

Managing Emotional Wellbeing - China - September 2020

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

Opportunities lie in providing more detailed solutions rather than a broad description of mood enhancement. This could include addressing stress and sleep issues in the short term as well as linking emotional issues with specific health issues of defined audiences in the long term. Brands may also offer meaningful reasons to engage or re-engage in interpersonal communication beyond simply encouraging consumers to step out of their comfort zone, as well as put more emphasis on using natural and emotional approaches in marketing communications (eg detailing out a sense of ritual to best enjoy the products).

- Understanding the state of today's consumers' emotional issues, as well as perceived causes and the impact of having such emotional issues
- What approaches are sought to manage emotional wellbeing
- How brands, companies and manufacturers could react to market opportunities and threats post-COVID-19



"The majority of Chinese believe that their emotional health is not in good form, driven by high incidence of stress and fatigue, as well as growing financial pressures and increasing workload. Despite this pessimism, proactive self-evaluation drives up better self-management."

– Catherine Liu, Research Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Report scope
- Subgroup definition

Figure 1: Definition of low/mid/high MHI groups, by monthly household income and city tier

EXECUTIVE SUMMARY

- The market
- China is about to step up efforts to address national mental health crisis
- Sleep problems point to more lifestyle related solutions
- Loneliness is rife among younger generations
- Impact of COVID-19 on emotional wellbeing management
- Recovery of indulgence spending despite financial situation still takes time to recover
- Consumers' definition of identity is becoming more specific during COVID-19

- Impact on the market and the future outlook
- Figure 2: Short-, medium- and long-term impact of COVID-19 on emotional management market, Sept 2020

- Who's innovating
- New solutions for anti-stress and better relax
- Addressing loneliness in different ways
- Making psychological counselling easier
- Food and drink product innovations
- The consumer
- Stress and tiredness are most commonly perceived emotional issues

Figure 3: Changes in emotional wellbeing, April 2020

- While financial stress and workload are problems to the majority, demand for detailed solutions to alleviate other causes of emotional issues are on the rise

Figure 4: Causes of emotional issues, April 2020

- Solution to sleep is demanded in achieving both mental and physical wellness

Figure 5: Impact of emotional issues, April 2020

- Consumers take a varied approach to emotional wellbeing management

Figure 6: Ways to manage emotional issues, April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Fruit and chocolate are equally popular as comfort food choices**

Figure 7: Comfort food, April 2020

- **Definition of loneliness is evolving amongst young consumers**

Figure 8: Attitudes towards emotional wellbeing (loneliness related), by consumers who feel lonely more often, April 2020

- **Creating a sense of ritual is not only appealing to young females but also young males**

Figure 9: Attitudes towards emotional wellbeing (having a sense of ritual in daily life helps lift mood), By gender and age, April 2020

- **What we think**

ISSUES AND INSIGHTS

- **Leveraging a sense of ritual to help young people de-stress**

- **The facts**

- **The implications**

Figure 10: Examples of foodservice and personal care retail brands combining rituals to their product offerings, Global and China, 2017-20

Figure 11: Examples of foodservice brands and cooking influencers offering home-cooking services, Global, 2020

- **Expanding the territories of sleep improving functions**

- **The facts**

- **The implications**

Figure 12: Examples of players within the fitness industry featuring sleep improvement, UK, 2019-20

Figure 13: Examples of products featuring both immune/gut health and stress & sleep functions, Global and China, 2019

Figure 14: Examples of bath products with sleep promoting function, Global and China, 2019

- **Engaging young adults in different ways to alleviate loneliness**

- **The facts**

- **The implications**

Figure 15: Platforms that creates opportunities for consumers to engage with others, Global and China, 2019-20

Figure 16: Examples of brands adjusting their product offerings and marketing language to meet young people's evolving definition of loneliness, Global and China, 2019-20

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

THE MARKET – WHAT YOU NEED TO KNOW

- China is about to step up efforts to address national mental health crisis
- Linking emotional wellbeing with consumers' identity
- Small increase in 'indulgence' spending as personal finance gradually improves during COVID-19
- Making healthy eating and mood lifting more engaging
- Captivating consumers with new sensations and emotional vocabulary
- Future outlook under the impact of COVID-19

MARKET FACTORS

- Unevenly distributed mental health resources and demand
- China to step up efforts to enhance mental health
- Sleep problems could exacerbate emotional issues
- Loneliness is rife among younger generation
- The impact of COVID-19 on emotional wellbeing management
- Recovery of indulgence spending as financial situations continue to improve
- Consumers' definition of identity is becoming more specific
- Impact on the market and the future outlook

Figure 17: Short-, medium- and long-term impact of COVID-19 on emotional management market, Sept 2020

WHO'S INNOVATING?

- New solutions for anti-stress and better relaxation
- Captivating consumers with brain-tingling sensation
Figure 18: Examples of ASMR product applications and advertisements, Global, 2019-20
Figure 19: ChromaYoga and Yili's NOC Xu Jin Huan frozen yogurt ice cream, Global and China, 2017-19
- Introducing activities and rituals in daily life
Figure 19: Brands providing activities and rituals for different emotional experiences, Global, 2017-19
- Applying mental wellbeing solutions in the workplace
- Helping kids learn the fundamentals of emotional wellbeing
Figure 21: Brands trying out to help kids with emotional wellbeing management, Global, 2020
- Addressing loneliness in different ways
- "Beat it"
Figure 22: Examples of brands acting as mentors, coaches and social catalysts to facilitate consumers' connection, Global, 2017-20

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **"Live with it"**
Figure 23: Verbatim on gmw news' mini survey, China, 2020
- **Beyond the six recognised emotions**
Figure 24: Bodily maps of emotion, published on PNAS in 2013
Figure 25: Products that use new vocabulary to describe more complex emotions, Global, 2015-19
- **Making psychological counselling easier**
- **More affordable: texting hotline**
Figure 26: Summersalt's Joycast free texting hotline, US, 2020
- **More accessible: meeting the therapists through VR and AI technology**
Figure 27: Examples of psychological therapy services using VR and AI, Global, 2019-20
- **More convenient: using digital device to track mental health triggers**
Figure 28: Moodbeam One wearable, UK, 2019
- **Food and drink product innovations**
- **Experimenting before committing**
Figure 29: Examples of food and drink and related products providing fun experiments, Global, 2020
- **Justifiable indulgences**
Figure 30: Examples of healthy products featuring a more indulgent taste profile, Global and China, 2019
Figure 30: Examples of indulgent products featuring a healthier proposition, Global, 2019-20
- **Using natural and scientific formulations**
Figure 31: Examples of products using adaptogens for boosting productivity, Global, 2017-18
Figure 32: Examples of products using nervines for stress relieving, Global, 2017-20
- **Offering dual functions**
Figure 33: Examples of products offering stress reduction and immune system support benefits, Global, 2019
Figure 35: Examples of products that increase brain's demand for sleep aiding neurotransmitters, Global, 2019

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Emotional issues are driven by stress and tiredness**
- **Financial stress and workload are major causes of emotional issues**
- **Sleep difficulty plays an impactful role**
- **Consumers take a varied approach to managing emotional wellbeing**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Fruit and chocolate are the most popular comfort food choices**
- **Consumers view psychological counselling as the medical treatment of specific diseases**
- **Ritual is a popular practice not only in young females but also young males**

CHANGES IN EMOTIONAL WELLBEING

- **Emotional issues are more driven by stress and tiredness**
Figure 36: Changes in emotional wellbeing, April 2020
- **Gender disparities in experience of emotional issues**
Figure 37: Select changes in emotional wellbeing (about the same and more often), by gender, April 2020
- **Young adults need a diverse support, while older adults need positive information environment**
Figure 38: Select changes in emotional wellbeing (about the same and more often), by age, April 2020
- **Body dissatisfaction is a risk factor for psychological distress**
Figure 39: Changes of emotional wellbeing (experienced any), by not satisfied with appearance as a cause of emotional issue, April 2020
- **Loneliness is triggered by how we handle relationships**
Figure 40: Changes of emotional wellbeing (experienced any), by causes of emotional issues, April 2020

CAUSES OF EMOTIONAL ISSUES

- **Financial stress is a leading cause of emotional issues**
Figure 41: Causes of emotional issues, April 2020
- **Excessive work could trigger physical symptoms**
Figure 42: Causes of emotional issues (workload), by age, April 2020
- **Appearance stigma in young people (even males) and health concerns in the middle-aged**
Figure 43: Causes of emotional issues (not satisfied with appearance), by gender and age, April 2020
Figure 44: Hims' mental health online support group, US, 2020
Figure 45: Causes of emotional issues (physical health status), by gender and age, April 2020

IMPACT OF EMOTIONAL ISSUES

- **Sleep plays a critical role in emotional issues**
Figure 46: Impact of emotional issues, April 2020
- **Impact of emotional issues varies by gender and age**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 47: Select impact of emotional issues, by age, April 2020

WAYS TO MANAGE EMOTIONAL WELLBEING

- **Consumers take a varied approach to managing emotional wellbeing**

Figure 48: Ways to manage emotional issues, April 2020

- **Setting up different “scenarios” for consumers at different age**

Figure 49: Ways to manage emotional wellbeing, by age, April 2020

Figure 50: Examples of fun products coupling with innovative experience, Global and China, 2018-20

- **Females tend to find “small treats” helpful in managing emotions**

Figure 51: Select ways to manage emotional wellbeing, by gender, April 2020

Figure 52: Examples of portion controlled and portable products, Global, 2018-20

- **Barriers from psychologist counselling: lack of spending power and knowledge to identify negative emotions**

Figure 53: Ways to manage emotional wellbeing (spoke to a psychologist), by monthly personal income, April 2020

Figure 54: Ways to manage emotional wellbeing (spoke to psychologists), by consumers who feel depressed more often, April 2020

- **Solution to manage mental issues are getting specific**

Figure 55: Ways to manage emotional wellbeing, by consumers who experience selected emotional issues more often, April 2020

Figure 56: Music player on Dermalogica Sound Sleep Cocoon’s website, 2018

- **Physical pain sufferers look for aromatherapy**

Figure 57: Ways to manage emotional wellbeing (Did a SPA/massage/used aromatherapy), by impact of emotional issues, April 2020

- **Facilitating new connections with strangers**

Figure 58: Selected ways to manage emotional wellbeing, by consumers who interact with strangers online, April 2020

COMFORT FOOD

- **Fruit and chocolate are the most popular comfort food choices**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 59: Comfort food, April 2020

Figure 60: Comfort food (chocolate, fruit), by age, April 2020

Figure 61: Examples of comfort food products for women, China, 2019-20

- **Linking chocolate with digestive benefits to attract higher-educated consumers**

Figure 62: Comfort food (chocolate), by education, April 2020

- **Food and shopping crossovers to stimulate experience**

Figure 63: Ways to manage emotional wellbeing, by ways to manage emotional wellbeing (satisfied my food cravings), April 2020

Figure 64: Examples of food and foodservice brands that aims to stimulate in-store experience, Global, 2019-20

ATTITUDES TOWARDS EMOTIONAL WELLBEING

- **Lack of knowledge and scepticism towards effectiveness are gaps to psychological counselling**

Figure 65: Selected attitudes towards emotional wellbeing, April 2020

- **Mass consumers prefer online and young people go for offline counselling**

Figure 66: Selected attitudes towards emotional wellbeing (online and offline counselling), April 2020

- **Redefining loneliness**

Figure 67: Attitudes towards emotional wellbeing (loneliness related), April 2020

Figure 68: Selected attitudes towards emotional wellbeing (loneliness related), by consumers who feel lonely more often, April 2020

- **Sense of ritual is not only appealing to young females but also males**

Figure 69: Attitudes towards emotional wellbeing (having a sense of ritual in daily life helps lift mood), by gender and age, April 2020

Figure 70: Examples of products that promotes a sense of ritual for men and women, Global, 2019-20

- **Seeing emotion as a sign of weakness could be a vicious cycle to overall health**

Figure 71: Attitudes towards emotional wellbeing (being emotional is a sign of weakness), by changes in emotional wellbeing (more often), April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 72: Attitudes towards emotional wellbeing (I would prefer online counselling if I felt depressed), by consumers who agree that being emotional is a sign of weakness, April 2020

Figure 73: Attitudes towards emotional wellbeing (being emotional is a sign of weakness), by gender and age, April 2020

MEET THE MINTROPOLITANS

- **Broad range of emotional issues threatens Mintropolitans**

Figure 74: Causes of emotional issues, by consumer classification, April 2020

Figure 75: Impact of emotional issues, by consumer classification, April 2020

- **Mintropolitans devote more effort to holistic emotional improvement**

Figure 76: Ways to manage emotional wellbeing, by consumer classification, April 2020

- **Mintropolitans are more likely to feel lonely when using social media**

Figure 77: Select attitudes towards emotional wellbeing, by consumer classification, April 2020

Figure 78: Examples of brands creating "digital rituals", Global, 2020

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.