Voice of the Consumer 2026 Survey

Indonesia survey result - August 2026

Voice of the Consumer 2026 Indonesia cut – Background and research overview

Survey background

Aligned with PwC's **'How We Care'** domain, PwC Global conducted the Voice of the Consumer 2026 survey, which aims to deliver actionable insights into **health and wellness behaviours**, **habits, and discretionary wellness spend** across diverse consumer groups.

Research overview

The research collected responses from 21,808 consumers across 27 global territories, including **Indonesia**, where **503 consumers** participated. Key demographic factors, including gender, age, employment status, and region, were represented. **Data was gathered anonymously during February and March 2026** through an external panel provider.

Insights report

This report is based on PwC Indonesia's analysis of the **503 Indonesian respondents** included in the Voice of the Consumer 2026 Survey, supplemented by local market data and supporting research to provide relevant insights into Indonesia's evolving wellness landscape.

The report explores key findings across:

- **V** Value-conscious spending
- **A** Active lifestyle and wellness
- **L** Lifespan and longevity
- **U** Understanding (trust and transparency)
- **E** Ease and convenience
- **S** Social and community dynamics

Indonesia survey overview

Wellbeing is emerging as a major driver for everyday choices in Indonesia

Lifespan and longevity is becoming one of the factors shaping everyday purchase decisions

Consumer goals around living longer and getting healthier are influencing shopping choices.

Implication: Incorporate lifespan-oriented attributes as one signal in broader product strategy, e.g. anti-ageing, MSG-free.

Wellness and active lifestyle are expanding

Consumer spending is broadening into fitness, hydration, and recovery-signalling opportunity in lifestyle retail.

Implication: Grow basket size by expanding into lifestyle categories (activewear, accessories, hydration).

Value-conscious spending remains the foundation of mass consumer market growth

Indonesia's mass market continues to prioritise price accessibility and value-for-money.

Implication: Create price-tiered assortments, smaller packs, value bundles, subscriptions, and loyalty programmes.

Brand trust and transparency are emerging as universal differentiators

As participation grows and product choices multiply, consumers increasingly rely on quality, safety, and transparency to determine which brands they trust.

Implication: Focus on clear claims, labelling, certifications, traceability, expert endorsements, and consumer education.

Convenience is becoming a decisive purchase driver

Consumers increasingly prioritise ease, speed, and simplicity in how they discover, evaluate, and purchase products.

Implication: Provide convenience by distributing across retail, e-commerce, and omni-channels.

Social and community dynamics are increasingly shaping mainstream purchase decisions

Peer and community-driven trends are reshaping how consumers discover and buy.

Implication: Build community-led engagements, sponsor, and build visibility through social events.

Lifespan and longevity

1 Lifespan and longevity is becoming one of several factors shaping broader everyday purchase decisions

The consumer shift

Healthier living is now an everyday choice

- "Better for me" now means living longer and feeling better, not just looking better
- Consumers prioritise energy, quality ingredients, and health benefits

Key drivers

What is pushing the shift

- Greater focus on preventive health and anti-ageing ingredients
- Community and peer discussions around longevity outcomes
- Wider product availability in functional categories, e.g. supplements, fortified foods, and recovery drinks

Business opportunity

Where brands and retailers can win

- Brands: launch affordable daily health stock keeping units (SKUs), such as sugar-free drinks, fortified snacks, fibre/protein staples
- Organise shelves around consumer goals, such as improving energy, sleeping better, building immunity
- Put healthier options at eye level in minimarkets, supermarkets, and pharmacies, not only health aisles

Winning strategy

How to make it work

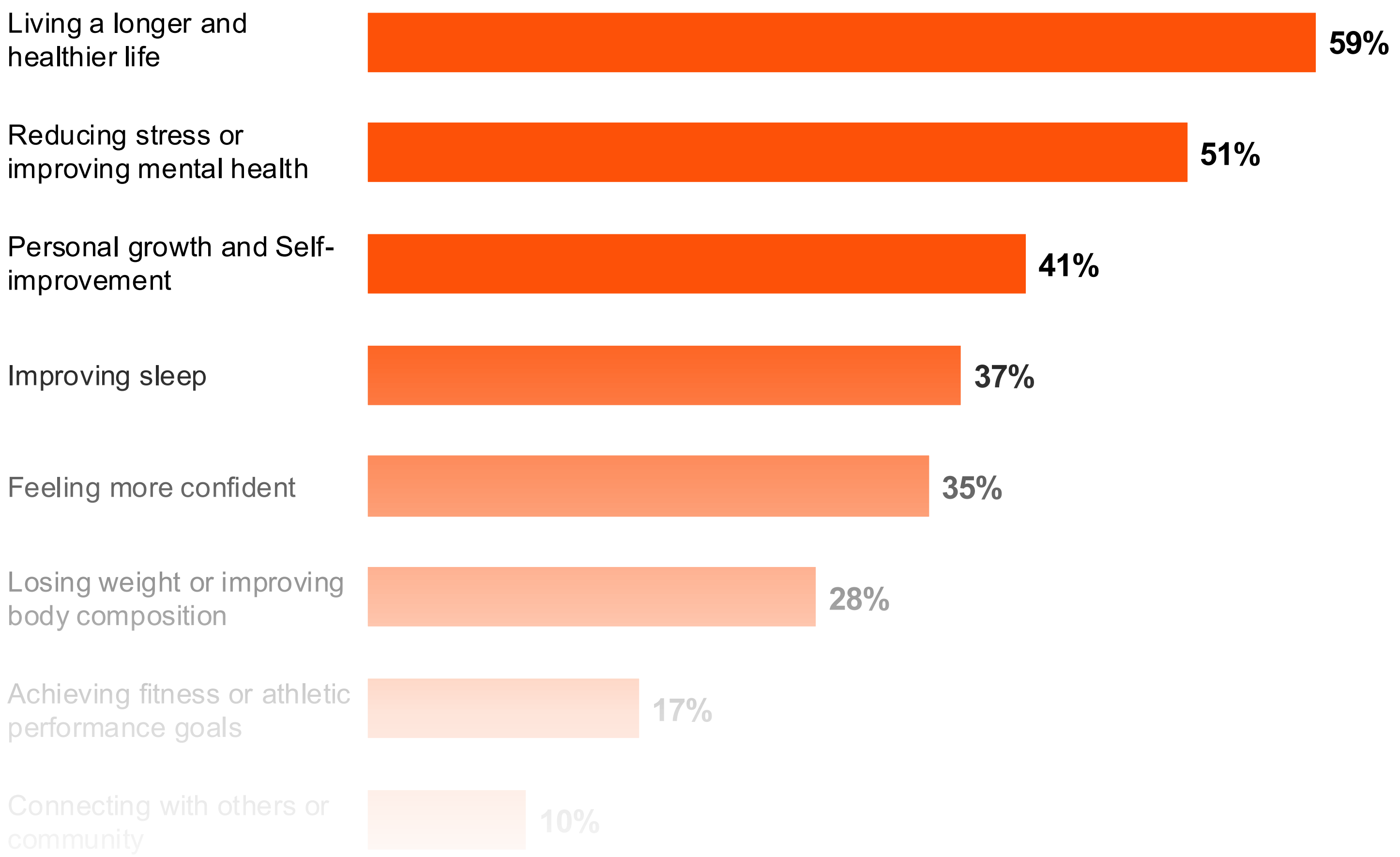
- Highlight one clear benefit on the the pack, such as "supports daily energy," "no added sugar", or "high in fibre"
- Bundle daily routines (breakfast + vitamins, hydration + fibre) and explain one benefit in 3-5 seconds at the shelf
- Use entry packs to drive market penetration and monthly bundles to encourage retention

As consumers prioritise living longer and healthier, everyday purchasing choices are creating new opportunities across food, retail, and lifestyle categories.

Living a longer and healthier life is the top wellbeing priority for Indonesian consumers

Question: Considering your current health and wellness, which of the following, if any, best represents your primary goals (i.e. specific aims or desired outcomes)? (n=503)
Base: Rank 1-3

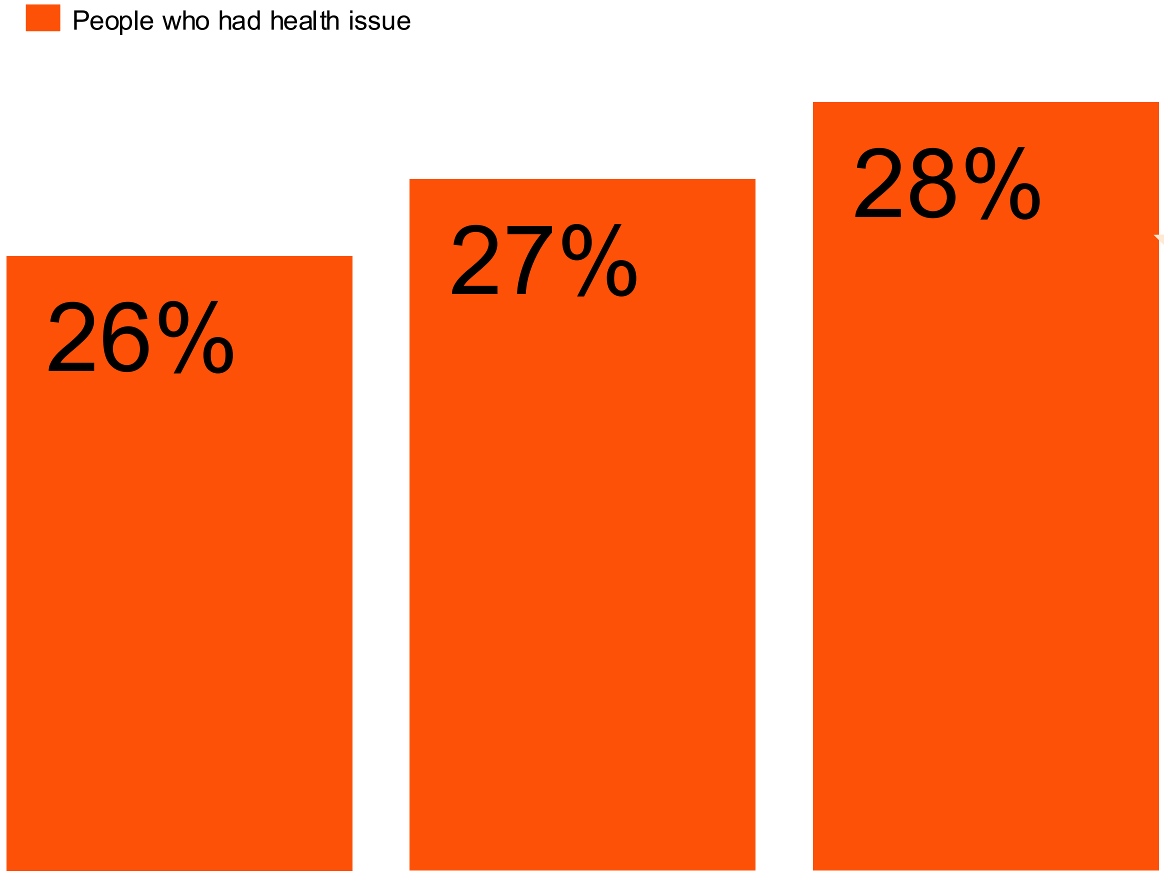
Current consumer health and wellness goals



Consumers increasingly equate successful ageing with both longevity and wellbeing, making healthy living their foremost wellness priority.

As health risks rise, Indonesian consumers are increasingly spending on prevention and protection…

People with health complaints
% of Indonesian population



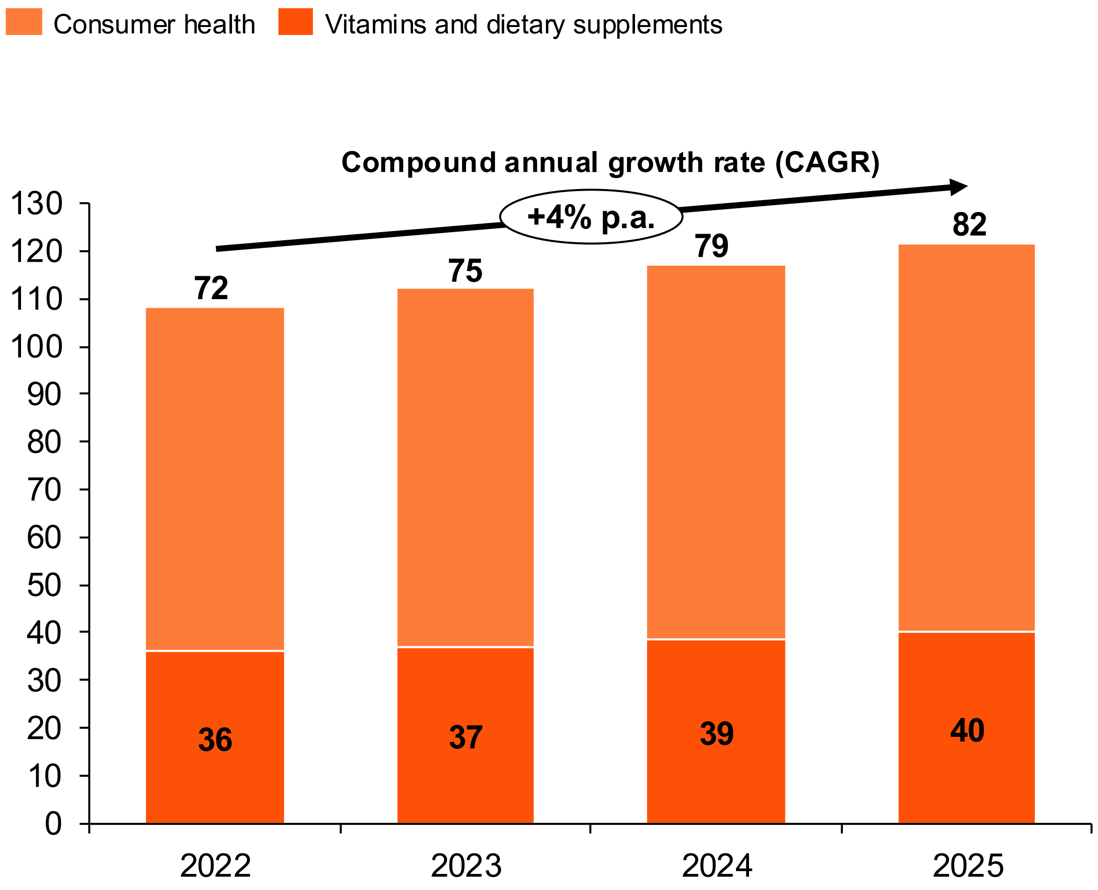
From 2023 to 2025, health issues continued to rise, indicating growing consumer **awareness of health risks.**

Growing health concerns are prompting consumers to take greater ownership of their long-term wellbeing through preventive health and wellness choices.

Source: Health Profile Statistics, BPS, 2025 and Euromonitor

...turning health awareness into consumer spending

Sales of consumer health products
IDR trillion



Health awareness is translating into spending, with consumers increasingly investing in **prevention, nutrition, and everyday wellbeing.**

The shift from treatment to prevention is accelerating as consumers increasingly view wellness spending as an investment in long-term health outcomes.

Notes: Consumer health includes over-the-counter (OTC), nutrition, vitamins, weight management, herbal remedies, allergy care, paediatric health.
Source: Consumer Health in Indonesia, Euromonitor International, 2025

Consumers are turning wellness aspirations into daily actions, adopting nutrition-focused routines…

Question: How often do you engage in the following health and nutrition related habits? (n=503)
Base: Net frequently

Frequency of health and nutrition habits

72%
I plan and prepare my meals at home.

59%
I take vitamins, minerals, or supplements.

54%
I monitor my fluid intake.

41%
I monitor the amount of fibre in my diet.

40%
I monitor the amount of protein in my diet.

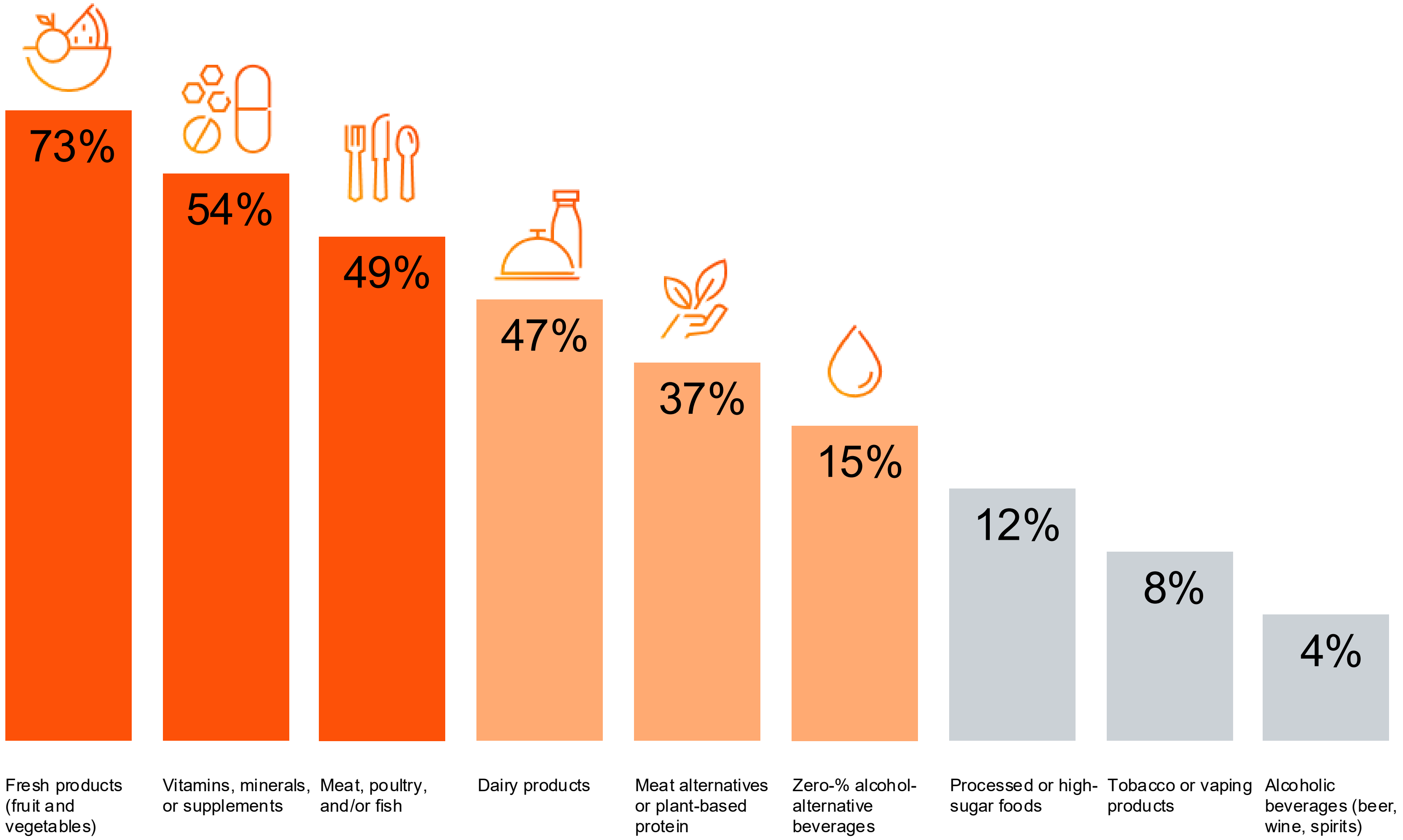
39%
I monitor my calorie intake.

Consumers are increasingly translating longevity aspirations into daily nutrition and wellness habits, taking a more proactive approach to maintaining long-term health.

...driving demand for products and services that support prevention, nutrition, and long-term wellbeing

Question: Thinking about the next 12 months, how do you anticipate your consumption will change in each of the following categories? (n=503)
Base: Net slightly and significantly increase

Changes in consumer consumption behaviours in the next 12 months



Consumers intend to further increase spending on healthier food and nutrition choices, reinforcing a long-term shift toward preventive wellbeing.

Key takeaways

Practical implications

The shift towards healthier living is creating new demand across the consumer basket.

What to sell/activate now

“Offer simple, tangible health benefits at scale, such as improved focus, stress support, digestive comfort, and heart health.”

For retailers

- ✓ Organise health-focused products around consumer needs, such as immunity, gut health, hydration, and stress support, to make them easier to discover
- ✓ Improve in-store navigation and visibility by grouping relevant products together and using clear, accessible signage
- ✓ Make healthier choices more affordable and convenient through accessible price points, promotions, and strategically placed everyday products
- ✓ Use bundles and repeat-purchase programmes to help consumers incorporate health-focused products into their regular shopping routines

For brands

- ✓ Develop affordable products that deliver simple, relevant health benefits and can be scaled across everyday consumption occasions
- ✓ Communicate one clear and easy-to-understand benefit on the front of the pack so consumers can quickly recognise the product’s value
- ✓ Use entry packs to encourage trial and offer larger formats or monthly bundles to support repeat purchase and retention
- ✓ Make healthier choices feel practical and familiar by integrating relevant benefits into products consumers already buy and use regularly

Food for thought

- ✓ Which of your existing SKUs can credibly own daily benefits such as energy, low sugar, or MSG-free formulations?
- ✓ Which categories can your brand credibly enter, such as supplements, functional beverages, fortified foods, or personal care?

Wellness and active lifestyle

2 Wellness and active lifestyle are expanding into everyday spending

The consumer shift

Being active is now mainstream

- Health ranks as a lifestyle priority
- Spending is expanding beyond conventional food and beverage (F&B) into categories such as hydration, recovery, and fitness

Key drivers

What is pushing the shift

- Greater engagement in fitness and wellness activities (58% exercise frequently)
- Social proof through fitness communities and gym culture
- Wider distribution of lifestyle products through non-traditional retail (gyms, activewear stores, sports venues)

Business opportunity

Where brands and retailers can win

- Create activity-based sections, such as running, gym, weekend cycling
- Brands: own one occasion, such as pre-workout fuel, post-run recovery, daily hydration, or strength snacks
- Sell products for before, during, and after activity, such as hydration, protein, recovery, energy, and travel packs

Winning strategy

How to make it work

- Launch convenient packaging: sachets, ready-to-drink (RTD), bars, gummies, single-serve protein, and electrolyte packs
- Clearly communicate simple benefits, such as fast hydration, protein per serving, recovery support, and lasting energy
- Partner with gyms, running clubs, and events for sampling, co-branded drops, and cross-merchandised add-ons

Active lifestyles are spilling into everyday retail, growing basket size well beyond dedicated sports categories.

Consumers are actively pursuing healthier lifestyles through wellness-oriented activities…

Question: How often, on average, do you practice the following health and wellness activities? (n=503)
Base: Net frequently

Frequency of health and wellness activities

58% Physical fitness routines or exercise

38% Spending time outdoors in nature

37% Tracking and improving sleep patterns

28% Nutrition or dietary planning

24% Digital detox

19% Meditation, spirituality, or mindfulness practices

7% Counselling or therapy services

Wellness is has become an active lifestyle choice, with consumers increasingly integrating exercise, recovery, nutrition, and mental wellbeing into their daily routines.

...making active living a mainstream expression of wellness...

Question: Thinking about the last 12 months, which of the following discretionary purchases have you made to support your personal health and wellbeing? (n=503)

Base: All respondents

Health and wellbeing purchases in the last 12 months

46% Speciality healthy food/beverage

34% Health screening or preventive check-up

33% Beauty treatments (e.g. manicure/pedicure, haircut/treatments

28% Gym membership, fitness classes, or personal training

25% Wearable devices (e.g. fitness trackers or smartwatches)

23% Fitness-related equipment

21% Health or fitness apps/subscriptions

21% Wellness or spa treatment/experience

17% Mental health support (e.g. counseling, meditation apps)

15% Sleep aids (e.g. medication, weighted blankets, sleep masks)

10% Alternative therapies (e.g. acupuncture, chiropractic)

Active lifestyles are translating into consumer spending, as individuals invest in products, services, and experiences that support their wellness goals.

...with consumers increasingly embracing sports and fitness as everyday wellness routines

Notes: *Wearable device usage
Source: Garmin Connect Data Report 2025 – Indonesia 2024-2025

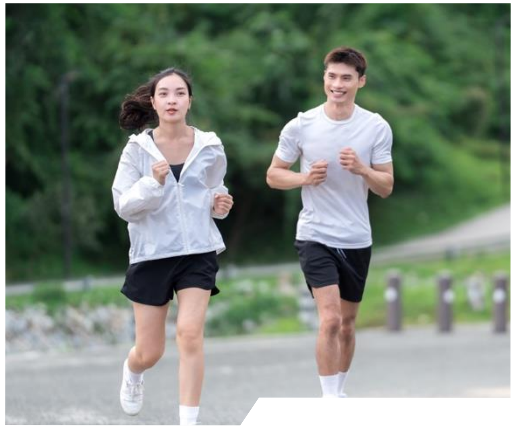
Indonesia's fastest-growing sports by user activity in 2025*
% year-on-year (YoY)

#1

+1,684%

Padel

#2



+124%

Running (track)

#3

+113%

Tennis

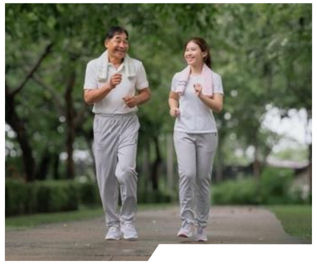
Active living stands as a mainstream expression of wellness, with consumers increasingly embracing fitness and sports as part of their everyday routines.

Running and walking remain the foundation of active lifestyles, while strength training is emerging as a fast-growing fitness trend

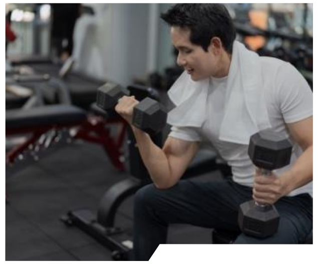
Source: Garmin press release

Top three sports in Indonesia
Millions of people

Running
10

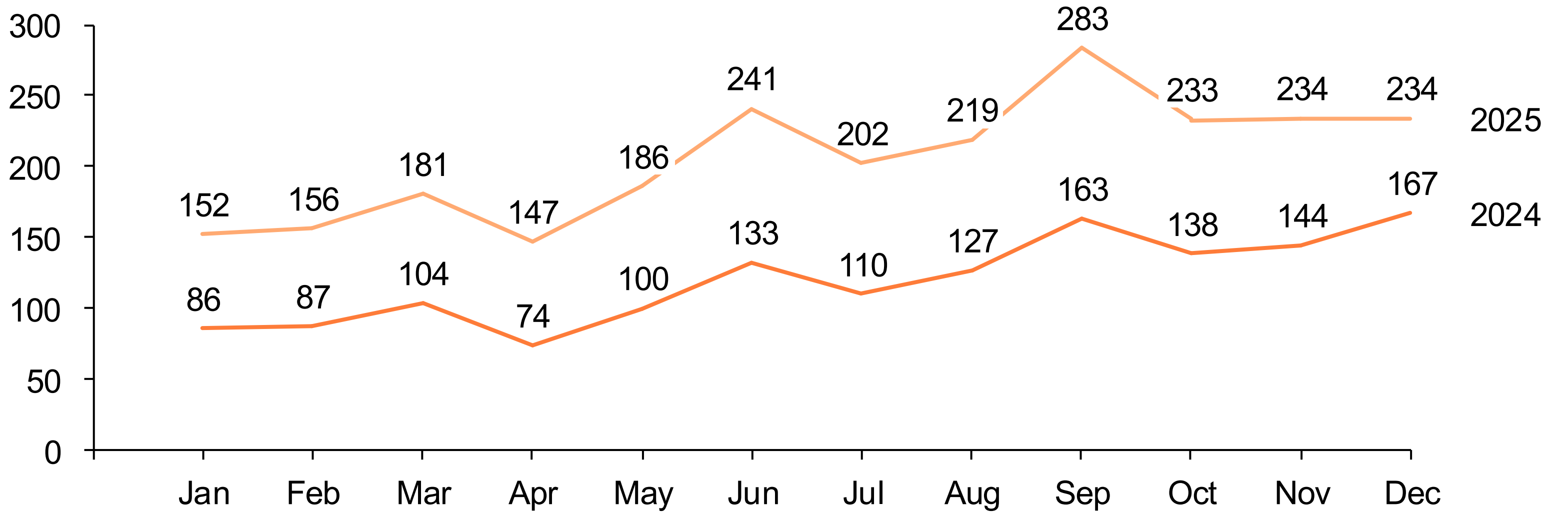


Walking
4



Strength training
2

Strength training in Indonesia



Consumers are embracing exercise habits that support healthy ageing, combining regular movement with strength-building activities that enhance long-term wellbeing.

Growing participation in sports and fitness is driving higher demand for footwear and apparel, the most-purchased active-lifestyle products

Source: 2024 Sports Development Report, Kemenpora

Products purchased to support active lifestyles
% of respondents

2021 | 2024

	2021	2024
Shoes	34%	42%
Apparel	27%	29%
Equipment	27%	29%
Food/drinks	27%	29%
Supplements	27%	29%
Accessories	27%	29%
Books/newspaper	27%	29%

The shift towards active lifestyles is translating into tangible consumer spending, with shoes (footwear) and apparel emerging as key beneficiaries of growing sports participation.

Key takeaways

Practical implications

Make active living shoppable through occasions, not just categories.

What to sell/activate now

"Build around the moments, such as before, during, and after physical activity, by offering hydration, energy, protein, recovery, apparel, accessories, and wearable products."

For retailers

- ✓ Create activity-based missions such as running, gym, weekend cycling, and recovery
- ✓ Bring complementary products together by merchandising hydration, snacks, protein, sunscreen, socks, and recovery products in one place
- ✓ Partner with gyms, running clubs, cycling groups, and fitness events to drive sampling, trial, and product redemption
- ✓ Use online recommendations and retail media to suggest relevant add-ons for each activity or occasion

For brands

- ✓ Own a clear activity occasion, such as pre-workout fuel, post-run recovery, daily hydration, or strength training
- ✓ Offer convenient formats for active lifestyles, including sachets, ready-to-drink products, bars, gummies, and single-serve packs
- ✓ Create activity-specific partnerships and limited-edition products with gyms, clubs, events, or active-lifestyle communities
- ✓ Communicate simple, relevant benefits such as hydration, protein per serving, recovery support, or sustained energy

Food for thought

- ✓ Which active occasion should your brand own, such as pre-workout, during-activity hydration, post-run recovery, or daily energy?
- ✓ What mix of hydration, protein, recovery, snacks, accessories, and wearable offers should be bundled together?
- ✓ Which gyms, clubs, sports venues, sports communities, or events can unlock trial and repeat usage?

Value-conscious spending

3 Value-conscious spending remains the foundation of mass consumer market growth

The consumer shift

Value for money still decides most baskets

- Consumers demand quality and affordability, not price alone
- They scrutinise value-per-use before purchase

Key drivers

What is pushing the shift

- Economic uncertainty and financial pressures are making consumers more selective in their spending decisions
- Greater awareness of ingredients and transparent pricing
- Peer recommendations on value-for-money
- Wider availability of quality options at accessible price points

Business opportunity

Where brands and retailers can win

- Retailers: build good-better-best shelves with clear price and benefit comparison
- Brands: sell visible value ladders, such as entry packs, refill packs, bundles, trial kits, and family packs

Winning strategy

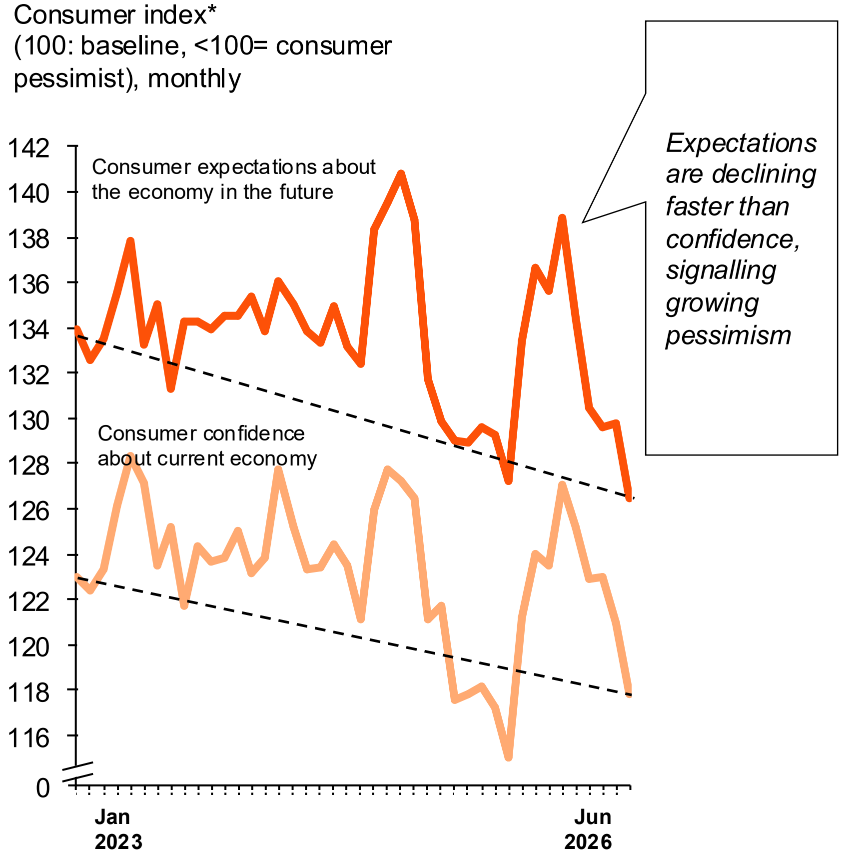
How to make it work

- Show value clearly through cost per serving, value packs, and bundle savings, not just discounts
- Create affordable bundles that cover a complete routine at a clear price point
- Encourage repeat purchases with subscriptions, starter kits, multipacks, and loyalty rewards

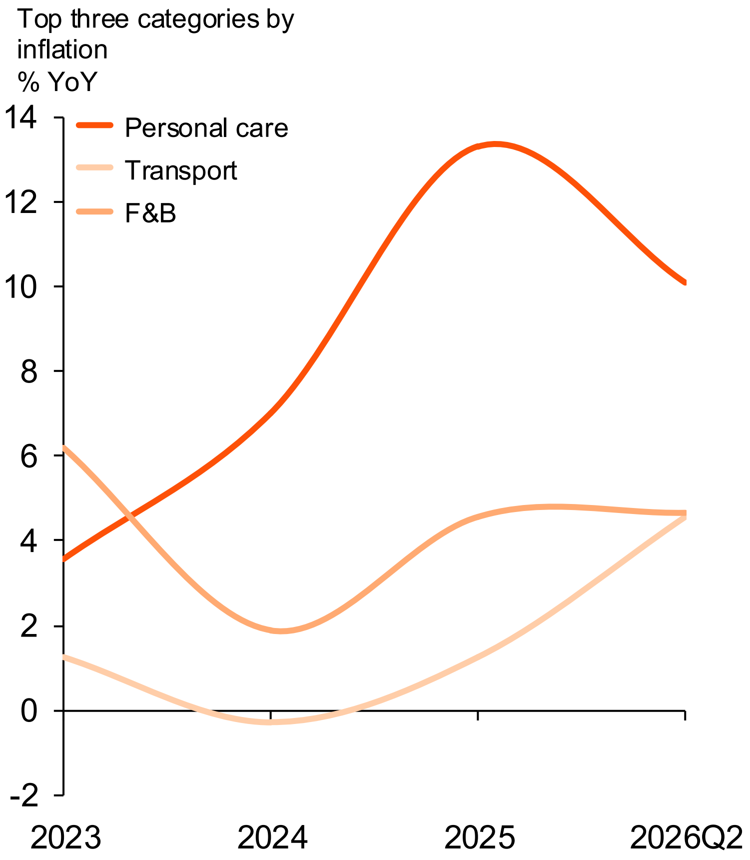
Value for money is the entry ticket to the mass market, won through pack sizes, bundles, and loyalty rather than discounting.

Financial pressures are making consumers more selective in their spending decisions

Their confidence about the economy becomes less optimistic, driven by concerns about income and job availability, both now and ahead



Discretionary spending becomes smaller as price cost pressures remain concentrated in everyday necessities and already absorb much of their budget



As household budgets come under pressure, consumers have grown increasingly selective, prioritising value and affordability in their spending decisions.

More than ever, consumers are looking for solutions that fit their budget and health ambitions…

Question: Thinking about your health and wellness goal(s),
which of the following challenges, if any, do you face in achieving them? (n=484)

Question: When considering whether to purchase a health or wellness product/service to support your goal, which attributes are most important? (n=484)
Data net: Net rank 1-5

Consumer challenges

Difficulty staying motivated
(73% of respondents)

Lack of time to commit
(67% of respondents)

Lack of disposable income
(50% of respondents)

Consumer considerations

Value-for-money
(77% of respondents)

Personalisation or ability to tailor to my needs
(65% of respondents)

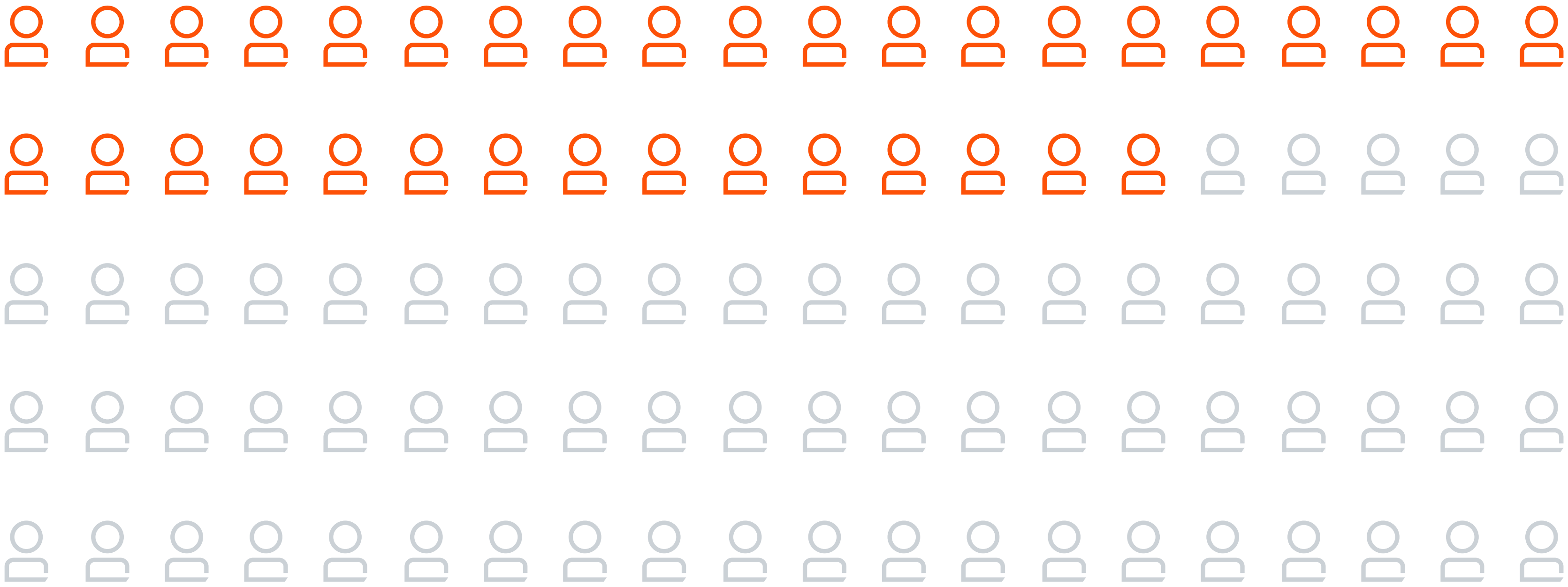
Cost
(64% of respondents)

Health aspirations remain strong, but consumers increasingly evaluate wellness investments through the lens of affordability, practicality, and value-for-money.

…while only one-third of consumers actively allocate their budget to health and wellness

Only 35%

of respondents said that they do personal budgeting for health and wellness activities



The gap between wellness aspirations and dedicated budgeting underscores the importance of affordable and accessible health solutions.

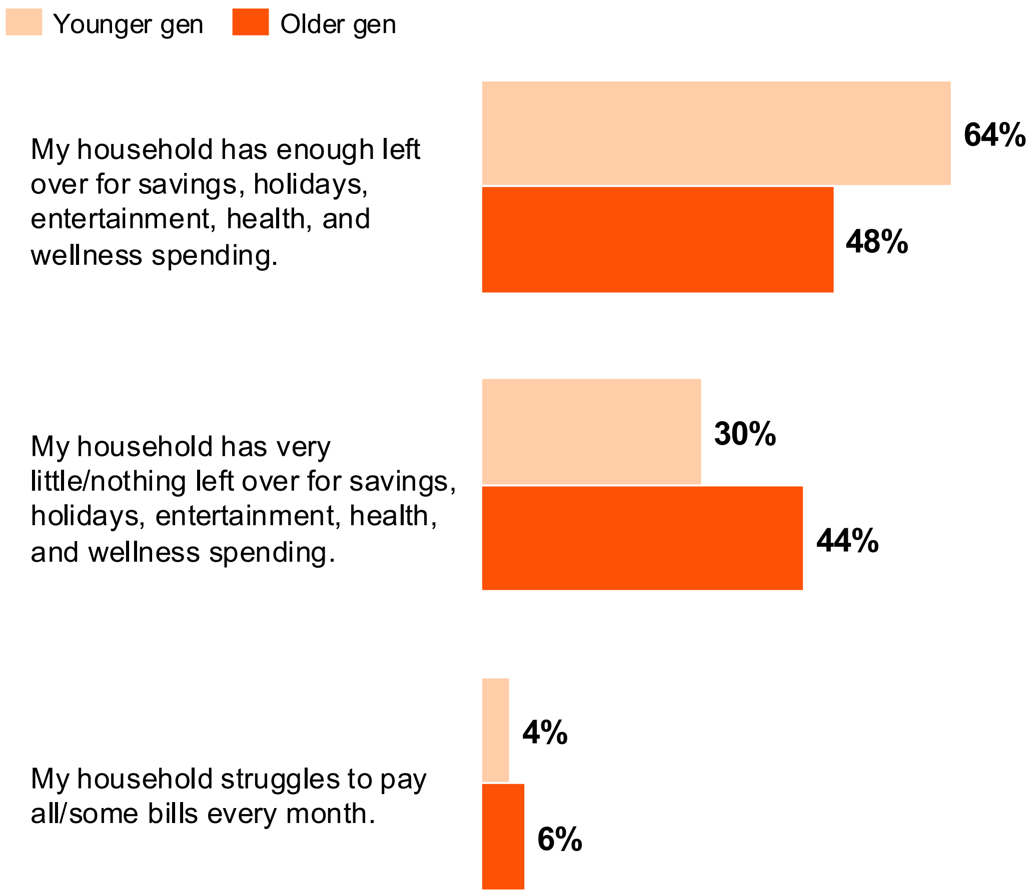
Question: How often, on average, do you practice the following health and wellness activities? (n= 503)

Data net: Net frequent

Weaker purchasing power is translating into slower retail spending growth...

Financial situation (n=503)

Financial situation



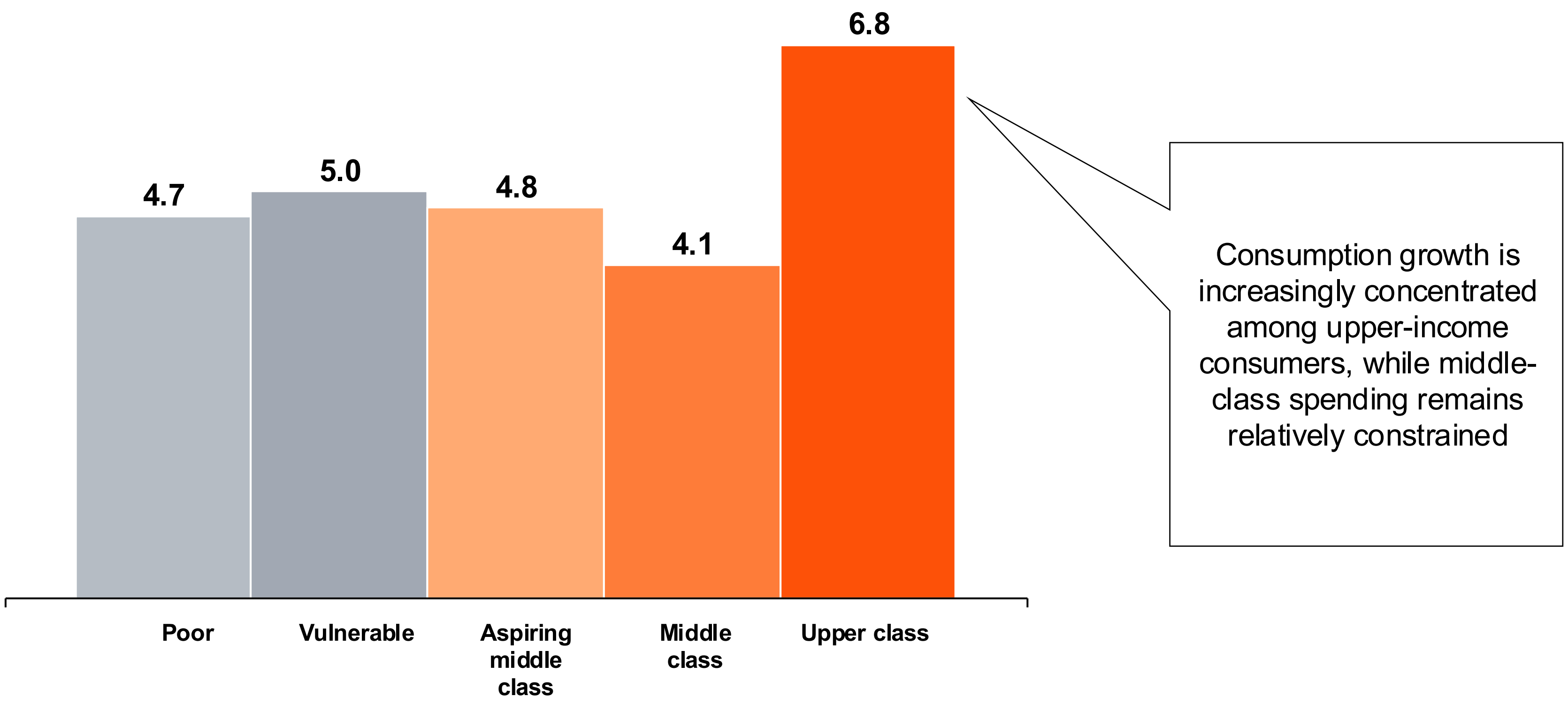
Consumers have limited health-spending capacity, making affordability and value critical for determining purchases. Moreover, **younger gen** show greater financial headroom than **older gen.**

Financial headroom varies significantly across generations, shaping consumers' ability to spend beyond essential needs.

...leading upper-class consumers to continue spending significantly more than other income groups

Source: Susenas 2025 BPS by Mandiri Institute

Consumption per capita growth by economic class, 2025
% YoY



The widening consumption gap across income groups highlights the need for targeted growth strategies across premium and value segments.

Key takeaways

Practical implications

Win the mass market by showing value, not just lowering price.

What to sell/activate now

Sell visible value ladders: entry packs, refill packs, bundles, trial kits, family packs, and benefit-per-rupiah claims

For retailers

- ✓ Create clear good–better–best choices on shelf so shoppers can compare products by price, quality, and benefit
- ✓ Build affordable bundles around complete routines, such as a week or month of use, at clear price points
- ✓ Use shelf labels and promotions to show value, including cost per serving, bundle savings, value packs, and trial sizes
- ✓ Use loyalty data to identify upcoming repurchase moments and send timely replenishment offers before shoppers switch to cheaper alternatives

For brands

- ✓ Create a clear range of pack sizes and price points, from trial and daily-use packs to family packs, refills, and premium products
- ✓ Make the value of each product easy to understand by showing the benefit, number of uses, or cost per serving, not just offering a discount
- ✓ Protect the core quality and benefit across the range, while removing unnecessary premium features or packaging from more affordable versions
- ✓ Encourage regular use and repeat purchase through starter kits, multipacks, subscriptions, and refill formats

Food for thought

- ✓ Do we have clear entry, core, family, refill, and premium options for each priority category?
- ✓ Which offers should become permanent rather than temporary discounts?
- ✓ Which consumer groups need affordability, simplicity, reassurance, or personalisation the most?

Unlocking trust through transparency

4 Brand trust and transparency are emerging as universal differentiators

The consumer shift

Shoppers back the brands they can verify

- Shoppers check ingredients, certifications, and sourcing before buying

Key drivers

What is pushing the shift

- Greater awareness of supply chain origins and ingredient sourcing
- Influencer and peer validation of brand transparency claims
- Wider availability of certified/verified products at competitive prices

Business opportunity

Where brands and retailers can win

- Retailers: create trusted-choice sections with certification tags, QR codes, and clear online filters
- Brands: highlight one or two easy-to-understand trust signals, such as tested, pesticide-free, traceable, or verified origin
- Make product origin, production methods, and ingredients easy for shoppers to see and understand

Winning strategy

How to make it work

- Explain the product clearly on the pack by using simple language about where it comes from, how it is made, and what it contains
- Use trusted experts and credible voices
- Keep trusted products affordable so confidence and transparency are not limited to premium shoppers
- Make verified products easy to identify through clear shelf visibility and guidance from trained staff or advisors

Trust now works as a universal differentiator, earned through clear claims, credible proof, and consistent quality.

Consumers want confidence in their health and wellness decisions

Question: When considering whether to purchase a health or wellness product/service to support your goal, which attributes are most important? (n=484)

Consumer concerns

Feeling overwhelmed by too much or conflicting information
(42% of respondents)

Past negative experiences
(25% of respondents)

Physical limitations due to existing health conditions
(24% of respondents)

Source of confidence

Clear information on what it is and how it works
(78% of respondents)

Security and privacy of my data
(63% of respondents)

Trusted brand
(49% of respondents)

Third-party certification through medical approval or meeting industry standards
(42% of respondents)

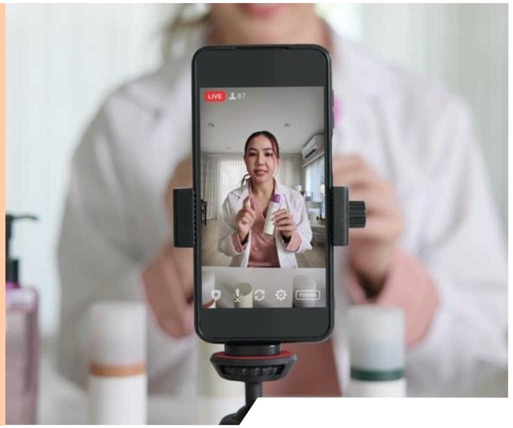
Amid growing information overload, consumers seek confidence through transparent information, trusted brands, and strong data privacy protections.

Strongest influences on health decisions come from personal curiosity and trusted people...

Question: Please specify who or what currently has the strongest influence on the actions you take regarding your health and wellbeing (n=503)
Base: Net rank 1-5

Consumer health and wellness influences

45%
Media content



42%
Certified expert

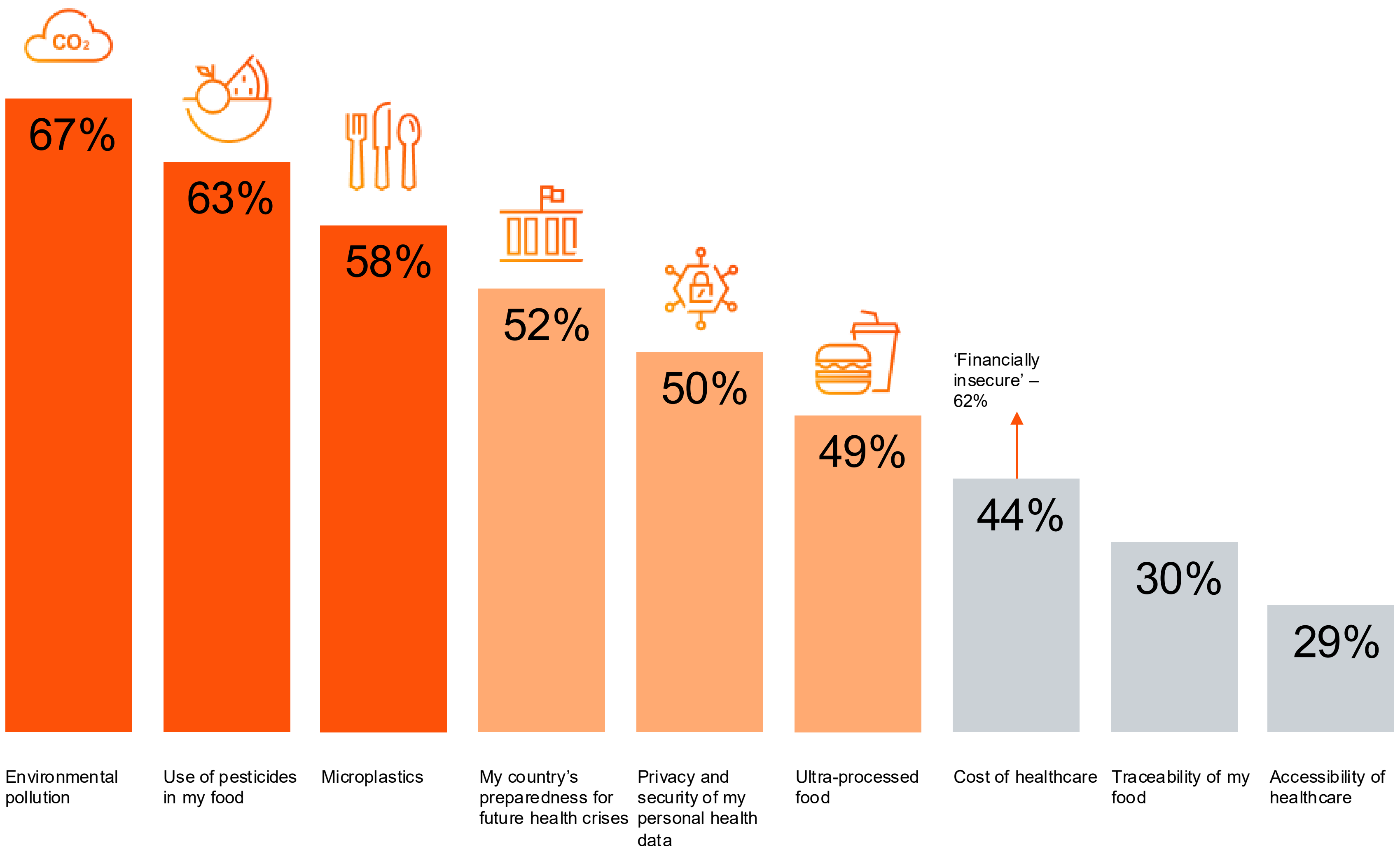
34%	27%	27%	26%	20%	14%
Wellness trends	Health app data	Influencers	Product reviews	Artificial intelligence (AI) conversations/tools	Government

As consumers seek confidence in their health journey, trusted experts, personal curiosity, and close relationships remain the most influential decision drivers.

...mainly regarding external health and wellbeing risks, beyond their control

Question: To what extent are you concerned, if at all, about the following factors in terms of their impact on your health and wellbeing? (n=503)
Base: Net very and extremely concerned

Consumers are concerned about external factors affecting their health and wellbeing



Yet despite relying on trusted sources, consumers remain concerned about health risks that are largely beyond their direct control.

Trust ranks as a key differentiator, as consumers increasingly favour brands that demonstrate transparency and credibility

Source: Edelman Indonesia, PR Newswire

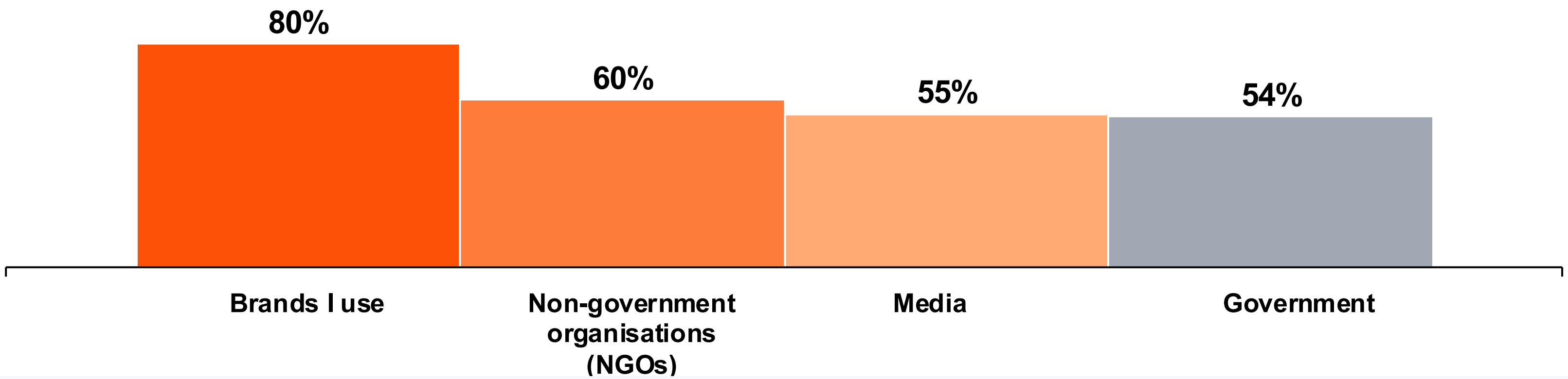
88%
say trust is as important as price and quality

81%
say they will switch brands because of increased transparency

73%
say they will be willing to pay more for a product that offers transparency in all attributes

56%
say information about how food is produced, handled, and sourced makes them trust the brand

Where consumers place their trust
% of respondents



Trust delivers real competitive advantage, as consumers increasingly favour brands that provide transparency, credibility, and reassurance.

Key takeaways

Practical implications

Make claims easy to verify on the shelf, on the pack, and online.

What to sell/activate now

"Offer products with clear trust signals, such as halal certification, National Agency of Drug and Food Control (BPOM) registration, verified origin, tested quality, and transparent ingredients."

For retailers

- ✓ Create trusted-choice sections with clear certification labels, QR codes, and simple explanations of what each certification means
- ✓ Use trained advisors, nutritionists, or store staff to help shoppers compare benefits and understand product claims without overcomplicating the decision
- ✓ Add clear online filters for attributes shoppers care about, such as halal, certified, low sugar, high protein, pesticide-free, and local origin
- ✓ Give verified brands stronger visibility through shelf placement, search rankings, and promotional space when their claims are clear and credible

For brands

- ✓ Focus on one or two clear trust signals, such as BPOM registration, halal certification, tested quality, pesticide-free production, clean-label ingredients, or verified origin
- ✓ Explain the product in plain language on the pack, including where the ingredients come from, how the product is made, and when or why consumers should use it
- ✓ Support claims with credible experts or key opinion leaders (KOLs) who can explain the benefit clearly and answer consumer questions, rather than simply promoting the product
- ✓ Offer accessible price points and pack sizes so certified and transparent products can reach more shoppers, not just premium consumers

Food for thought

- ✓ Which one or two credibility markers should be most visible? BPOM, halal, tested, origin verified, or pesticide-free?
- ✓ How do we keep certified or transparent options accessible, not only premium?
- ✓ Which experts or KOLs can explain the benefit credibly without making the message feel overly medical?

Ease and convenience

5 Convenience is becoming a decisive purchase driver

The consumer shift

Ease of buying provokes consumers

- Convenience (ease, speed, accessibility) is the number one purchase driver across all demographics
- Complexity is friction

Key drivers

What is pushing the shift

- Shoppers are overwhelmed by too many choices (42%) and limited time (67%)
- Streamlined e-commerce and quick-commerce are reducing friction
- Goal-based product discovery (e.g. search by benefit, not category)

Business opportunity

Where brands and retailers can win

- Retailers: stock convenient products in high-traffic channels, such as minimarkets, pharmacies, and e-commerce
- Brands: create channel-specific formats, such as sachets, larger online packs, and minimart bundles
- Offer easy-to-buy formats, including grab-and-go products, multipacks, goal-based bundles, and one-click reorder options

Winning strategy

How to make it work

- Design packaging that shoppers can understand quickly, both in-store and online
- Make replenishment easy with auto-refill, quick-commerce, pickup, and loyalty reminders
- Organise shelves and online search by consumer goals and occasions
- Use retail media to promote relevant products around needs such as energy, sleep, stress, and digestion

Convenience is now a purchase driver in itself, making availability and channel coverage as decisive as the product.

In everyday purchases, consumers prioritise solutions that seamlessly fit into their daily lives

Question: When considering whether to purchase a health or wellness product/service to support your goal, which attributes are most important? (n=484)

Purchase attributes

Convenience or ease of use
(79% of respondents)

Fun, motivating features (e.g. gamification)
(48% of respondents)

Features, functionality, or service offerings
(55% of respondents)

Ability to integrate/work seamlessly with my other products/apps
(46% of respondents)

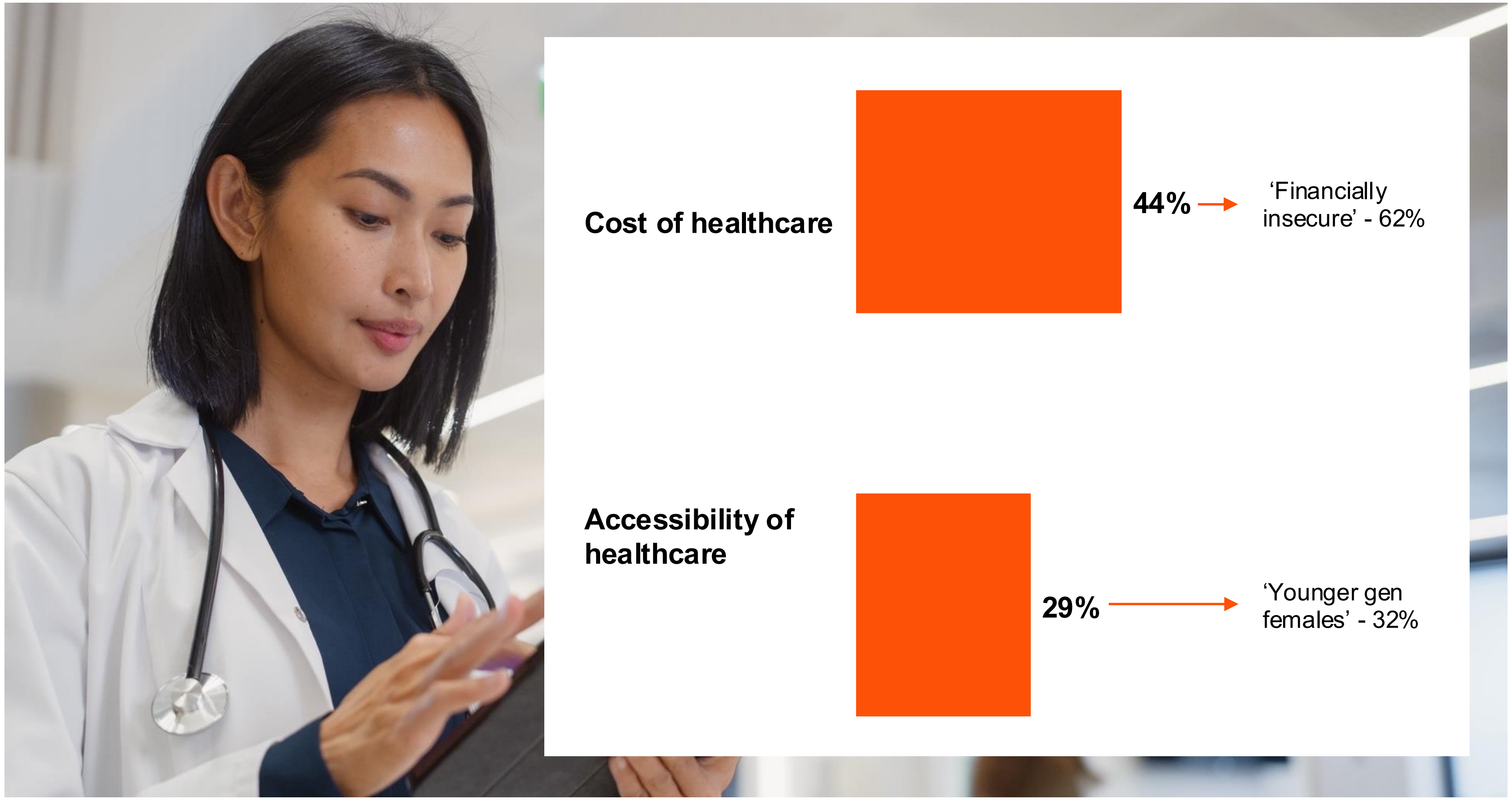
Availability of customer support services
(49% of respondents)

Consumers favour health and wellness solutions that integrate seamlessly into daily routines, minimising effort while maximising value.

Consumers are looking for healthcare solutions that are financially attainable and easy to access…

Question: To what extent are you concerned, if at all, about the following factors in terms of their impact on your health and wellbeing? (n=503)
Base: Net very and extremely concerned

Consumer concerns

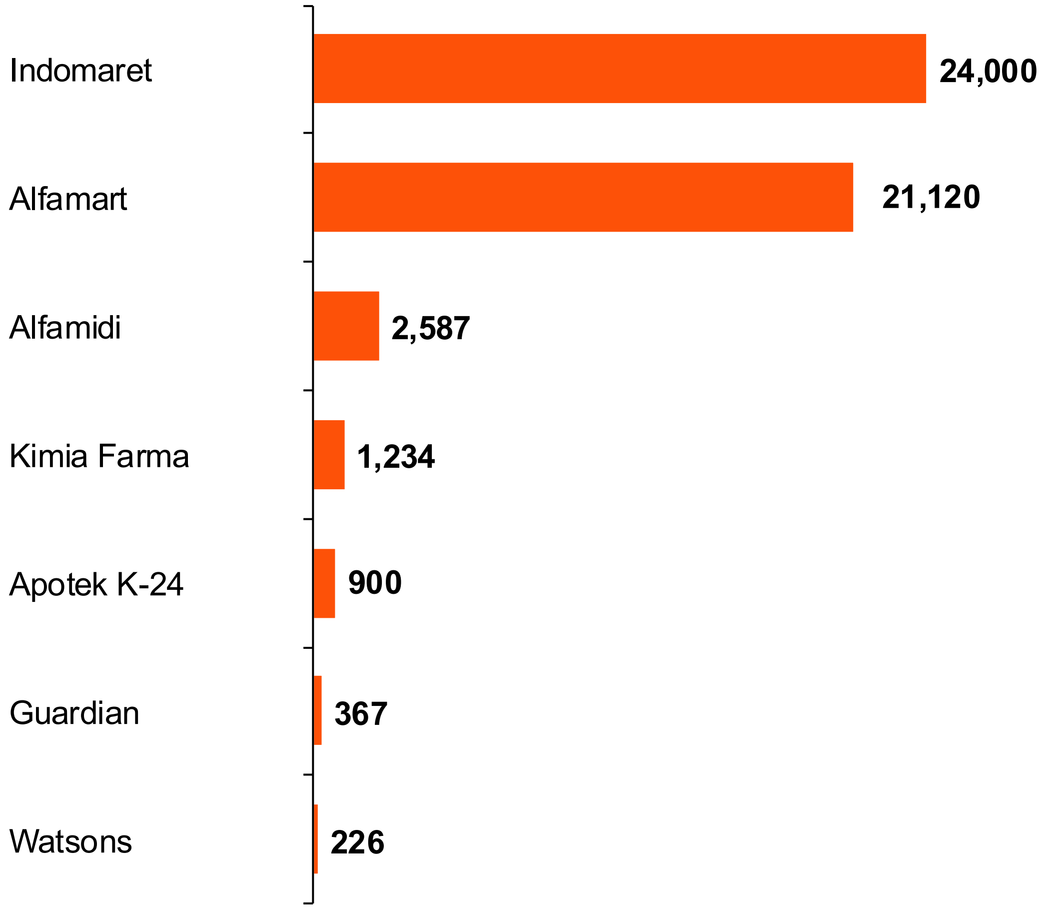


Beyond convenience, consumers expect healthcare solutions to be both affordable and accessible, reducing financial and practical barriers to care.

…evidently, the market shows that health products are increasingly accessed through minimarket networks rather than traditional pharmacy channels

Sources: 2025 Annual report of each company, PwC analysis

Consumer health distribution channel trends



44k+

outlets operated by Alfamart and Indomaret

22x

Larger retail footprint than leading pharmacy chains (Indomaret and Alfamart vs. Kimia Farma and K-24)

As healthcare moves further into mainstream, consumers are increasingly accessing health products through channels that are already part of their daily routines.

Moreover, the convenience of technology has made health apps part of consumers' daily health ecosystem

Question: To what extent do you currently use health apps or wearable devices (e.g. fitness trackers or smartwatches) for the following purposes? (n=503)

Base: Net frequently

Consumer use of health apps and wearables

86% of consumers use health apps or wearables for at least one health and wellness activity

71% of consumers would turn to AI first to ask about health questions

Health management is shifting rapidly towards digital, with consumers turning to apps, wearables, and AI-powered tools for everyday health decisions.

Consumers are willing to pay more for a wearable that enables professionals to review their data and support their health more effectively

Question: Would you be willing to pay more for a wearable device whose data is trusted by healthcare professionals and can be reviewed by them to support your health and wellness care?
Base: Respondents who use health apps or wearable devices (n=434)

Consumer willingness for wearable device that is trusted by healthcare professionals

7%

of consumers are **not** willing to pay more

77%

of consumers **are** willing to pay more

Consumers increasingly value connected health ecosystems, showing greater willingness to pay for solutions that combine wearable technology with professional healthcare support.

Key takeaways

Practical implications

Win by being available where the routine already happens.

What to sell/activate now

“Offer products that are easy to find, buy, and reorder, such as grab-and-go packs, multipacks, goal-based bundles, and convenient online purchase options.”

For retailers

- ✓ Place wellness products in high-frequency channels, such as minimarkets, supermarkets, pharmacies, e-commerce platforms, and social commerce
- ✓ Organise shelves and online stores by consumer needs and occasions, such as energy, sleep, stress, and digestion, not only by product category.
- ✓ Make repeat purchases convenient through subscriptions, click-and-collect, quick commerce, and timely loyalty reminders
- ✓ Use small pack sizes and checkout displays to encourage impulse purchases and product trial

For brands

- ✓ Design packaging that clearly communicates the product’s purpose within seconds, both on the shelf and in online thumbnails
- ✓ Create convenient replenishment options, such as monthly packs, auto-refill, cross-sell reminders, and recurring bundles
- ✓ Develop packaging suited to each channel, for example, sachets for minimarkets, larger packs for online shoppers, and bundles for pharmacies
- ✓ Work with retailers on targeted promotions and search placement using need-based terms such as energy, sleep, stress, and digestion

Food for thought

- ✓ Which high-frequency channels should carry priority wellness SKUs? Minimarket, supermarket, pharmacy, e-commerce, or social commerce?
- ✓ Where does the current customer journey create confusion, too much choice or unnecessary effort?
- ✓ Which search terms, online filters, and retail media placements would better target shoppers?

Social and community dynamics

6 Social and community dynamics are increasingly shaping mainstream purchase decisions

The consumer shift

Shoppers buy what their circle is buying

- Peer and community influence (56%) now outweigs celebrity endorsements (27%)
- Purchase decisions driven by social validation

Key drivers

What is pushing the shift

- Peer recommendations and user reviews shaping choices
- Community-driven social commerce platforms (TikTok, Instagram, Shopee)
- Wider access to peer-generated content and social proof

Business opportunity

Where brands and retailers can win

- Brands: build local communities through running clubs, gyms, schools, offices, and local creators
- Retailers: host or sponsor community events, such as store runs, wellness booths, and pop-up activities
- Offer shareable experiences, including event packs, run-day bundles, recovery kits, and referral rewards

Winning strategy

How to make it work

- Create event-specific bundles that combine products such as hydration, snacks, and recovery items
- Highlight community favourites using ratings, reviews, and local best-seller displays
- Connect referrals and social sharing to loyalty programmes to reward participation and generate visibility
- Make advocacy easy with simple hashtags, review prompts, referral rewards, and ready-to-use social content

Community and creator influence is a mainstream route to trial, making earned visibility a real growth channel.

Consumers seek guidance and support to achieve their health and wellness goals

Question: Proportion of respondents interested in each product/service category. (n=484)

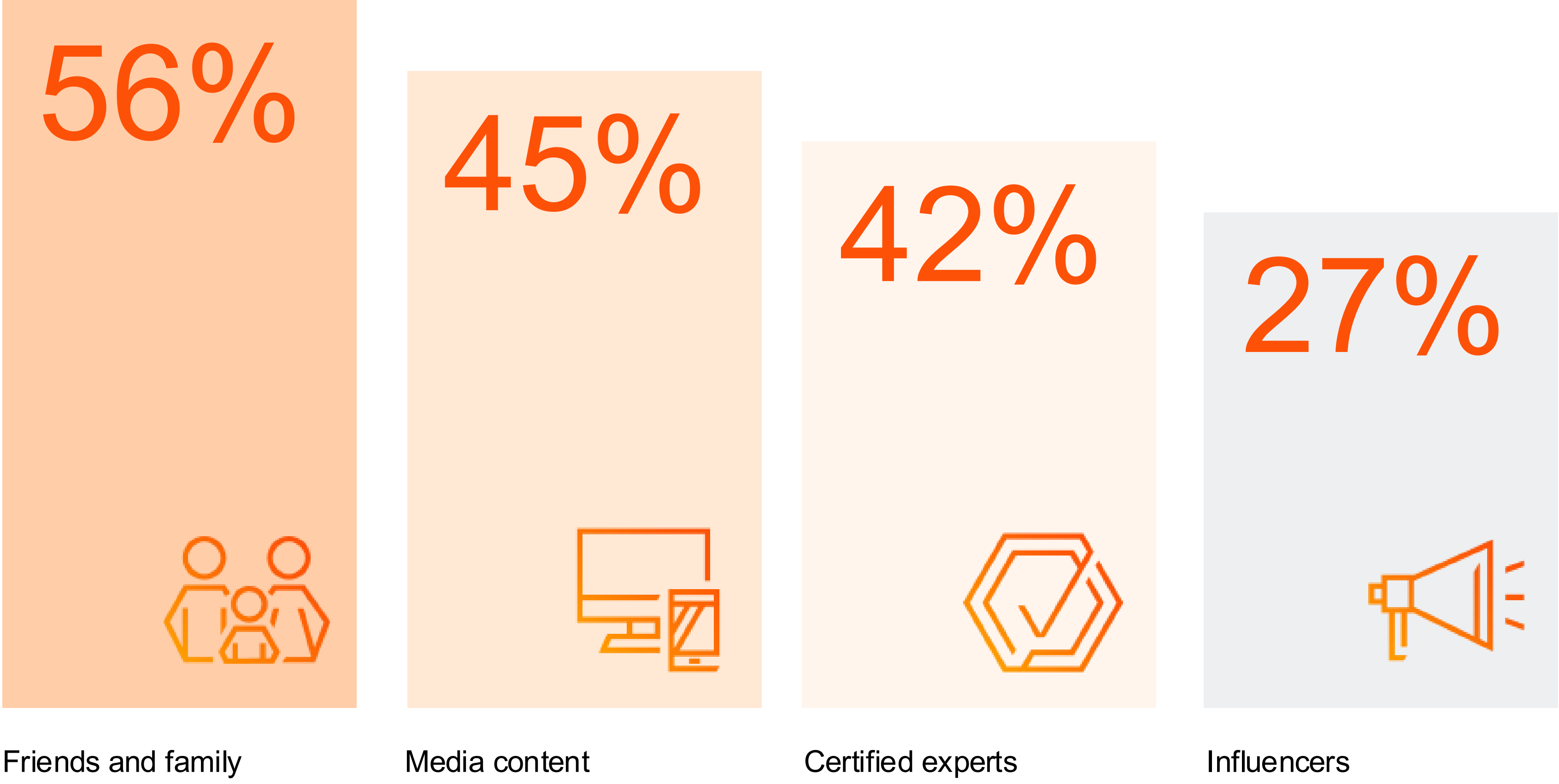
Top products to support consumer health and wellness goals

Consumers increasingly recognise that achieving wellness goals requires ongoing guidance, coaching, and support systems rather than products alone.

Health and wellness decisions are shaped most by trusted personal relationships

Question: Please specify who or what currently has the strongest influence on the actions you take regarding your health and wellbeing (n=503)
Base: Net rank 1-5

Consumer health and wellness influences



Health and wellness decisions are shaped most by trusted personal relationships, reinforcing the enduring influence of friends, family, and credible expertise.

Running is evolving into a social wellness ecosystem, where community and shared experiences increasingly drive participation

Source: Snapcart TASC Online Survey 2026

Social connection is reshaping running culture

53%

usually join running events with friends.

Friends are the most common companions, ahead of running alone (20%) or with family (14%).

56%

discover running events via social media.

Followed by friends' recommendations (27%) and running communities (12%), showing that digital and social networks now drive participation.

36%

get enough rest before running events.

Regular training (31%) follows closely, while rising attention to maintaining a healthy diet (9%) and checking equipment (6%) marks the next wave of runner routines.

46%

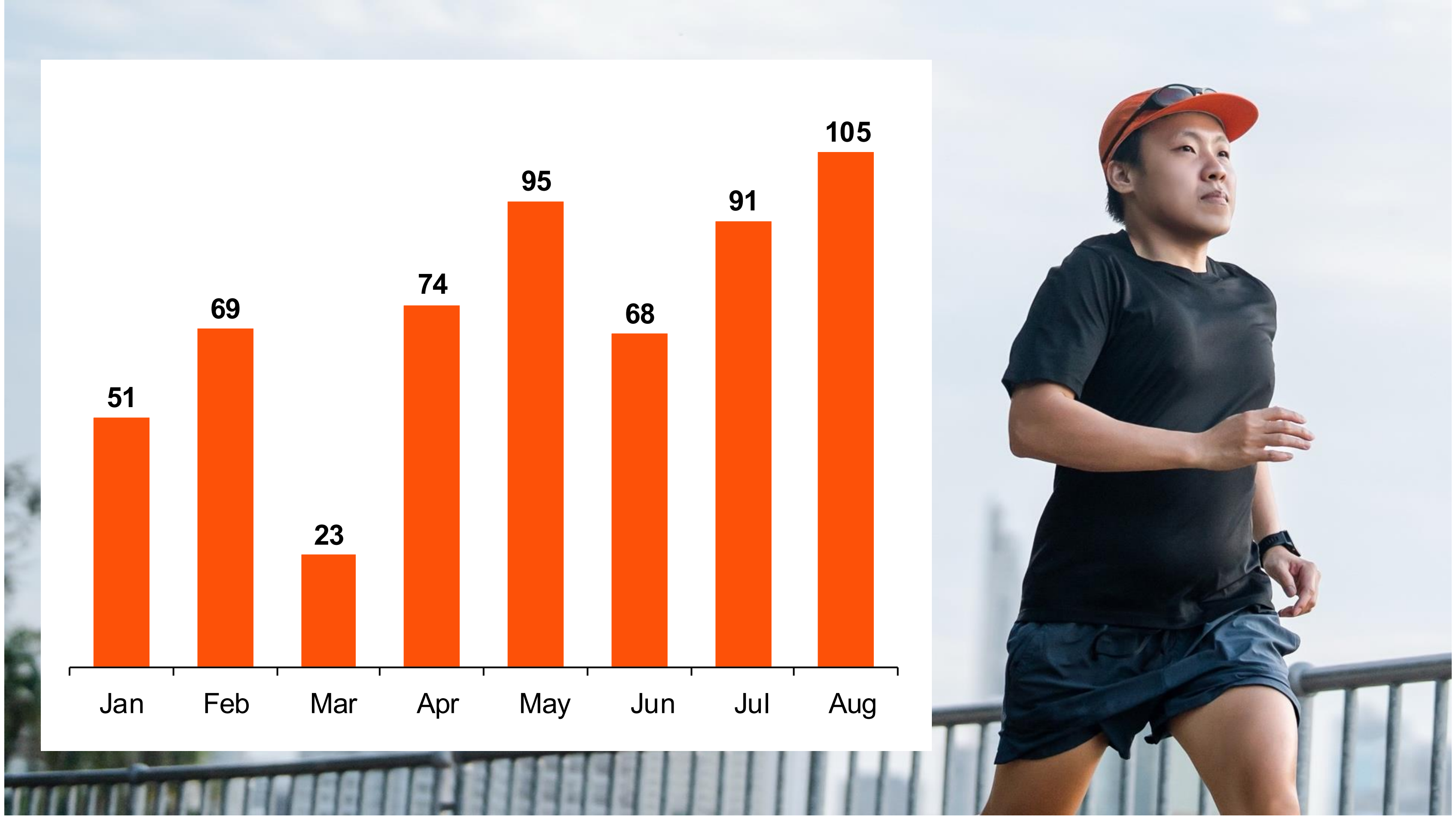
say having fun is their main goal.

Only 20% aim primarily to finish the race, while winning or earning medals matters far less, signalling a shift towards experience and self-improvement.

Running is evolving into a social wellness ecosystem, where community, enjoyment, and shared experiences now outweigh competition as participation drivers.

A year-round calendar of 800+ events confirms running as a social wellness movement

Number of running events in Indonesia in 2026



Source: JadwalLari.id

Growing participation in running events signals that consumers increasingly view wellness as a social experience rather than a solitary activity.

Key takeaways

Practical implications

Turn community visibility into trial, repeat, and advocacy.

What to sell/activate now

“Sell shareable experiences and community products: event packs, run-day bundles, recovery kits, referral rewards, user-generated content, and local community collaborations.”

For retailers

- ✓ Host or sponsor local community activities such as store runs, weekend wellness booths, and Car Free Day pop-ups
- ✓ Showcase community favourites through displays featuring customer ratings, reviews, and local best-sellers
- ✓ Connect community activities to loyalty programmes by offering social sharing, referrals, and rewards
- ✓ Give participating brands visibility throughout the event through signage, sampling, and displays before, during, and after the activity

For brands

- ✓ Build local partnerships with running clubs, gyms, schools, offices, and community creators
- ✓ Create event-specific product bundles that combine hydration, snacks, and recovery products, with QR codes for sign-ups or referrals
- ✓ Make it easy for customers to recommend the brand with simple hashtags, review prompts, referral points, and ready-to-use social content
- ✓ Use community feedback to build trust by sharing testimonials, ratings, and endorsements from local clubs both in-store and online

Food for thought

- ✓ Which communities are most natural for the brand? Running clubs, gyms, offices, schools, local creators, or Car Free Day audiences?
- ✓ What should the brand sell around community occasions? Hydration, snacks, recovery, trial kits, apparel, or referral bundle?
- ✓ What rewards should shoppers get for reviews, referrals, or community participation?

Contact us

Understanding the trends shaping Indonesia’s growth with #Values

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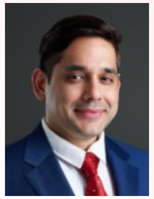

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