

# Yoga Survey Results

Malaysia | 19 August 2019



ORGANIC LIFE KL

*In partnership with:*



Final Report

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<b>Yoga Exposure</b>	People who practiced yoga at least once in their life
<b>Yoga Penetration</b>	People who has been practicing yoga in the last 3 months
<b>Yoga Practitioners</b>	People who has been practicing yoga in the last 3 months
<b>Potential Practitioners</b>	People who indicated interest to try yoga in the next 1 year



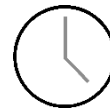
## KEY OBJECTIVES

- 1 To assess the penetration rate of yoga in Malaysia
- 2 To estimate yoga market size in Malaysia

## SURVEY METHOD



**METHOD:** Online survey



**SURVEY LENGTH:** 3-minute questionnaire of 16 questions



**SAMPLE SIZE:** 1,000 responses from 3 key locations



## RESPONDENTS' CRITERIA

- Gender : Male & Female
- Ethnicity : All (Malay, Chinese, Indian, Others)
- Age group : >18 years old
- Geography : Klang Valley, Penang & Johor
- Profile : Yoga practitioners within 6 months & intention to practice yoga in the next 1 year

**1,000**  
Responses



## SCREEN-OUT RESPONDENTS

- Age group : <18 years old
- Geography : Others aside from the 3 locations stated
- Income : No indication of income levels
- Profile : Lapsed yoga practitioners (>6 months ago) & Non-yoga practitioners who do not intend to practice yoga in the next 1 year

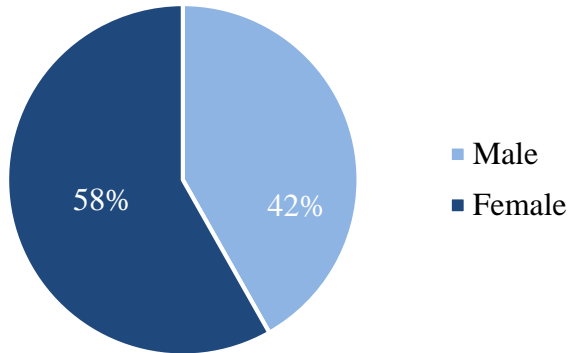
**937**  
Responses

# Survey Statistics - Demographics

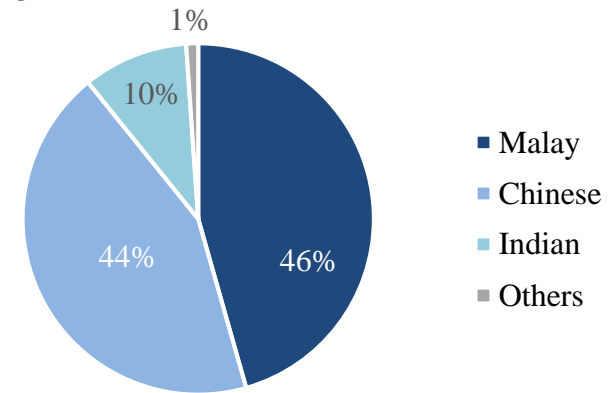


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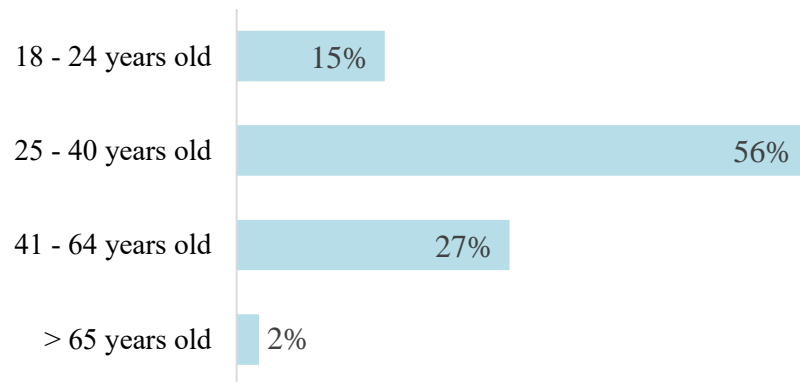
## 1 GENDER



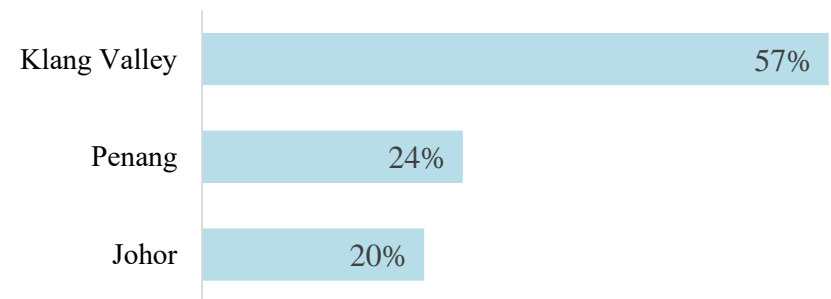
## 2 ETHNICITY



## 3 AGE GROUP SPLIT



## 4 GEOGRAPHY LOCATION



Note: Based on 1,000 survey responses within criteria set

# Quick Snapshot of Malaysia



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**32.6 mil**

- Malaysia population as at 2019 amounts to 32.6 million
- Almost equal ratio of gender - Male to female split is 51% and 49% respectively
- 70% of the population lies in the age group of 15 – 64 years old



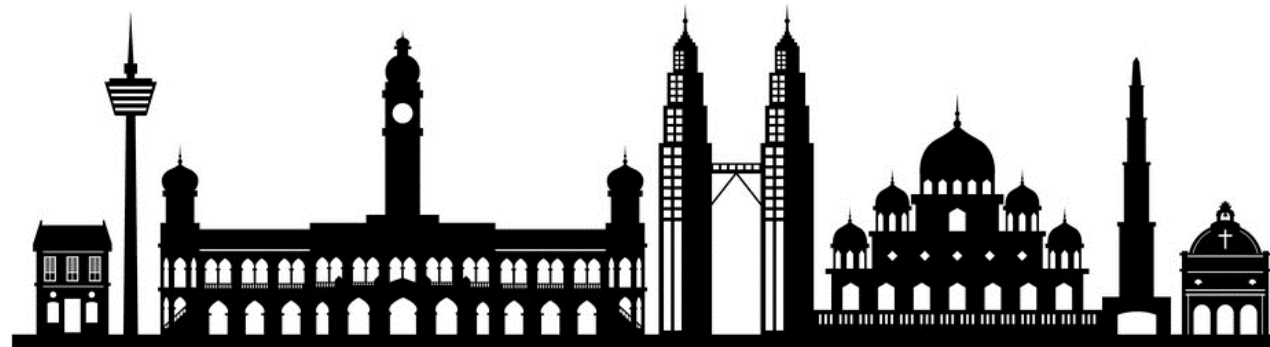
**69:23:8**

- Malaysia population ethnicity composition is as follows:
  - 69% Malay – 22.5 mil
  - 23% Chinese – 7.5 mil
  - 7% Indian – 2.3 mil
  - 1% Others – 0.3 mil



**76%**

- Malaysia's urbanization<sup>1</sup> rate is relatively high at 76% as at 2018
  - Klang Valley: 96%
  - Penang: 91%
  - Johor: 72%



1

## Yoga Penetration

Yoga penetration in Malaysia currently stands at **12%**, signifying that 1 in every 10 person has practiced yoga in the last 3 months

2

## Yoga Market Size

It is estimated that Malaysia Yoga market currently amounts to **~RM1.2 billion**

3

## Yoga Adopters

Yoga is practiced primarily by young adults of **25 – 40 years old, led by ethnic Chinese female**

4

## Types of Yoga

**Modern Yoga** is the most practiced by current Yoga practitioners over traditional yoga styles, with Hatha Yoga being the most preferred type of modern yoga

5

## Triggers To Yoga

Physical benefits such as **improving health and fitness levels** are the key triggers to start practicing Yoga

6

## Future Yoga Instructor

**1 in 2** yoga practitioners indicated interest to be a yoga instructor





# Yoga in Malaysia

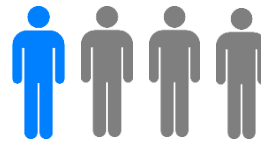
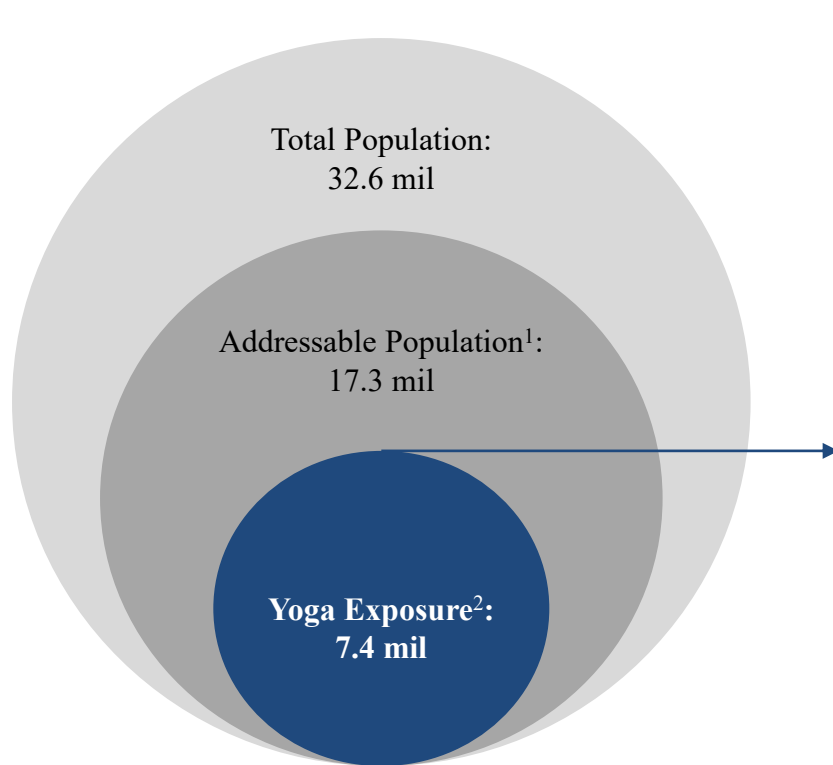
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# Yoga Exposure In Malaysia



Utilizing a top-down approach, it is estimated that yoga exposure rate (practiced at least once before) in Malaysia currently stands at 23%, translating to 7.4 mil Malaysians, of whom 52% are regular practitioners.



**1 in 4**

Practiced Yoga at least once at some point in their lives

Practitioners	Practicing Frequency		% of Total Population
Regular	Last 1 week	30%	7%
	Last 3 months	22%	5%
Non-Regular	Last 6 months	11%	2.5%
Lapsed	> Last 6 months	37%	8%

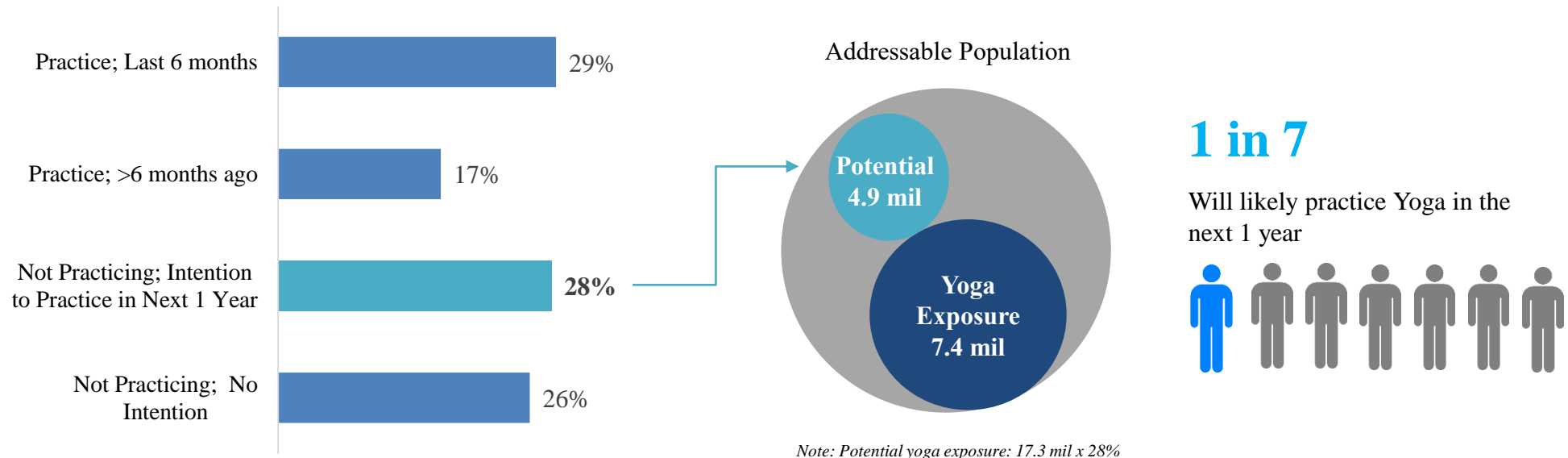
Note: Addressable population: 32.6 mil x 70% x 76% = 17.3 mil

# Likelihood of Yoga Exposure To Increase In Next 1 Year



There is a potential for yoga exposure rate to increase from 23% to ~38% with 1 in 7 of Malaysians stating their intention to practice Yoga in the next one year.

## Yoga Involvement<sup>1</sup>



Note: (1) Based on total survey statistics n=1,751 as shown in appendix

# Yoga Penetration

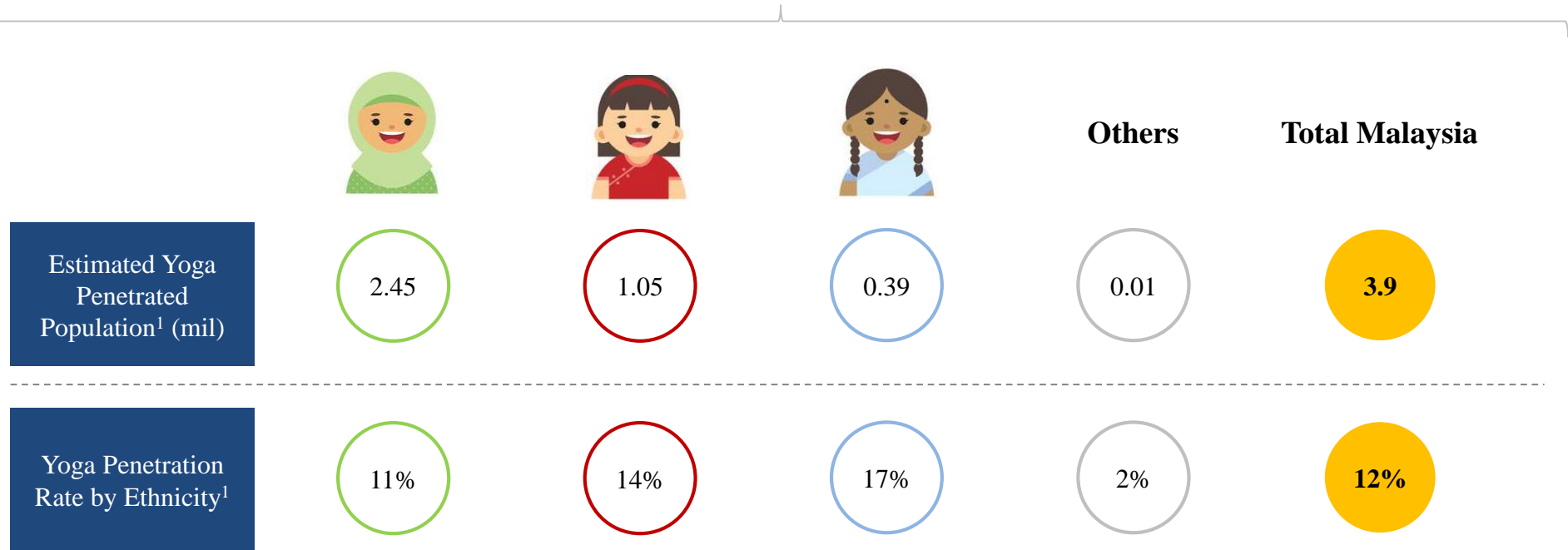


Yoga penetration rate in Malaysia is estimated to be at 12%, translating into ~4 mil Malaysians, with Chinese and Indian Malaysians garnering a higher penetration rate as compared to Malays.



**1 in 10**

Practiced Yoga in the last 3 months



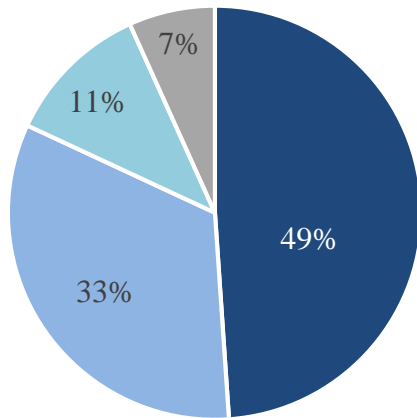
Note: (1) Refer to appendix for calculation of yoga penetrated population and yoga penetration rate by ethnicity

# Annual Yoga Market Size In Malaysia



Yoga market size is estimated to be RM1,173 mil based on expenses incurred on membership, yoga classes, clothing and other yoga-related items such as accessories, media and reading materials.

## Yoga Expenses by Practitioners (n=415)



- <RM500
- RM501 - 1,000
- RM1,001 - 1,500
- >RM1,500

## Yoga Market Size Estimation

### Key Assumptions:

- Yoga expenses weightage applied
- 60% of estimated yoga market size as recurring expenditure

*Market Size = 3.9 mil (i.e. Yoga Penetration) x Weightage by Yoga Expenses x Expenditure*

Expenditure Range	Weightage	Expenditure Assumption (RM)	Market Size (RM)
<RM500	49%	250	476 mil
RM501 -1,000	33%	501	644 mil
RM1,001 -1,500	11%	1,001	441 mil
>RM1,500	7%	1,500	394 mil
Total			1,955 mil
<b>60% recurring</b>			<b>1,173 mil</b>



# Current Yoga & Potential Practitioners

## Key Findings

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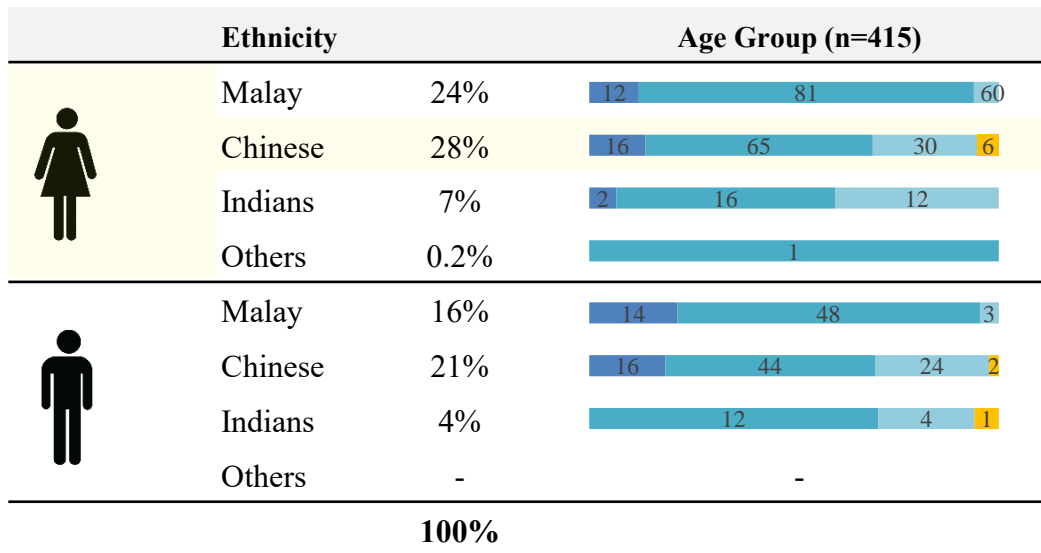
# Yoga Adoption Mainly Led By Ethnic Chinese Women



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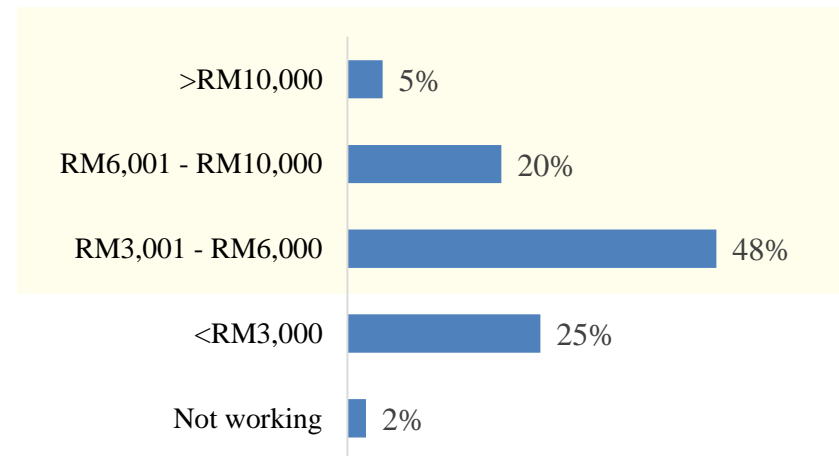
Yoga adopters are predominantly females with a female to male ratio of 60:40. Adoption rate among young adults (25 – 40 years old) is the highest across all ethnicities. 73% of yoga practitioners came from the middle to higher income bracket, signifying a possible correlation between income levels and probability of practicing Yoga.

## Yoga Practitioners Demographics



Legend (Age Group) ■ 18 – 24 years ■ 25 – 40 years ■ 41 – 64 years ■ >65 years

## Yoga Practitioners Income Levels

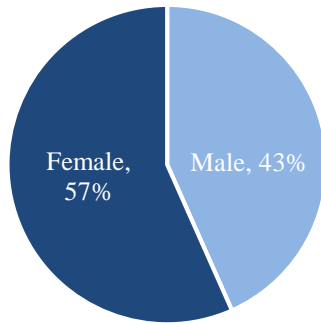


# Potential Yoga Practitioners

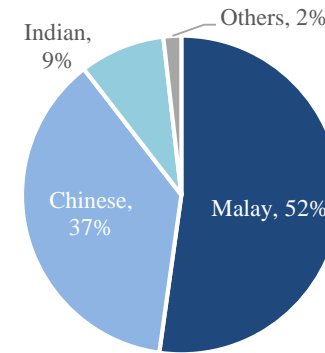


The increase in Yoga exposure is likely to be led by young, ethnic Malay women, signifying increasing Yoga popularity among ethnic Malays. 58% of potential practitioners came from middle to higher income bracket compared to 73% in current practitioners, indicating Yoga's extended appeal into middle-upper income bracket.

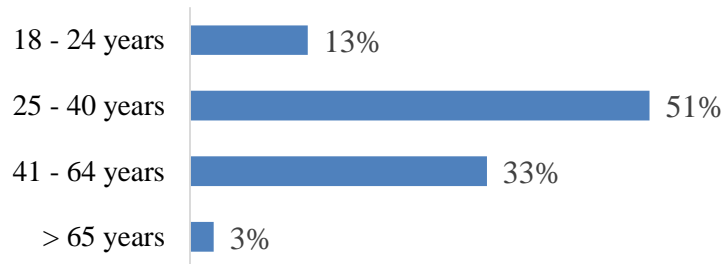
## 1 GENDER



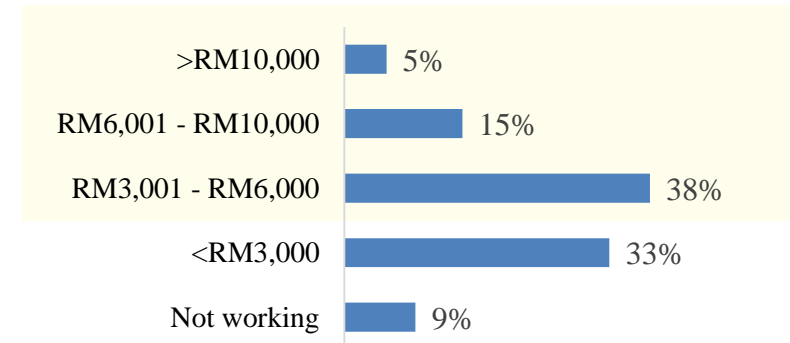
## 2 ETHNICITY



## 3 AGE GROUP SPLIT



## 4 INCOME LEVELS



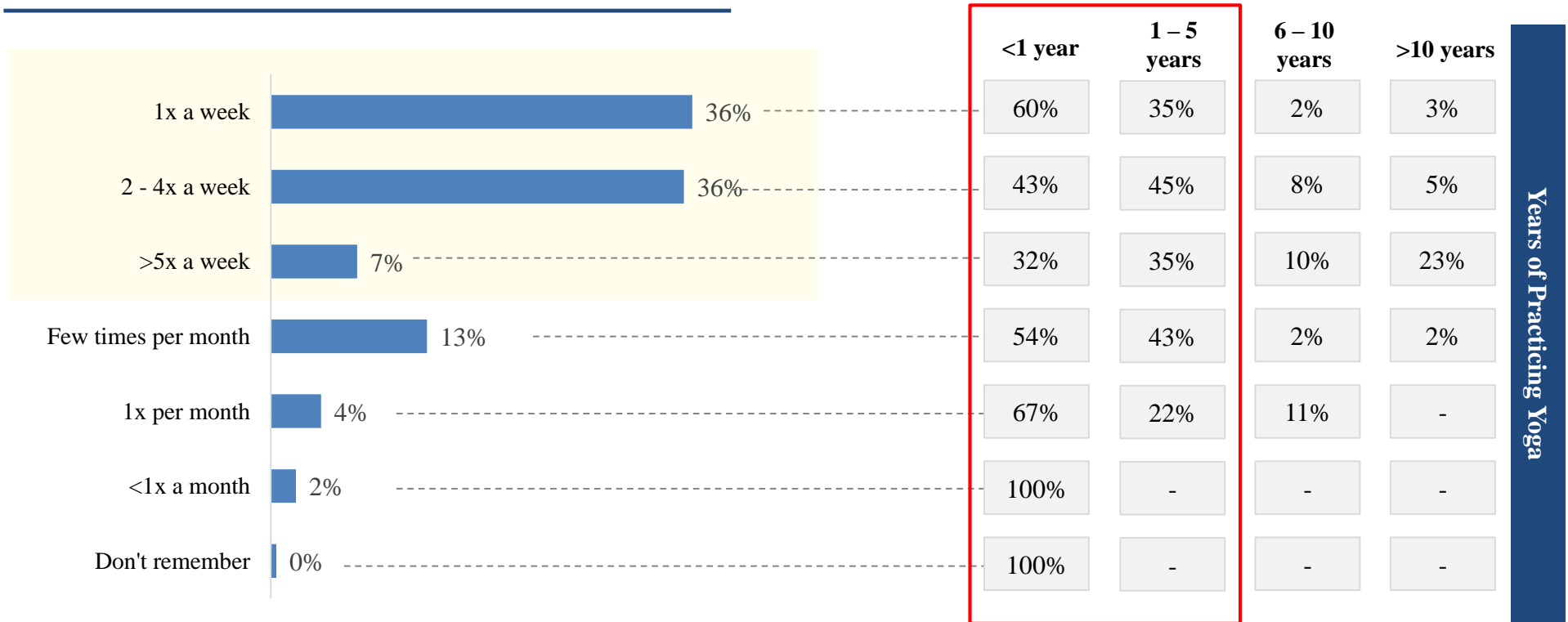


# Newer Practitioners Are More Actively Practicing Yoga



80% Yoga practitioners who practice on a weekly basis are found to be relatively newer adopters of Yoga who only have less than 5 years of Yoga practice. This may indicate a growing Yoga awareness around 5 years ago in year 2014.

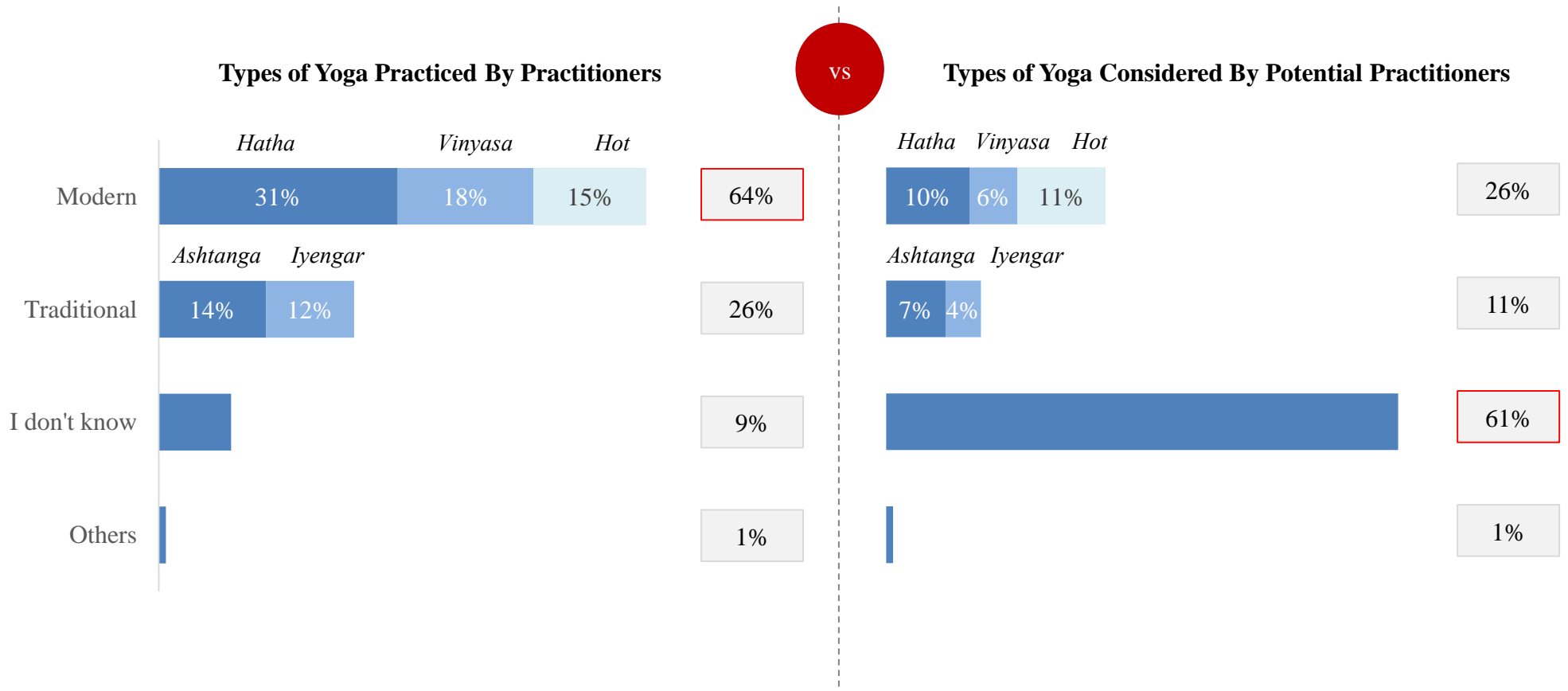
**Years Of Practice vs Frequency Of Yoga Participation (n = 415)**



# Hatha Yoga Is The Most Popular Type Amongst Practitioners



Modern Yoga, especially Hatha Yoga is most favoured by current Yoga practitioners while two-thirds of potential practitioners who has the intention to practice yoga in the next one year are yet to be aware of the types of yoga available. Having said that, awareness towards Hot Yoga and Hatha Yoga remains to be slightly higher than the rest.



# Newer Practitioners <5 Years Prefer Modern Yoga

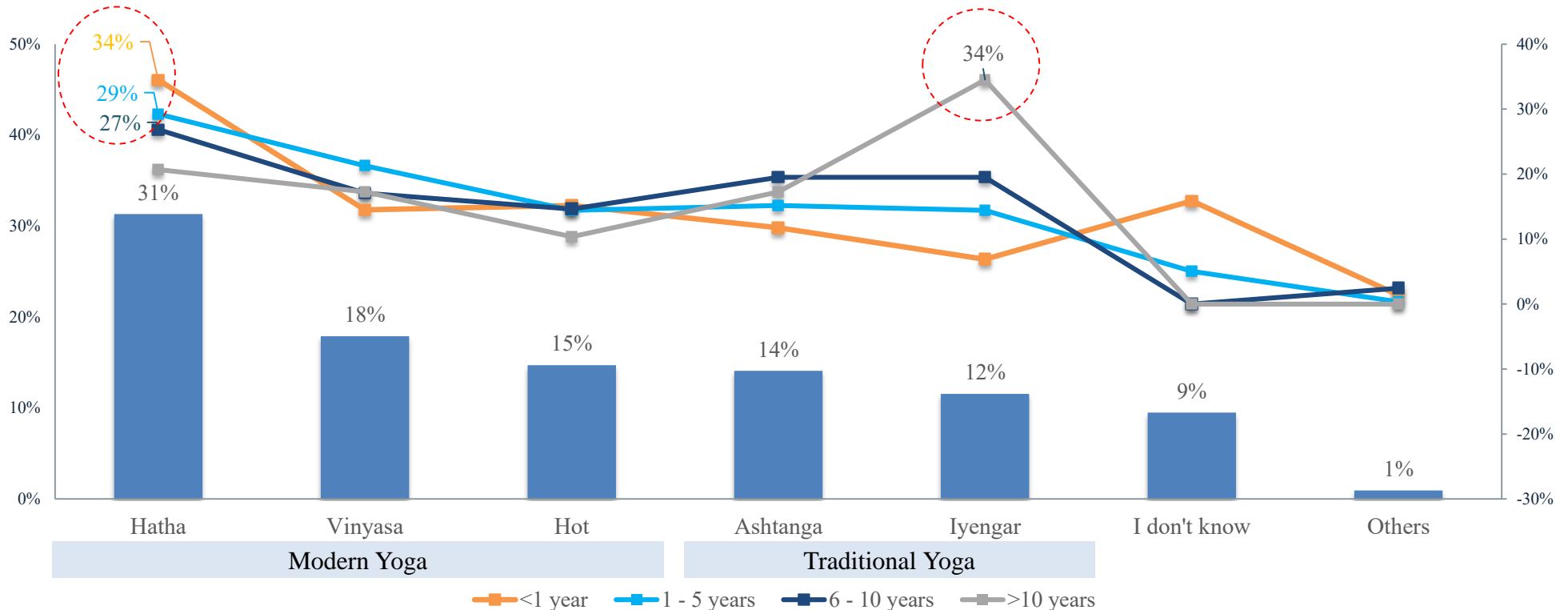


Newer yoga adopters of <5 years seem to have higher awareness of the types of yoga, leaning towards modern yoga as compared to long-time practitioners >10 years which 34% prefer traditional style – Iyengar yoga.

## Types of Yoga Practiced vs Years Of Practice (n = 415)

% Types of yoga practiced

% Types of yoga practiced vs years of practicing yoga

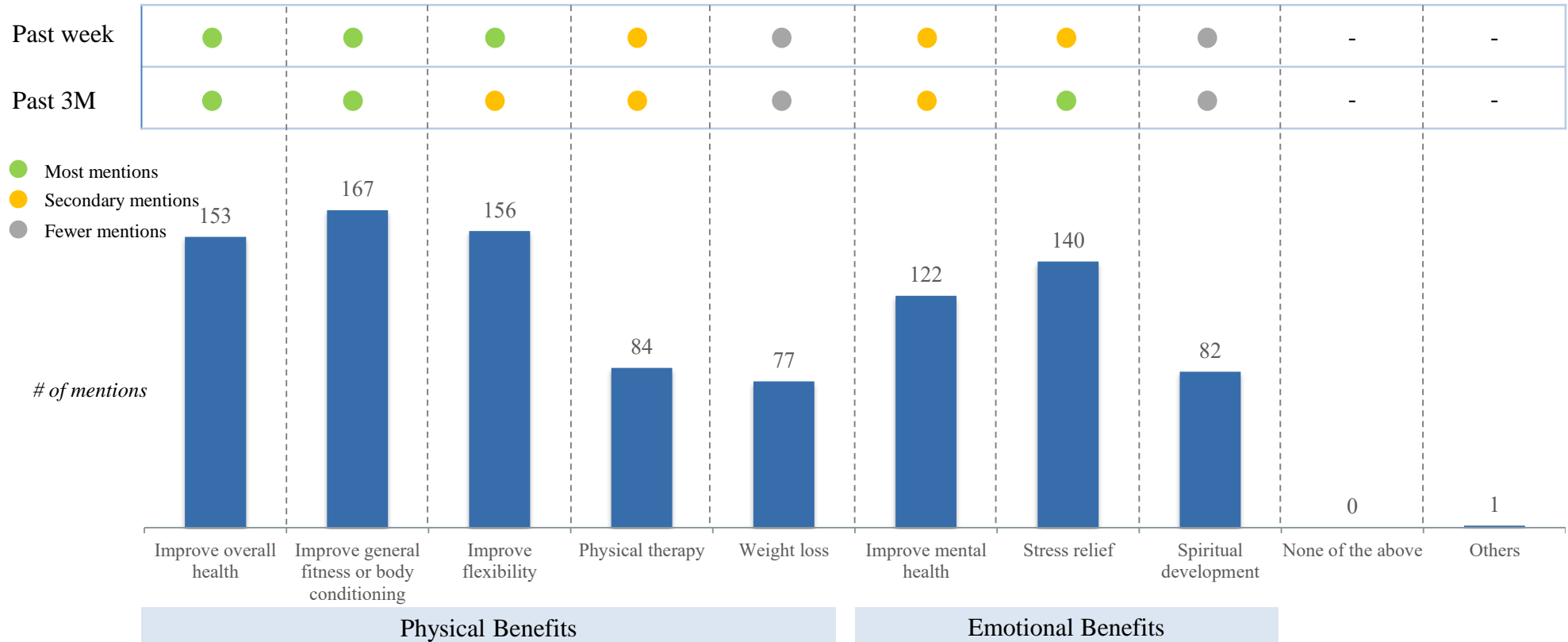


# Yoga Is Mostly Practiced For Physical Benefits



While it is known that practicing Yoga could also improve mental health, active practitioners practice yoga mainly for general physical benefits such as improving fitness while yoga practitioners who are less active view that Yoga could also relieve stress.

## Yoga Practitioners Active Levels Against Reasons To Practice



Question: "Why did you start practicing yoga ? (Select all that applies)"

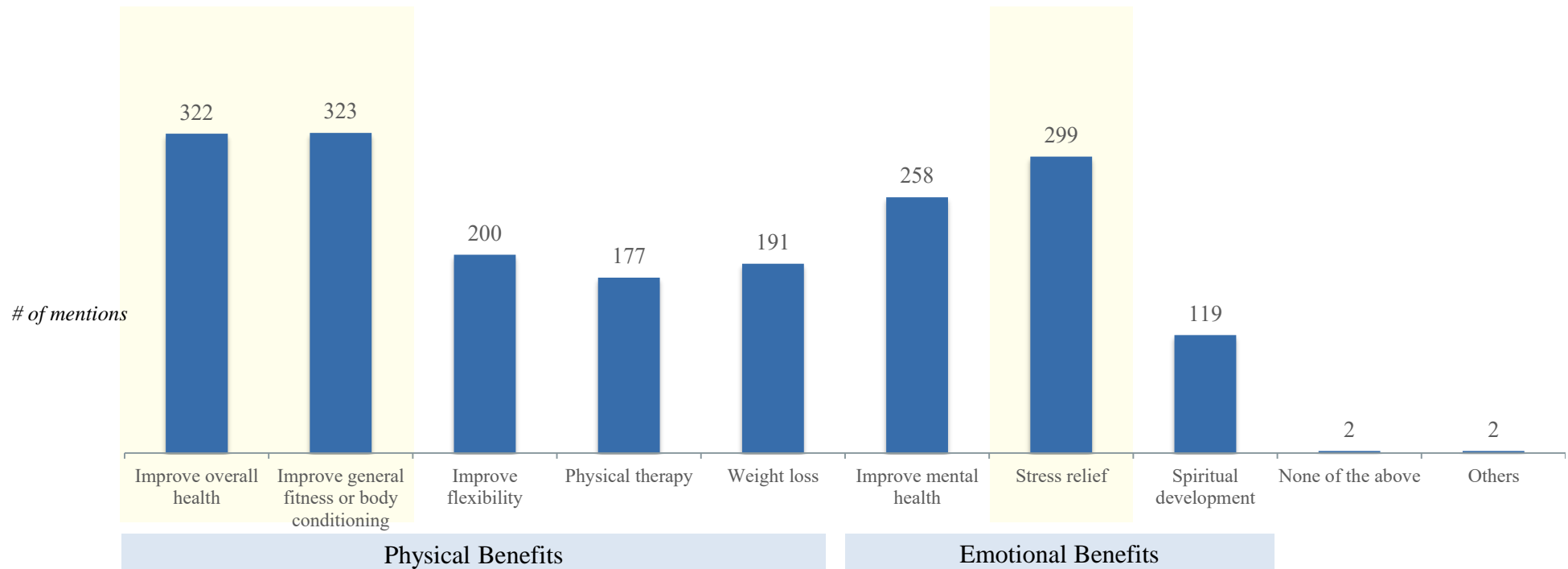
# Potential Practitioners Also Highly Value Physical Benefits



The main reasons for potential practitioners to start practicing Yoga are consistent with current yoga practitioners. Non-practitioners intend to practice Yoga to improve health and body fitness as well as to relieve stress.

## Reasons To Start Practicing Yoga By Non-Practitioners

Q: “Why would you start practicing yoga? (Select all that applies)”



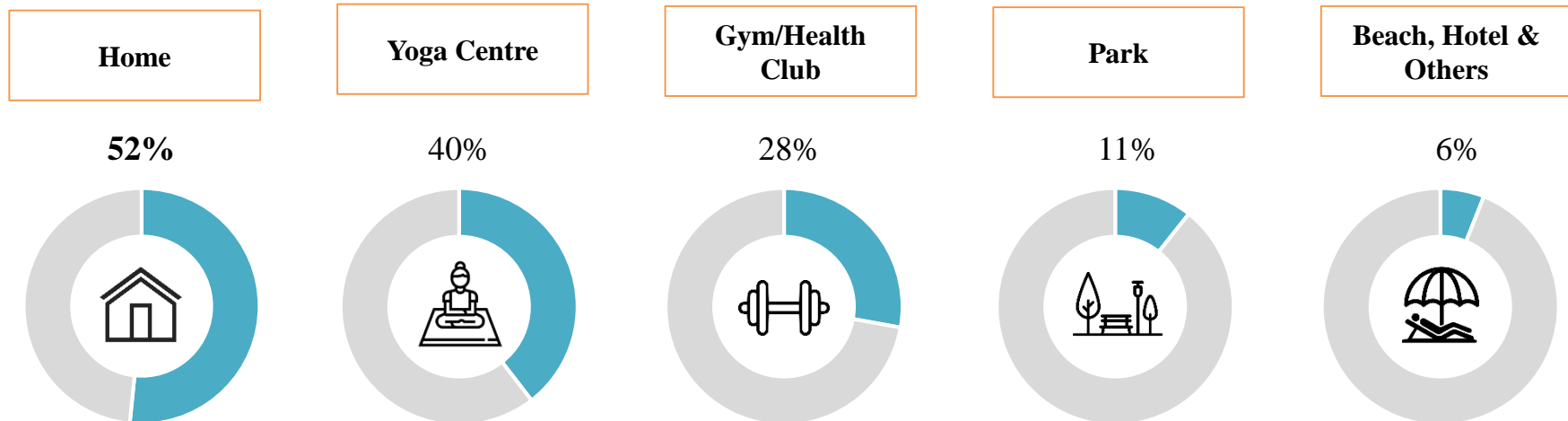
# Home Is Highly Preferred As Yoga Practicing Ground



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52% of Yoga practitioners practice yoga at home and is often coupled with another practice venue such as yoga centre or gym while outdoors are less preferred in Malaysia.

## Yoga Practice Venue Preferred by Yoga Practitioners



Question: "Where do you normally practice yoga? (Select all that applies)"

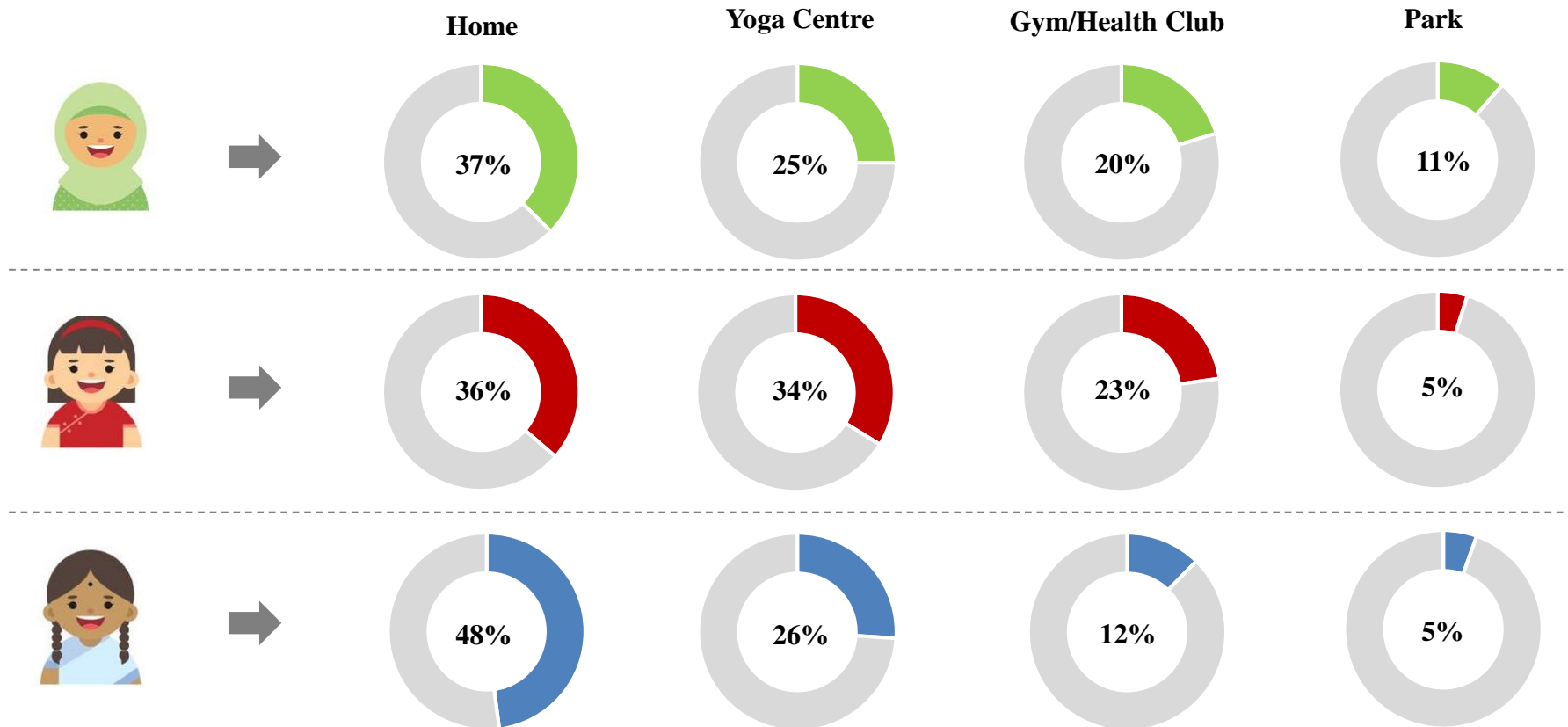
# Home Is Highly Preferred As Yoga Practicing Ground (Cont'd)



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Malays and Indians have a stronger preference to practice at home while Chinese are indifferent between practicing yoga at home and yoga centres.

## Yoga Practice Venue By Ethnicity



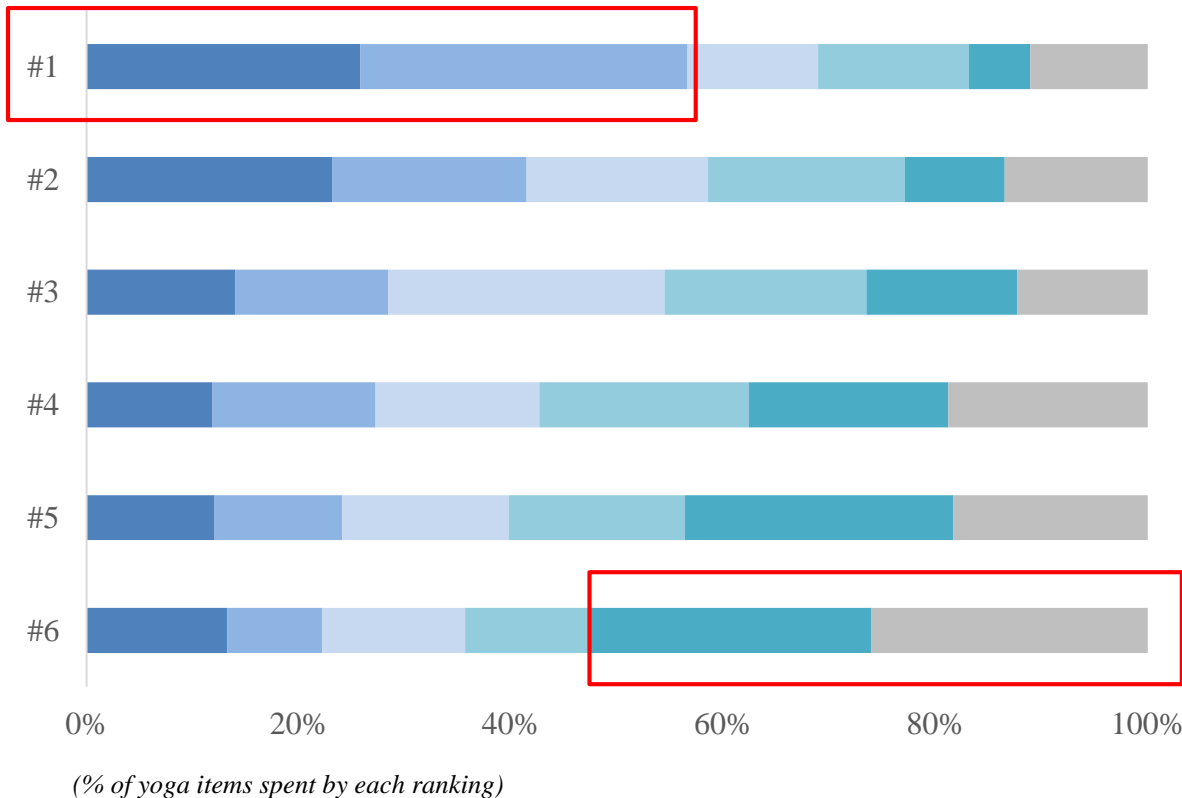
Question: "Where do you normally practice yoga? (Select all that applies)"

# Yoga Practitioners Spend Most On Recurring Items Annually



57% Yoga practitioners indicated they spend the most on gym membership and fitness classes (inclusive of yoga classes) while they spend the least on reading materials and media such as yoga-related apps as they are of lower priority.

## Expenditure Ranking (#1 Most - #6 Least) On Yoga Related Items



### Legend of Yoga-Related Items

- Gym membership
- Fitness classes including yoga
- Yoga clothing
- Yoga accessories or props
- Yoga books or magazines
- Yoga media ie. apps



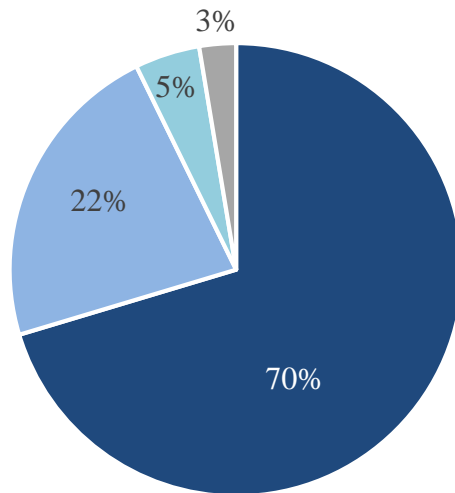
# Intended Spending By Potential Practitioners Are Similar To Current Yoga Practitioners



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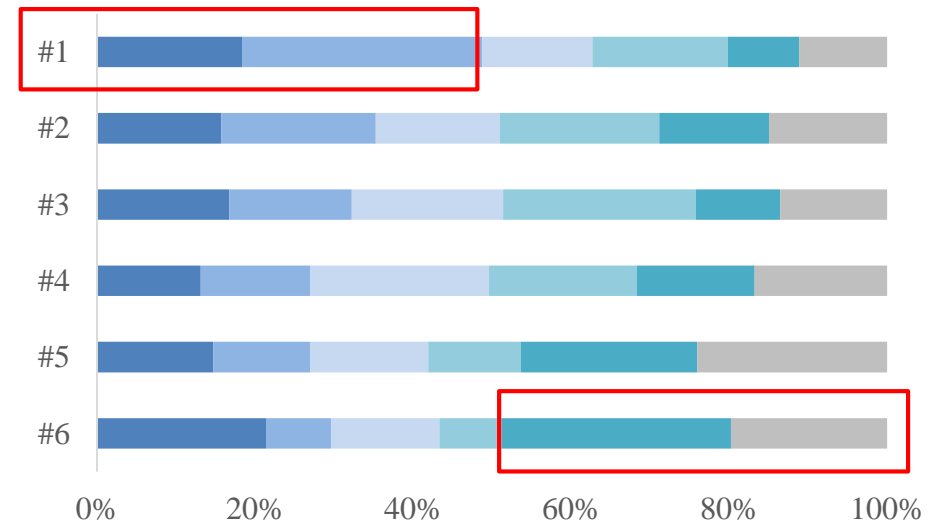
70% of potential practitioners intend to spend no more than RM500 annually for Yoga practice, signifying a lower willingness to spend as compared to 47% of Yoga practitioners who are ready to spend >RM500 a year. However, similar to yoga practitioners spending patterns, 49% of potential practitioners rank gym membership and yoga classes as their top 2 items.

## Willingness Of Expenditure Levels For Yoga-related Items



- <RM500
- RM501 - 1,000
- RM1,001 - 1,500
- >RM1,500

## Expenditure Ranking (#1 Most - #6 Least) On Yoga Related Items



(% of yoga items spent by each ranking)

### Legend of Yoga-Related Items

- Gym membership
- Fitness classes including yoga
- Yoga clothing
- Yoga accessories or props
- Yoga books or magazines
- Yoga media ie. apps

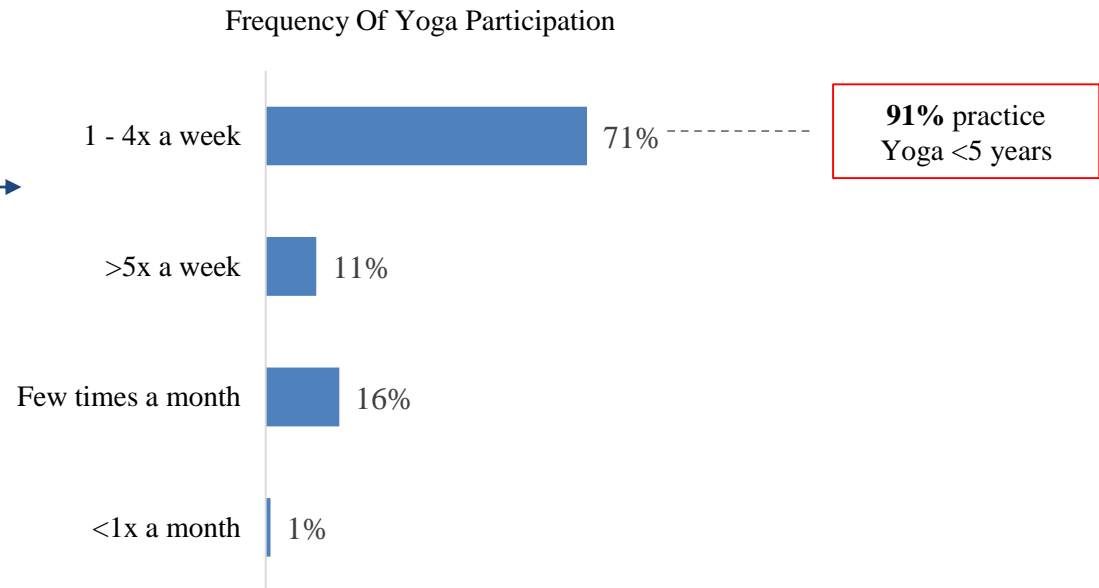
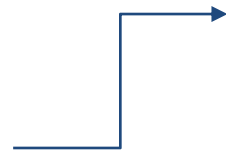
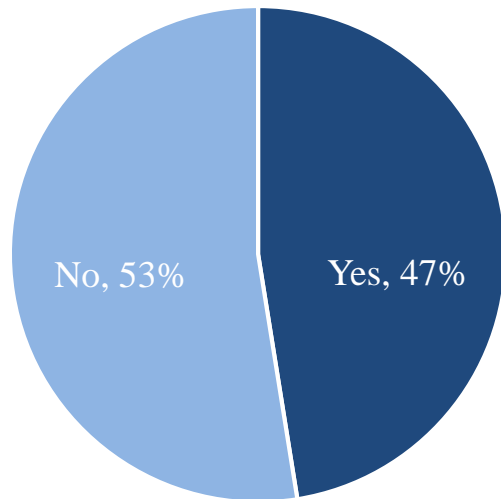
Question: "On average, how much would you be willing to spend on yoga in a year, including yoga classes, accessories and props (e.g. mats, straps, blankets etc.), yoga clothing, books and media?"

# 1 in 2 Yoga Practitioners Intend To Be An Instructor



47% Yoga practitioners reportedly mentioned they would like to be an instructor at some point in the future, indicating a high continuity rate of current Yoga practitioners. 82% of these intended practitioners are practicing Yoga regularly few times per week.

*Question: “Would you consider becoming a yoga instructor?”*



# Yoga Practitioners Tend To Be More Mindful On Their Diet



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Yoga practitioners have a slight tendency to lead a healthier and cleaner diet regime as compared to potential practitioners while in terms of environmental consciousness, there is no distinction between them.

## Statements Relating to Food Intake & Environment



Question: "Do you agree with the following statements? Select all that applies."



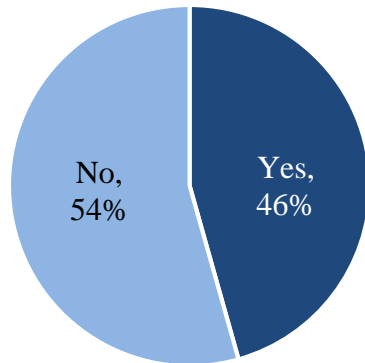
# Appendix

# Total Survey Statistics

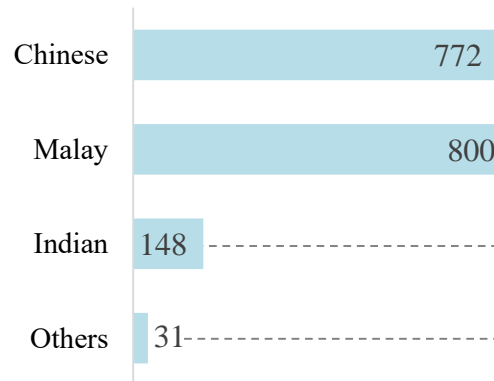


	Total Responses	Q: Have you practiced yoga before?		
		Yes	No	Screen-out prior
Survey Respondents (In Criteria)	1,000	504	496	NA
Survey Respondents (Screen Out <sup>1</sup> )	937	295	456	186
<b>Total</b>		<b>799</b>	<b>952</b>	

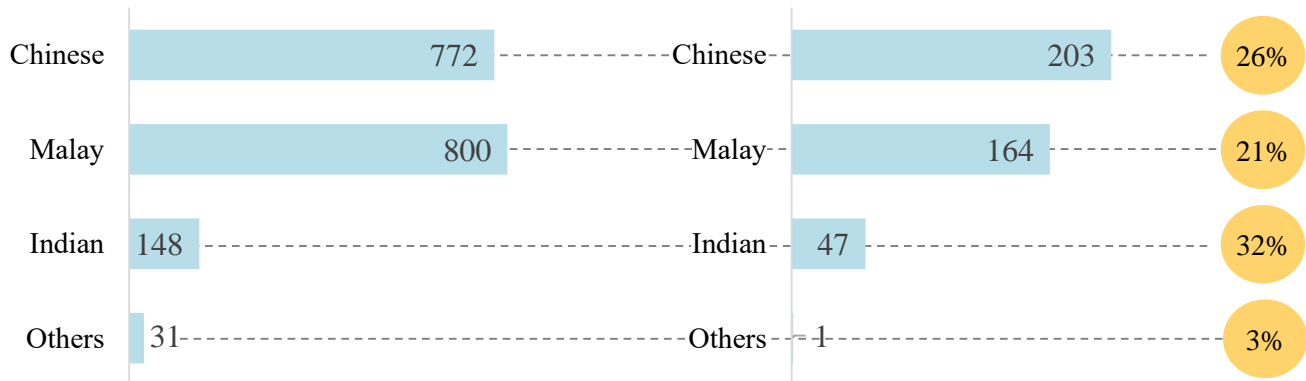
Yoga Participation (n=1,751)



No. of Respondents by Ethnicity (n=1,751)



Respondents Who Practice Yoga Last 3 Months (n=415)



Note: (1) Screen out are respondents who do not meet the qualifying criteria as stipulated in slide 4 – “Survey Coverage Overview”

# Yoga Penetration Calculation



## Survey Results Applied

N = 1,751 (In criteria & screen-out respondents)  
Including non-practitioners, lapsed, current and potential yoga practitioners

## Department of Statistics Malaysia (DOSM)

69% Malay – 22.5 mil	23% Chinese – 7.5 mil
7% Indian – 2.3 mil	1% Others – 0.3 mil

- **A. Penetration by Ethnicity on Addressable Population** (Refer to previous slide on survey results)
- **B. Addressable Population by Ethnicity:** Addressable Population of 17.3 mil x % of ethnicity by DOSM  
Ie. Chinese 17.3 mil x 23% = 4.0 mil
- **Penetrated Population:** A x B
- **Penetration by Ethnicity:** Penetration Population / Total Ethnic Population  
Ie. 1.0 mil / 7.5 mil total Chinese Malaysians = 14%

Ethnicity	A	B	Penetrated Population	Penetration by Ethnicity
Chinese	26%	4.0 mil	1.05 mil	14%
Malay	21%	12.0 mil	2.45 mil	11%
Indian	32%	1.2 mil	0.39 mil	17%
Others	3%	0.2 mil	0.01 mil	2%
<b>Total Penetration</b>			<b>3.89 mil</b>	
<b>Penetration Rate</b>			<b>12%</b>	



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