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DSG Consumer Partners
Toluna

Beyond Diets and Dumbbells: Unlocking How SEA Eats, Moves, and Lives Well

October 2025

Inside the SEA Health Mindset

Real insights into real lives across Southeast Asia

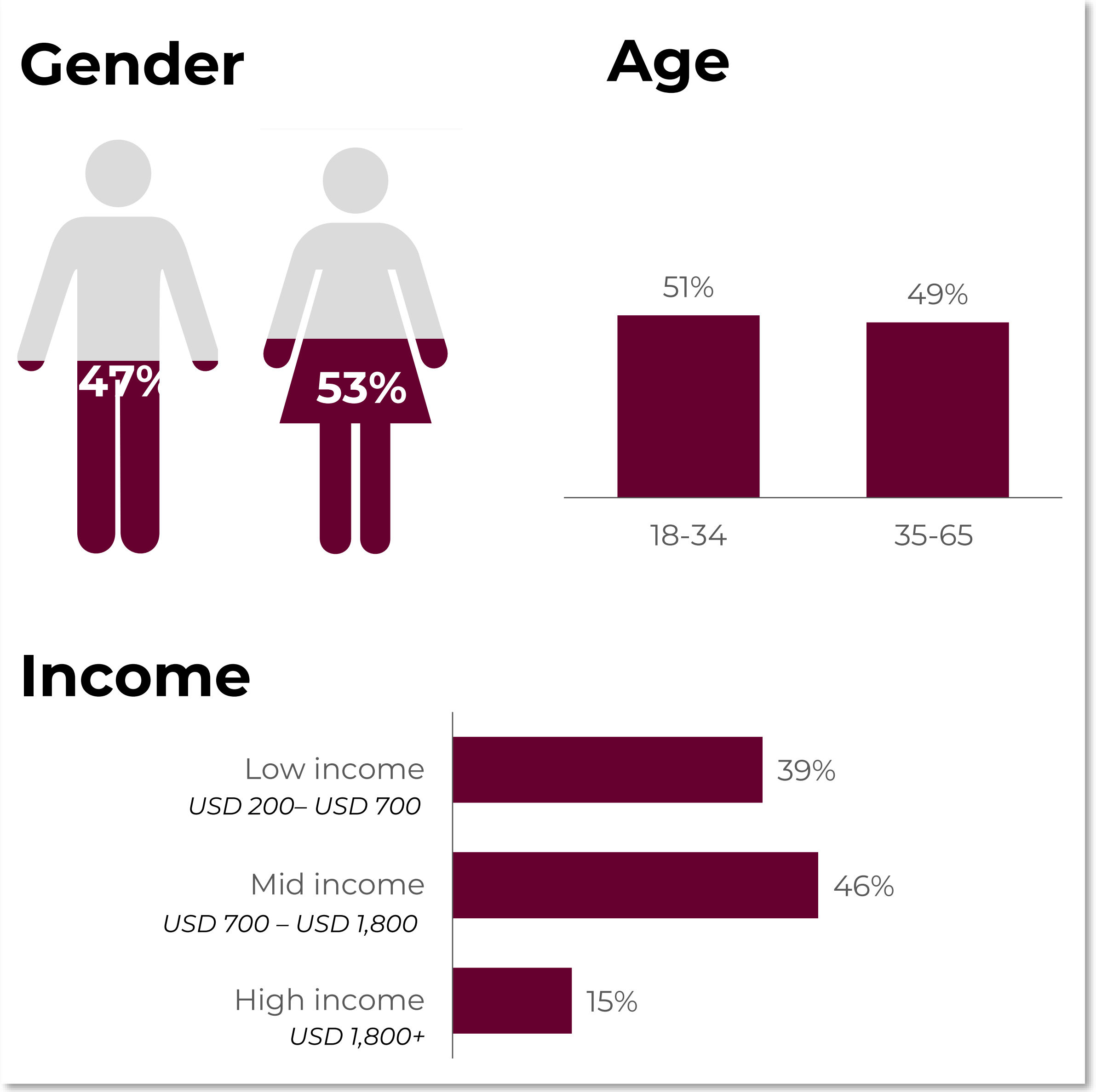
DSG Consumer Partners is an early-stage consumer venture capital firm that **lives and breathes the Southeast Asian consumer** — understanding that there's no single story or formula for how the region lives well.

This research is grounded in **real consumer insights from our proprietary Health & Wellness Trends Survey** across Philippines, Vietnam, and Indonesia.

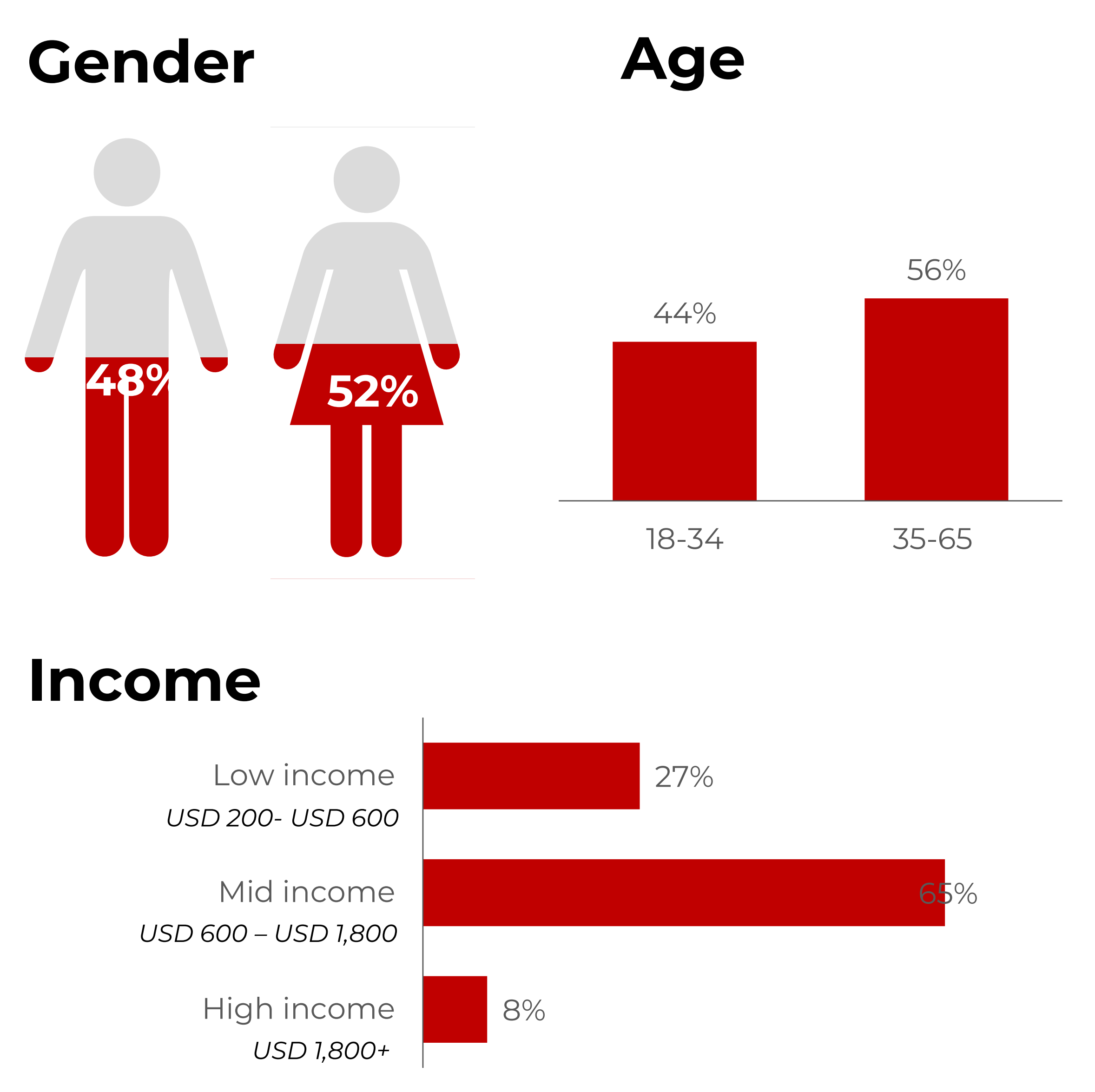
We captured the pulse of **1,800 consumers** to understand how aspiration meets everyday reality in health and wellness — created in partnership with **Toluna**, a leader in real-time consumer insights.

We spoke to 1800 consumers…

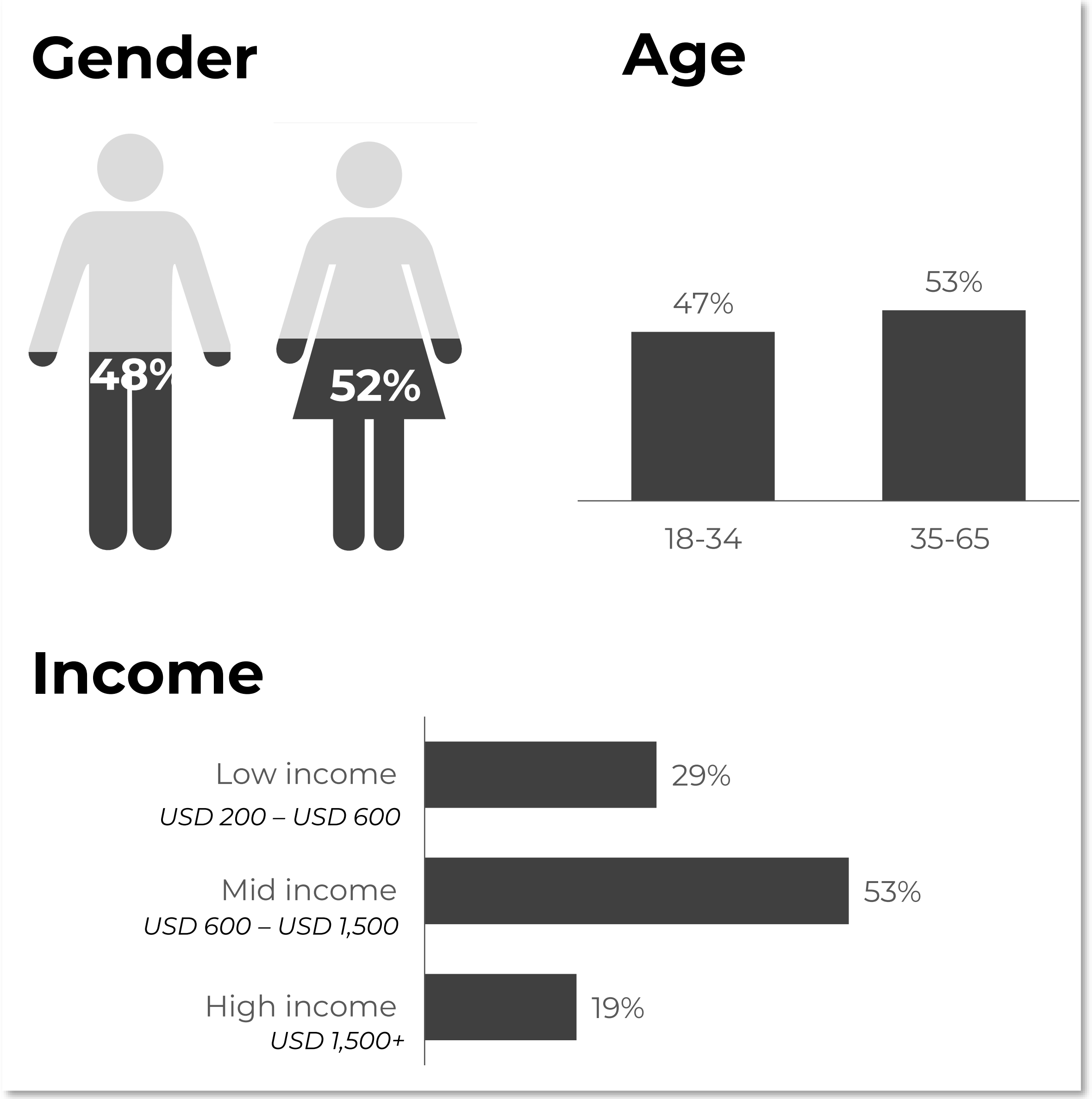
PHILIPPINES (n=600)



VIETNAM (n=600)



INDONESIA (n=600)



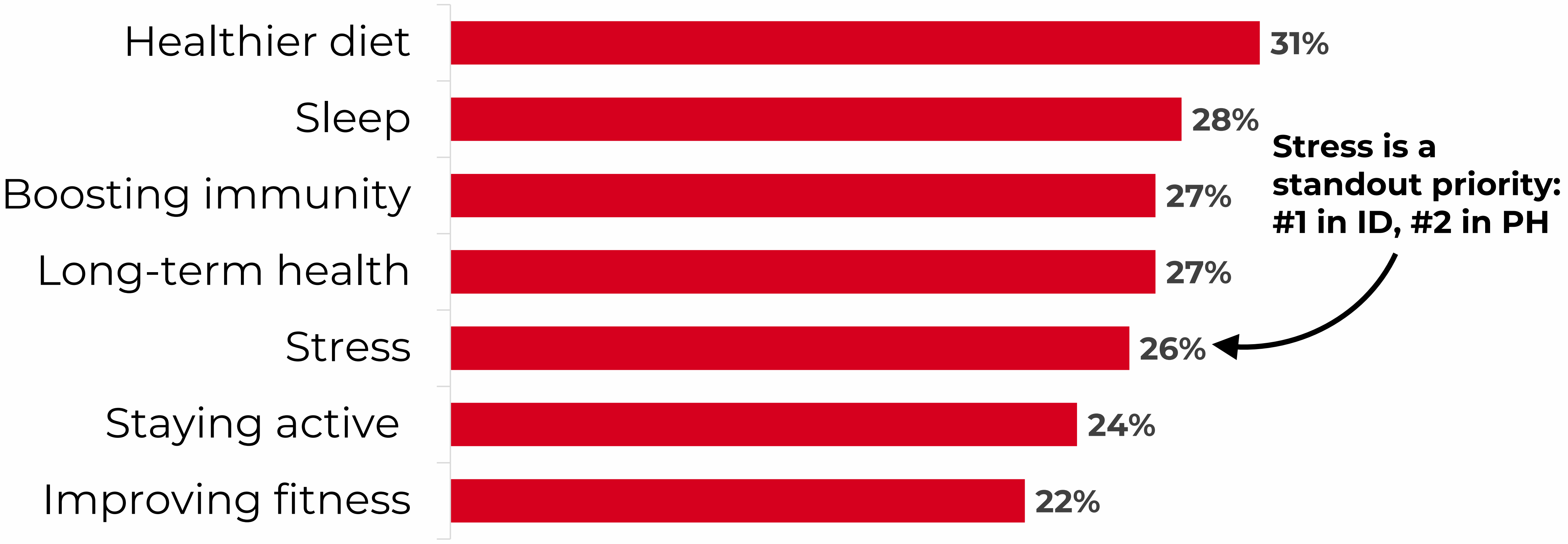
Fieldwork timing: August 2025

Note: In this report, label 'All' refers to the aggregated data from all three markets

A Health Pulse Check in Indonesia, Philippines & Vietnam

Across ID, PH & VN, health goals converge on diet, sleep & immunity. But stress weighs heavier in ID & PH

Which aspects of your health matter most today?



Local nuances shape health priorities

Weight matters more
25% prioritize managing weight (vs. 18% ALL)

Beauty is health
22% focus on skin & hair appearance (vs. 16% ALL)

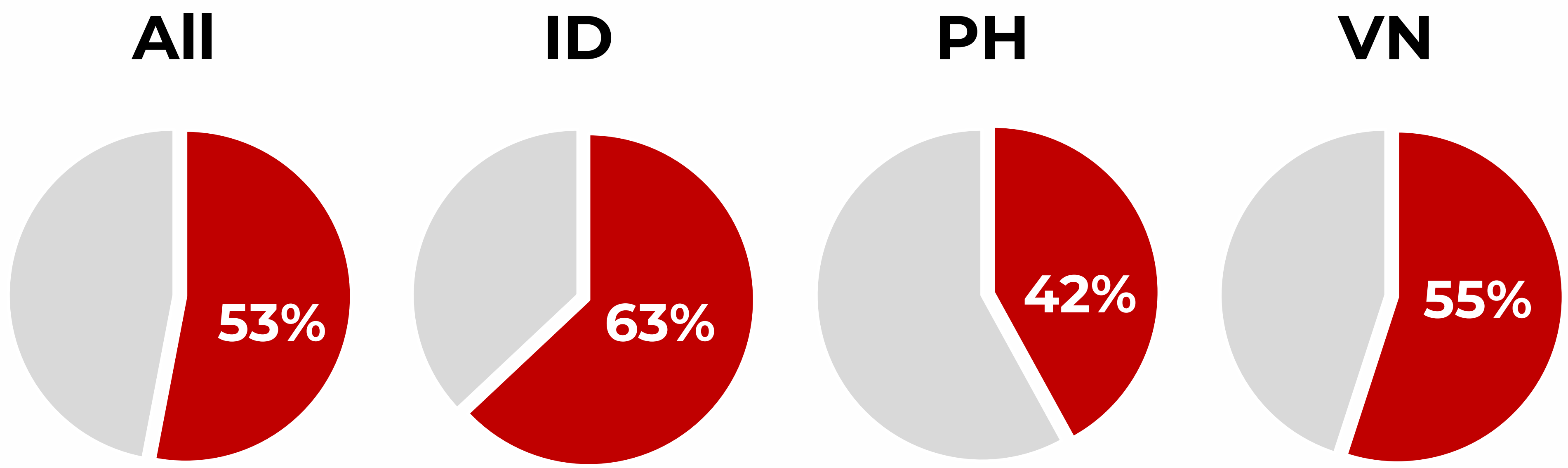
Base: All respondents (PH,VN,ID)
4000b Which aspects of your health do you care about most right now? (Choose and Rank up to Top 3)

Nearly half rate their health a 9 or 10.
ID is the most satisfied while PH is the least

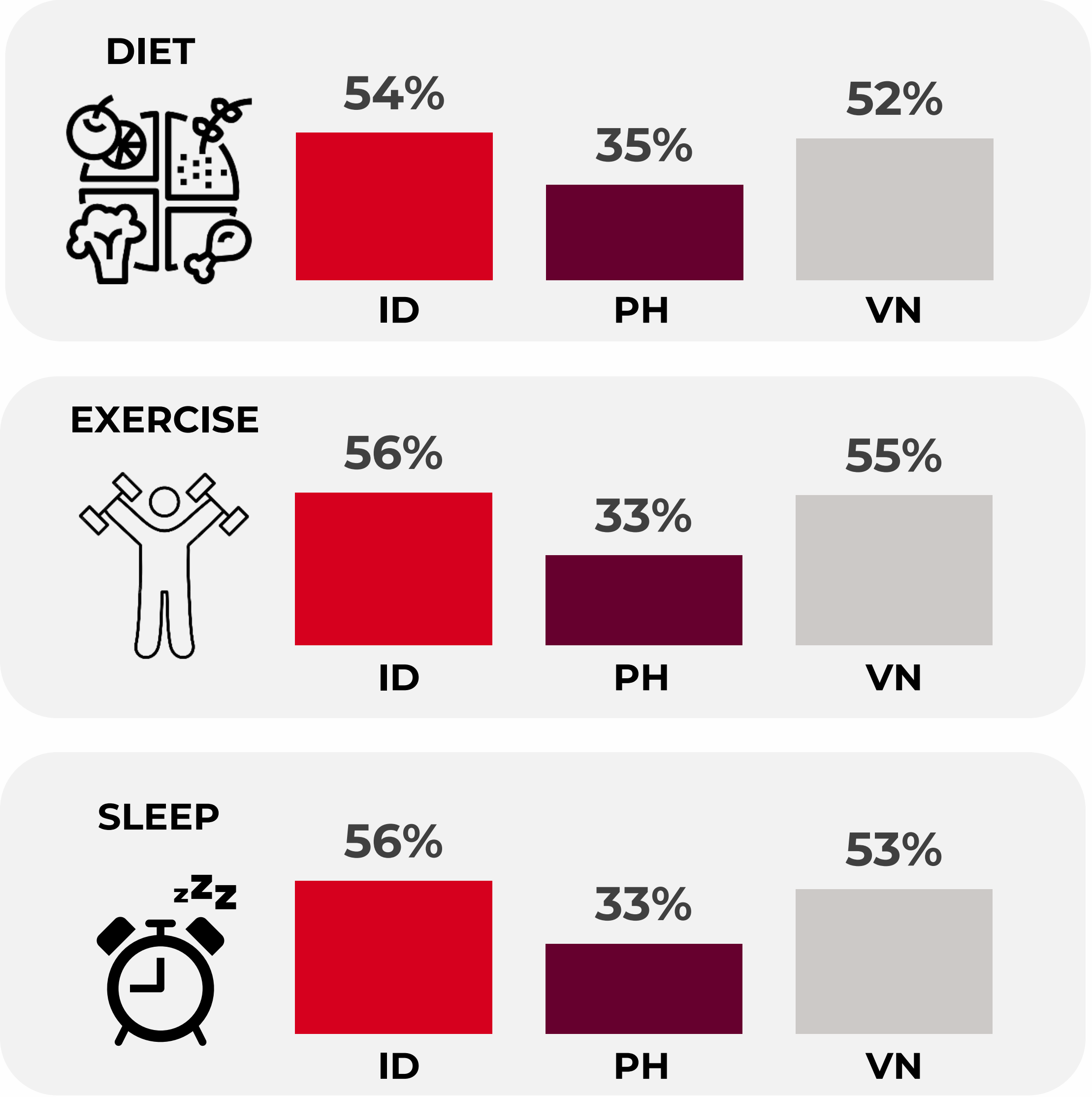
How satisfied are you with your health / diet / exercise / sleep today?

On a scale of 1 to 10…

Rated 9 or 10 Below 9



Most satisfied Least satisfied



Base: All respondents (PH,VN,ID)

4000a How satisfied are you with your health today? I 5001b How satisfied are you with your current eating habits? I 7001b How satisfied are you with your current exercise routine? I 9001 How satisfied are you with your sleep most nights?

The Paradox: ID has the highest confidence and heaviest disease burden, proof that perception ≠ reality

Health Satisfaction

63%

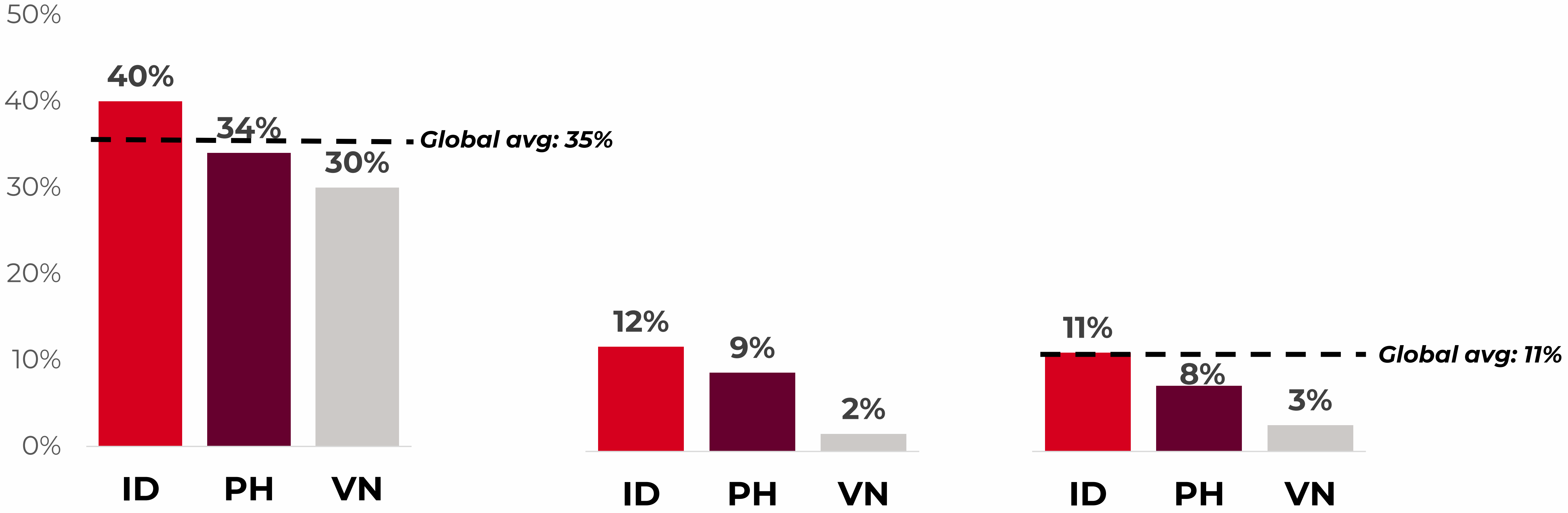
42%

55%

Hypertension/ Heart Risk

Obesity (BMI >30)

Diabetes

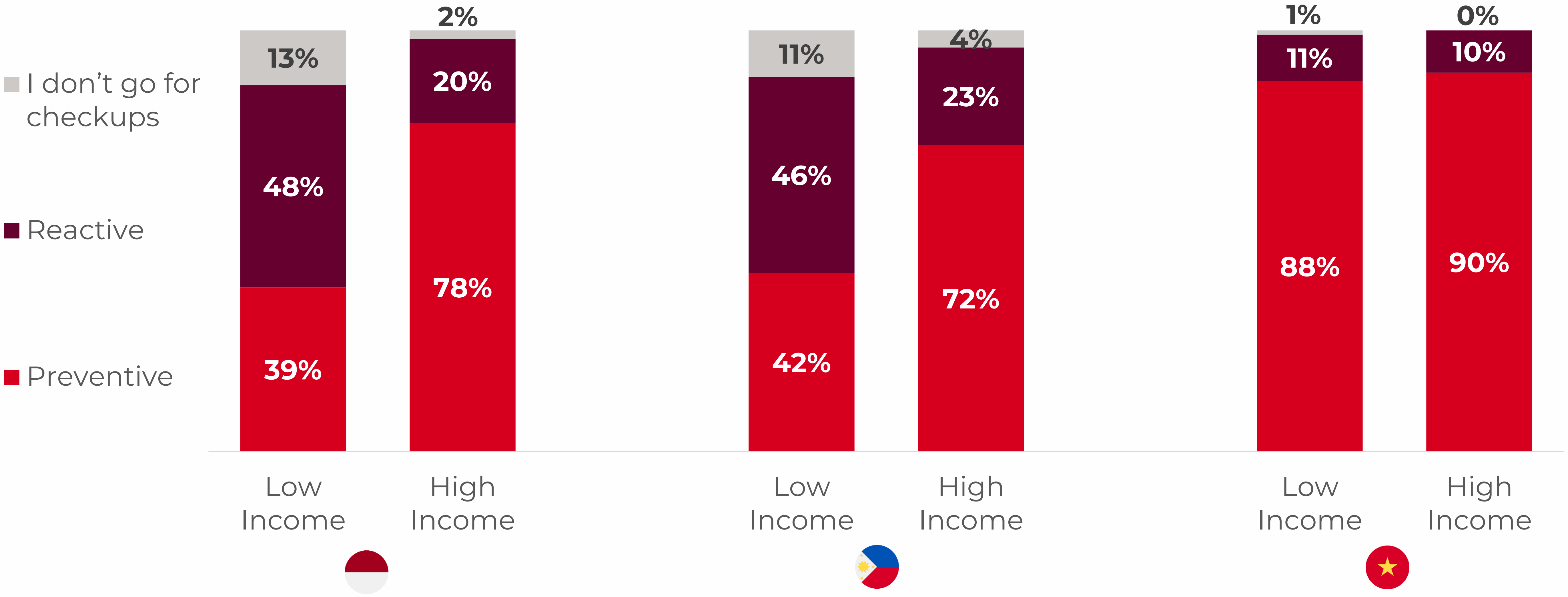


Source: WHO Country Profiles 2023 (Hypertension — ID, PH, VN); World Obesity Federation 2022 (Obesity Ranking PDF); World Obesity Federation (Diabetes — Indonesia, Philippines, Vietnam)

Base: All respondents (PH,VN,ID)
4000a How satisfied are you with your health today? I 5001b How satisfied are you with your current eating habits? I 7001b How satisfied are you with your current exercise routine? I 9001 How satisfied are you with your sleep most nights?

Preventive care is a privilege in ID & PH, but universal in VN

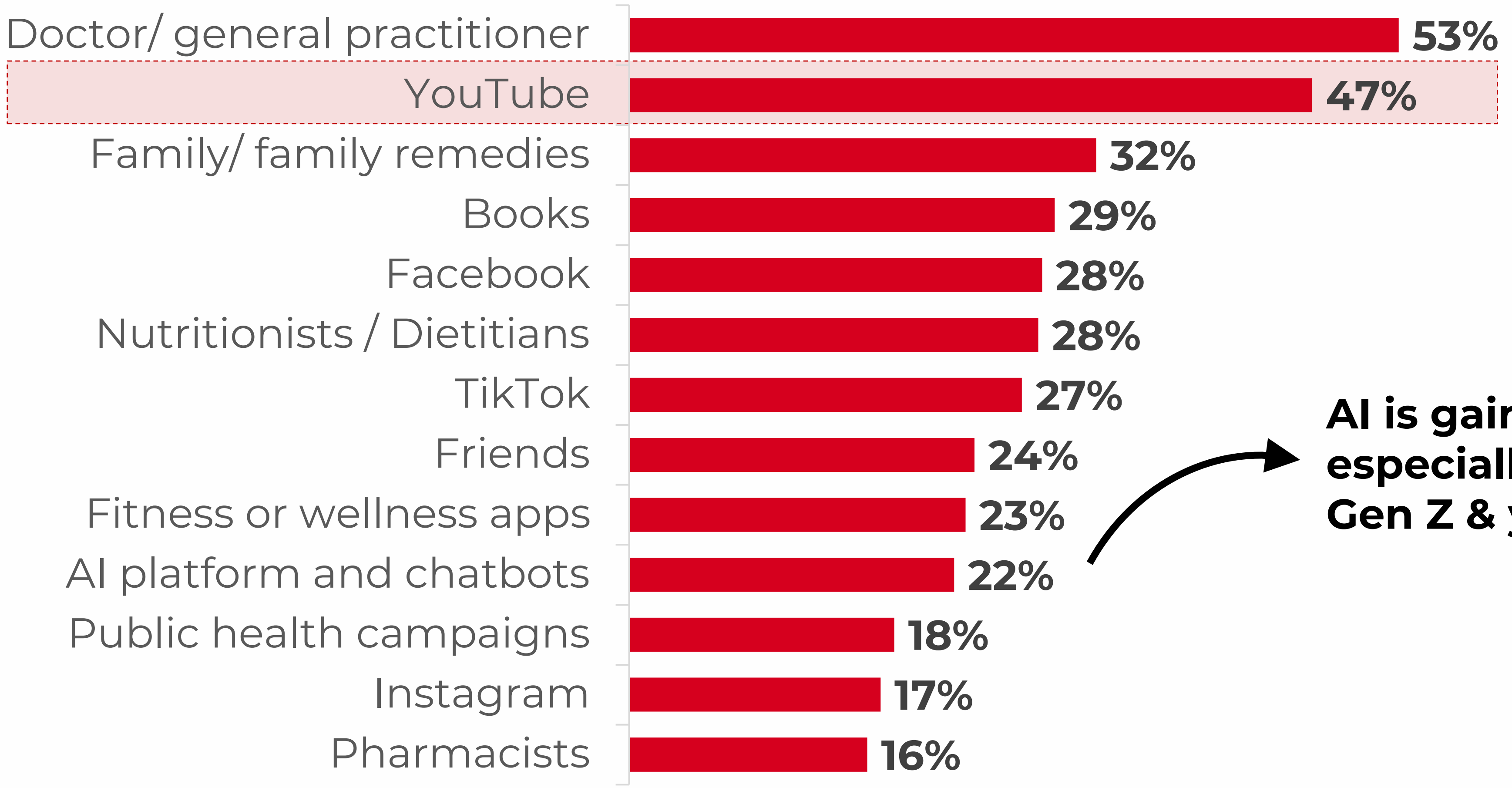
Do you go for regular health checkups?



Base: All respondents (PH,VN,ID)
1000 Do you go for regular health checkups?

Health authority dichotomy – doctors still lead but YouTube is catching up fast and AI surging amongst younger cohorts

Which sources do you rely on when it comes to getting information about health?



AI is gaining popularity especially among Tier 1 Gen Z & young millennials

YouTube is trusted more than Doctors in ID

Doctors (63%) & Family (42%) remain anchors of trust

Doctors and Social Media* hold equal levels of trust

Base: All respondents (PH,VN,ID)

Q4002 Which of the following sources do you mostly rely on when it comes to getting information about "health"? (Select up to 5)

* Youtube & Facebook are ~on par with Doctors in VN

The 3 Faces of Health: Bliss, Avoidance, Balance

Indonesia:
“Ignorance is Bliss”

Believes they’re healthy despite the highest disease burden.
Trusts YouTube over doctors and chasing quick fixes, not long-term change.

Philippines:
“Anxious Avoider”

Health worry is high, but action is low. They do health screens only when issues arise and defers to doctors out of fear and anxiety, not discipline.

Vietnam:
“Balanced Planner”

Most health-forward with highest preventive habits, lowest disease burden and a growing openness to digital health.

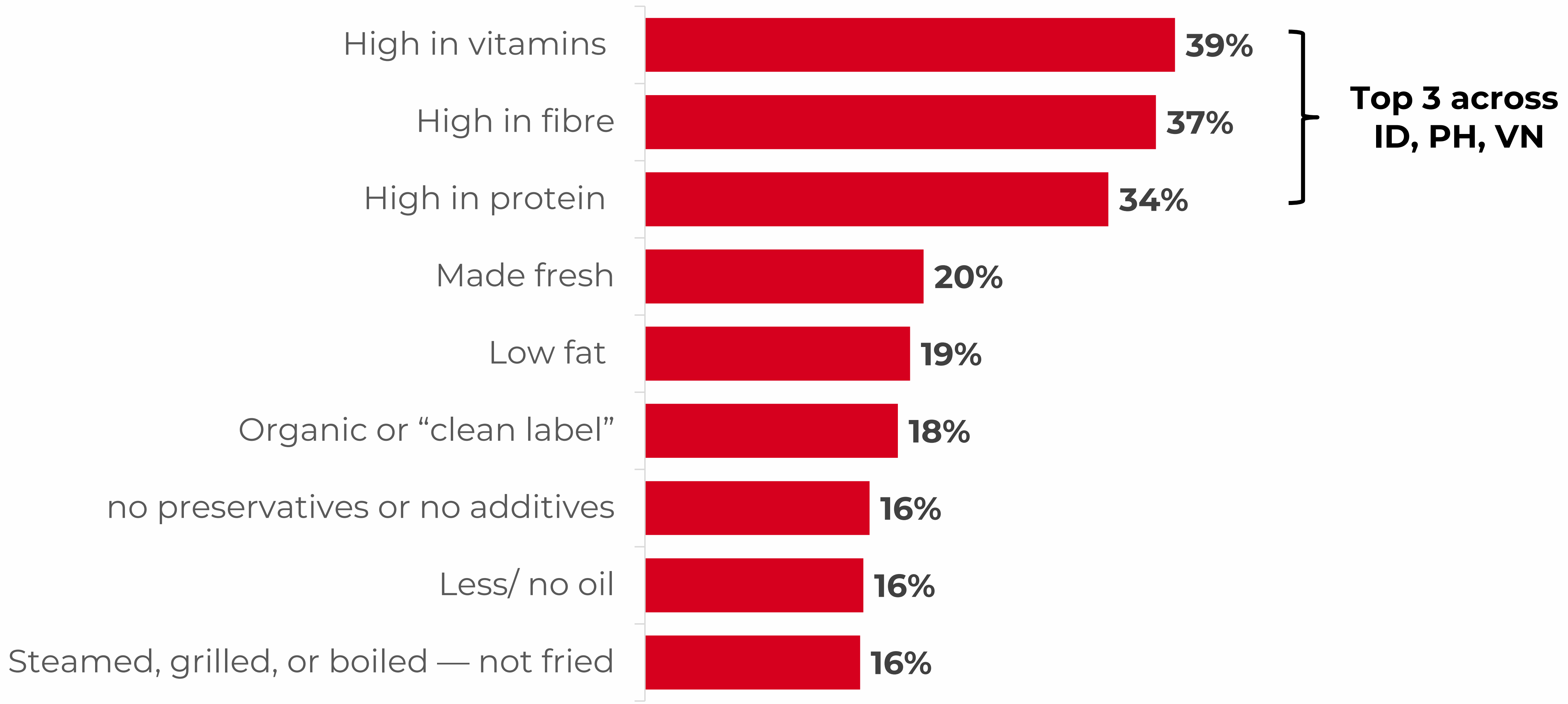
Base: All respondents (PH,VN,ID)
Q4002 Which of the following sources do you mostly rely on when it comes to getting information about “health”? (Select up to 5)

The Hidden Logic Behind Everyday Eating & Drinking

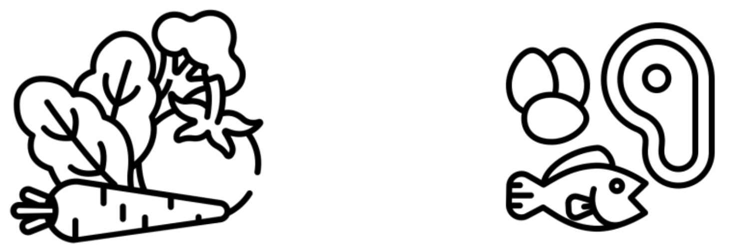
Food & beverage choices reveal consumers' effort to strike an everyday balance — seeking nourishment without giving up enjoyment or tradition

Healthy = Foods high in vitamins, fibre and protein

When you think of "healthy" food, what comes to mind? (Rank your top 3)



However markets are nuanced...



High fibre (41%) | High protein (40%)

Made fresh (30%) | Plant-based/vegan (26%)

Organic / clean (25%) | Low fat (23%)

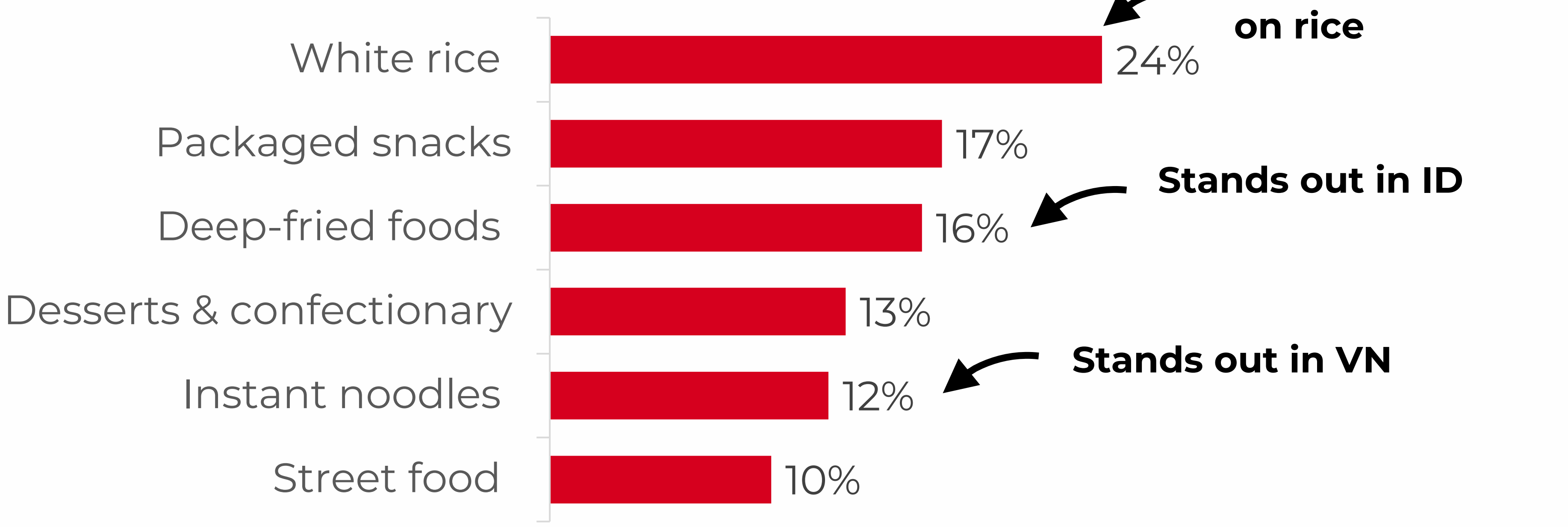
Base: All respondents (PH,VN,ID)
5001 When you think of "healthy" food, what comes to mind? (Pick and rank up to top 3) I 5000 Which of these do you consume regularly (3+ times a week)? (Please select all that apply) [Rank 1-3]

Vegetables and protein-rich food lead the plate, while rice tops the guilt list

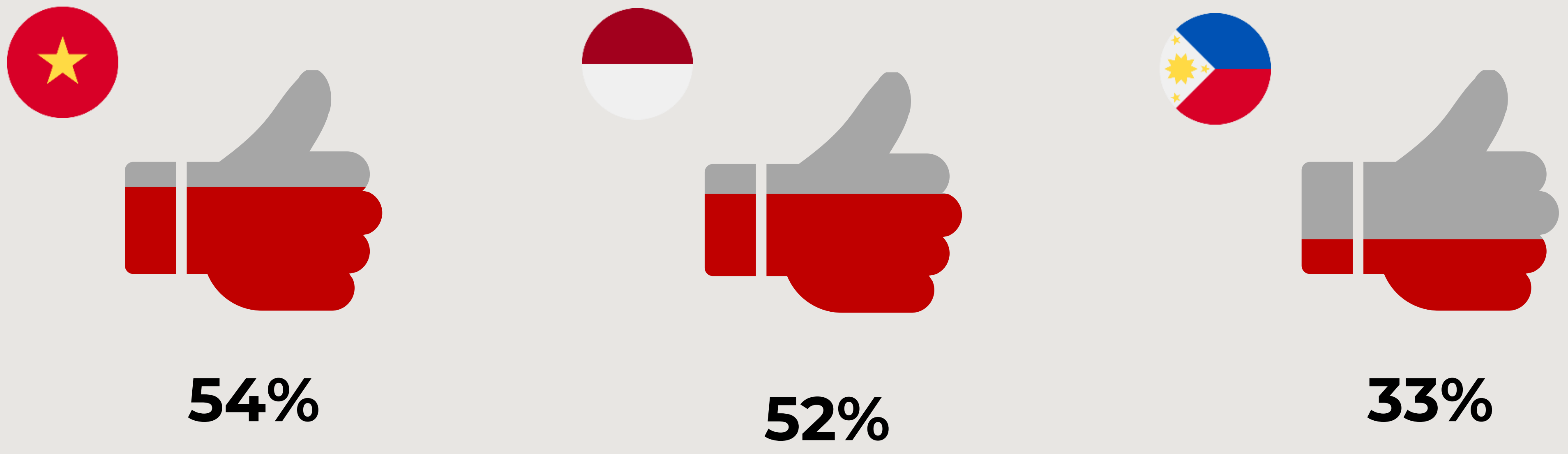
Which of these do you consume regularly (3+ times a week)?

Vegetables	Protein-rich foods	Fruits	White rice	Fresh home-made meals
77%	72%	70%	70%	63%

Which of these do you wish to consume less?



How satisfied are you with your eating habits (rate 9 or 10)

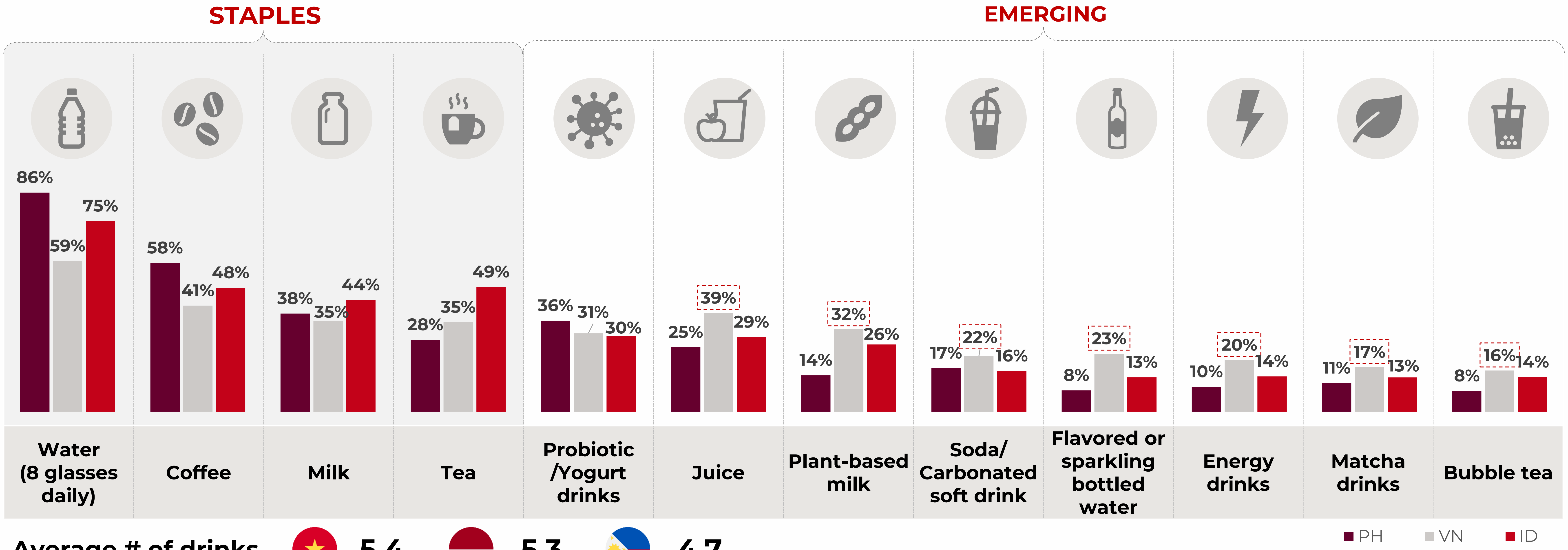


Base: All respondents (PH,VN,ID)

5000 Which of these do you consume regularly (3+ times a week)? (Please select all that apply) I 50012. And which of these do you wish you consumed less? You can choose up to 2 items that you wish you consumed less of. I 5001b How satisfied are you with your current eating habits?

Staples still rule, but new “feel-good” drinks from probiotics to matcha and bubble tea, are redefining beverage habits

What do you typically drink in a week?



Average # of drinks 5.4 5.3 4.7

Base: All respondents (PH,VN,ID)
5002 What do you typically drink in a week?

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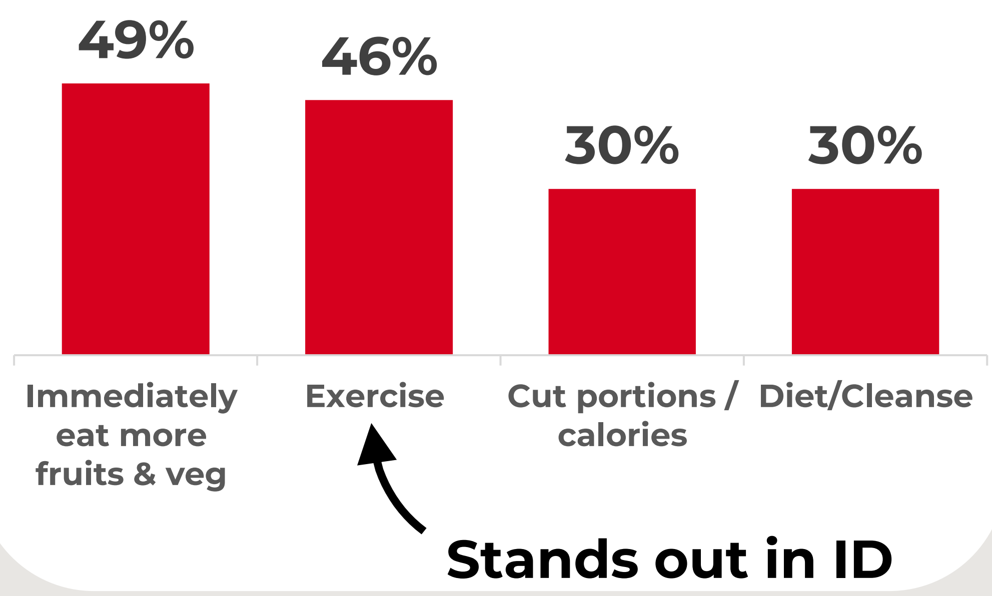
Health is about balance & trade-offs, not abstinence

How much do you agree...

- **75%** I try to balance unhealthy foods with healthier ones.
- **53%** Fried foods are my guilty pleasure and my go to comfort meal.
- **51%** I enjoy traditional dishes from my culture more than “healthy” options.
- **49%** Balance means eating very healthy, then rewarding myself with junk food
- **48%** Street food and eating out are part of my life, even if they aren’t healthy.

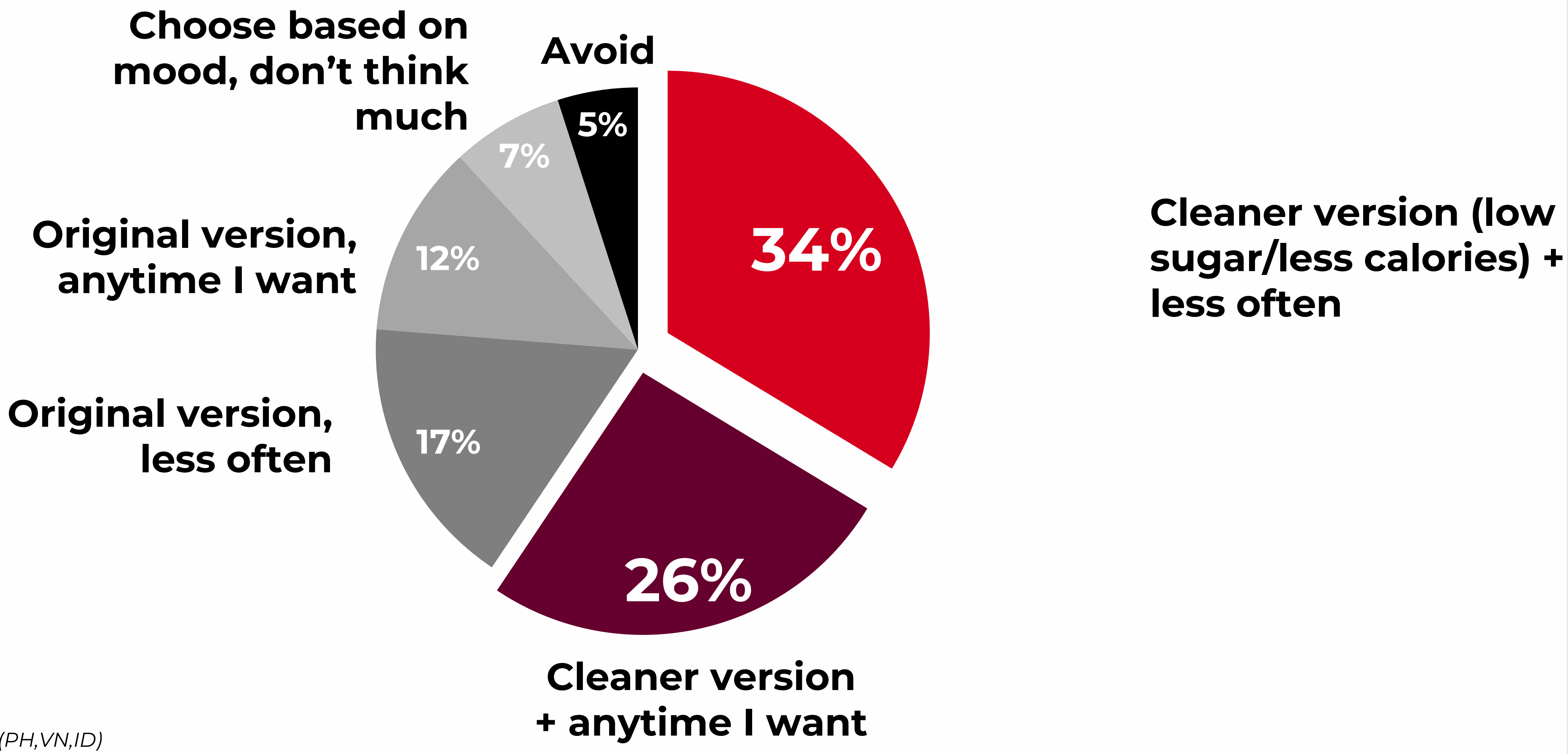
When you feel you’ve eaten ‘badly’ for a few days, what do you do next?



Base: All respondents (PH,VN,ID)
5003 How much do you agree with the following statements about your relationship with food?
5011 When you feel like you’ve eaten ‘badly’ for a few days, what do you do next?(Choose up to 2 things you usually do)

Consumers are toggling between cleaner choices or reducing frequency

If you're having a drink that's not the healthiest, which best describes what you do?



- **VN is most disciplined** in cleaner & reducing frequency
- **ID leans toward cleaner** alternatives
- **PH is most likely to drink based on how they feel**

High-income consumers are 2x more likely to avoid unhealthy drinks altogether

Base: All respondents (PH,VN,ID)
Source: 50023 If you're having a drink that's not the healthiest, which best describes what you do?

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Health shows up in routine moments, indulgence is how consumers unwind – alone or together

On the following occasions, what do you usually crave or choose to eat / drink?

Healthier Occasions

% Something Healthy / Good for me

- **Breakfast (65%)**
- **Post workout (54%)**
- **Dinner (52%)**
- **Lunch (48%)**

Indulgent Occasions

% Something Indulgent/a treat

- **With Friends/ Family (55%)**
- **While Watching Tv / Scrolling (46%)**
- **Afternoon Snack (37%)**

Mixed

% Something Healthy / Good for me

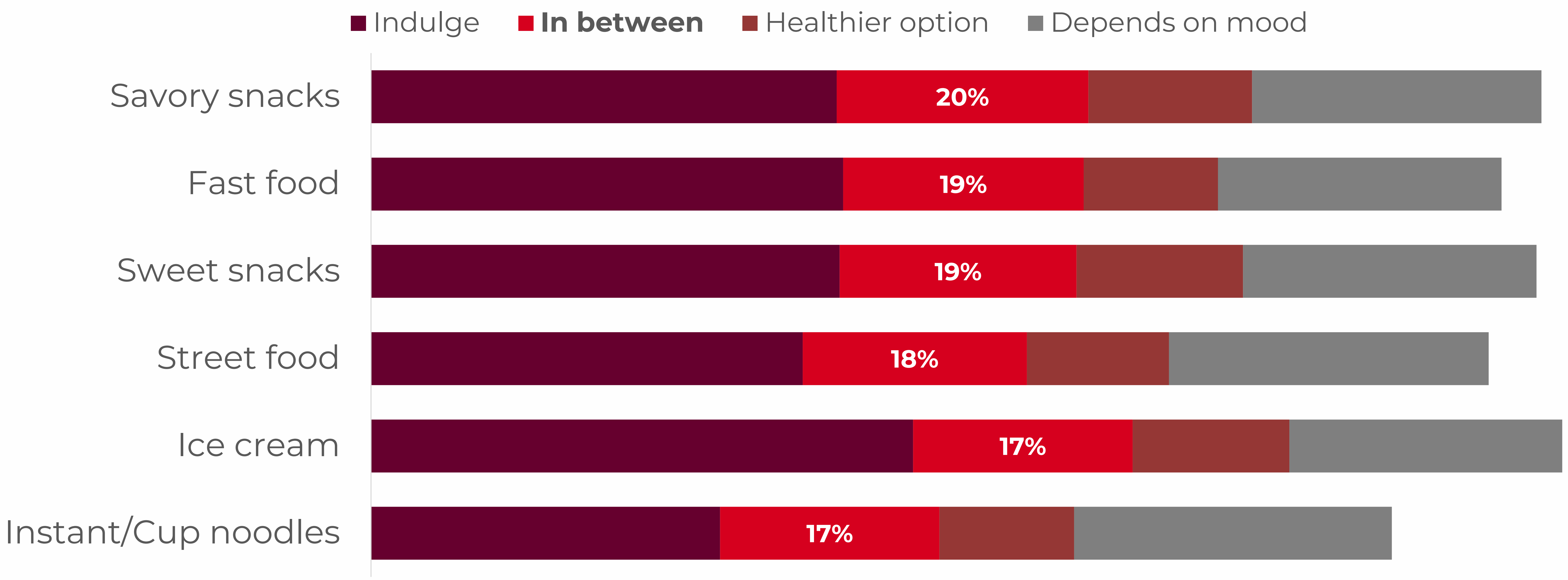
When Eating/ Drinking Alone
- Healthy (33%)
- Indulgence (34%)

While Working Or Studying
- Healthy (29%)
- Indulgence (31%)

Base: All respondents (PH,VN,ID)
5007a: On the following occasions, what do you usually crave or choose to eat?
Note: *Similar findings for beverage consumption*

In snacking, indulgence wins, but ~20% of consumers are now looking for an "in between"

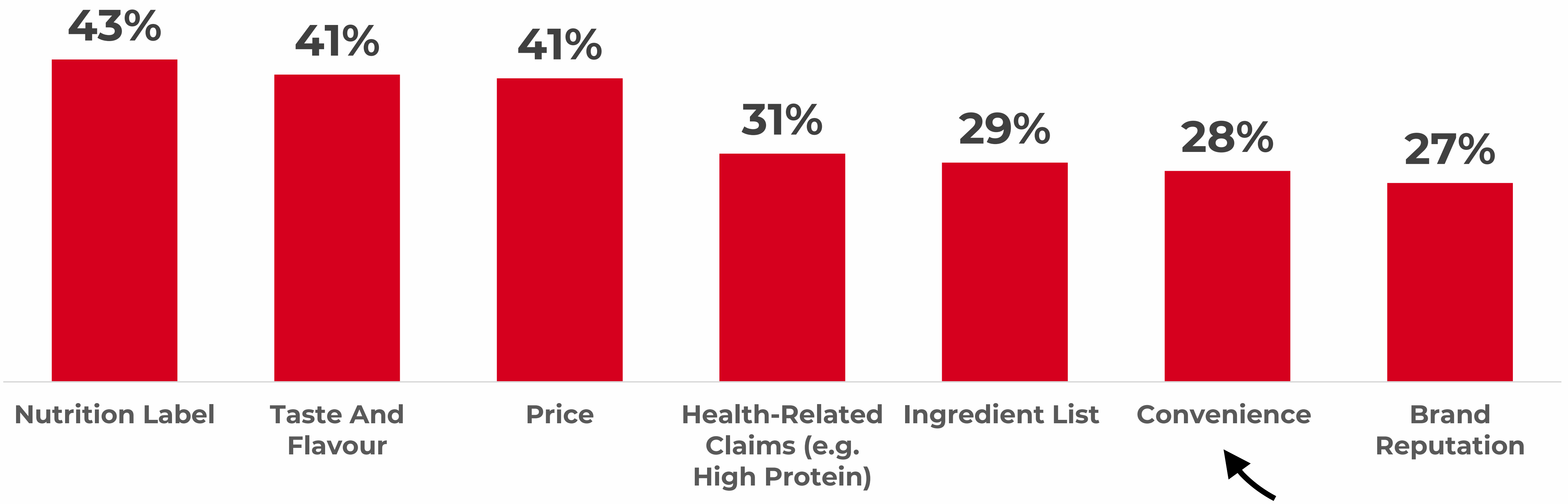
Choose the option that best describes how you usually decide what to have.



Base: All respondents (PH,VN,ID)
5007c For each of the following categories, choose the option that best describes how you usually decide what to have.

When it comes to buying packaged food/beverage, health is now a purchase driver, on par with taste and price

When choosing packaged food or beverages, which of the following influences your decision the most?



Spikes among Gen Zs (50%)

Certifications build trust - 31% value labels like Halal.

49% said price is the top driver, they are value health seekers

Strong emphasis on brand reputation and social influence shapes shopper decision.

Base: All respondents (PH,VN,ID)
5012 When choosing packaged food or beverages, which of the following influences your decision the most? (Select and Rank up to 3)

For consumers in SEA, health is a series of trade-offs — not restrictions. They balance enjoyment with small adjustments and offset indulgence with mindful choices. The future of food and beverage lies in designing *better-for-you indulgence* that feels rewarding (not restrictive), tastes great and remains accessibly priced

Key Insights

Provocations
for Founders & Investors

"Guilt free" propositions wont work — they're a Western construct rooted in restriction and denial. In SEA, health is defined by *balance and mindful trade-offs,* not self-restraint

The win lies in reframing indulgence: from "guilt-free" to *"feel-good."* Brands that make enjoyment smarter — *the same pleasure, made lighter* — connect more deeply with modern consumers

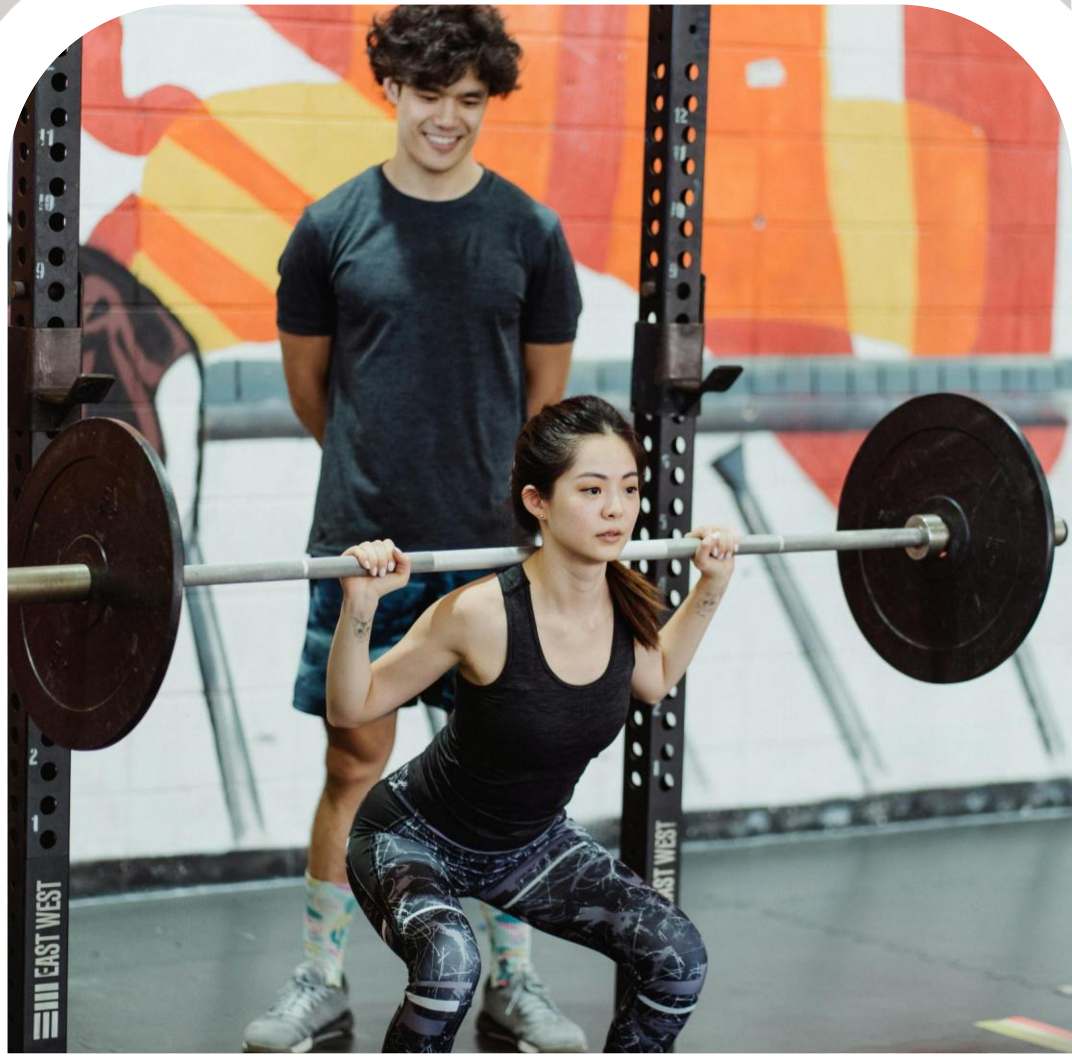
Health only wins when it passes the taste-and-value test

The brands that win make "better-for-you" irresistible — delivering taste, nutrition, and value without compromise

Design for everyday trade-offs. Health in SEA isn't one big switch — it's a series of **small, rational choices** made at the shelf or hawker stall

Businesses that offer *small levers of control* — smaller cups, "less sugar" toggles, mini treats, single-serve sachets— make health fit naturally into how people already live, not the other way around

Exercise reflects the next step — a way to stay in control, feel good, and restore both body and mind



SEA moves in simple ways – walking, cardio and sports rule and on average 2-3x a week

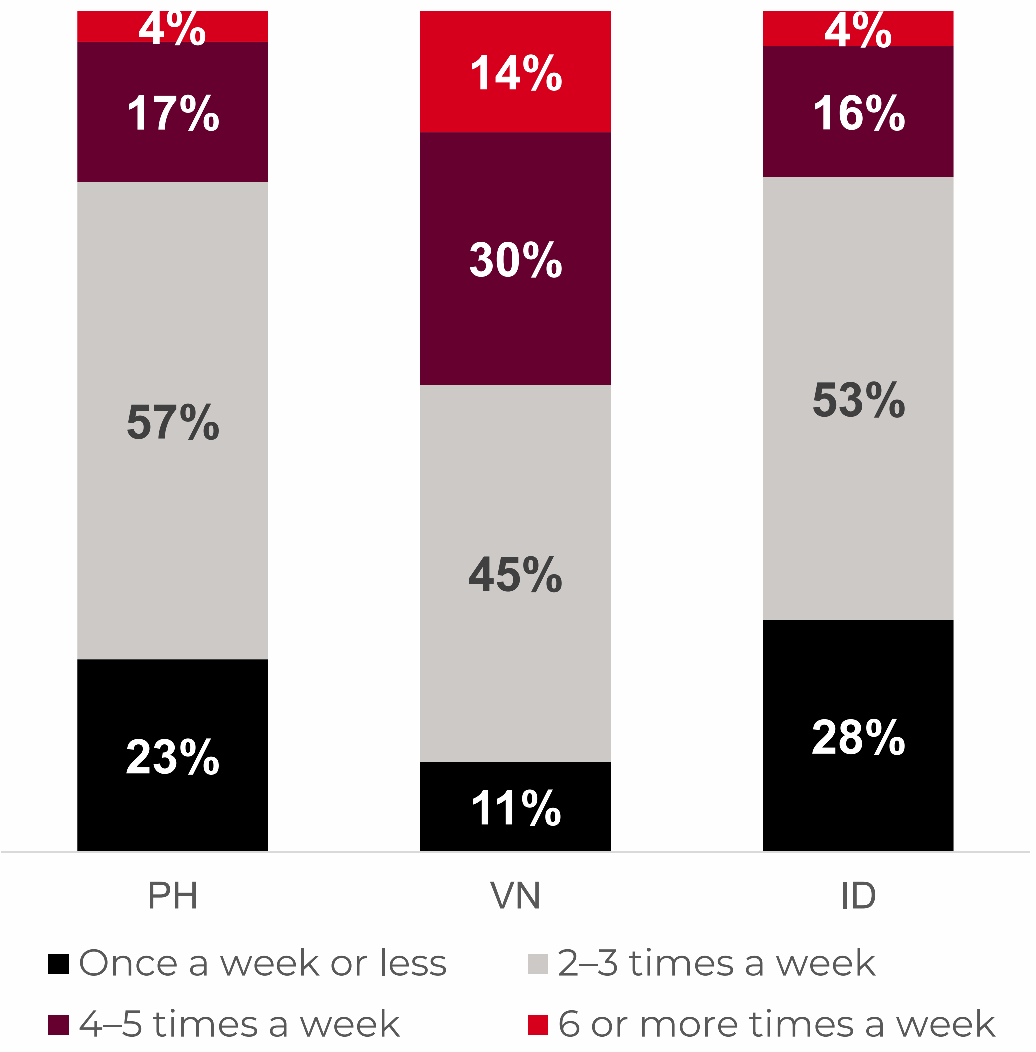
What type(s) of physical activity do you do regularly?

Male
Sports (48%),
Cardio (42%),
Gym / strength (32%)

Female
Online workouts (35%),
Yoga / stretching (34%)

High income
Sports (49%),
Yoga / stretching (42%),
Gym / strength (41%)

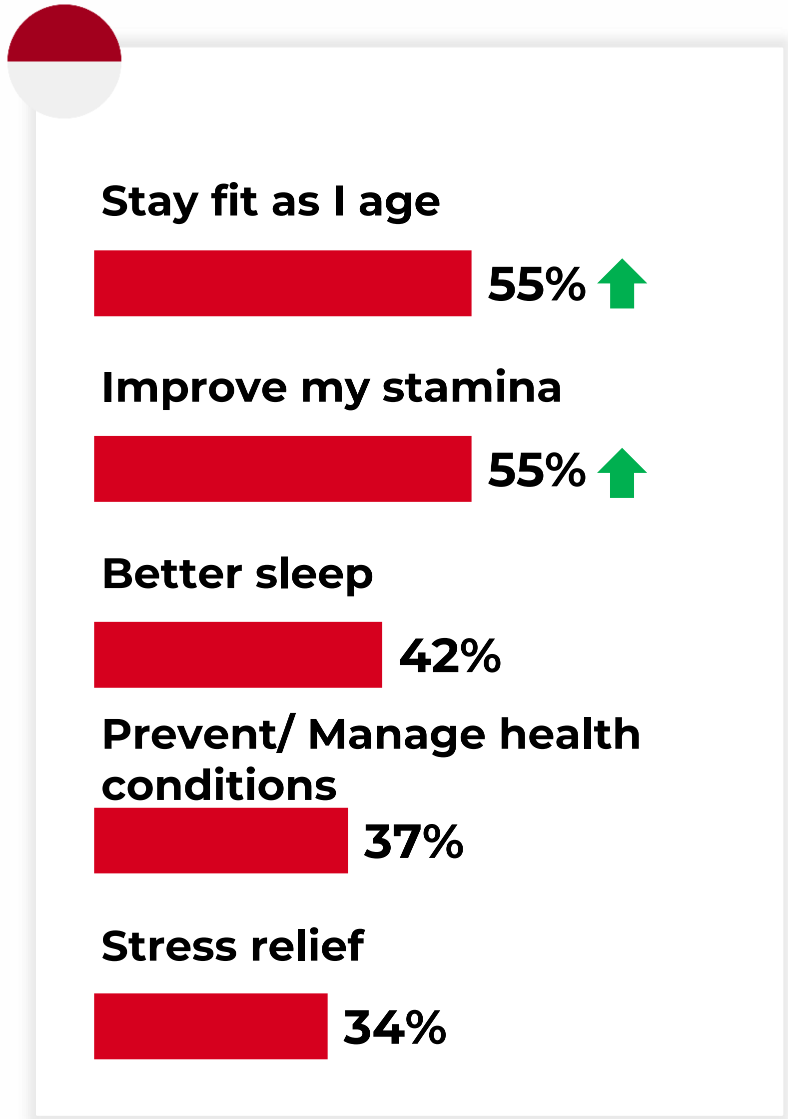
How often do you exercise in a typical week?

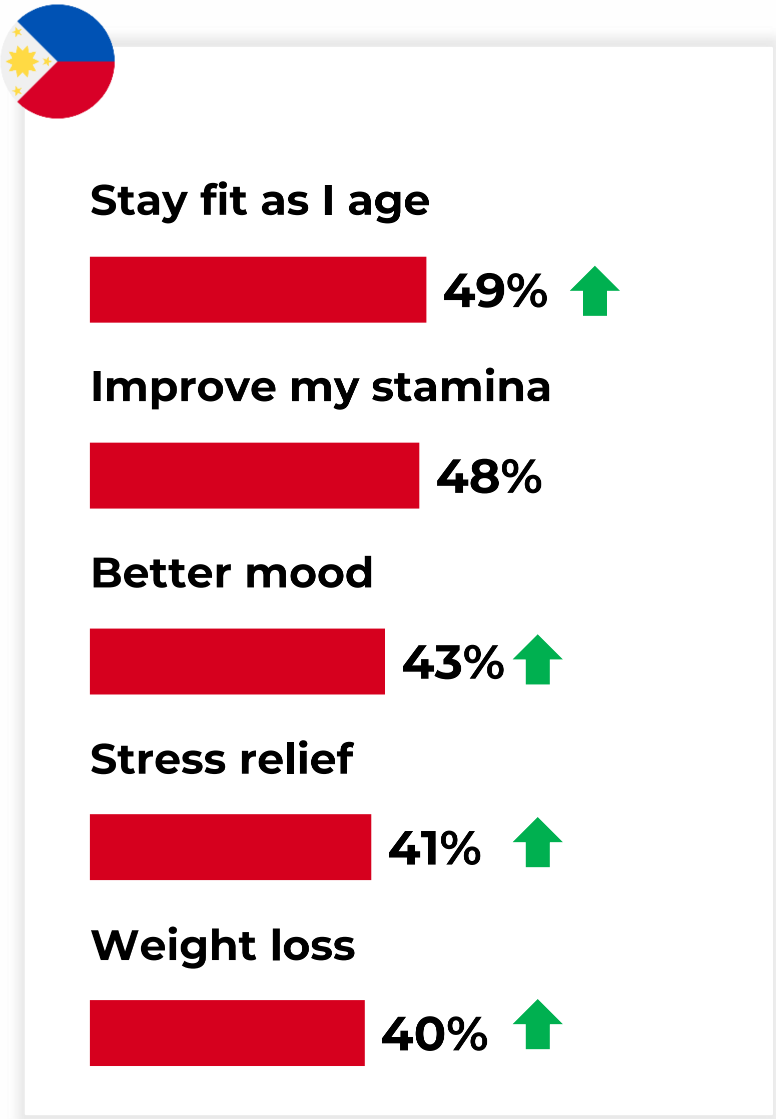


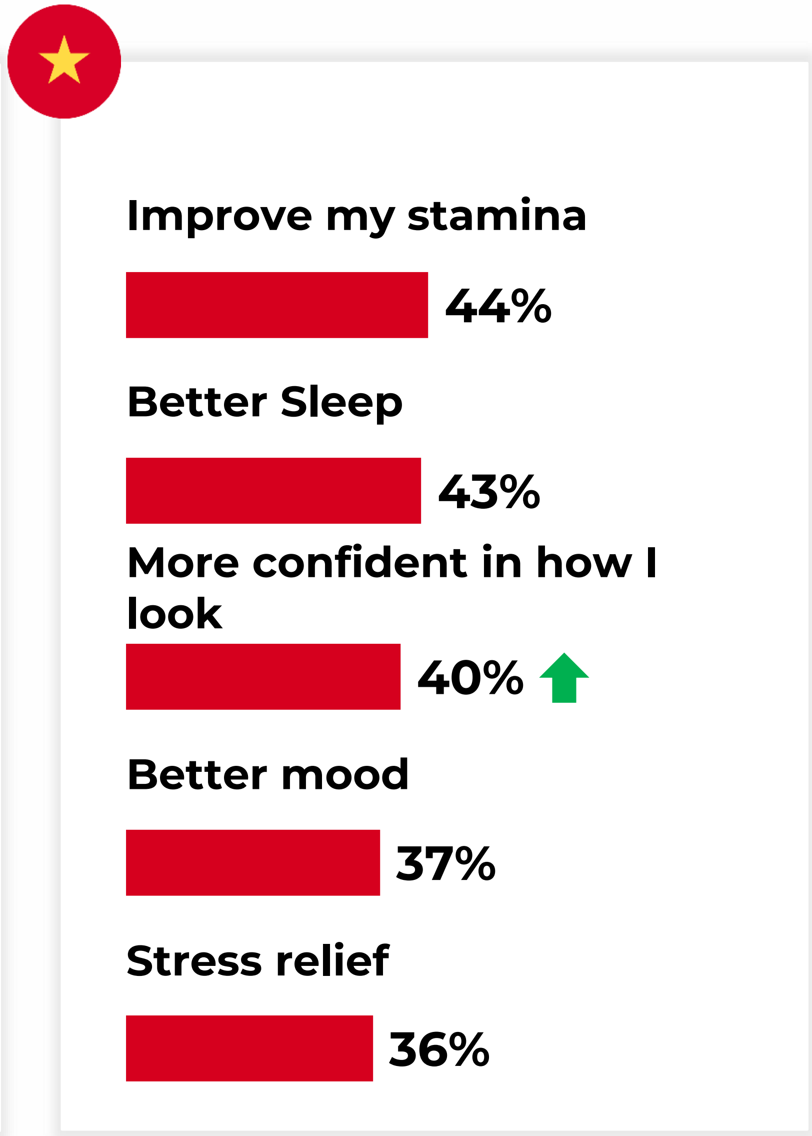
Base: All respondents (PH,VN,ID)
7000 What type(s) of physical activity or movement do you do regularly? (at least once a week in the past 3 months)?
7001 How often do you exercise in a typical week?

Goals go beyond fitness – exercise fuels stamina, mood and confidence

What are the main results you are hoping to get from exercising?







SHARED ATTITUDES

86% feel more like themselves and in control of life when they exercise

73% exercise to lose weight and look my best

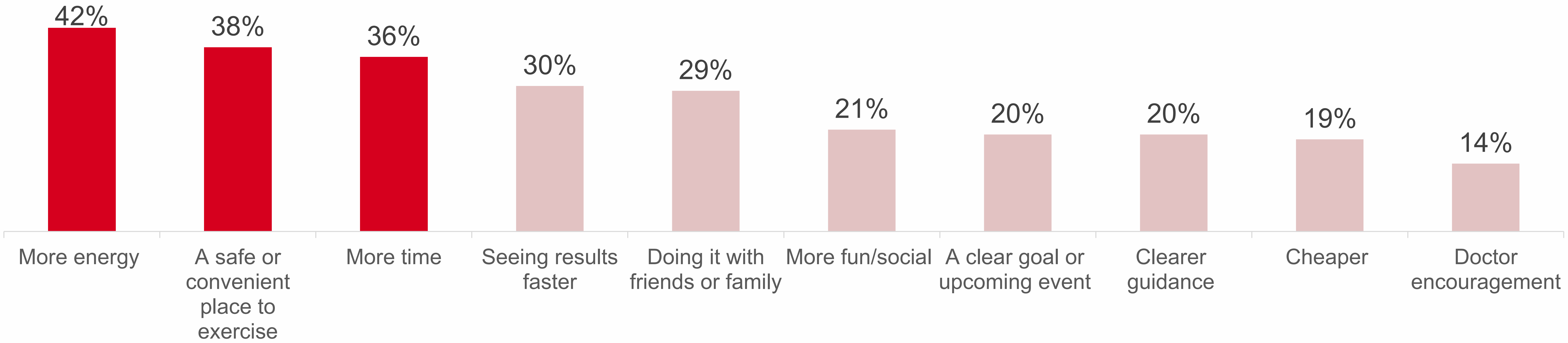
52% exercise so they can eat or drink what I like without feeling guilty

Market skewed. Significantly higher than average scores

Base: All respondents (PH,VN,ID)
7004 What are the main results you're hoping to get from exercising? Please select and rank up to 5 goals, starting 1 being the most important. You can choose fewer than 5 if that feels right for you.
7002 How much do you agree or disagree with the following statements about your relationship with exercise?

Energy, convenience and time – the real barriers to consistency

What 3 things would allow you to exercise more?



Local nuances

A **clear goal or upcoming event** (26%)

More **fun/social** (23%)

A **safe or convenient** place to exercise (44%)

Doing it **with friends or family** (33%)

Younger consumers

Clearer guidance (23%)

Cheaper/ More affordable (22%)

Untapped need: The role of social in exercise

Base: All respondents (PH,VN,ID)

70010 Imagine you really wanted to exercise more often. Which 3 of the following would make the biggest difference for you?

Fitness is a lifestyle investment

What do you currently spend on as part of your fitness routine? (Top spend areas)

Activewear & Accessories	Home equipment	Workout-linked nutrition	Health/ fitness wearables	Recovery & Body care	Digital content/apps	Gym/ fitness memberships
46%	39%	39%	28%	24%	22%	20%

Local nuances

Most active spenders
Leads in gym memberships (26%), personal training (24%), and nutrition (50%)

Value-conscious
Stands out for home equipment (46%)

"Mix & match" approach
Lower gym penetration but balanced investment across digital (21%) and classes (20%)

Approx. monthly spend:

~USD 20

Base: All respondents (PH,VN,ID)
7007 What do you currently spend on as part of your fitness or exercise routine?

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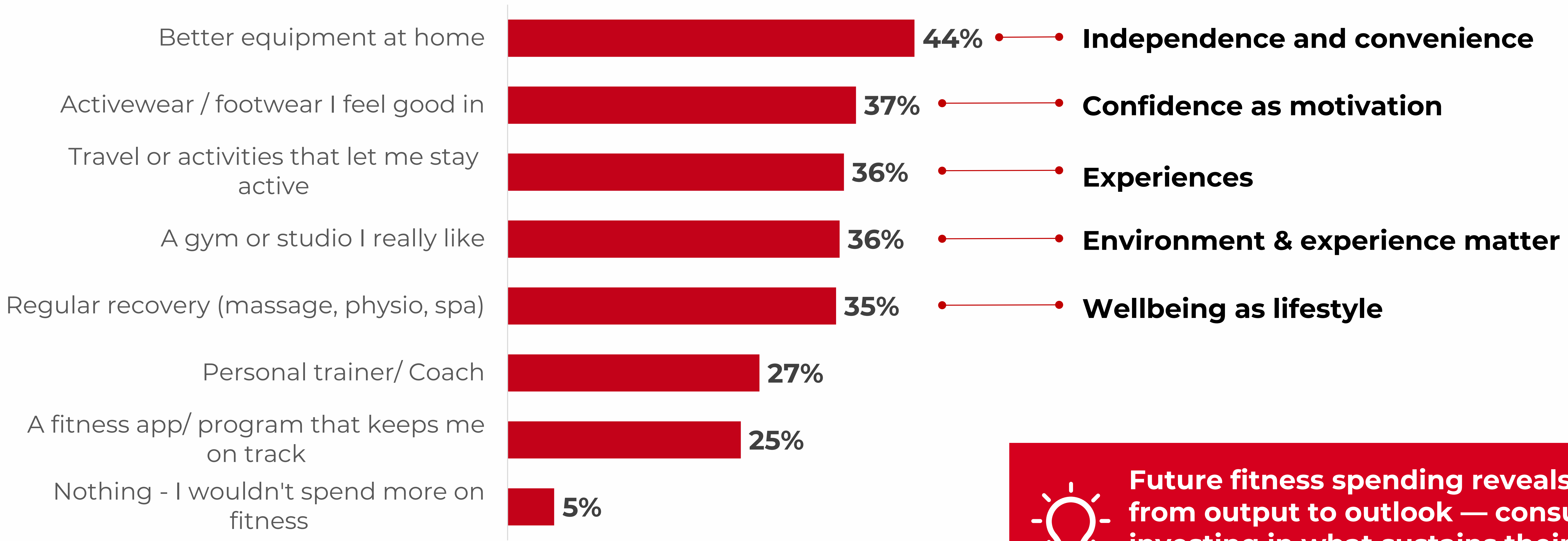
If money isn't a barrier, people would invest more in how fitness makes them feel, not just perform

If money wasn't a barrier, what would you choose to spend on for your fitness?



Future fitness spending reveals a shift from output to outlook — consumers are investing in what sustains their confidence and sense of control

Base: All respondents (PH,VN,ID)
7008 If money wasn't a barrier, what would you choose to spend on for your fitness? (Select up to 3)

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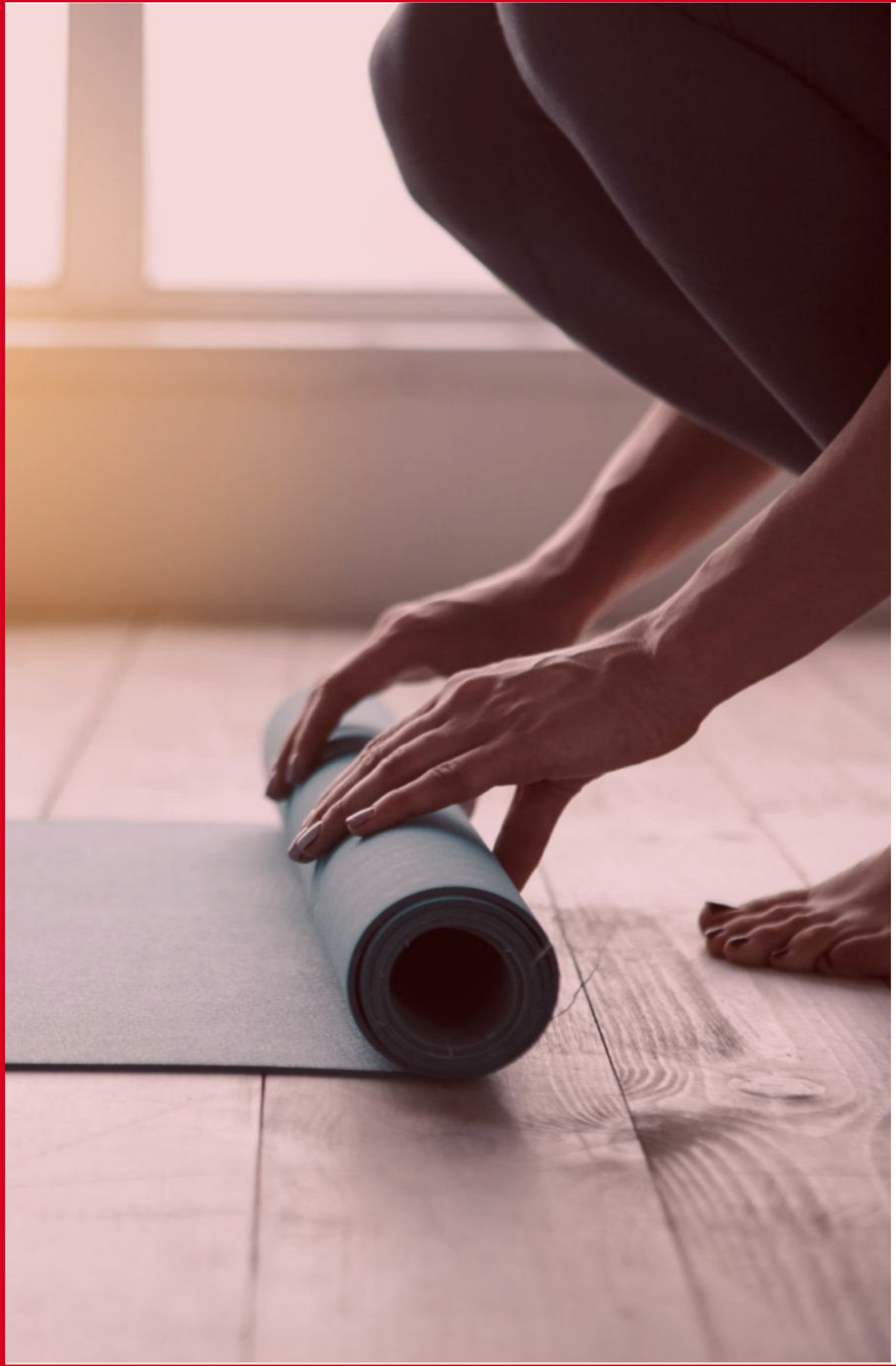


Fitness is no longer just about outcomes (losing weight, building muscle). **It's about expression of self-worth, confidence, and control.** Consumers today see movement as a way to strengthen both body and mind — valuing balance, confidence, and calm. As recovery, gear, and mindful experiences take up a large share of spend, **the opportunity lies in building fitness ecosystems that nurture the whole self — physical and mental**

Key Insights

Provocations

for Founders & Investors

Hardcore performance messaging speaks to a niche. For the mainstream, fitness isn't about peak performance — it's about *keeping up with life*. People move to look good, de-stress, and feel in control

Build fitness that feels achievable, not aspirational. Winning brands shift the narrative from performance to participation — framing fitness as something anyone can do, anytime, anywhere

Energy, time, and cost are the real barriers. People want to stay active, but lack of access — not lack of motivation — keeps them inconsistent

Design for low-friction movement. Affordable formats, community-led classes, on-demand content, and flexible pricing help make movement routine, not a luxury

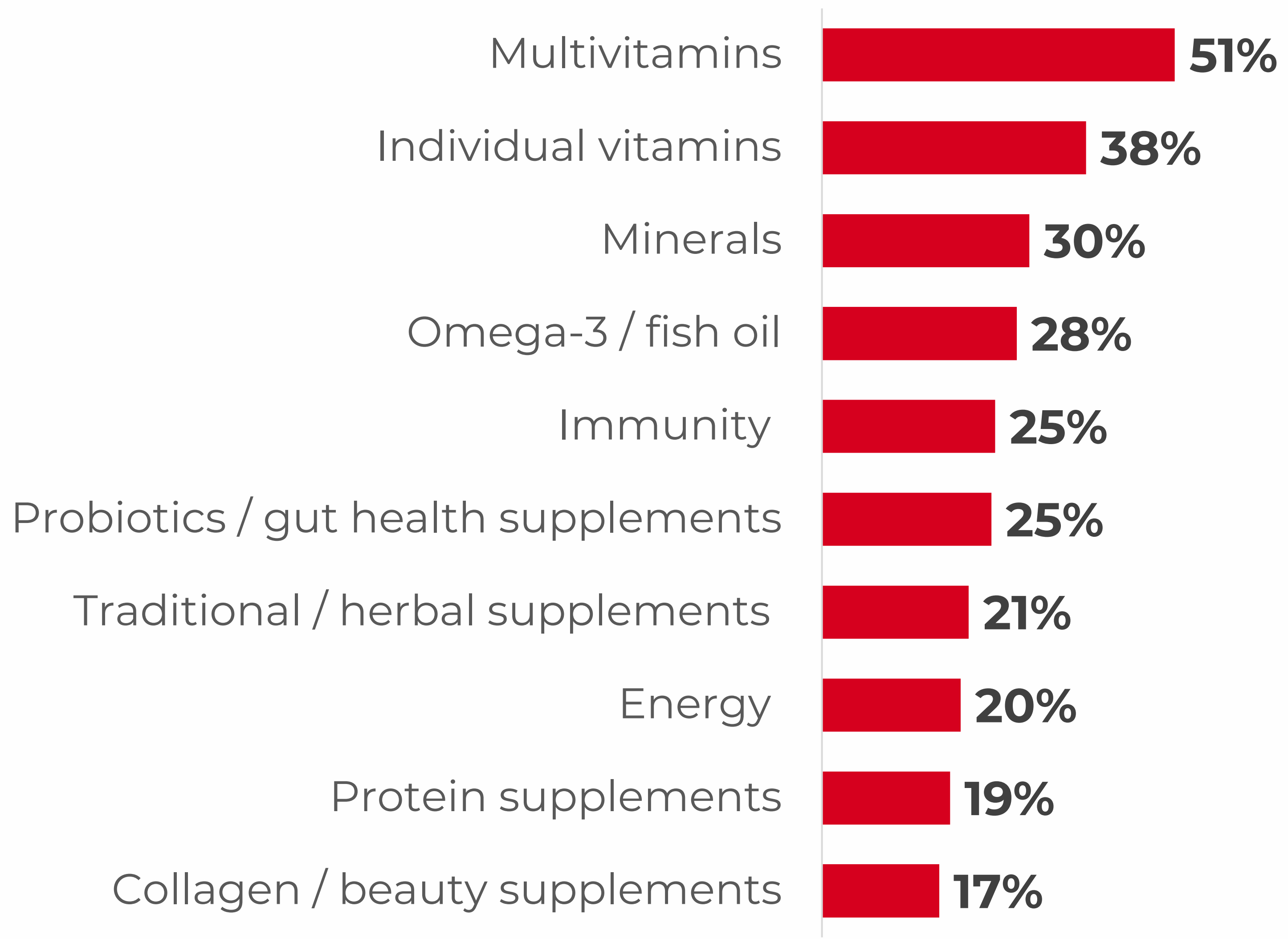
Consistency needs emotional reward, not social pressure. Motivation in SEA comes from feeling better after a workout, not proving it to others

Invest in ecosystems that reward consistency. The opportunity lies in low-barrier, feel-good fitness that celebrates the emotional 'win' after effort

Supplements complete the circle, bridging the gaps that food and activity alone can’t fill, but not yet mainstream

SEA markets climb the supplement ladder at different speeds. Vietnam leads the shift to functionals

Which of these supplements have you been taking recently for the past 6 months ?



The Multivitamin-ers
Highest consumption of multivitamins (60%) vs. ID & VN

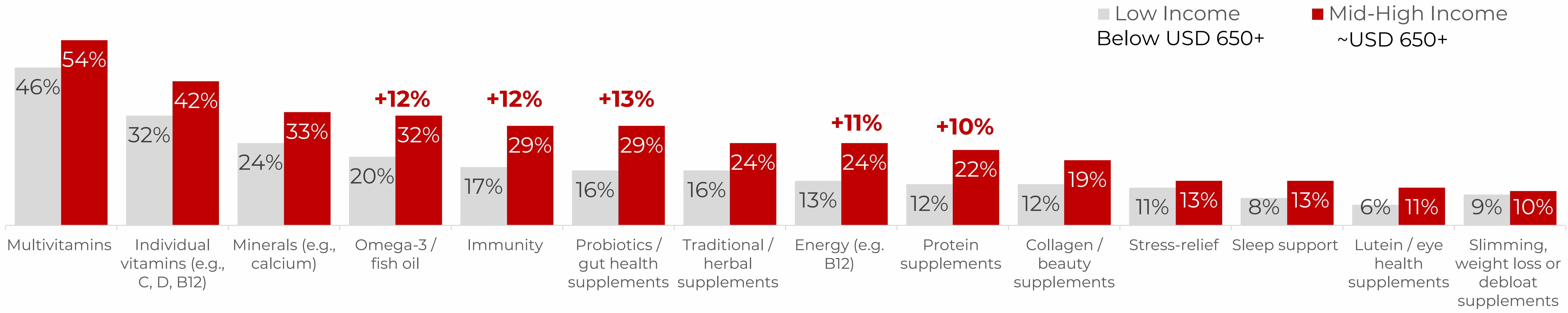
Traditional Balancers
Favors individual vitamins (59%) and traditional/herbal supplements (30%)

The Functional Optimizers
Lowest on multivitamins and highest on functional and performance benefits (Protein 25%, Collagen 22%, Omega 36%)

Base: All respondents (PH,VN,ID)
6001 Which of these supplements have you been taking recently for the past 6 months ?
6004 How much do you agree with the following statements about your relationship with supplements?

As monthly income rises to ~USD 650+, supplement repertoires expand beyond the basics

Which of these supplements have you been taking recently for the past 6 months ?



Mid/ High-income consumers add +7 – 13pts penetration lift across many supplement categories — shifting from essential vitamins to functional and lifestyle supplements

	Low Income (USD ~200 to ~650)	Mid Income (USD ~650 to ~1,700)	High Income (USD ~1,700+)	
Average No. of Supplements	**2.7**	**3.9**	**4.0**	**Spikes on VN's High Income (5.1)**

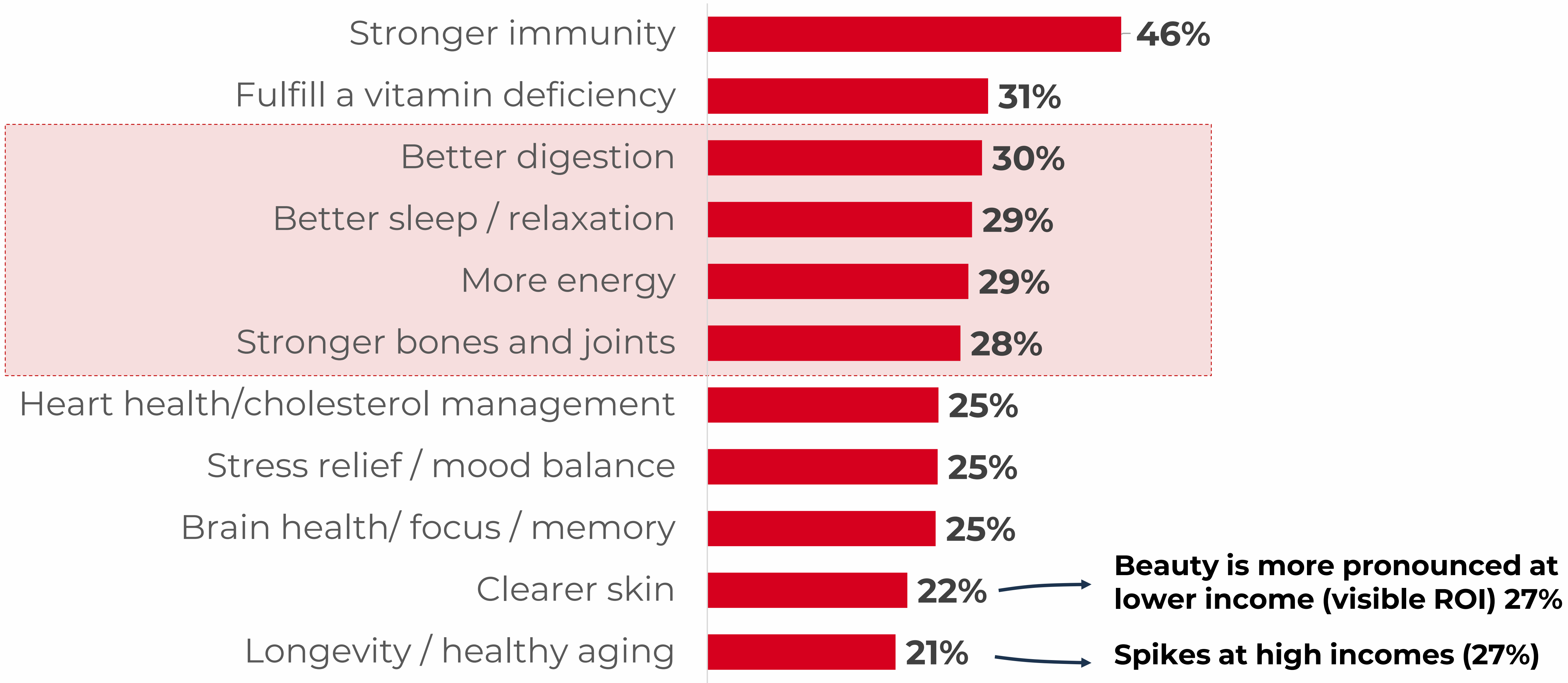
Tipping point

As household income rises, supplement use increases—though it eventually levels off

Base: All respondents (PH,VN,ID)
6001 Which of these supplements have you been taking recently for the past 6 months ?

While immunity remains a baseline need, functional needs like digestion, sleep, energy are the next frontiers

Which of these health outcomes would you want to get from supplements, even if you don't take them today?



Base: All respondents (PH,VN,ID)
6005 Which of these health outcomes would you want to get from supplements, even if you don't take them today? (Choose and rank up to top 5)
6001 Which of these supplements have you been taking recently for the past 6 months?

Cost is the biggest barrier to supplement use regardless of income level. Skepticism comes next

What stops you from taking supplements or taking them more regularly?

They're too **expensive**	I prefer **getting nutrients from real food**	I'm not sure **they really work**	I **just forget** or can't stick to the habit	I **don't know enough** about what I should take	I've **tried them before** but **didn't notice any benefit**	It feels **overwhelming or confusing**
49%	**42%**	**31%**	**31%**	**28%**	**25%**	**21%**
Higher in PH (55%)		**Higher in VN (37%)**				**Higher in VN (27%)**

Skepticism & feeling overwhelmed spikes in VN

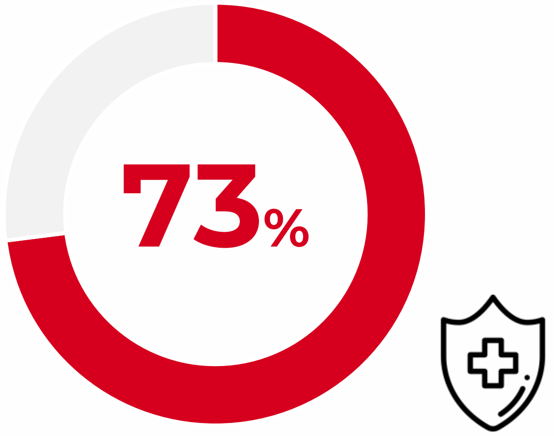
Base: All respondents (PH,VN,ID)
6006 What stops you from taking supplements OR taking them more regularly? (Please rank up to 3 reasons with 1 being the most key reason.)

Behavior is another big barrier. People believe in prevention but still act reactively

How much do you agree…

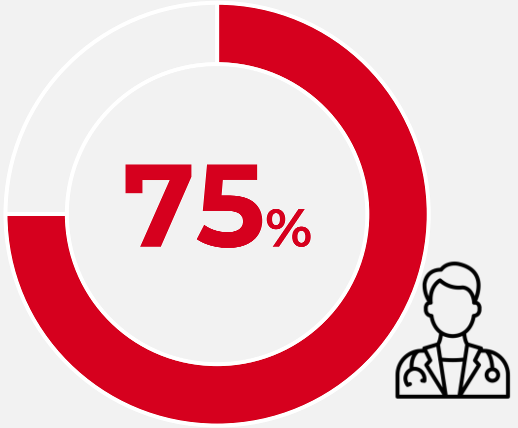
WHAT THEY BELIEVE

Supplements help **prevent sickness** and should be taken daily

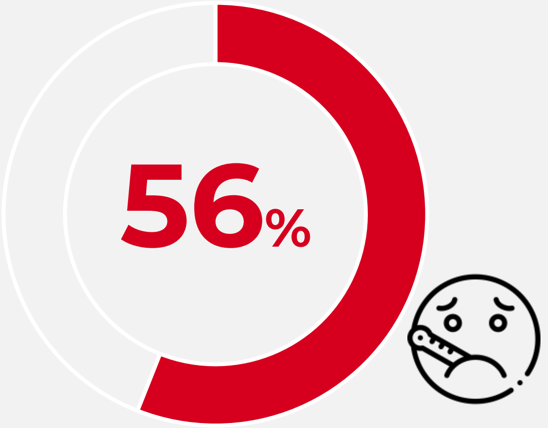


WHAT THEY DO

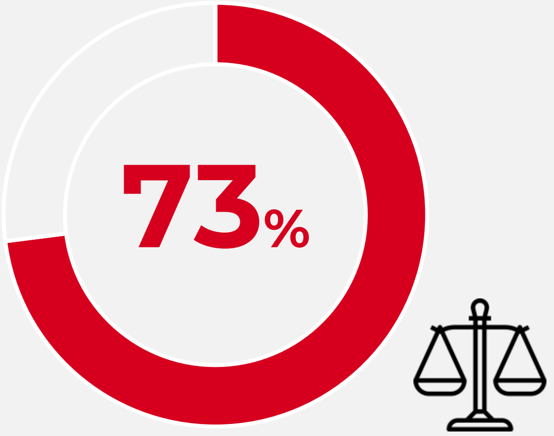
I take supplements more regularly when my **doctor or healthcare provider tells me to**



I usually start taking supplements **when I feel sick**



I see supplements as a way to **balance out my lifestyle when I can't eat healthy**

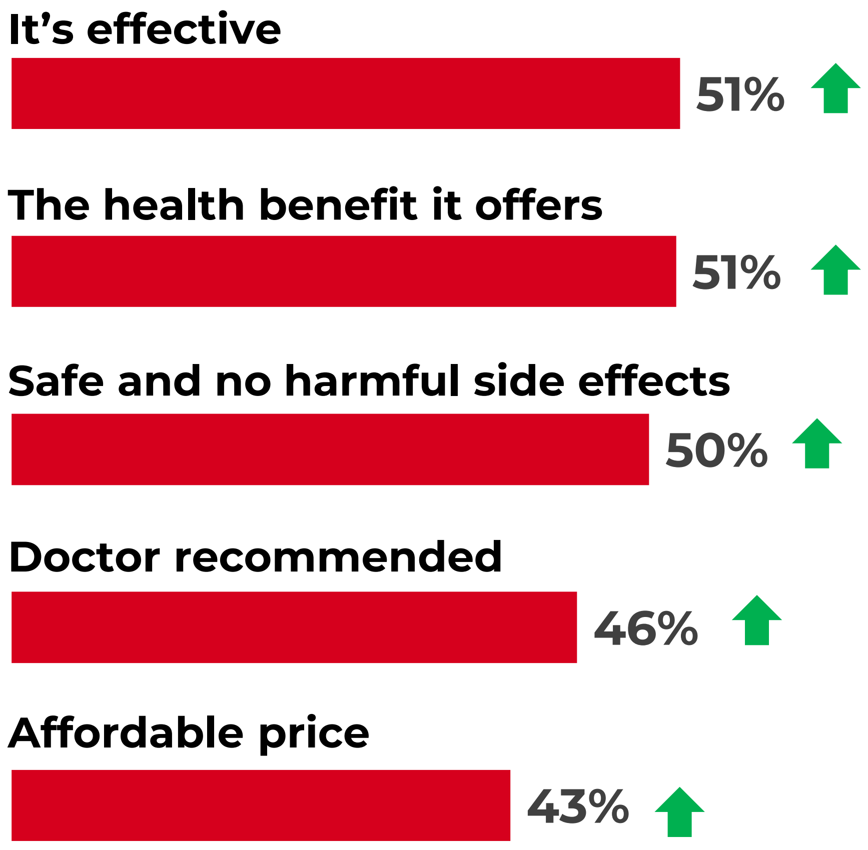


Base: All respondents (PH,VN,ID)
6004 How much do you agree with the following statements about your relationship with supplements?

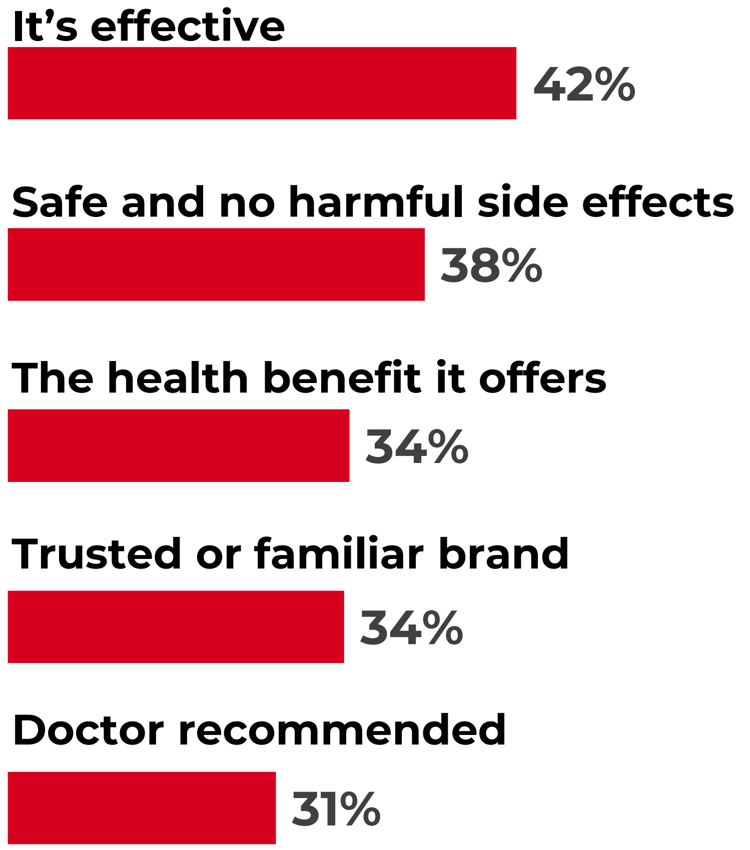
Across SEA, what earns your wallet differs: proof in PH, credibility in VN, safety in ID

When choosing a supplement to buy, what matters most to you?

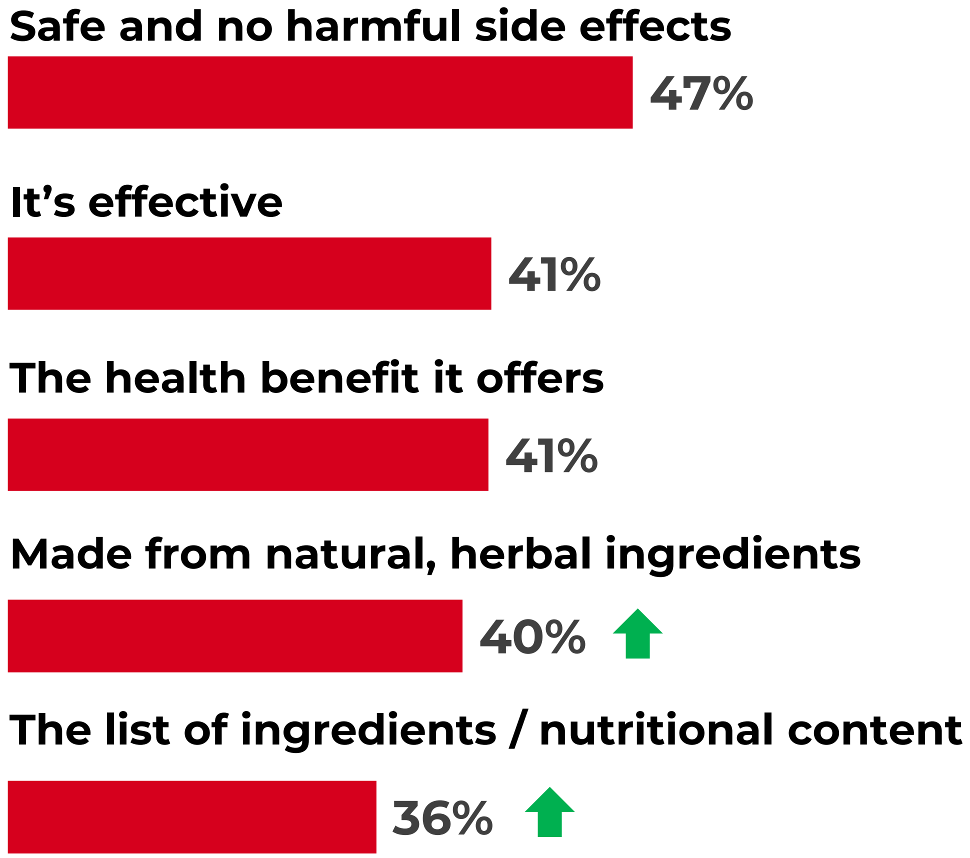
Effectiveness builds trust



Cautious and brand-reliant



Safety and ingredients-centric



Market skewed. Significantly higher than average scores

Base: All respondents (PH,VN,ID)

6007 When choosing a supplement to buy, what matters most to you? Pick and rank up to 5 factors — with 1 being the most important.

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Supplements act as a safety net for immunity **but access still depends on income.** As spending power grows, consumers are **building broader, more personalized repertoires,** yet the journey remains uneven. **Affordability and skepticism** remain the biggest hurdles and behavior often lags belief – people value prevention but still act reactively

The opportunity for brands isn't just to sell prevention: it's to prove it, personalize it, and price it for the everyday consumer

Key Insights

Provocations
for Founders & Investors

The next frontier for supplements isn't the premium wellness crowd — **it's the middle-income consumer (~650 USD) crossing into prevention**

Design for the tipping point, not the top tier. Products and packs that bridge the gap between "occasional multivitamin" and "daily routine" will unlock the next wave of users

Affordability and skepticism hold back belief. People value prevention but act reactively — they only start supplementing when they feel sick or are told to

Make prevention feel as easy and as proven as pain relief. Brands that offer *perceivable results*, *simple formats*, and *trusted channels* will drive the shift in behavior from reactive to proactive

Proof is personal. What builds trust differs by market — safety and effectiveness in Indonesia, proof and credibility in Vietnam, affordability and visible benefits in the Philippines

Invest in trust infrastructure. From ingredient traceability to doctor-influencer content, credibility is becoming a differentiator

Contact Us

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