



WHITEPAPER

Women's Health & Beauty Needs Across Life Stages in APAC

Consumer Insights from China, Korea and Indonesia

Foreword

Women's health and beauty needs are evolving. Across Asia Pacific, and particularly in China, we are seeing a fundamental shift from reactive care to proactive wellbeing. Consumers are no longer waiting for problems to emerge. They are investing earlier, seeking solutions that help them maintain confidence, vitality and quality of life throughout every stage of their journey.

This whitepaper explores how women's priorities change across four life stages, from Active Life & Career to Healthy Ageing. While their needs evolve, one aspiration remains constant: the desire to stay confident, capable and in control for longer.

For our industry, this presents an important opportunity. Beauty, wellness and healthy ageing can no longer be viewed as separate categories. Consumers increasingly expect integrated, science-backed solutions that support them through life's transitions, with benefits that are relevant, effective and trusted.

Our challenge is clear: to innovate beyond products and create solutions that address the changing needs of women at every life stage. Those who succeed will not only meet today's expectations but help shape the future of women's wellbeing across the region.

I hope the insights in this report inspire new thinking, meaningful innovation and deeper collaboration as we work together to support women in living healthier, more confident and more vibrant lives.

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01 Introduction

Wellness in China is no longer about fixing what's wrong. It is about preserving what matters most.

Chinese women are approaching their health with a forward-looking mindset; they are no longer waiting for concerns to become serious before acting. Instead, they are **investing proactively in the future version of themselves** — through daily habits, beauty routines and supplements.

Their aspiration comes down to one question:

“What can I do today to support the person I want to be tomorrow?”

Four Life Stages, One Wellness Journey

How do women's perceptions, behaviours and unmet needs evolve as they move through life, and so how can we best serve them at each stage? This study set out to answer exactly that. It focuses on the **China** findings, outlining what sets its consumers apart from those in South Korea and Indonesia.



That journey unfolds across four life stages, which anchor this study: Active Life & Career (Ages 20–39), Family Planning & Motherhood (Ages 20–39), Midlife Transition (Ages 40–55) and Healthy Longevity (Ages 55+) — each with its own priorities, tensions and aspirations.

1.1 Chinese consumers don't wait for health problems to emerge

Among the APAC markets studied, China demonstrates the strongest prevention-oriented mindset. Rather than waiting for health concerns to become serious, women are more likely to take action early to preserve their wellbeing, appearance and quality of life over the long term.

With the highest proactive wellness index in the region (34%), Chinese consumers consistently prioritize preventive behaviours across multiple dimensions of health, particularly skin and appearance, physical wellbeing and feminine health.

This behaviour reflects more than simple health consciousness. Chinese women increasingly view wellbeing as an asset that should be actively maintained, not repaired after problems emerge. Prevention is therefore not driven primarily by fear of illness, but by the aspiration to stay healthy, capable and at their best for longer.

EXHIBIT 1 China leads APAC in prevention-led wellness, driven by aspiration

Proactiveness index by concern

Index (act on early signs + already managing daily); T2B

	China	Korea	Indonesia
Overall	34.3%	30.8%	32.6%
Skin / hair / appearance	42.7%	37.6%	39.8%
Physical wellbeing	40.5%	32.8%	37.3%
Feminine health	37.8%	34.6%	29.6%



Chinese women act early on what they want to achieve — **looking good** and staying healthy. This points to an opportunity to position and frame a need as an aspiration, helping them move towards the person they want to become, rather than away from a problem.

For China, beauty is where aspiration meets urgency

For Chinese consumers, beauty is unique in that it is both highly aspirational and visibly disruptive; it is ranked as 2nd most disruptive daily concern (vs. 8th in Korea, 6th in Indonesia). This rare combination is why beauty becomes the natural entry point for a lifelong, prevention-led relationship.

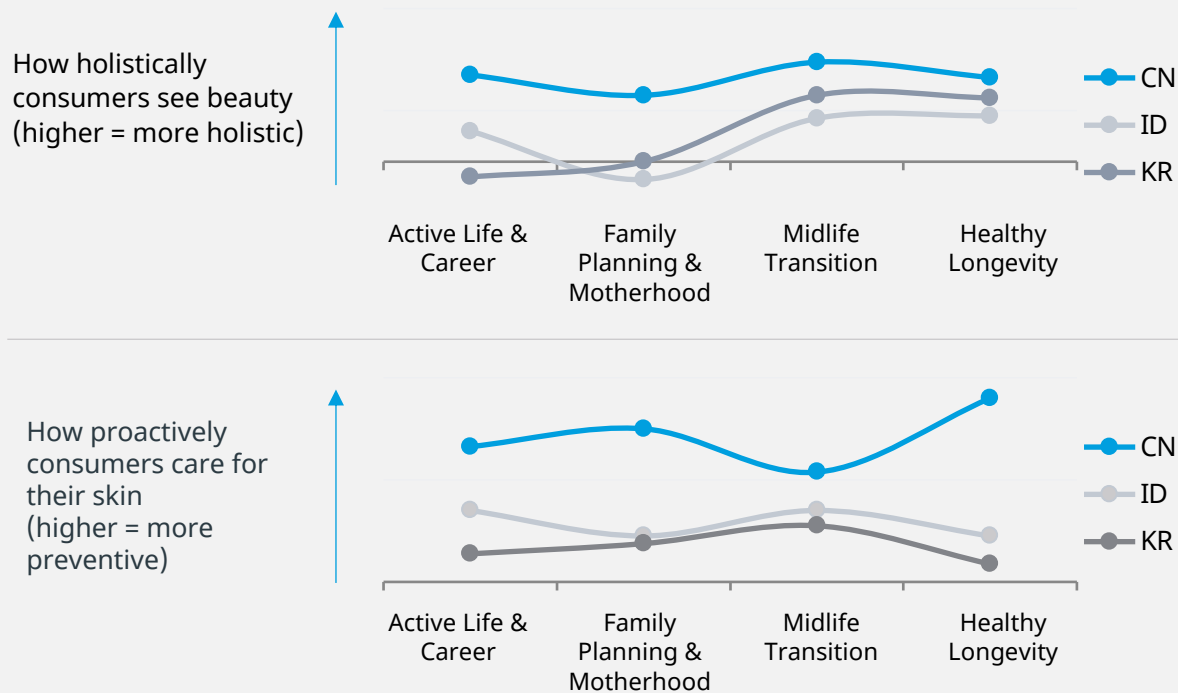
1.2.1 How beauty is being redefined: from correction to prevention...

Chinese women's prevention mindset extends naturally into beauty. Increasingly, beauty is viewed not as a response to visible concerns, but as an ongoing investment in maintaining long-term health, vitality and appearance.

Consumers are redefining beauty across three dimensions: from appearance to holistic wellbeing, from corrective solutions to preventive care, and from surface treatments to broader lifestyle support.

What distinguishes China is that this new definition is supported by action. Across every life stage, women place a higher priority on beauty and demonstrate more proactive beauty-management behaviours than their regional peers. Beauty is therefore not simply an aspiration, but a sustained practice.

EXHIBIT 2 Whatever her age, Chinese consumers care for her beauty more holistically and more proactively than her regional peers



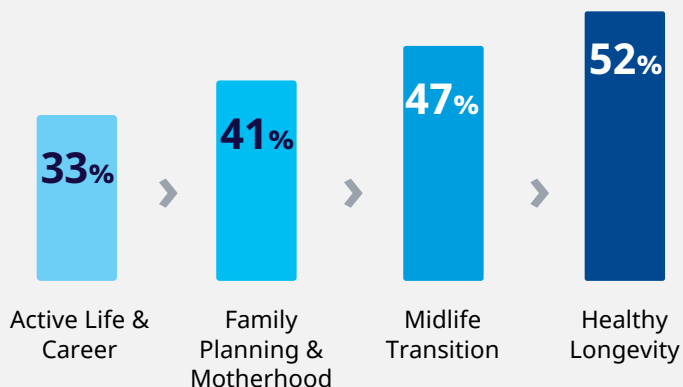
As beauty becomes more closely connected to overall wellbeing, consumers are increasingly open to solutions that support appearance from the inside out. This sets the stage for the next evolution of preventive beauty: beauty-from-within (next page).

1.2.2 ...and preventive beauty starts early and deepens with age

For Chinese women, beauty-from-within is not a niche behaviour reserved for older consumers. It begins early in adulthood and becomes increasingly important with each life stage, reflecting a growing belief that maintaining appearance starts with supporting health from within.

EXHIBIT 3 'Beauty-from-within' rises with age

% of Chinese women considering internal support (supplement intake) for long-term prevention



In China, consumers increasingly viewing internal health as the foundation of long-term appearance. Acceptance of internal beauty support grows steadily across life stages, rising from 33% among young working women (active life & career, 20-39 years old) to 52% among healthy-longevity agers (55+ years old).

This progression reflects a broader shift in how beauty is understood. Rather than focusing on correcting visible concerns, women increasingly seek to preserve vitality, skin health and overall wellbeing over time.

As beauty becomes more closely linked to health, supplements and other forms of internal support emerge as natural extensions of a prevention-oriented beauty routine. For brands, this creates an opportunity to develop holistic solutions that bridge beauty, wellness and healthy aging.

1.3 Consumers want proof they can see, and safety they can trust

As Chinese women become more proactive in managing their health and beauty, trust becomes increasingly important. Consumers are willing to invest in solutions that promise long-term benefits, but only when efficacy and safety are equally evident.

Visible results remain a powerful driver of adoption, with 62% citing noticeable benefits as a key reason to try and continue using a product. Consumers want reassurance that their investment is delivering meaningful outcomes.

At the same time, safety remains the most critical barrier. Concerns around side effects and suitability for long-term use prevent many consumers from adopting new solutions, highlighting the importance of gentle and well-tolerated formulations.

EXHIBIT 4 Visible results drive adoption, 'gentle & safe' is expected

Top adoption driver

62%

rank "benefits I can feel & notice" within top 3 reasons to try and stay

74% KR, 76% ID | Visible results matter most for all of APAC

Top barrier

62%

hold back by "the worry on side effects for regular use/ long-term safety" (top 3 ranks)

57% KR, 62% ID | Gentleness is a hygiene factor – strongly punished when absent

Unlike neighbouring markets that rely more heavily on clinical authority or immediate outcomes, Chinese consumers seek a balance between effectiveness and reassurance.

The most trusted products are those that can demonstrate real results while fitting comfortably into a long-term prevention routine.

Trust is built differently across APAC

China — Safety + personal relevance:
"Is it gentle enough for long-term use, and is it right for me?"

Korea — Scientific authority
"Is it clinically proven and endorsed by experts?"

Indonesia — Visible outcomes
"Can I clearly see that it works?"

This reflects the broader prevention mindset established earlier: maintaining health and beauty is viewed as an ongoing journey, not a short-term intervention.

1.4 Consumers are ready for life-stage solutions. The market isn't

Chinese women increasingly manage beauty and wellness as a lifelong journey, with priorities evolving from prevention and appearance maintenance to healthy aging and long-term vitality. Yet many products continue to take a one-size-fits-all approach.

This creates a growing disconnect between consumer needs and market offerings. Nearly half of consumers report that current solutions do not fully meet their expectations, while two-thirds feel underserved by what is currently available.

The opportunity lies not in expanding product portfolios indiscriminately, but in delivering greater relevance. An overwhelming majority of consumers express interest in solutions tailored to their specific life stage, reflecting a desire for products that recognize their changing goals, concerns and aspirations.

As beauty and wellness become increasingly intertwined, life-stage positioning offers a powerful way to make preventive care more meaningful and personally relevant.

EXHIBIT 5 Life-stage tailored solution is an untapped opportunity

40-50%

APAC consumers say that their current products are not working or only partially working.

66%

Chinese women feel underserved by what's available today

87%

prefer solutions tailored to their life stage (China)

Not more products, but more *relevant* ones

The unmet need is not another beauty product. It is a beauty solution designed for a specific life stage.



1.5 One Enduring Goal – Life stages change, the goal doesn't

Across every life stage, women's wellness priorities evolve. Concerns shift from appearance and self-confidence to energy, resilience and eventually healthy aging. Yet beneath these changing needs lies a remarkably consistent aspiration: preserving the ability to live confidently, actively and independently.

For younger women, this goal is expressed through appearance and self-assurance. In midlife, it becomes about maintaining energy and control over daily life. As women age, the focus increasingly shifts toward mobility, physical strength and long-term autonomy.

These priorities should not be viewed as separate needs, but as different expressions of the same desire to preserve quality of life over time.

From beauty to wellness to healthy aging, consumers are ultimately investing in their future selves. The brands best positioned to win will be those that support this lifelong journey, helping women not simply look better or feel better, but continue living life on their own terms.

Confidently

BEAUTY · APPEARANCE

>90%

want to **look fresh**, natural and **radiant** / slow down signs of aging (20-39 years old)

>91%

prefer iron supplement/ skincare that feels simple, gentle, & **reassuring** (family planning & motherhood)

Actively in control

ENERGY · MOBILITY

86%

want an energy solution that helps me stay calm and in control (20-39, 40-55 years old)

74%

won't let heat episodes, night sweats or energy dips disrupt their daily life (40-55 years old)

Independently

LONG TERM AUTONOMY

88%

want to stay physically strong/ mobile so I can continue moving freely (55+ years old)

93%

want to keep my health manageable so I can remain independent for longer (55+ years old)



Different expressions, one aspirations

Beauty, wellness and healthy aging are not separate opportunities.

They are different chapters of the same aspiration: living confidently, actively and independently throughout life.



CHAPTER 2

The Life-Stage Journey

Four stages, four mindsets, four distinct opportunities, with one continuous prevention-to-preservation arc.

The life-stage journey: from performing today to preserving tomorrow

No two life stages feel the same. What worries a woman in her twenties is worlds apart from what she notices in her fifties. But across these very different tensions, the same recurring theme emerges: protecting the ability to live well, now and in the future.

And what changes is not the desire for wellbeing, but how that desire is expressed. Early adulthood is about staying ahead. Parenthood is about protecting what matters most. Midlife is about regaining balance, while healthy aging focuses on preserving independence and quality of life.

Each stage creates distinct innovation opportunities, but all are connected by a desire to protect her future self.

EXHIBIT 6 Different tensions, one constant: protecting future self to live well

	Active Life & Career	Family Planning & Motherhood	Midlife Transition	Healthy Longevity
	Stay ahead	Protect	Regain balance	Preserve
Tensions consumers feel:	Early signs of stress; pressured to perform best	Skin more sensitive; more cautious of what to consume	Skin less firm, body less predictable	Skin feels fragile; want to maintain health
What consumers desire:	Everyday Radiance/ Skin Recovery	Pregnancy Skin Comfort	Firmness/ Resilience	Longevity Renewal
	Steady Energy & Focus	Pregnancy Iron & Nutrition	Menopause Rebalancing	Bone, Mobility & Longevity
	92%	87%	91%	95%
	92%	93%	90%	92%

% = Chinese consumers agreeing (T2B)

“I want to stay ahead”



Young working women are not motivated by aging concerns. They are motivated by momentum.

This life stage is defined by ambition, performance and self-investment. Consumers want to look healthy, feel energized and maintain control over increasingly demanding lifestyles. Prevention is seen not as protection against future decline, but as a way to sustain success today while safeguarding tomorrow.

Appearance therefore matters not simply for beauty, but because it contributes to confidence, self-expression and personal readiness.

What she wants

- Energy through a demanding day
- Faster recovery from a busy life
- A healthy, radiant appearance
- Confidence in long-term wellbeing

The innovation whitespace

- **Feel more energized & recovered**
- **Feel more confident, in control**
- **Clear cues that progress is happening**
- **An ‘invest early’ prevention narrative**

Purchase behaviour & willingness to pay

Young working women are highly open to prevention-led solutions and demonstrate strong willingness to invest in products from brands they already trust. While moderate premiumization is broadly accepted, stronger price premiums (+50%) require a compelling story of future value, visible results and personal relevance.

“Help her create the lifestyle she aspires to live — not just solve a problem.”

Protecting self and child



Pregnancy marks the biggest mindset shift in the journey. The focus moves from self-improvement to protection, as women become significantly more cautious about anything they put on or into their bodies.

Beauty and wellness remain important, but efficacy alone is no longer enough. Safety, gentleness and trust become decisive factors. Women increasingly seek solutions that feel proven, transparent and appropriate for both themselves and their child.

At this stage, consumers are not looking for the most advanced innovation. They are looking for reassurance. Products that remove uncertainty and simplify decision-making have the greatest potential to earn trust.

What she wants

- Proven safety for mother & baby
- Essential nutrition across the journey
- Gentleness on the digestive system
- Simple routines & trusted guidance

The innovation whitespace

- Every choice feels safe & transparent
- Nutritionally complete, gentler to use
- Trusted across pregnancy & postpartum
- Suitability & benefit made clear

Purchase behaviour & willingness to pay

Trust becomes the primary purchasing currency during pregnancy and early motherhood. Women actively seek reassurance before trying anything new and show a strong preference for brands that simplify decision-making through clear safety credentials and transparent communication.

Purchase intent is extremely high when innovation is introduced through trusted brands, and consumers are willing to pay a moderate premium (up to +50%) for products that reduce uncertainty. At this stage, willingness to pay is less about aspiration and more about confidence, reassurance and peace of mind.

“Make every choice feel safe, effective and easy — for both mother and baby.”

“My body doesn’t feel as predictable”



Midlife is less about prevention and more about adaptation. As hormonal and physical changes become more noticeable, women increasingly seek solutions that help them maintain balance, confidence and continuity in their daily lives.

This is the stage where beauty, wellness and physical health begin to converge. Concerns around skin ageing, energy levels, sleep and emotional wellbeing become interconnected rather than separate issues.

Rather than pursuing transformation, women are looking for reassurance that they can continue feeling like themselves through a period of change. They want solutions that restore predictability, support resilience and help them navigate life with confidence.

What she wants

- Physical wellness — sleep, energy
- Hormonal wellbeing — balance
- Beauty confidence — firmer skin
- Support to feel like herself again

The innovation whitespace

- **Rebalance body, wellbeing & beauty**
- **Confidence through change**
- **Beauty from the inside out**
- **Evidence-forward reassurance**

Purchase behaviour & willingness to pay

As wellness needs become more complex, buying decisions become increasingly evidence-based. Consumers still value holistic wellbeing and beauty benefits, but they are less willing to pay for promises alone. Demonstrable efficacy, expert endorsement and credible outcomes become more influential in driving adoption.

Moderate premium pricing is broadly accepted when supported by visible benefits or believable scientific proof. Consumers are willing to invest, provided they understand how the solution addresses their changing life-stage needs.

“Rebalance body, wellbeing and beauty — so she can navigate change with confidence.”

“I want to stay active & engaged”



Healthy longevity is not about looking younger. It is about preserving the freedom to continue living independently, actively and confidently for as long as possible.

At this stage, consumers are increasingly focused on capability rather than correction. Strength, mobility, cognitive wellbeing and overall resilience become more important than chasing an idealized version of youth.

The goal is not to stop aging. It is to remain engaged in family, community and everyday life without limitations.

This makes healthy aging one of the clearest expressions of China's prevention mindset. Consumers are investing not in appearance alone, but in protecting their future quality of life.

What she wants

- To remain independent for longer
- To stay in control of decisions
- To keep participating in family life
- To feel confident about the future

The innovation whitespace

- **Age confidently, stay engaged**
- **Recover better; preserve capability**
- **Active longevity, not anti-aging**
- **A structural longevity story**

Purchase behaviour & willingness to pay

Healthy longevity agers demonstrate the strongest willingness to invest in solutions that preserve capability, independence and quality of life. This group is highly receptive to benefit-led innovation and shows the highest premium acceptance across the life-stage journey when value is clear and credible.

Unlike younger consumers, spending is motivated less by enhancement and more by the desire to maintain mobility, vitality and autonomy. Solutions that support active longevity and healthy aging can therefore sustain both higher purchase intent and premium pricing.

“The future of healthy aging is not anti-aging — it is active longevity and capability preservation.”

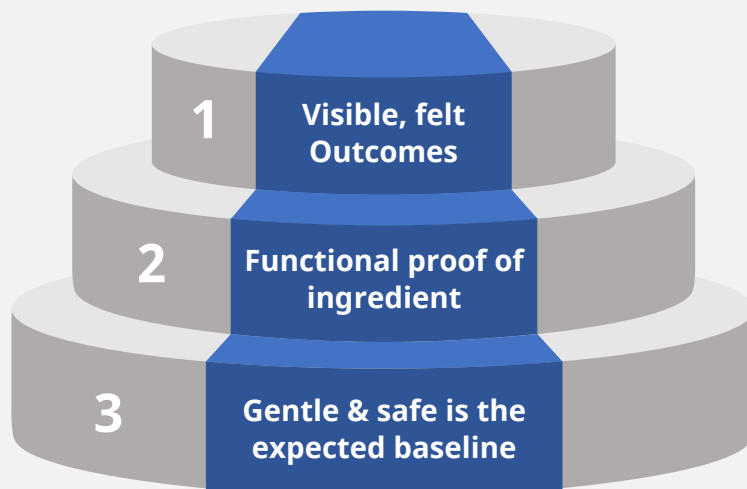
3.1 Trust is earned through outcomes, strengthened by proof and protected by safety

Throughout the study, one pattern remained consistent: consumers are willing to invest in prevention, but only when solutions feel effective, credible and safe for long-term use.

The pathway to trust follows a clear hierarchy:

1. **Visible, felt outcomes:** Benefits must be noticeable and personally relevant. Consumers need confidence that a solution is working in their daily lives.
2. **Functional proof:** Scientific explanation and ingredient credibility reinforce belief and justify continued use.
3. **Gentleness and safety:** Safety is expected rather than celebrated. Consumers may forgive products that work slowly, but are unlikely to tolerate products perceived as harsh or unsuitable for long-term use.

EXHIBIT 7 3-tier pathway to trust



Key Takeaway

Results attract trial.

Proof builds confidence.

Safety sustains loyalty.

3.2 Beauty is the gateway, prevention is the destination

Across the life-stage journey, beauty consistently emerges as the most accessible entry point into proactive wellbeing.

What begins as a desire to look healthy and feel confident increasingly expands into broader health goals, including energy, resilience, mobility and longevity.

As a result, consumers are naturally connecting beauty routines with nutrition and internal wellness support. They expect both categories to work together toward the same outcome rather than operate independently.

This convergence becomes stronger with age, as beauty increasingly shifts from correction toward preservation and long-term vitality.

EXHIBIT 8 A roadmap for winning across life stages

1

START WITH THE NEED CONSUMERS ALREADY TRUST

Anchor around the benefit that matters most at each life stage, whether confidence, safety, balance or longevity.

2

BRIDGE THE ADJACENT SOLUTIONS

Connect topical and ingestible products through a shared life-stage narrative and a common consumer outcome.

3

DESIGN FOR CONTINUITY

Create routines that consumers can maintain comfortably over time through visible benefits, trusted science and long-term safety.

3.3 From prevention to preservation: one consumer journey, one opportunity

Chinese women are not approaching beauty, wellness and healthy aging as separate categories. Across every life stage, they are investing in a single outcome: protecting their ability to live confidently, actively and independently for longer.

As priorities evolve from performance to protection, rebalancing and preservation, consumer needs change. However, the underlying motivation remains remarkably consistent: maintaining vitality today while safeguarding wellbeing for tomorrow.

The brands best positioned to win will be those that understand where she is today, anticipate where she is going next, and support her journey from performance to preservation.



**The most successful brands won't merely sell products;
They'll support women through every chapter of their wellbeing journey.**

Acknowledgement

From the first research interview to this final publication, this whitepaper is the result of many months of careful work. Every data point was drawn from primary research and validated against the realities of today's market. The perspectives and conclusions here reflect the lived experiences and aspirations of consumers themselves. Our sincere thanks go to everyone who took part. Without their contribution, this whitepaper would not have been possible.

Research Partner

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About Lubrizol

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