



Healthy Living Index Survey 2016

CHINA FINDINGS

13th April 2016

2016 AIA Healthy Living Index Survey – Design and Approach



- This is the 3rd wave of the Healthy Living Index Survey conducted to understand how adults across Asia Pacific feel about their health, their concerns and hopes for a healthier way of life and how this has changed over the years.
- The benchmark wave was completed in August 2011, the second wave in August 2013 and the current wave in January, 2016. [Over 10,000 interviews for each wave.]



- Target group – general population in each market aged 18 years+ covering all income as well as education groups.
- Fieldwork conducted via online interviews in China.
- Quotas set on age, gender and household income to ensure a representative sample



- Survey conducted across 15 Asia Pacific markets in which AIA operates – total of **10,316** interviews (sampling error +/- 1%). The sample size for China was **2,001 interviews**.

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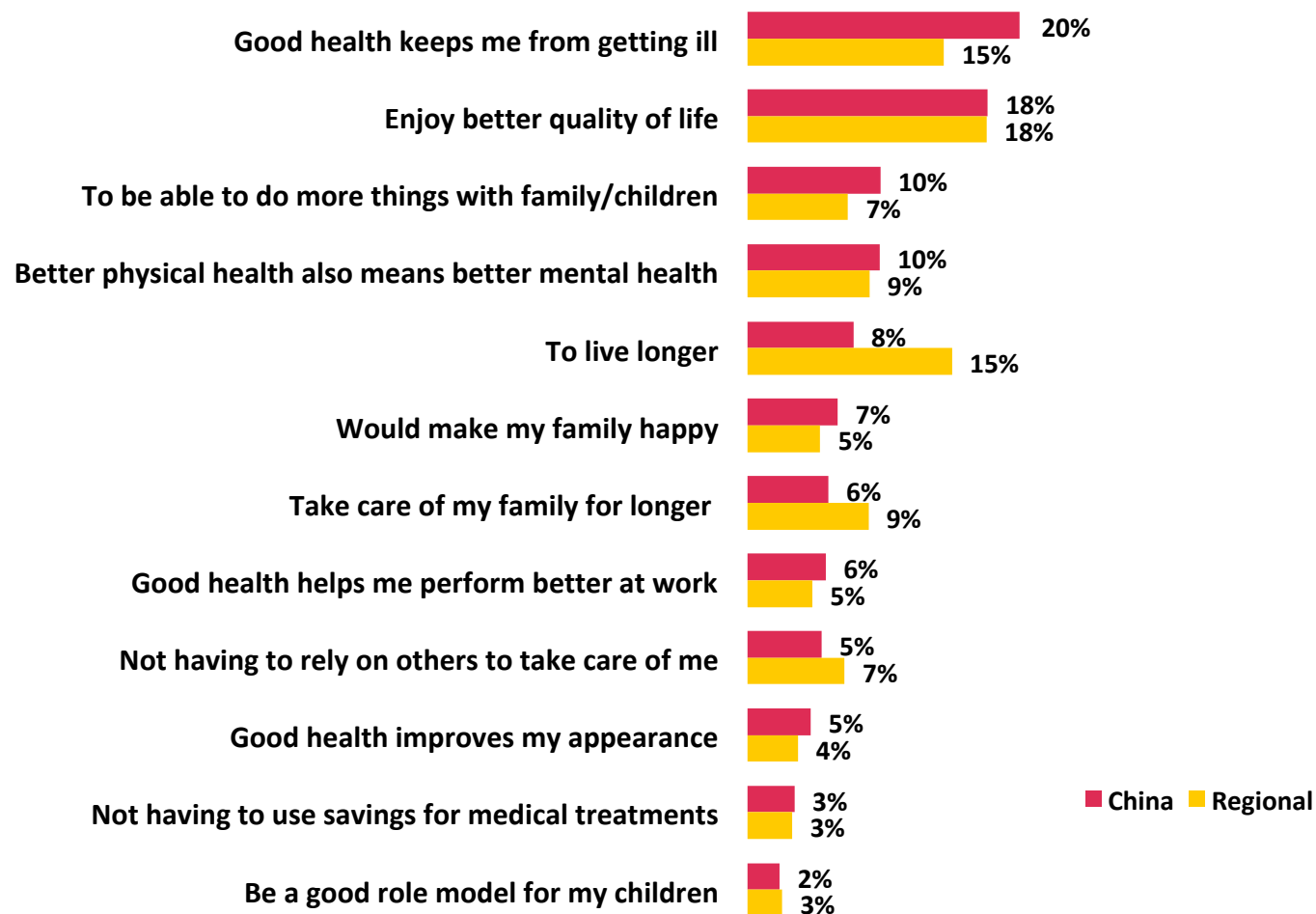
Conclusions

How satisfied with own health?



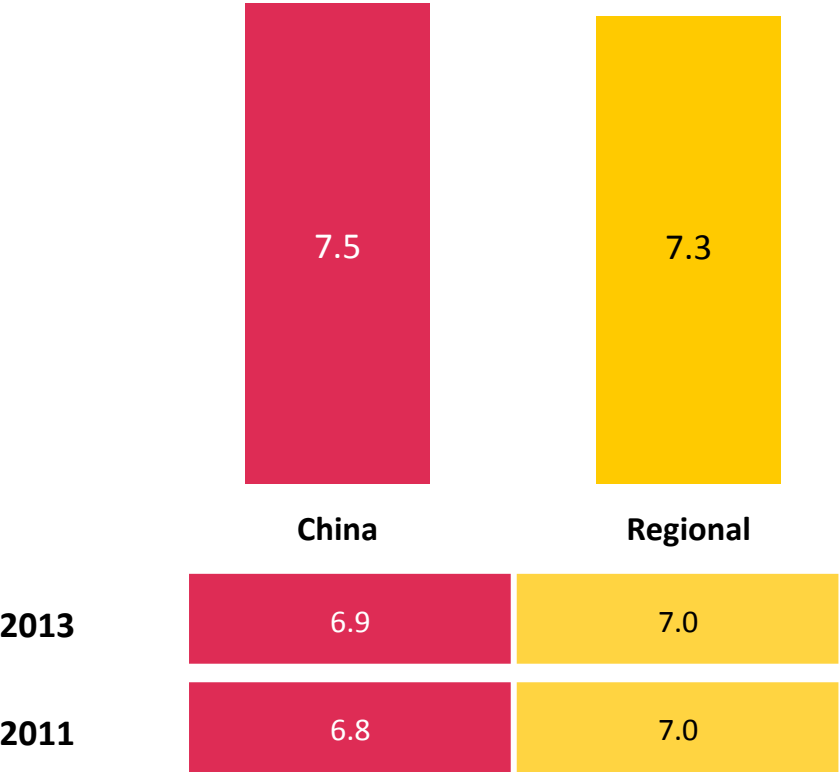
Past waves of the survey have seen universal agreement in China and across the region that healthy living is important. The key reasons for wanting to live a healthy life among adults in China are to “keep from getting ill” (20%) and “enjoy a better quality of life” (18%). Other reasons in China include being able to do more things with family / children (10%) and “for better mental health” (10%).

Reasons for wanting to live a healthy life



Adults in China seem more satisfied with their health compared to previous years. Overall satisfaction with health is now 7.5 out of 10 -- a significant increase on the 6.9 score in the last wave, and also slightly higher than the regional average (7.3)

Overall satisfaction with health – Average

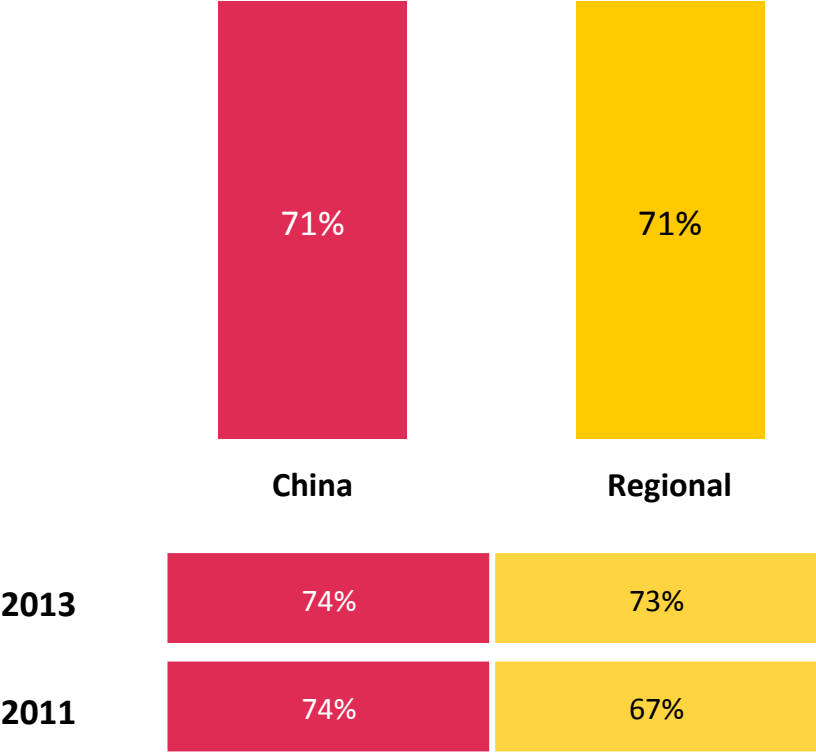


Differences by age/gender

Men tend to be slightly more satisfied with their health than women (7.7 vs. 7.4)

However, 71% of adults in China feel their health is not as good as it was 5 years ago -- a percentage slightly lower than in 2013 (74%), but in line with the regional average (71%).

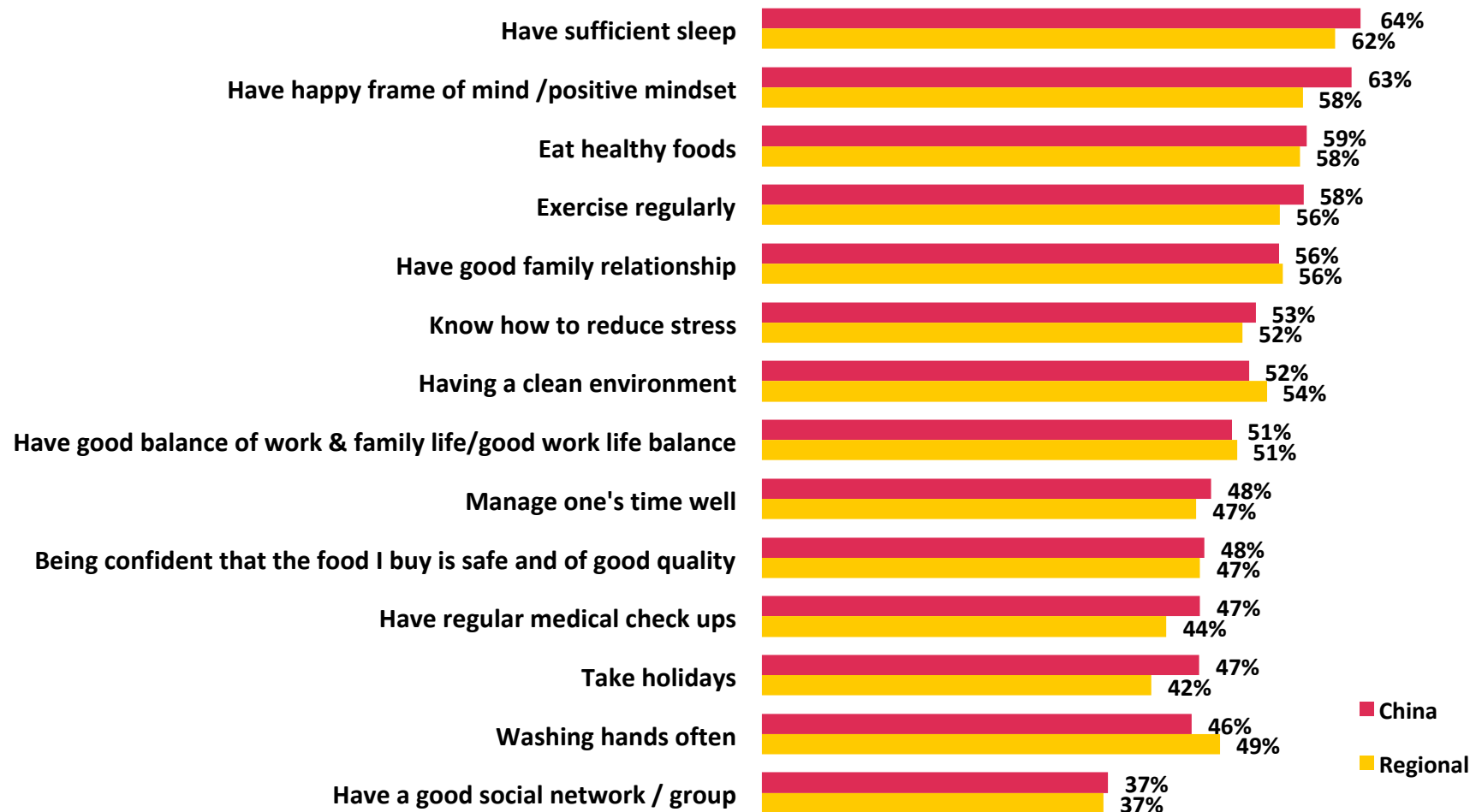
Agreement with 'my health is not as good as it was 5 years ago'



The top 5 most important drivers of healthy living according to adults in China are the same as the regional averages: having sufficient sleep (64%), eating healthy foods (59%) and exercising regularly (58%) are in the top 5, along with mental aspects such as positive mindset (63%) and having good family relationships (56%).

Drivers of healthy living

(Rated 9-10 on scale of 1 to 10)



Differences by age/gender

Those aged 45+ rate having good family relationships (72%) higher compared to other age groups – 18-29 (57%) and 30-44 (51%).

Women tend to rate the importance of most drivers higher than men including having sufficient sleep (67% vs. 62%), having a positive mindset (66% vs. 61%) and knowing how to reduce stress (57% vs. 50%).

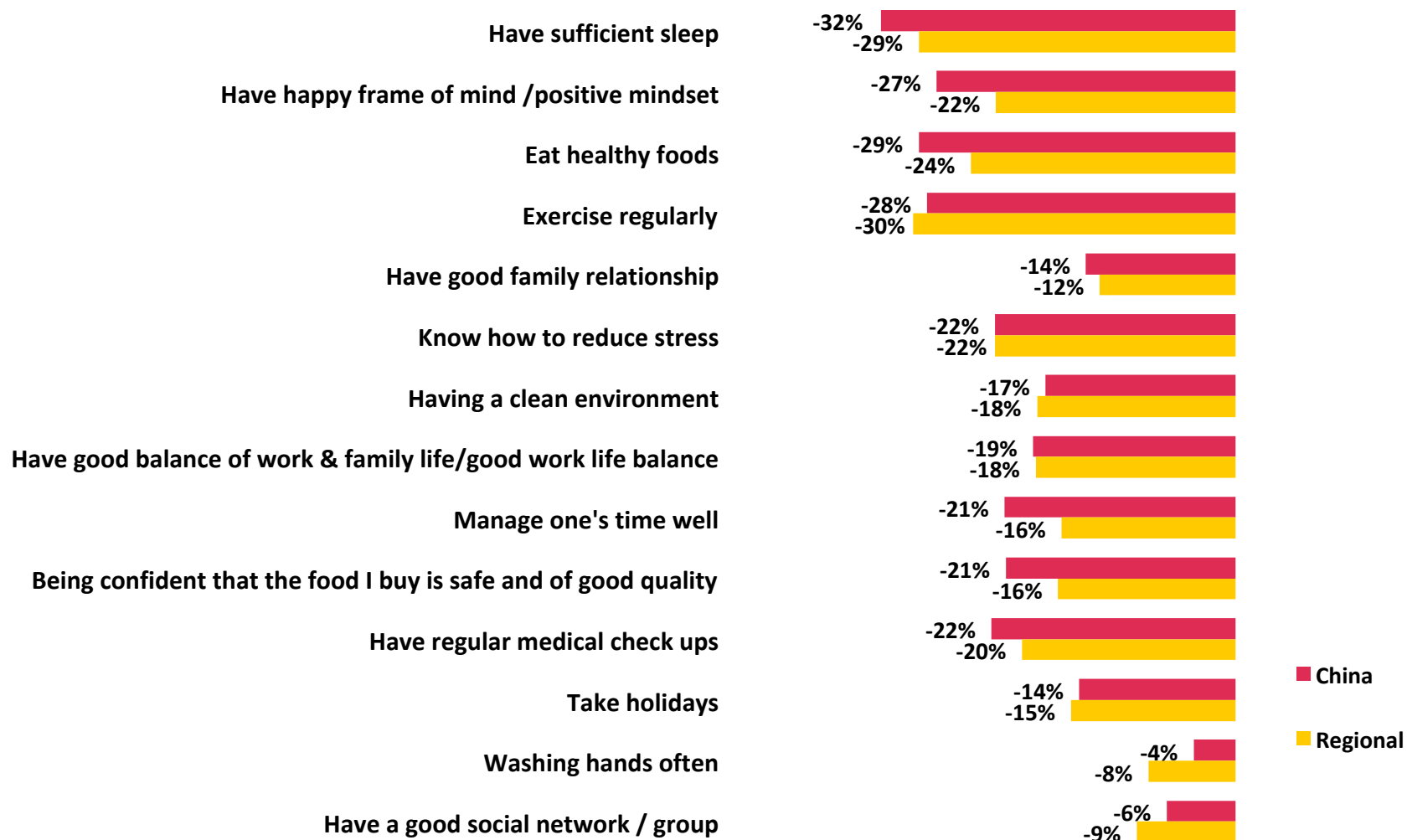
■ China
■ Regional



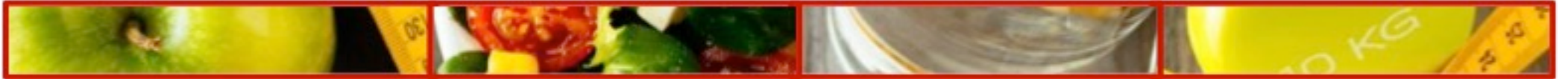
For items rated earlier in terms of importance, adults in China tend to give themselves lower ratings – meaning much room for improvement across the board. For example, “have sufficient sleep” have importance rating of 64% but rating of self on this attribute is only 32% so gap of -32% pts. The gaps are biggest for the most important drivers – sleep (-32% pts), positive mindset (-27%), eating healthy foods (-29%), exercising regularly (-28%).

Gap analysis – Importance vs. Self Ratings

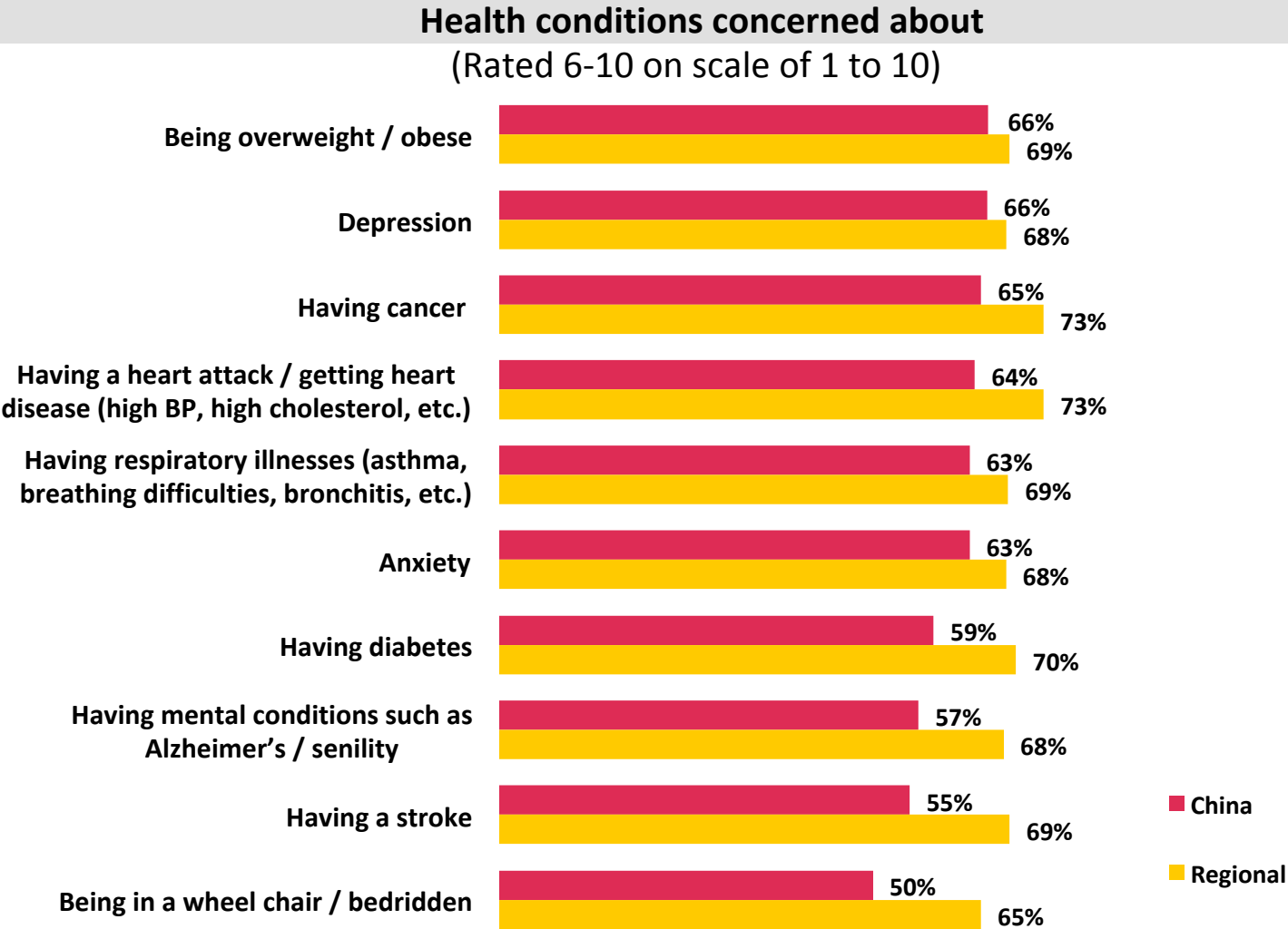
(Rated 9-10 on scale of 1 to 10)



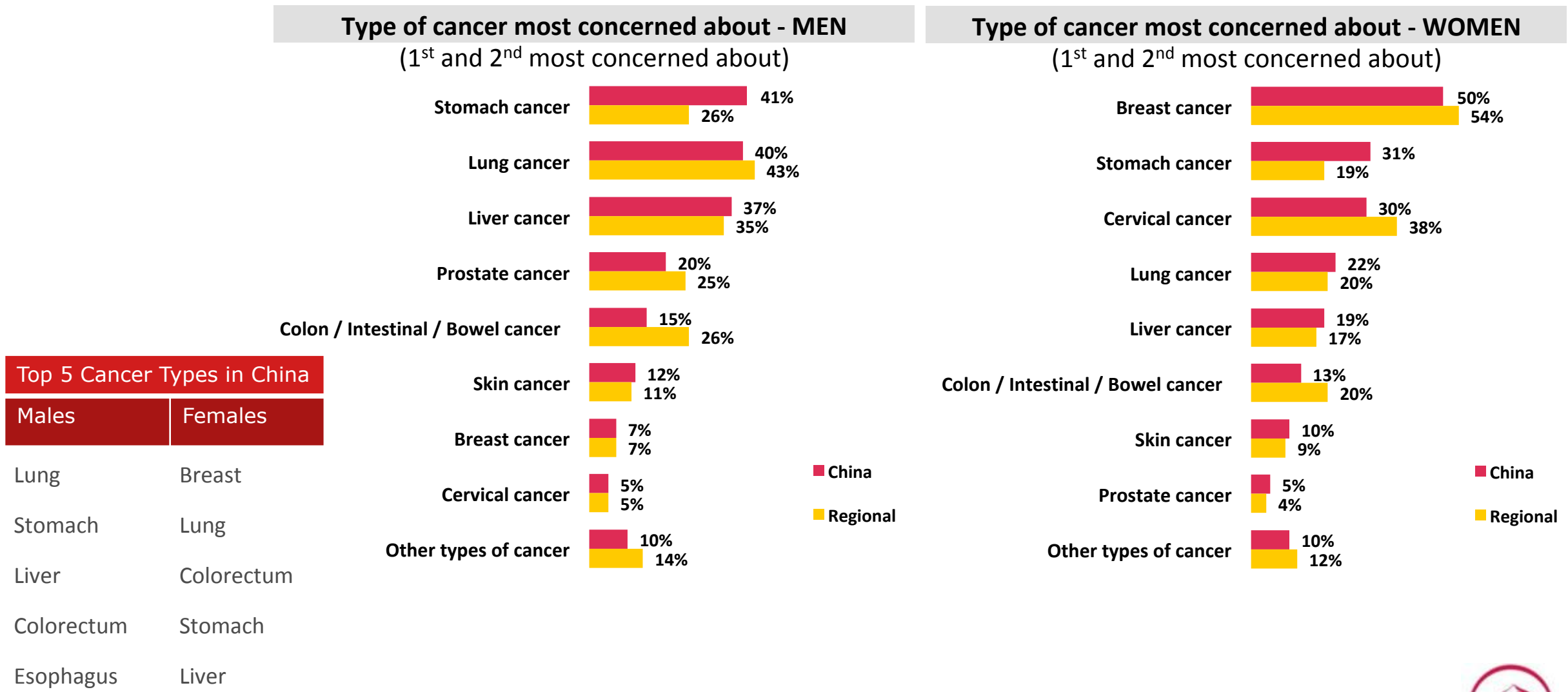
What are the top concerns?



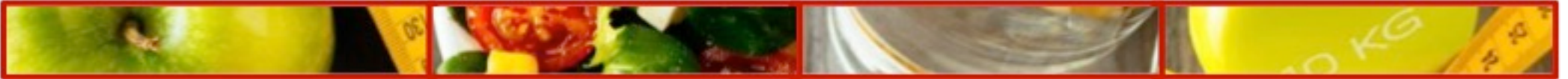
Being overweight/obese (66%), depression (66%) and cancer (65%) are the top health conditions of most concern to adults in China. These are followed by concerns about having a heart attack (64%), having respiratory illness (63%) and anxiety (63%).



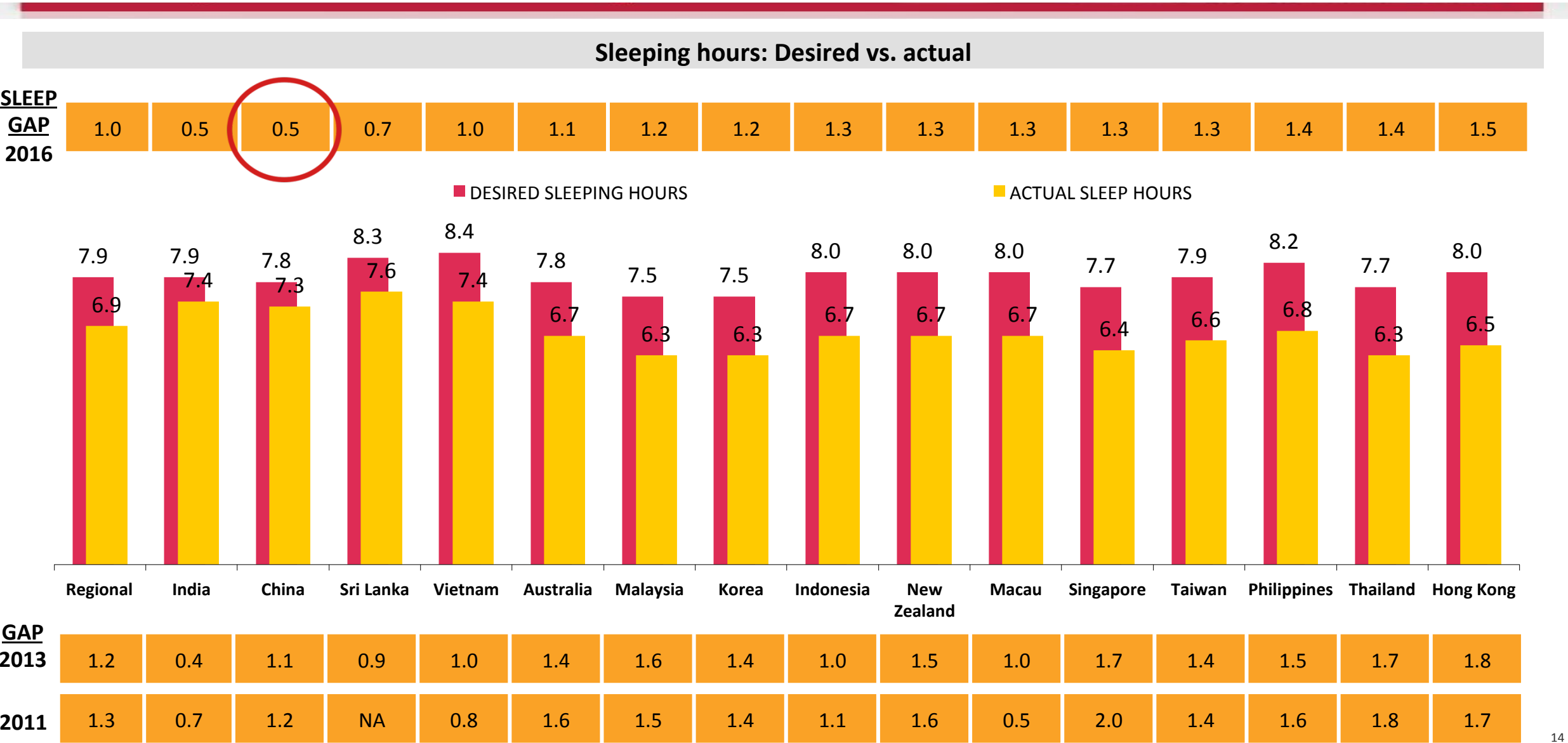
Among men, stomach cancer is of highest concern (41%) – much higher compared to the regional average (26%) -- followed by lung cancer (40%) and liver cancer (37%). Chinese women are most concerned about breast cancer (50%), stomach cancer (31%) and cervical cancer (30%). Concern about cancer of the lung (22%), liver (19%) and colorectum (13%) is relatively lower, despite being among the most common cancer types for women in China. A recent WHO report* suggests China is the hardest hit by the global surge in cancer so China can probably benefit from greater awareness of the various cancer types.



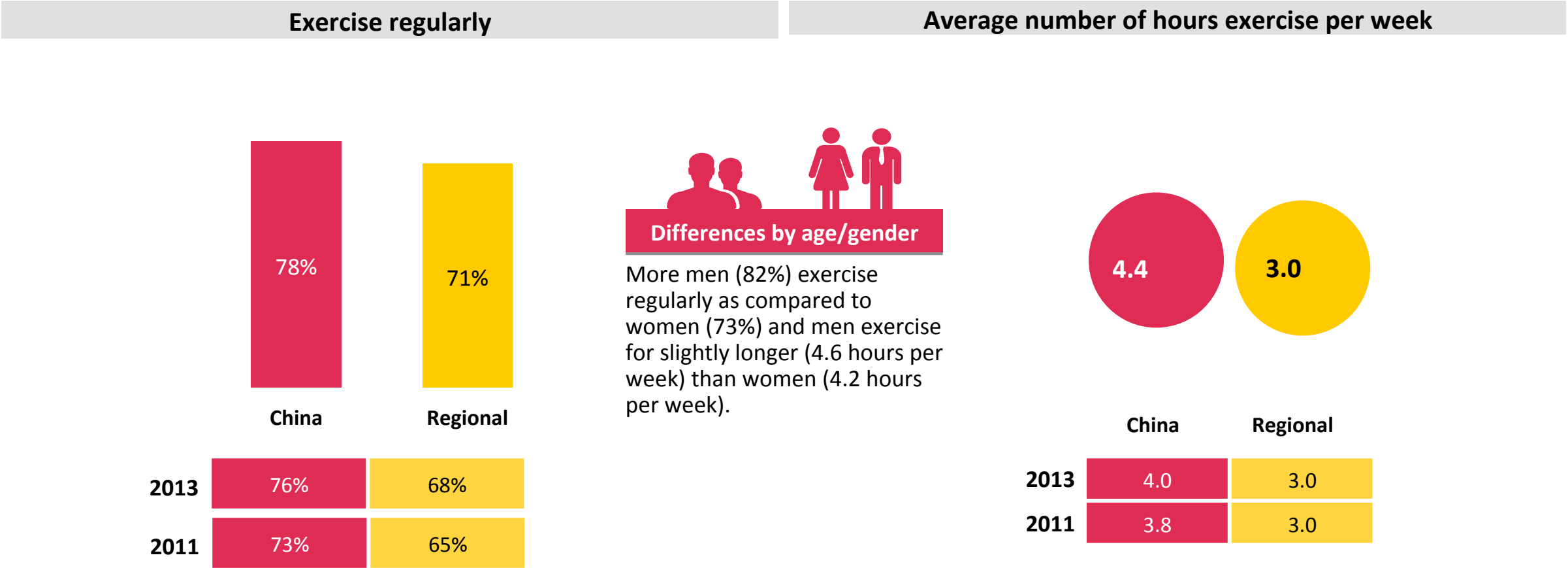
What are the current behaviours?



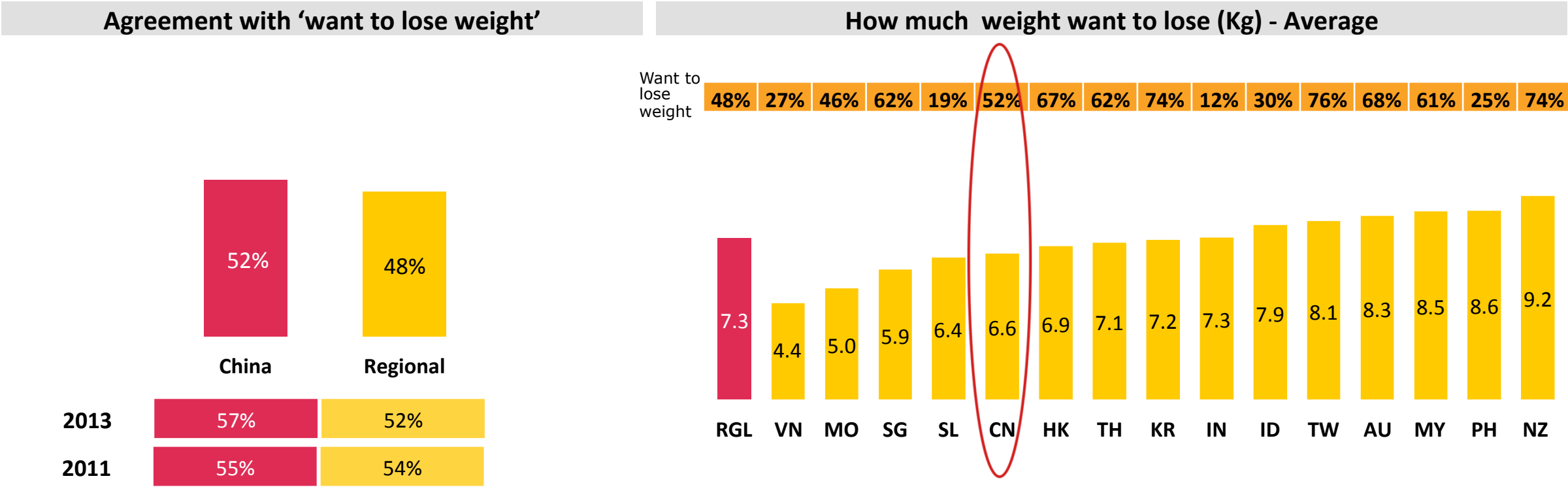
Having sufficient sleep is viewed as the most important driver to living a healthy life in China and across the region. Adults in China report a gap of 0.5 hours between desired and actual sleeping hours. This gap is an improvement from the 1.1 hour sleep gap in the last wave and is lower than the regional average (1.0 hours).



78% of Chinese adults say they exercise regularly, higher than the regional average (71%). The average number of hours spent exercising is 4.4 hours per week – up from 3.8 hours in 2011, and is higher than the regional average of 3.0 hours.

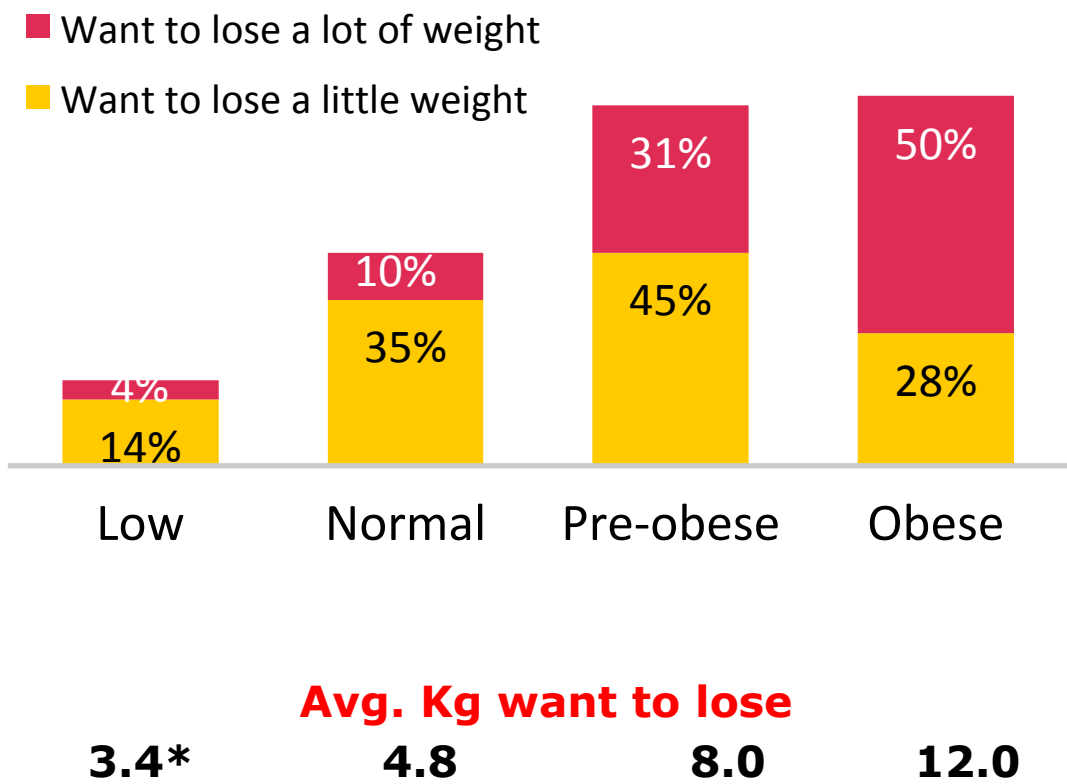


52% of adults in China would like to lose weight, slightly lower than in the last wave and they would like to lose a significant 6.6 kgs. Desire to feel fit (95%), look better (94%) and have better general health (92%) are the main reasons for wanting to lose weight – these personal motivations are more important reasons than pressure from others such as family and doctor.



Based on the Body Mass Index scale, 26% of adults in China are pre-obese and 6% are obese. While the desire to lose weight and the amount they would like to lose is dependent on BMI, even 45% of those with normal range of BMI would like to lose weight and on average, 4.8 kgs each.

Body Mass Index (kg/m2) – Chinese Adults			
<18.5	18.5 – 23.0	23.0 – 27.5	>=27.5
Low	Normal	Pre-obese	Obese
11%	56%	26%	6%

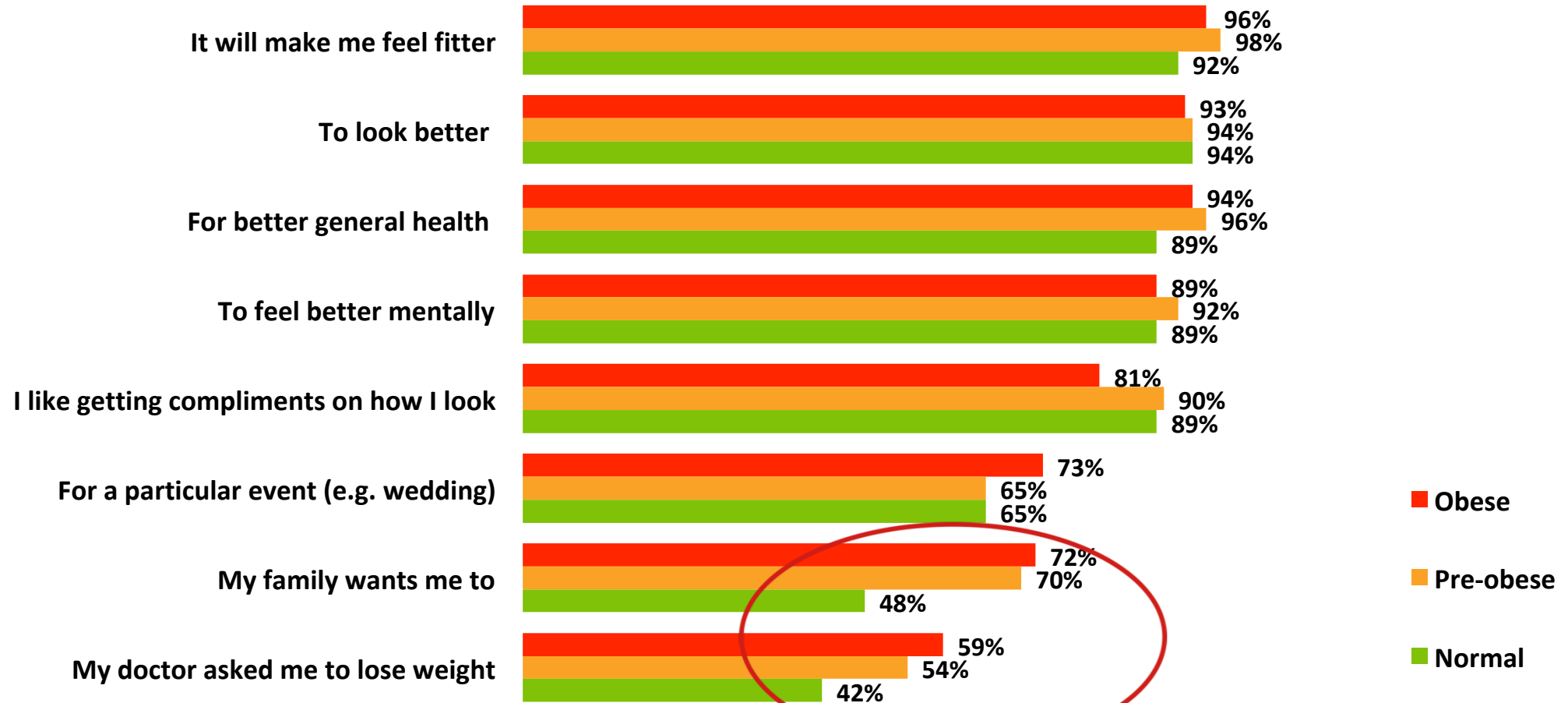


* Low base



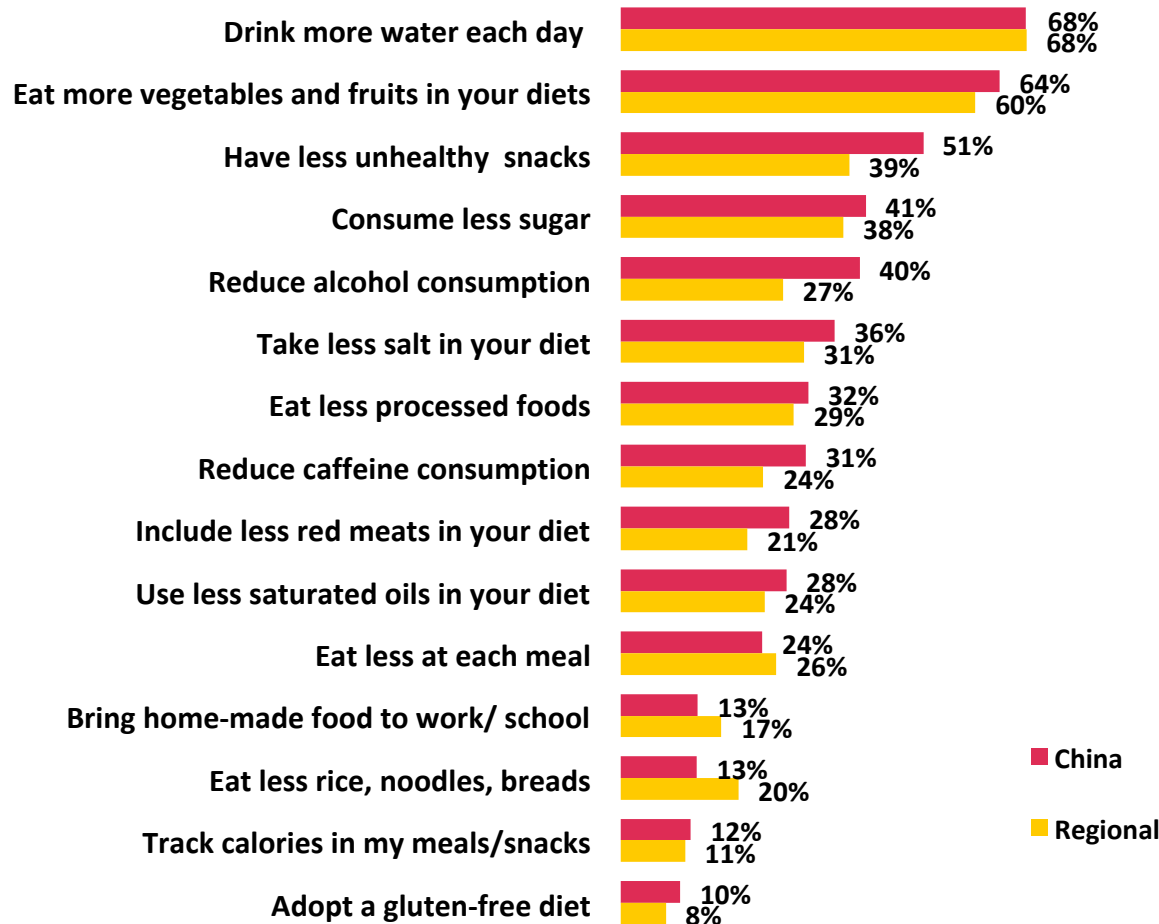
Wanting to feel fitter (95%), look better (94%) and have better general health (92%) are the main reasons for wanting to lose weight regardless of BMI. Among those who are pre-obese or obese, pressures from family (72%) and doctor (59%) are stronger reasons to lose weight.

Reasons for wanting to lose weight – by BMI



Basics of drinking more water (68%) and eating more fruits and vegetables (64%) are still the main healthy eating habits practiced by adults in China. Compared to regional averages, more Chinese adults say they are trying to have less unhealthy snack (51% vs. 39%), consume less sugar (41% vs. 38%) and reduce alcohol consumption (40% vs. 27%).

Healthy food habits trying to put into action



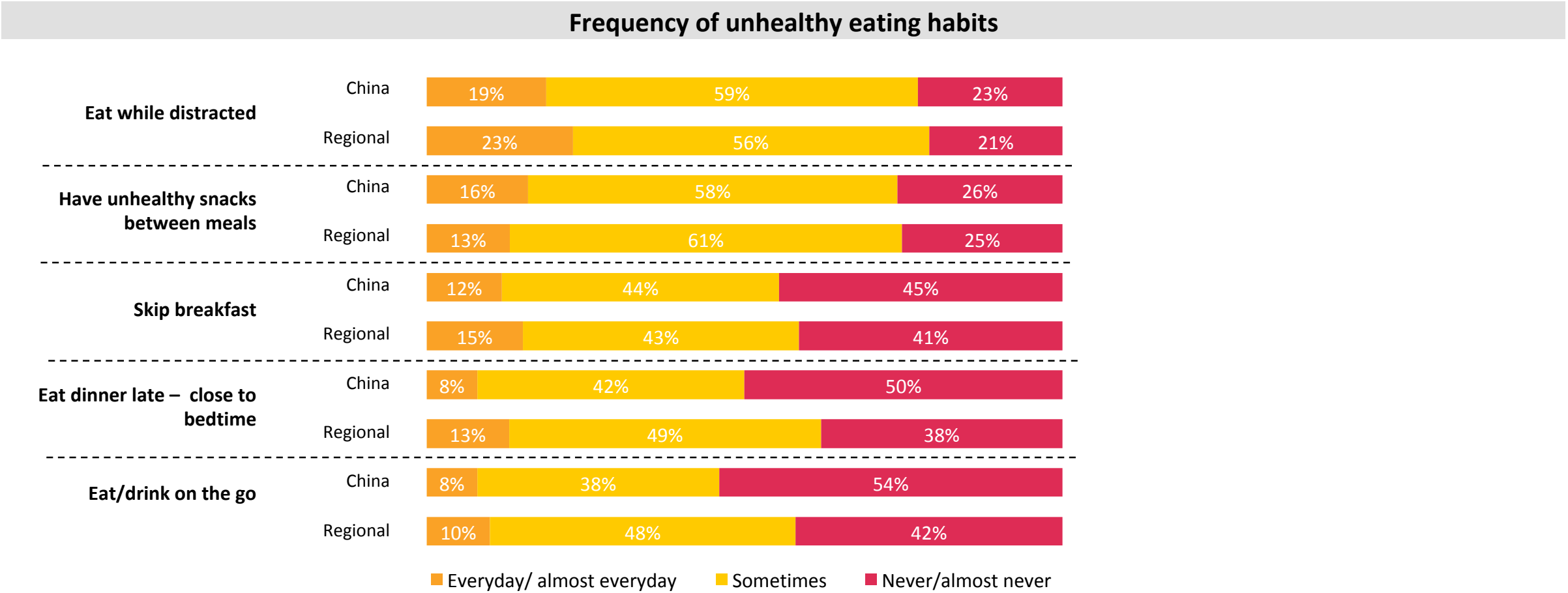
Differences by age/gender

Women tend to practice these more than men:

- Eat less at each meal (26% vs. 22%)
- Bring home-made food to work/ school (17% vs. 10%)

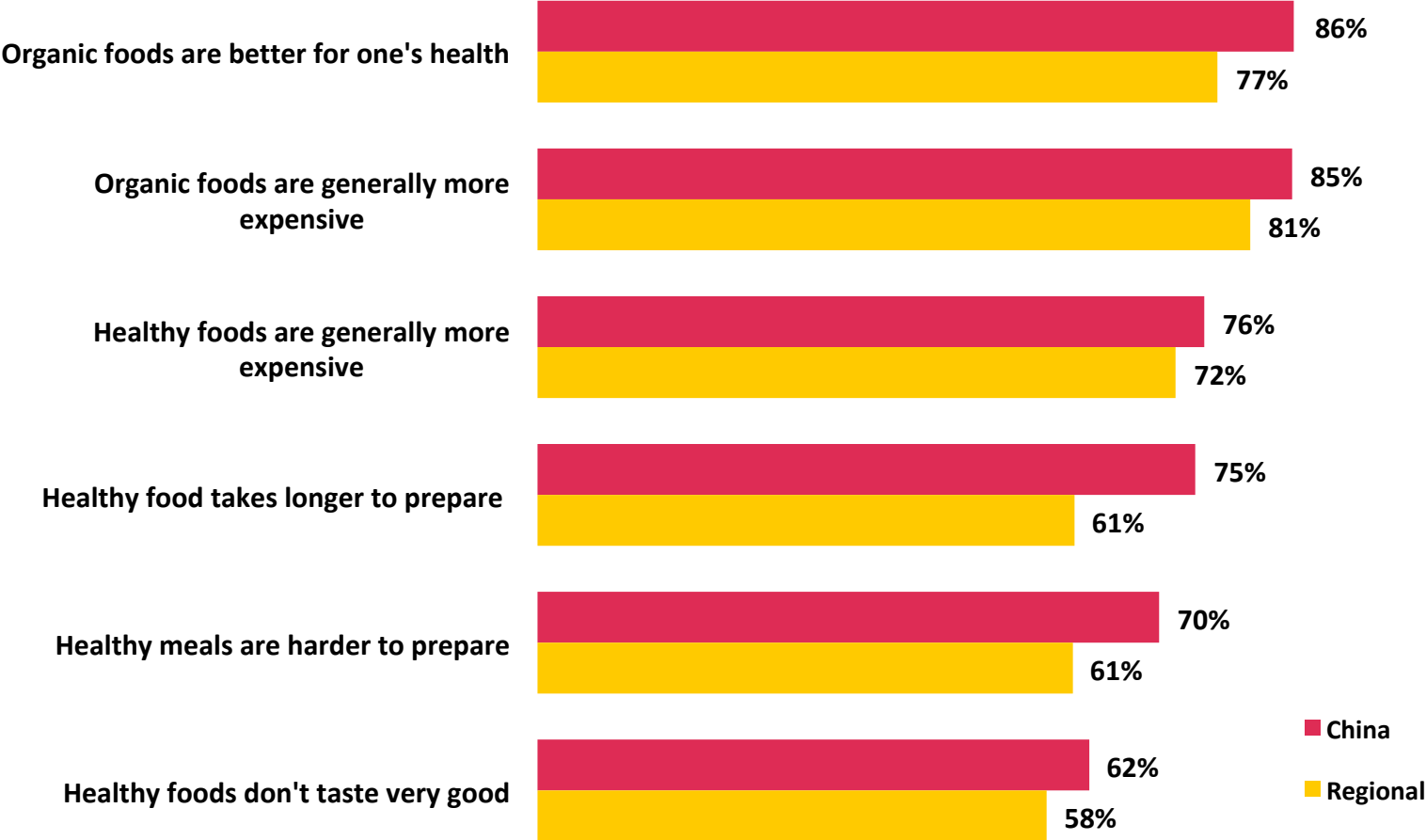
More men say they are reducing alcohol consumption (47% vs. 32%) than women

The most often mentioned unhealthy eating habit is “eating while distracted” in China (77%) and across the region (79%). This unhealthy eating habit may be hard to break given the high and increasing ownership of smartphones and other screen devices. 74% of adults in China also admit eating unhealthy snacks in between meals.



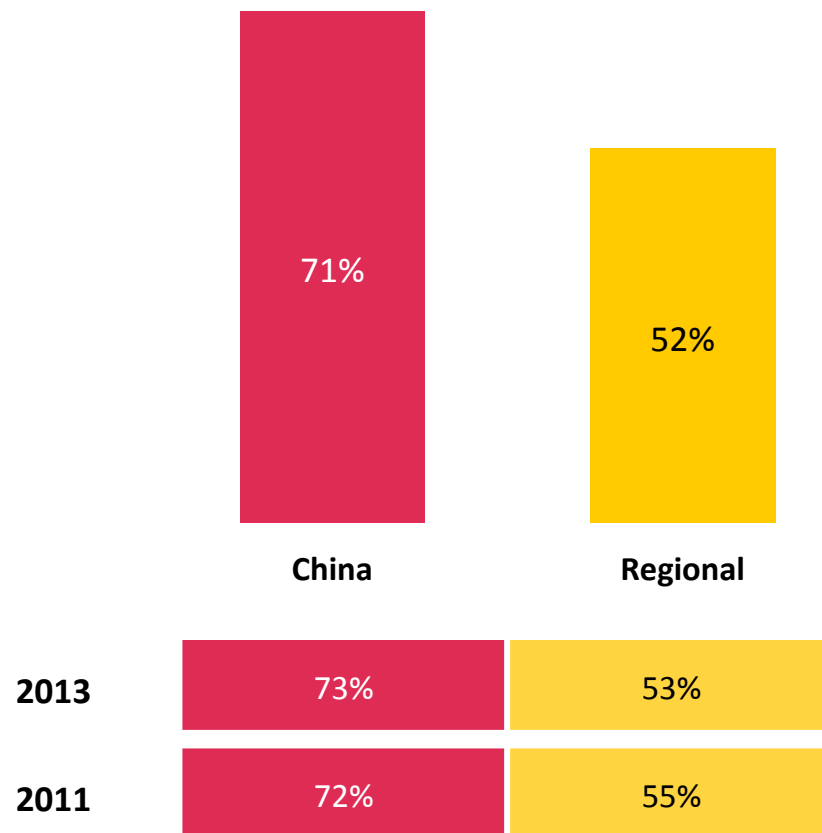
Although adults in China recognise that organic foods are better for health (86%) , they also find these to be more expensive (85%) – stronger beliefs compared to regional averages. In a market plagued by tainted food scandals, it is likely that Chinese consumers find themselves paying the higher prices for imported organic foods. Most Chinese adults also believe that healthy foods are generally more expensive (76%), take longer to prepare (75%) and are harder to prepare (70%).

Perceptions toward healthy food
(Rated 6-10 on scale of 1 to 10)

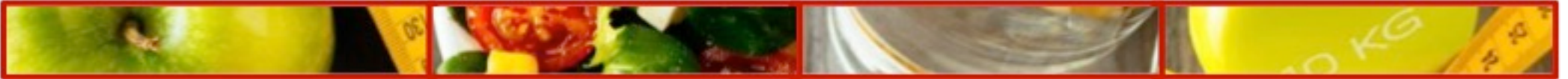


Majority of adults (71%) in China have had a medical check up in the past 12 months, much higher than regional average (52%).

Had medical check up in the past 12 months

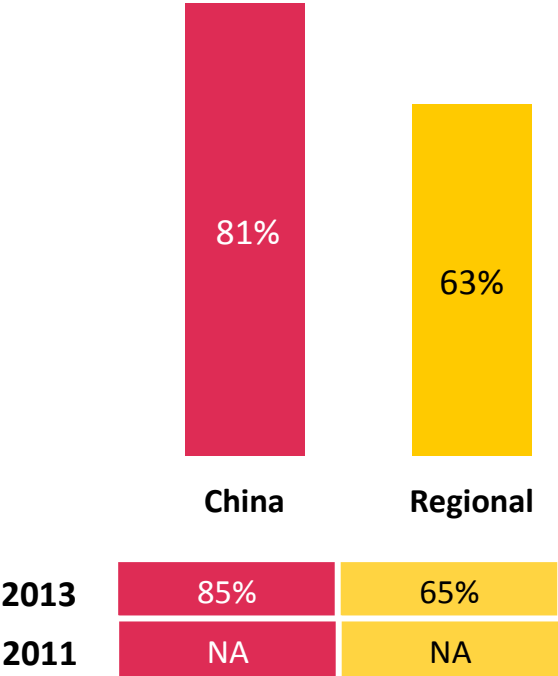


What are the other threats to healthy living?

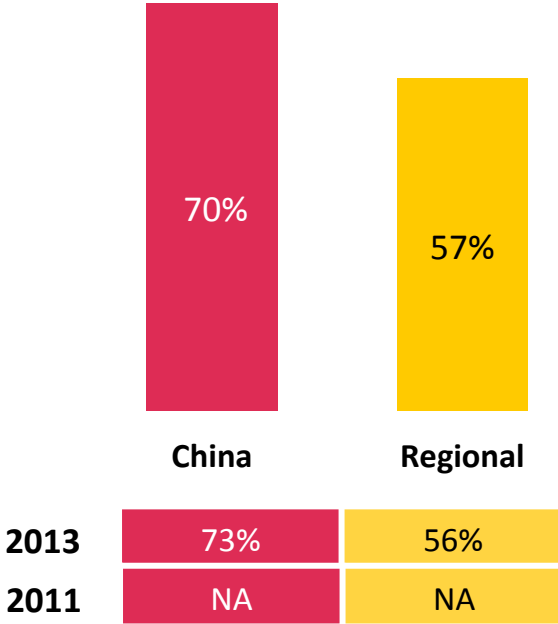


81% of adults in China find it hard to break the habit of spending a lot of time in front of screens. Though the figure is slightly lower compared to 2013 (85%), it is still much higher compared to regional average (63%). The majority (70%) also admit to being addicted to social media and online activities, again higher than the regional average (57%).

Agreement with ‘It’s hard to break the habit of spending too much time in front of computers/tablets, televisions/mobile phone’
(Rated 6-10 on scale of 1 to 10)



Agreement with ‘Social networking / spending time online is becoming addictive for me’
(Rated 6-10 on scale of 1 to 10)



In China, there is much higher awareness of the negative impact of electronic device use on health –preventing sufficient exercise (83%), preventing sufficient sleep (79%) and affecting posture (76%). Despite this, Chinese adults spend long hours on the internet with an average of 4 hours per day in China spent on the internet in terms of non-work usage. This is much longer than the regional average of 3 hours.

Hours spent on the internet per day - Average



Differences by age/gender

Men understand more strongly than women the negative impact of electronic device use on their sleep (81% vs. 77%) and posture (78% vs. 73%).

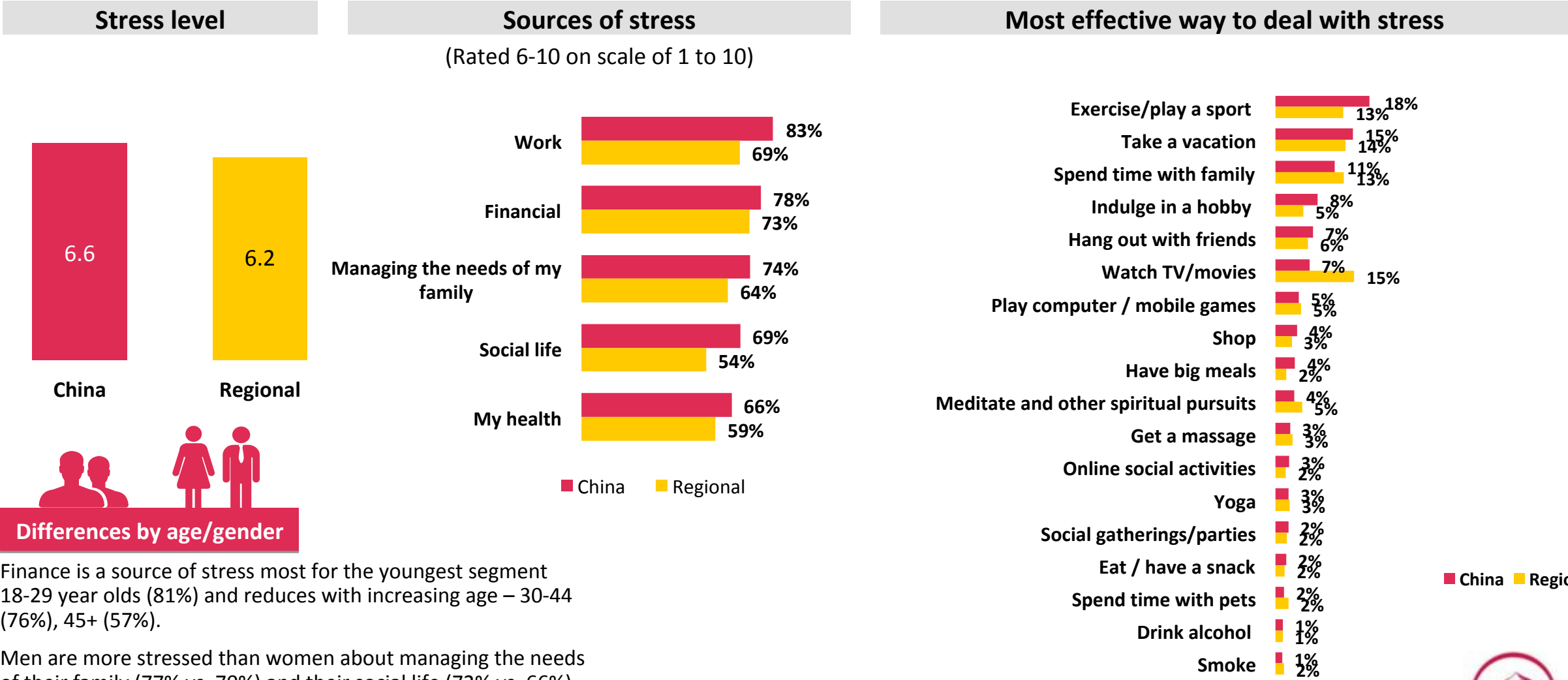
Impact of electronic device use on health

(Rated 6-10 on scale of 1 to 10)

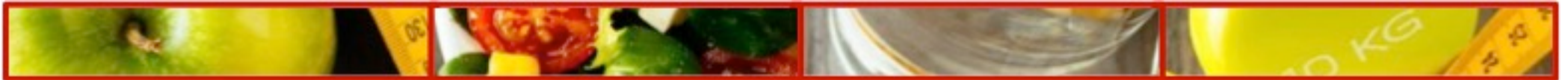


China Regional

The stress adults in China feel are a little higher than the regional average (6.6 vs. 6.2). The key sources of stress are work (83%), finance (78%) and managing family needs (74%). In China, “exercising or playing a sport” and “taking a vacation” are seen as good ways of dealing with stress.



What about the 2016 Healthy Living Index scores?

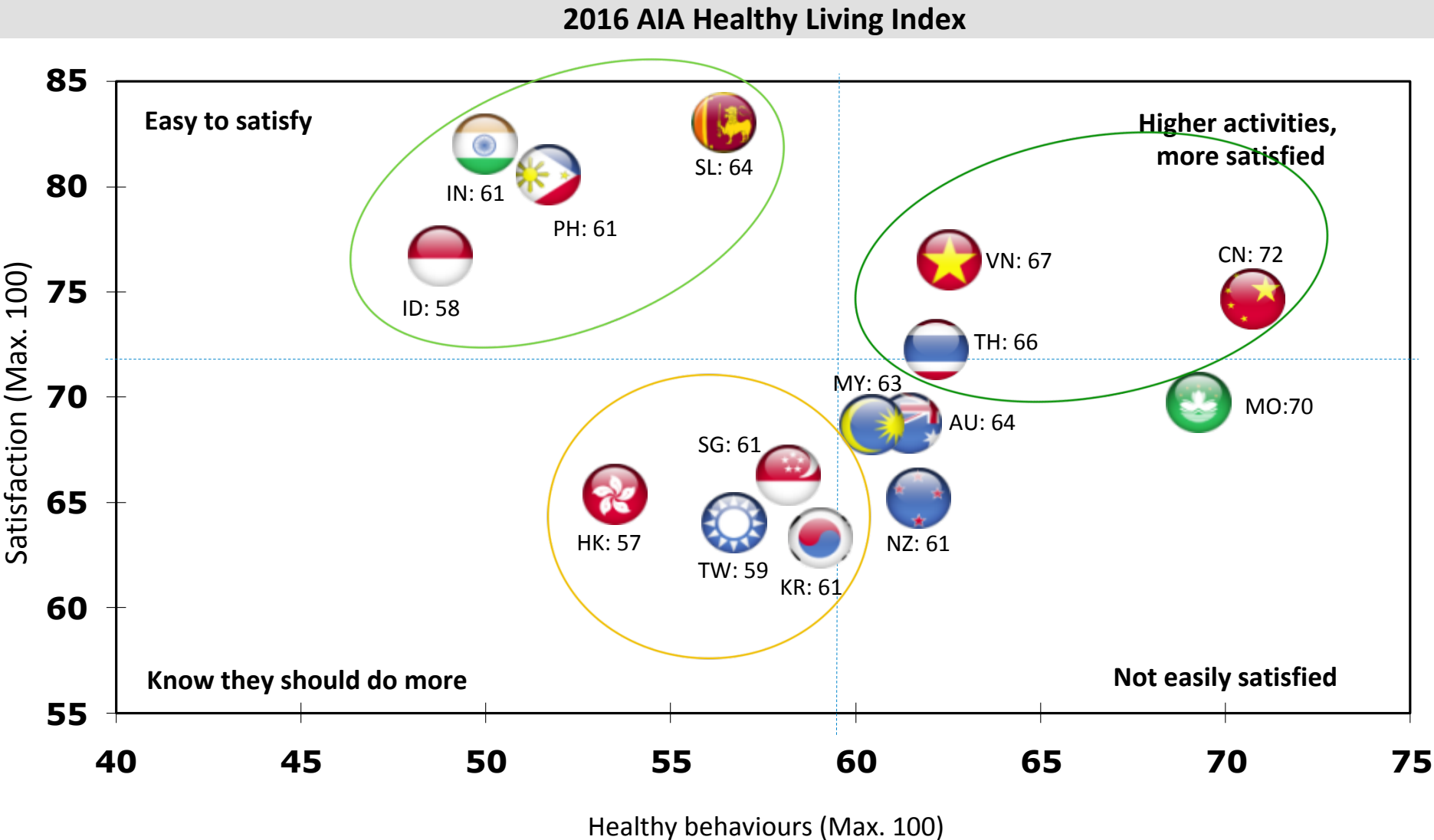


China is among 7 markets (especially Thailand) that have noticeable improvements in their HLI scores. With a score of 72, China is now in 1st place in terms of the Healthy Living Index. However, there is still room for improvement.

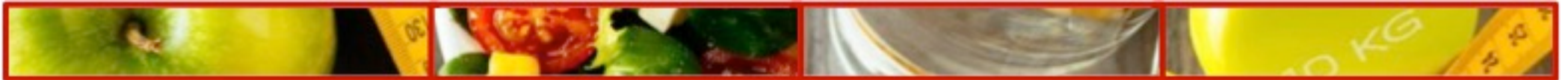
Healthy Living Index Scores

2016 RANK	Market	2011	2013	2016	
1	China	68	69	72	↑
2	Macau	70	69	70	
3	Vietnam	68	71	67	↓
4	Thailand	57	61	66	↑
5	Sri Lanka	na	63	65	
6	Australia	59	62	64	↑
REGIONAL AVERAGE		61	62	64	↑
7	New Zealand	58	61	63	↑
8	Malaysia	62	61	63	
9	Korea	55	57	61	↑
10	India	61	58	61	
11	Singapore	57	59	61	↑
12	Philippines	63	61	61	
13	Taiwan	59	58	59	
14	Indonesia	55	55	58	↑
15	Hong Kong	57	58	57	

Healthy Living Index is a composite measure derived from satisfaction with own health and extent of various healthy behaviours, shown on the two axis in the chart below. China falls in the same “higher activities, more satisfied” quadrant with other developing markets in Asia like Vietnam and Thailand where adults are leading relatively healthier lives and seem more satisfied with their own health. On the other hand, adults in markets like the Philippines, India, Indonesia and Sri Lanka tend to be more easily satisfied with their own health despite below average healthy behaviours.



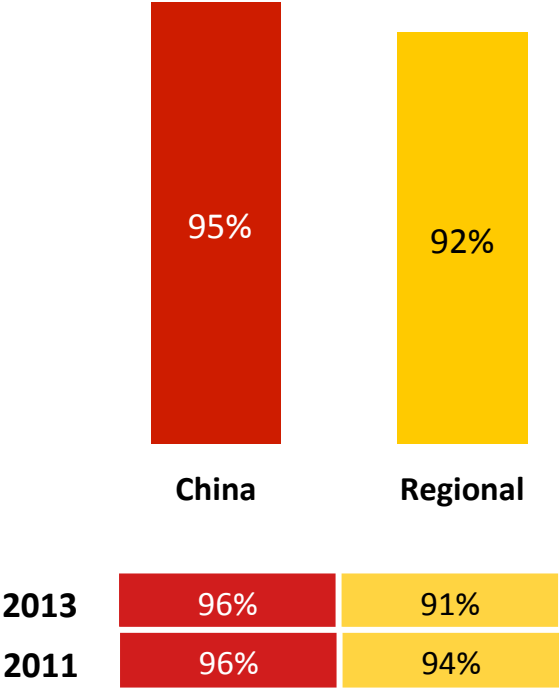
Can Do More? What motivates & deters healthy living?



95% of adults in China acknowledge there are definitely things they can do to improve their health and 90% also admit some things they do are not good for their health. Both percentages are higher than the regional averages (92% and 84% respectively). However, such awareness has not been turned into action.

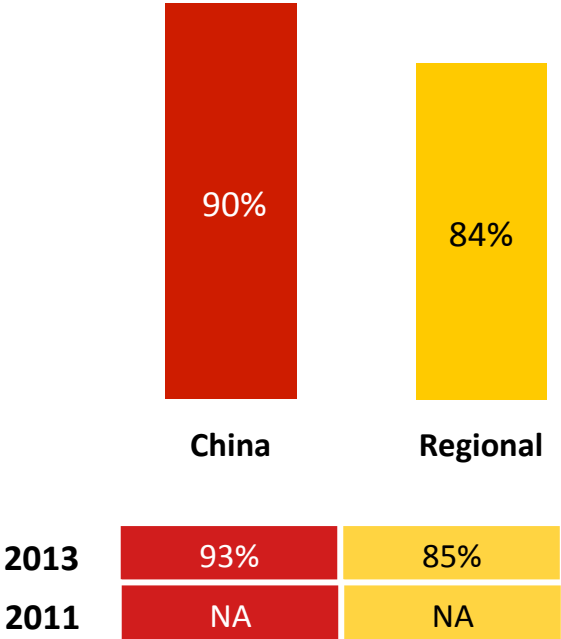
Agreement with ‘there are definitely things I can do to improve my health’

(Rated 6-10 on scale of 1 to 10)



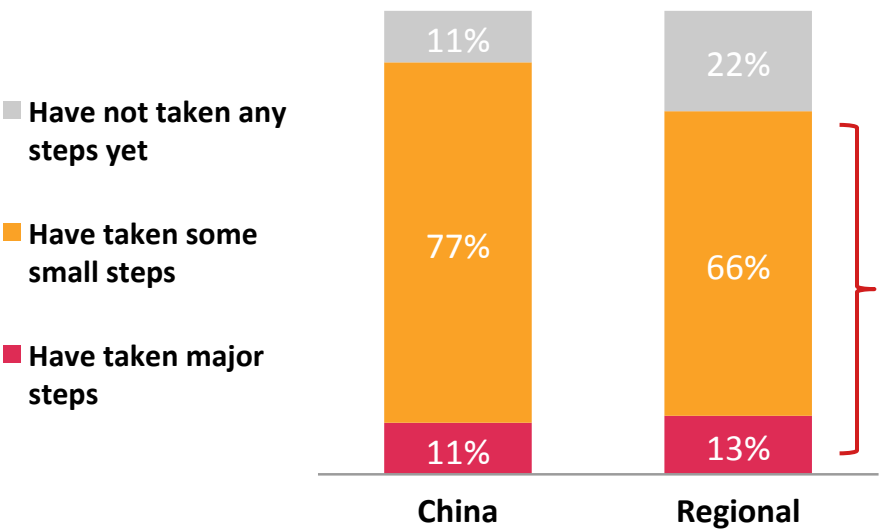
Agreement with ‘I know some things I do are not good for my health’

(Rated 6-10 on scale of 1 to 10)



While only 11% in China have taken major steps towards healthy living, 77% say they have taken some small steps in that direction. Among those who have taken some steps towards healthy living – major or small - the key reason is simply deciding that it was time to improve their health (88%) . 81% of adults also acknowledge taking small steps is better than not doing anything, amidst more reminders to be healthy these days (77%). Other reasons include seeing difference that healthy living made to a friend or family member (77%) and also because of having had a recent health scare (76% vs. 61% regional average).

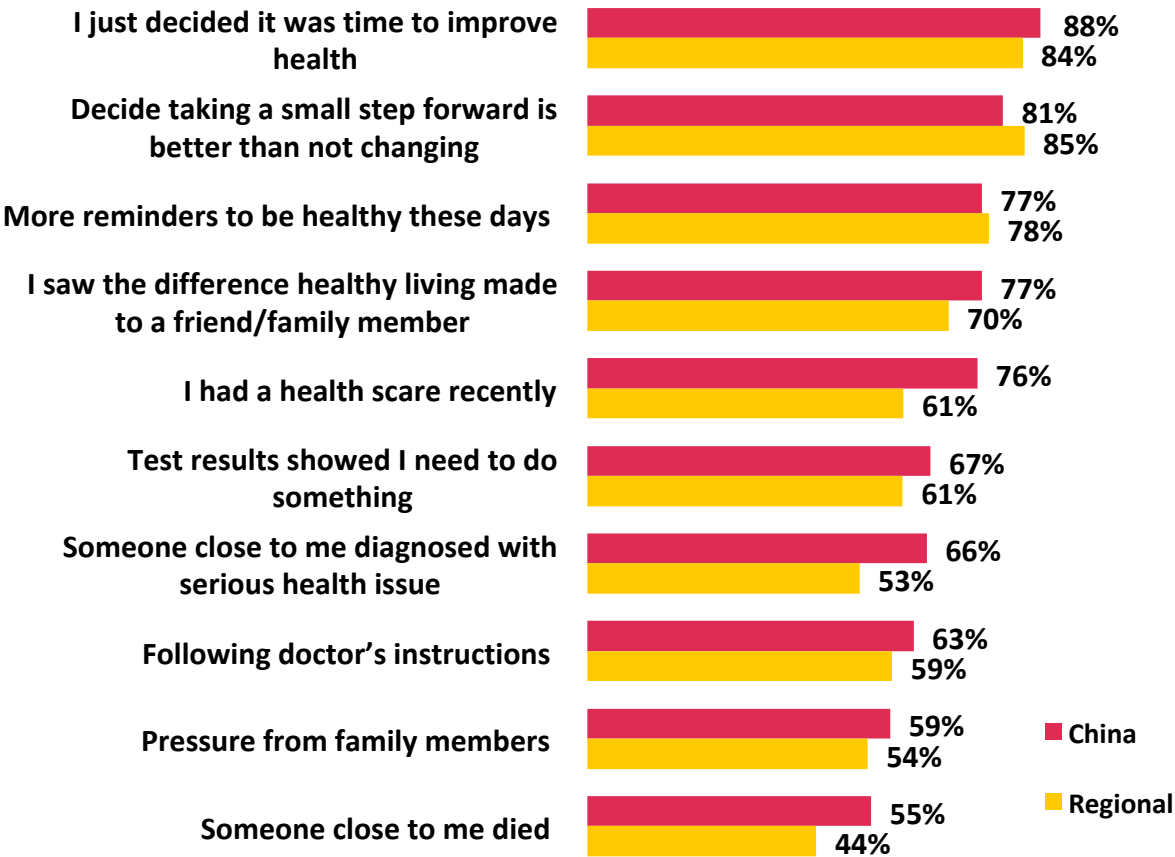
Taken steps toward living a healthier life?



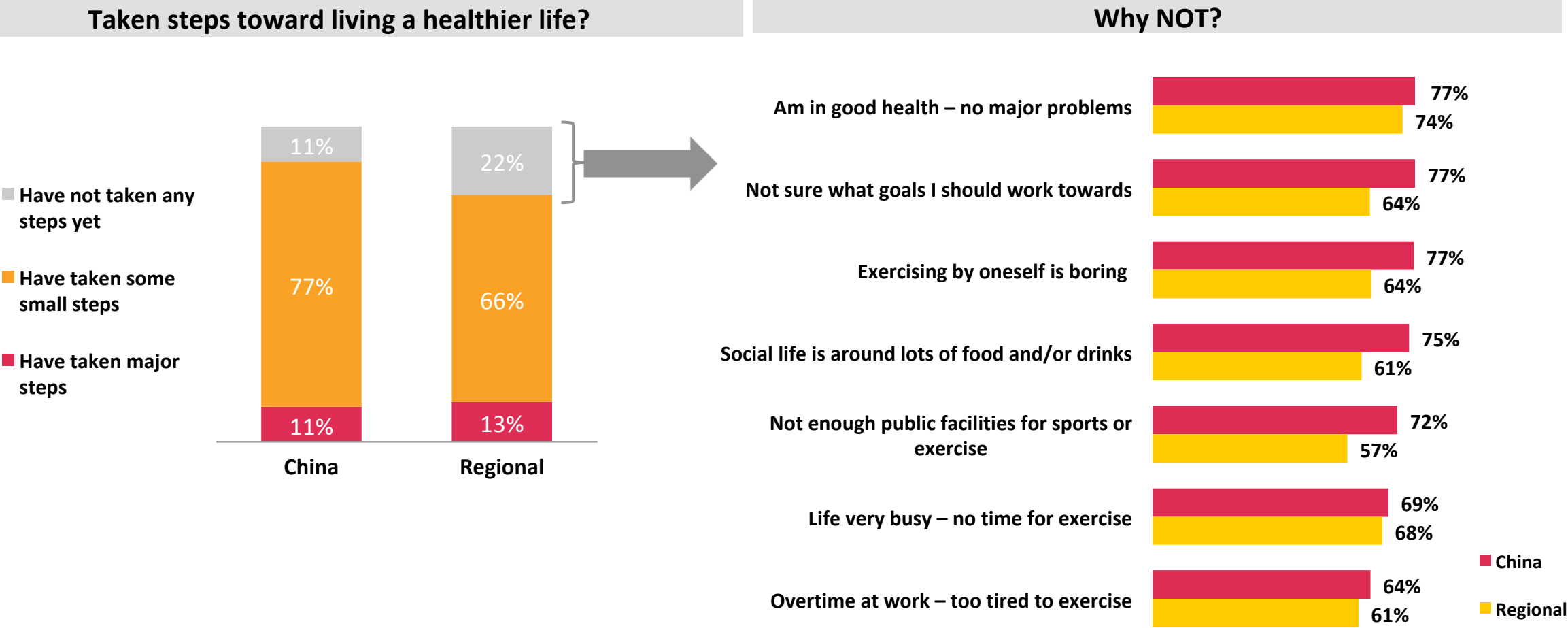
Differences by age/gender

Compared to women, men tend to be more influenced by outside forces – test results (64% vs. 49%), doctors (66% vs. 60%)

Why?

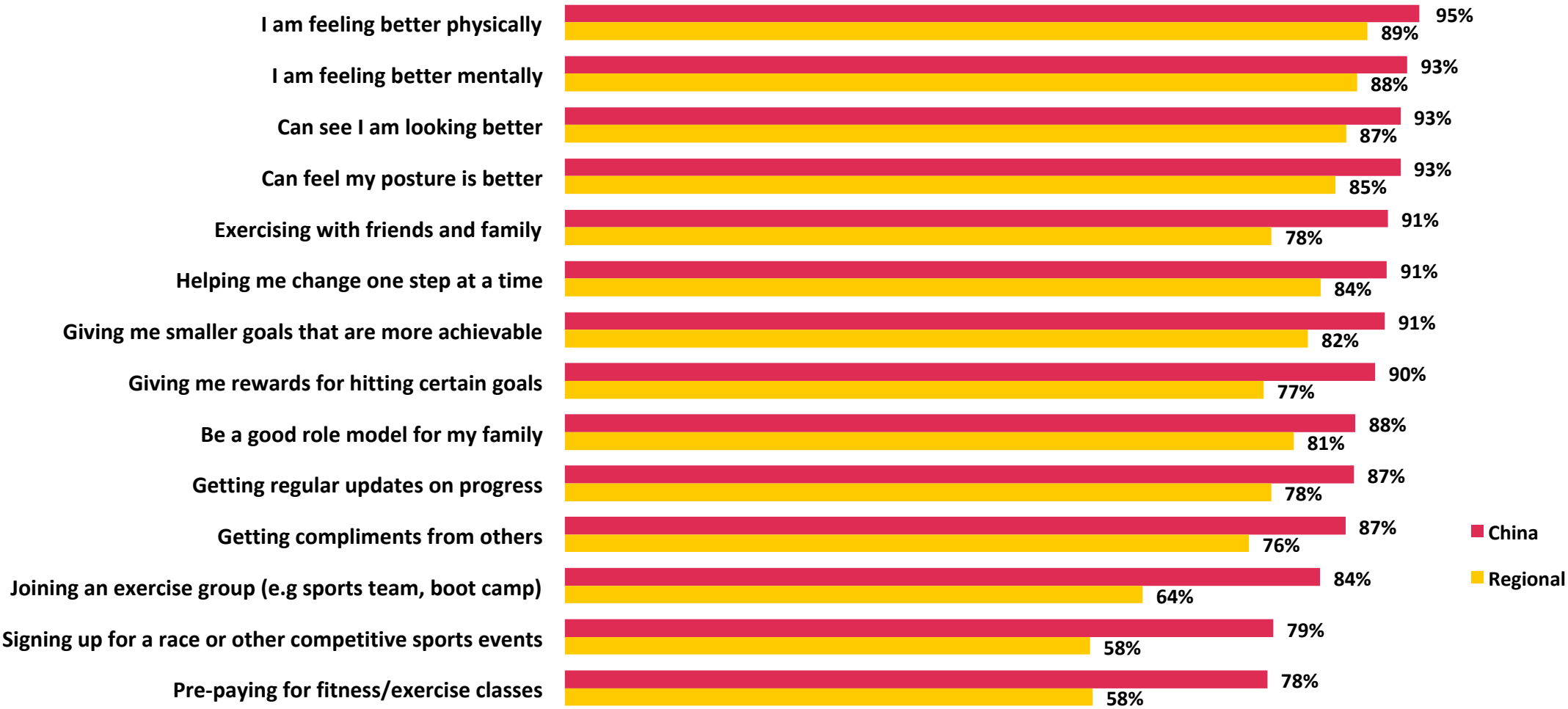


Among those who have not taken steps towards healthier living, 77% say this is because they are in good health. However, an equal percentage say it is because they don't know what goals to work towards and also because exercising by oneself is boring. 75% also say it's because social life often revolves around food and drinks and lack of public facilities for sports or exercise (72%) – the latter is much higher than regional average (57%).



Adults in China say they can be motivated to exercise or eat healthier by a range of reasons, all of them to a greater extent compared to regional averages. These include tangible effects such as feeling better physically (95%) and mentally (93%), looking better (93%) and having better posture (93%). Exercising with friends and family provides motivation too (91%) along with having smaller and more achievable goals (91%) which helps them to change one step at a time (91%) and they welcome rewards for reaching goals (90%).

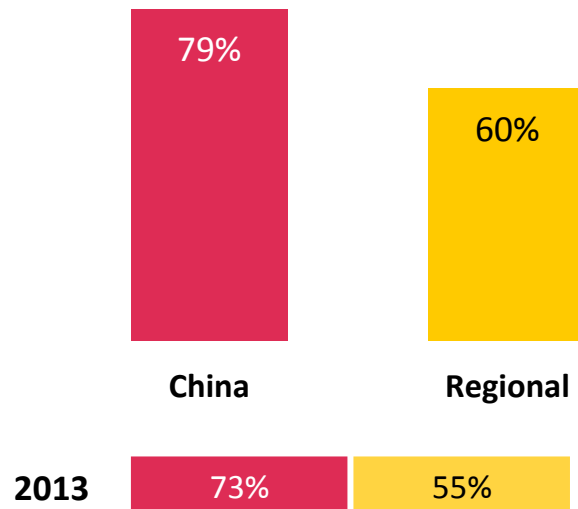
Motivations for exercising more or eating healthier



79% of adults in China find the internet and mobile devices useful in helping them “keep track of and motivated to exercise”, much higher than the regional average (60%). Many also rely on the internet for information and advice on healthy food (83%) – more so than the regional average of 67%.

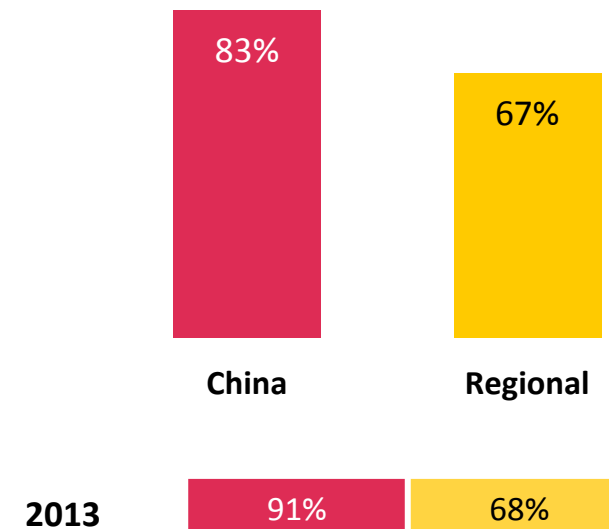
Agreement with ‘I find that the internet/ mobile phones are useful to help me keep track of and to stay motivated to exercise’

(Rated 6-10 on scale of 1 to 10)



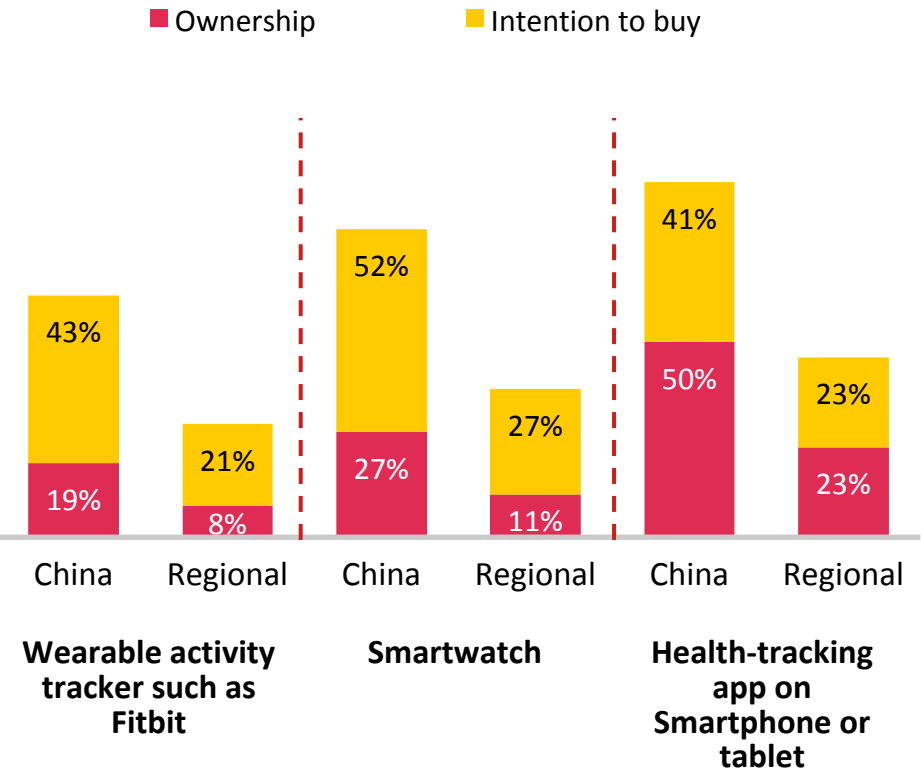
Agreement with ‘I rely on the internet for information and advice on healthy foods’

(Rated 6-10 on scale of 1 to 10)

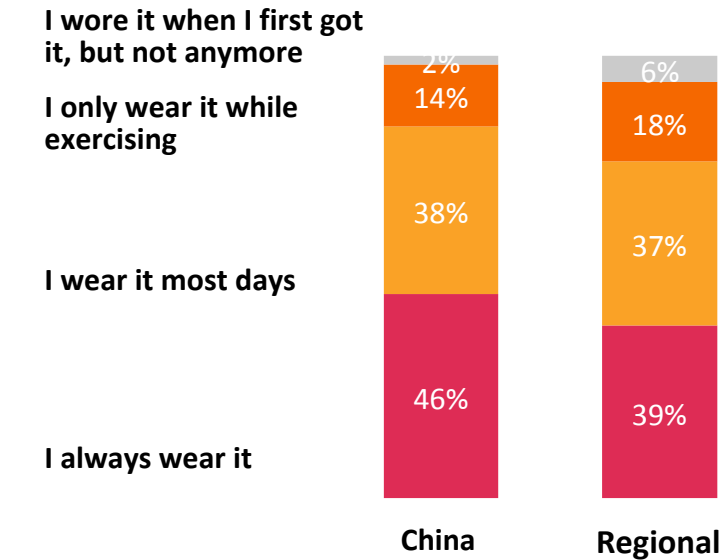


Current ownership of activity trackers (19%) and smart watches (27%) is higher in China compared to regional averages (8% and 11%). There is also significant desire to own these devices (43% and 52% respectively), again much higher than regional averages (21% and 27%). Half of China’s adults say they use health tracking apps. Owners of such devices or users of apps in China regard these as useful tools to becoming healthy (87%) and such device owners tend to wear the device always or on most days (84%).

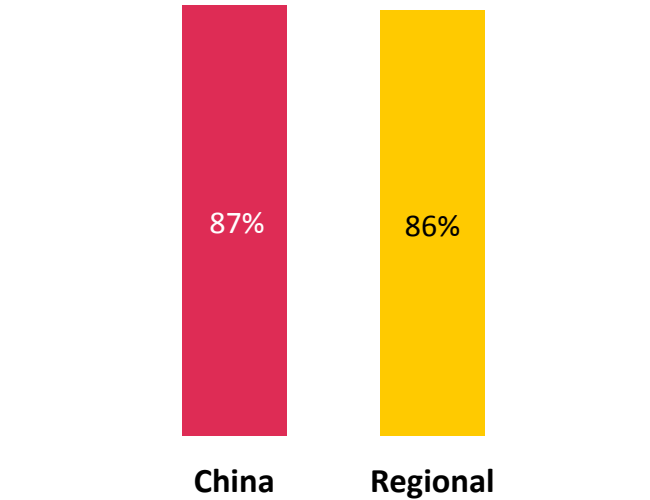
Ownership of/ Intention to own devices/apps to monitor activity



Frequency of using devices/apps to monitor activity



Usefulness of using devices/apps in helping you to become healthy
(Rated 6-10 on scale of 1 to 10)

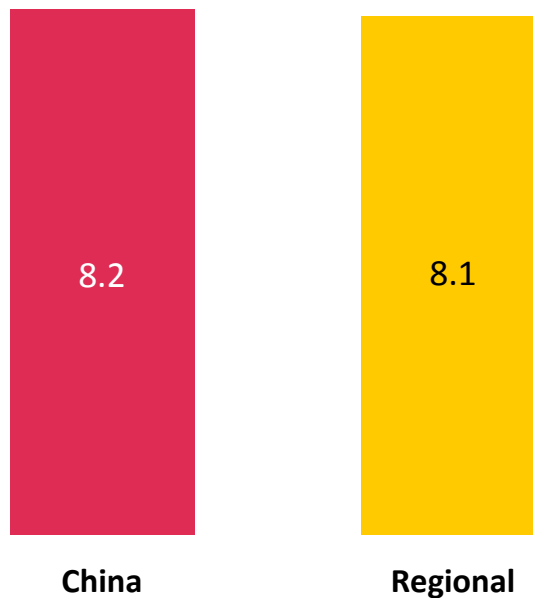


What are attitudes toward children's health?



In China, as with other markets in the region, satisfaction with children's health tends to be higher (8.2) than adults' rating of their own health (7.5).

Satisfaction with child's health – Average



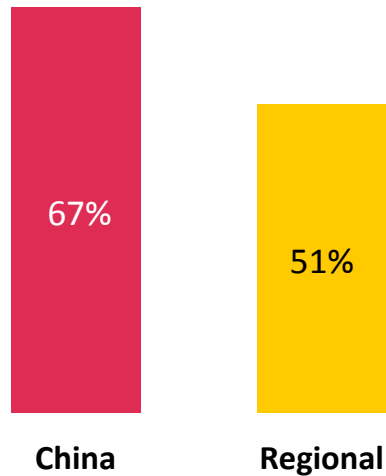
Adults – satisfaction with own health



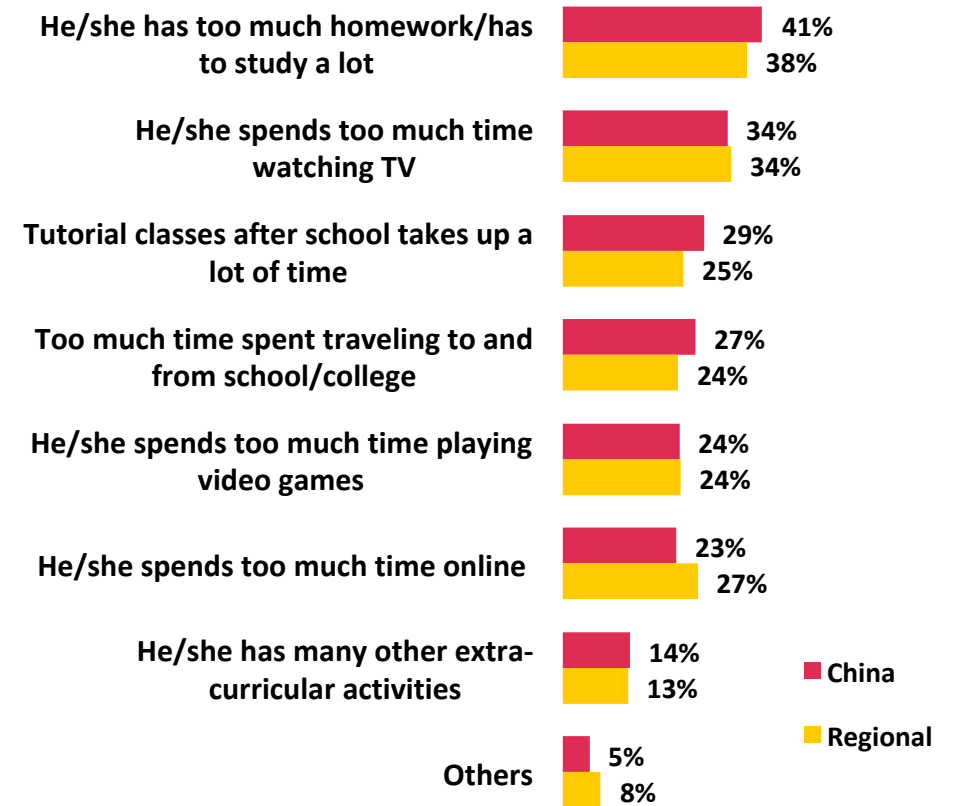
67% of parents in China say their children don't get enough exercise -- much higher than regional average of 51%. This is seen as mainly because of homework (41%) and time spent watching TV (34%). Other reasons include time spent attending tutorials after school (29%) and time spent travelling to school (27%).

Agreement with 'child not getting enough exercise'

(Rated 6-10 on scale of 1 to 10)

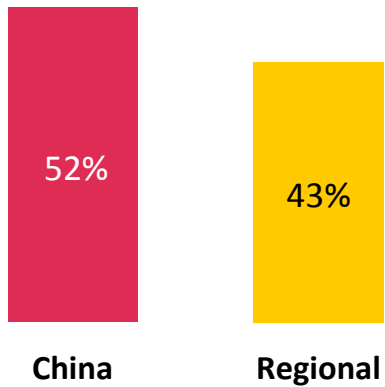


Reasons for not getting enough exercise

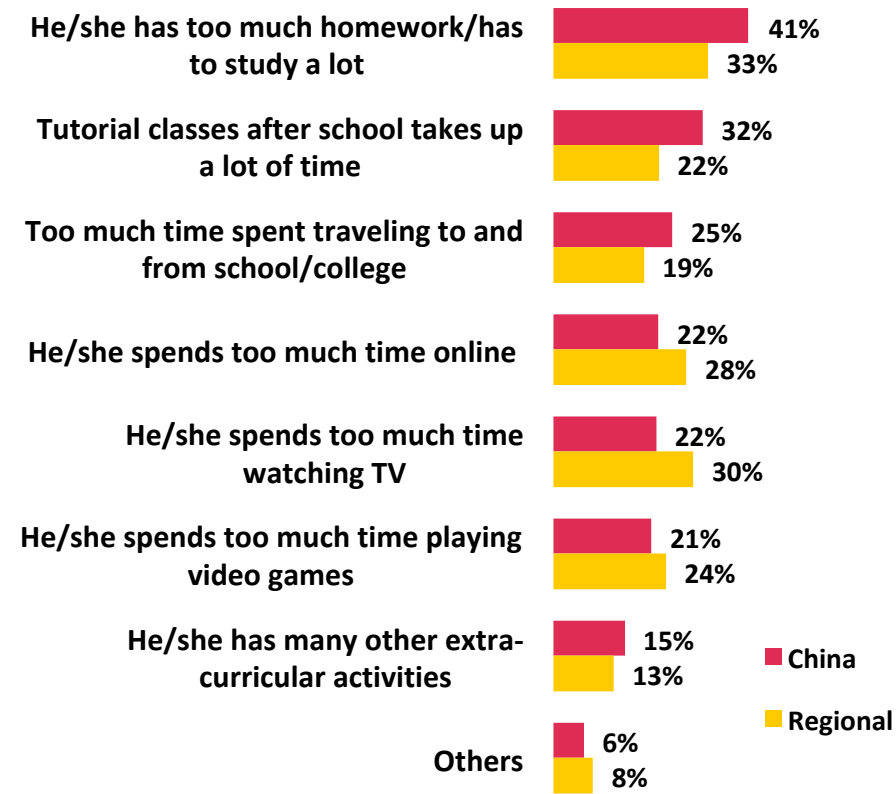


Parents in China also feel their children are not getting enough (52%), more so than the regional average (43%), for the same reasons cited previously. It seems parents in China generally find school pressure – too much homework (41%), attending after school tutorial classes (32%) and time spent travelling to and from school (25%) – worse than regional averages (33%, 22% and 19% respectively).

Agreement with ‘child not getting enough sleep’
(Rated 6-10 on scale of 1 to 10)

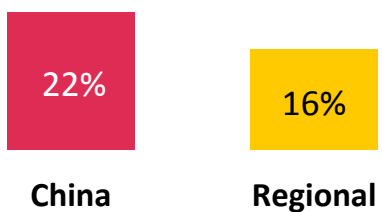


Reasons for not getting enough sleep

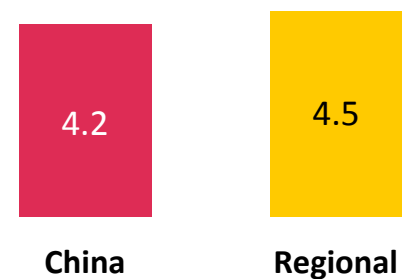


22% of Chinese parents would like their child to lose weight, slightly higher than regional average of 16%. On average, they would like their child to lose a significant 4.2 kgs.

Agreement with 'want child to lose weight'



How much weight want child to lose – Average Kg



Conclusions



China: 2016 AIA Healthy Living Index – Key Findings & Conclusions

China emerged as the #1 among the 15 markets in the region

As a result of the increases in satisfaction and behaviours among Chinese adults, the Healthy Living Index score in China has increased from 69 to 72. With a decline in score for the previous front-runner Vietnam, China is now in 1st place among the 15 markets in the region.

Chinese adults are more satisfied with their health nowadays

There is an improvement on satisfaction among adults in China with their own health from 6.9 out of 10 in the last wave to 7.5 currently. Despite this though, 71% of Chinese adults still feel that their health is not as good as it was 5 years ago.

52% in China would like to lose a significant 6.6 kilos

Based on BMI, 26% of adults in China are pre-obese and 6% are obese, but 52% of adults in China would like to lose weight. Condition of most concern in this market is also obesity or being overweight.

On average, adults in China would like to lose a significant 6.6 kgs. Desire to feel fit (95%), look better (94%) and have better health (92%) are the main reasons for wanting to lose weight – these personal motivations are more important reasons than pressure from others such as family and doctor. Given the poor healthy eating habits and excessive time spent in front of screens, the weight loss goals will be hard to achieve without some help/change.

Food habits: Healthy eating habits are still limited to the basics of drinking more water (68%) and eating more fruits and vegetables (64%). Adults in China share the belief with their counterparts across the region that healthy foods are generally more expensive (76%), take longer to prepare (75%) and are harder to prepare (70%). More education is needed to inform Chinese adults about tasty and easy-to-prepare healthy alternatives. The most often mentioned unhealthy eating habit is “eating while distracted” (77%) - this may be hard to break given the high and increasing ownership of smartphones and other screen devices.

Sleep: There is an improvement in the sleep gap, 0.5 hours vs. 1.1 hours in 2013, now among the lowest in the region.

Exercise: 78% of Chinese adults say they exercise regularly, with an average of 4.4 hours per week spent on exercise. On both counts, this is better than the regional averages.

China: 2016 AIA Healthy Living Index – Key Findings & Conclusions

Internet addiction remains a modern day threat to healthy living

China has the largest pool of internet users globally and 81% of adults in China say they find it hard to break habit of spending a lot of time in front of screens. 70% also admit an addiction to social media and online activities. They spend an average of 4 hours per day on the internet in terms of non-work usage, longer than the regional average of 3 hours. Adults in China do recognise the negative impact of spending too much time online – less time for exercise (83%), less time for sleep (79%) and affecting posture (76%).

Health concerns in China are lower than regional averages

In China, conditions of most concern are being overweight (66%), suffering from depression (66%), cancer (65%), having a heart attack (64%) and having respiratory illness (63%). Specific cancer types of greatest concern are stomach cancer and lung cancer among men and breast, stomach cervical and cervical cancer among women. With China the hardest hit by the global surge in cancer according a report by the WHO, greater awareness of the various cancer types would probably be beneficial. Incidence of having medical check-ups though is higher than the regional average (71% vs. 52%)

Adults in China tend to feel more stressed than the regional average (6.6 vs. 6.2 out of 10). With work pressures at the top of the list of causes of stress, employers can help reduce the stress levels of their employees .

High self-awareness on need to do more and consumers welcome help to do more to improve their health

Adults in China are not hesitant in admitting that there are definitely things they can do to improve their health and that some things they do are not good for their health. While only 11% of adults in China have taken major steps towards healthy living, 77% say they have taken some small steps in that direction.

What will motivate them to take major steps to healthy living? In addition to having smaller, achievable goals, adults in China are motivated to exercise more or eat healthier by feeling better physically (95%) and mentally (93%), looking better (93%) and having better posture (93%). Exercising with friends and family provides motivation too (91%) along with being rewarded for reaching goals (90%).

There are also many barriers to taking more steps to healthier living- not knowing what goals to work towards, boredom when exercising alone, a social life that revolves around food and/or drinks and the lack of public facilities for sports or exercise. The government needs to provide more or promote existing facilities for sports/exercising.

China: 2016 AIA Healthy Living Index – Key Findings & Conclusions

Despite high satisfaction on children's health, parents in China still feel their children don't get enough sleep and exercise

Parents tend to be more satisfied with their children's health than their own health. In China, parents rate their children's health 8.2 out of 10 compared to 7.5 rating for their own health. 22% of parents would like their children to lose a substantial 4.2 kgs in weight.

As with adults themselves, parents feel their children also don't get enough sleep and exercise. The key reasons are school-related pressure – too much homework, travel time to school, attending after-school tutorials – and also time spent watching TV. Parents should regulate the amount of time their children spent watching TV.

Schools and parents should help address the issue of too much homework. Schools and parents should also work to ensure children incorporate exercise into their lives at an early stage which would mean healthier lives thereafter.

AIA Vitality can definitely help consumers with what they want and need – customised advice, activity tracker device, helping them set goals, updating them on progress, regular motivation and rewards.

