid, but haven't bought any products containing it', 2024
 - Graph 36: age management ingredient awareness – hyaluronic acid, by definition of older people, 2024
- For peptides, besides emphasising the effects of collagen peptides on bones and joints...
- ... brands can also link other types of peptides to anti-ageing management in terms of lifestyle
- Leveraging the popularity of krill oil to link the antioxidant effects of astaxanthin to cardiovascular and cerebrovascular health

ISSUES AND INSIGHTS

Communicate about nutrition with more preciseness to adapt to the precision health trend

- The new version of The Chinese Dietary Guidelines will lead the seniors' wellbeing market towards precision management
- The health supplement and milk powder sectors have begun to offer functionally precise products for older people
- Communicating differently and accurately to different health sub-groups that have the knowledge but are not taking action to facilitate purchasing power conversion
- Opportunity: people aged 55-59 can be a key target audience to invest in...
- ...and catering to gender-specific demands can be leveraged as added value to develop segmented product versions
- Product ideas that reflect these insights

Anti-ageing from within – key development points for the seniors' anti-ageing industry

- Active ageing national policies and consumer perspectives boost the seniors' anti-ageing industry
- When it comes to anti-ageing, older people are more concerned with improving their inner health rather than their external appearance
- Marketing communications should capture values that older people care about to achieve further growth in the existing market
- Improving physical function is the main selling point of popular anti-ageing ingredients, while skin anti-ageing is an additional selling point
- Combine online and offline marketing and communicate using heart-warming everyday scenarios
- Product innovation featuring Yangsheng shows a considerable pace and can be differentiated by seasonality or ease of use...
 - Graph 37: distribution of 'medicine food homology' new products in foods, drinks and diet/nutritional supplements, 2019-24
 - Graph 38: share of new products with 'ease of use' and 'seasonal' claims in all new products using medicinal foods as an ingredient, 2019-24
- Products and marketing examples that reflect the above
- ...and the 'nature and science' concept popular in the beauty and personal care sector can be leveraged to explore the potential for further growth

There is a white space for foods that are both appetising and suitable for the oral conditions of older people

- Japan launched a systematic categorisation and guidance for older people with barriers to eating...
- ... however, the market for older people with barriers to eating is still a white space in China
- Launching foods that are both appetising and chewing-friendly can better meet the needs of elderly in the Chinese market

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- Methodology

- Abbreviations

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