



GLOBAL WELLNESS
SUMMIT 2019

Caught Between Tradition and Modernity: How Chinese Gen Z and Gen Y View Wellness

Amrita Banta, Managing Director, Agility Research
& Strategy Pte Ltd, Singapore



Millennials & Gen-Z in China

Attitudes towards health and wellness



Agility Research & Strategy is a Top 10 Globally ranked Research and Consulting company with a core focus on the Affluent Consumers.

With over 30 years combined experience in understanding the Affluent consumer, working on projects for premium brands we are truly **Fluent on the Affluent™**.

The logo for agility Research & Strategy. The word "agility" is in a bold, purple, lowercase sans-serif font. To its right, the words "RESEARCH & STRATEGY" are in a smaller, purple, uppercase sans-serif font. A stylized, curved line in shades of green and yellow arches over the text.

agility RESEARCH
& STRATEGY

Consulting Arm

The logo for Affluent Insights Insights Engine. The word "AFFLUENTIAL" is in a purple, uppercase sans-serif font, with a purple circle partially surrounding the letter "A". Below it, "Affluent Insights™" is in a gold, lowercase sans-serif font, and "INSIGHTS ENGINE" is in a purple, uppercase sans-serif font.

AFFLUENTIAL
Affluent Insights™
INSIGHTS ENGINE

Data & Insights Portal

The logo for LuxeTalk. The word "LUXETALK" is in a white, uppercase, spaced-out sans-serif font, centered within a black rectangular box.

LUXETALK

Affluent Digital Community

We work with leading brands around the world

We share our thought leadership and insights at global events



China's Millennials and Gen-Z: Why Care?

China	Population	% of Pop.
Gen Z (15-24yo)	169.5 mln	12%
Millennials (25-39yo)	326.8 mln	23%

Millennials and Gen.Z are Challenging the Chinese Conventional Look

ChinaOutlook
Focusing on China's Future

Chinese millennials – a truly unique generation

THE FUTURE OF LUXURY

财经 财经网 Jing Daily

Well-being is Luxury for Chinese Millennials

Muscular millennials fuel Chinese health and fitness boom

The opportunity

Gym, Health & Fitness Clubs

Total Rev 2019:

US\$8Bn

Annual Growth

2014-19

8.6%

Number of marathons in China in 2017

400

Lululemon sales in China jumped 70% y-o-y in the first half of 2019

Sportswear market

Total Rev 2020:

US\$43Bn

Gym memberships in China - 2016

6.6m

(double vs 2008)



Reaches 100m registered users in China

Wellness is top of mind... but Wellness is often interpreted differently

“Consumers ask for organic products, but they don’t always expect it to be [organic], rather they expect it to be safer and of better quality than a regular product.” – Café owner Shanghai

Women are driving the wellness push

China’s past demographic policy has created a gender imbalance that is responsible for the new “**sheconomy.**” Chinese women’s spending has grown by 81 percent in the past five years, and they are driving major consumer trends like the wellness push.

A different approach is required

“The idea of a perfect activewear for Chinese consumers can be very different from the West. Our products are all specially Asian-fitted from day one, which differentiates us from a lot of existing activewear brands. Meanwhile, we break through the conventional design approach for activewear and blend in fashion elements in our product design.” - Maia Active (local activewear brand) Creative Director



Methodology

2019 Millennial & Gen Z Study

Interviews with 1,005 Millennial and Gen-Z consumers in 14 cities in China

Age:

- Millennials (50%) – born 1980-1994
- Gen-Z (50%) – born 1995-2002

Gender: Male: Female = 50:50

Cities Covered:

- Tier 1 (50%): Beijing, Guangzhou, Shenzhen, Shanghai
- Tier 2 (50%): Hangzhou, Nanjing, Dalian, Harbin, Tianjin, Wuhan, Xiamen, Chengdu, Kunming, Xi'an

How do they describe their generation?

While they use many different terms to define their age group, they cluster around a few key themes:

Applies more to:

- Gen-Z
- Millennials
- Both evenly





Millennials and Gen-Zs feel overall optimistic and are in pursuit of a high-quality lifestyle.

56% “Feel very optimistic for the next 5 years” of their life
– versus 9% who feel “very concerned”

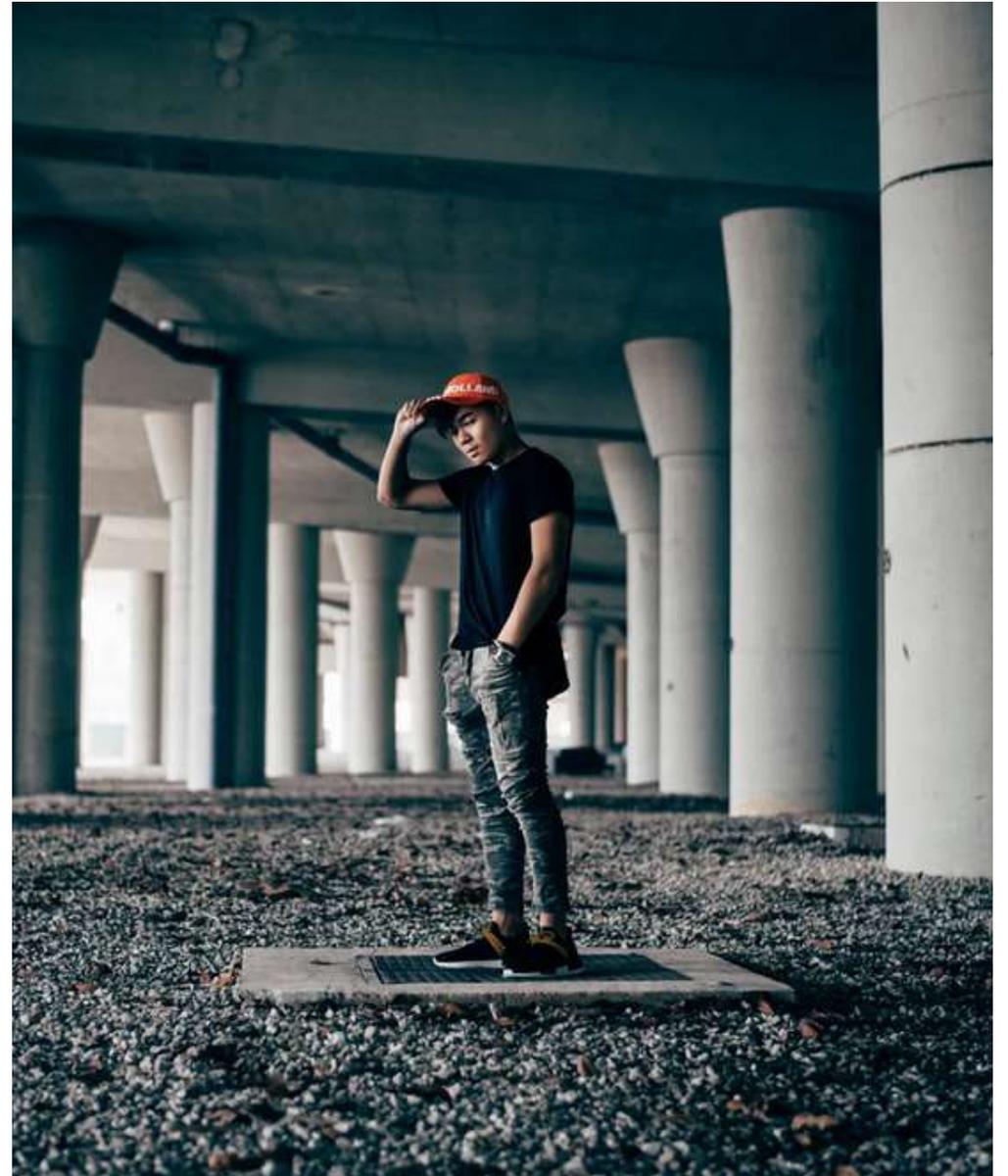
45% are “willing to spend more to eat well, dress well, and live in a good environment”
– versus 22% who describe themselves as more “pragmatic” and consider value trade-offs

They're individualistic

Compared with their elders, many have a sense of being independent and brave and are more willing to express themselves and their views openly. Millennials especially view themselves in this way, using terms like "freedom-loving" or even "selfish" to describe themselves

"I like to pursue individuality and quality of life –
I don't like to be restrained."

- *Male, 28*



They feel pressured

While they are optimistic, this feeling is balanced by a pressure to succeed in school, achieve success in their careers, make money, and fulfill obligations to their families.

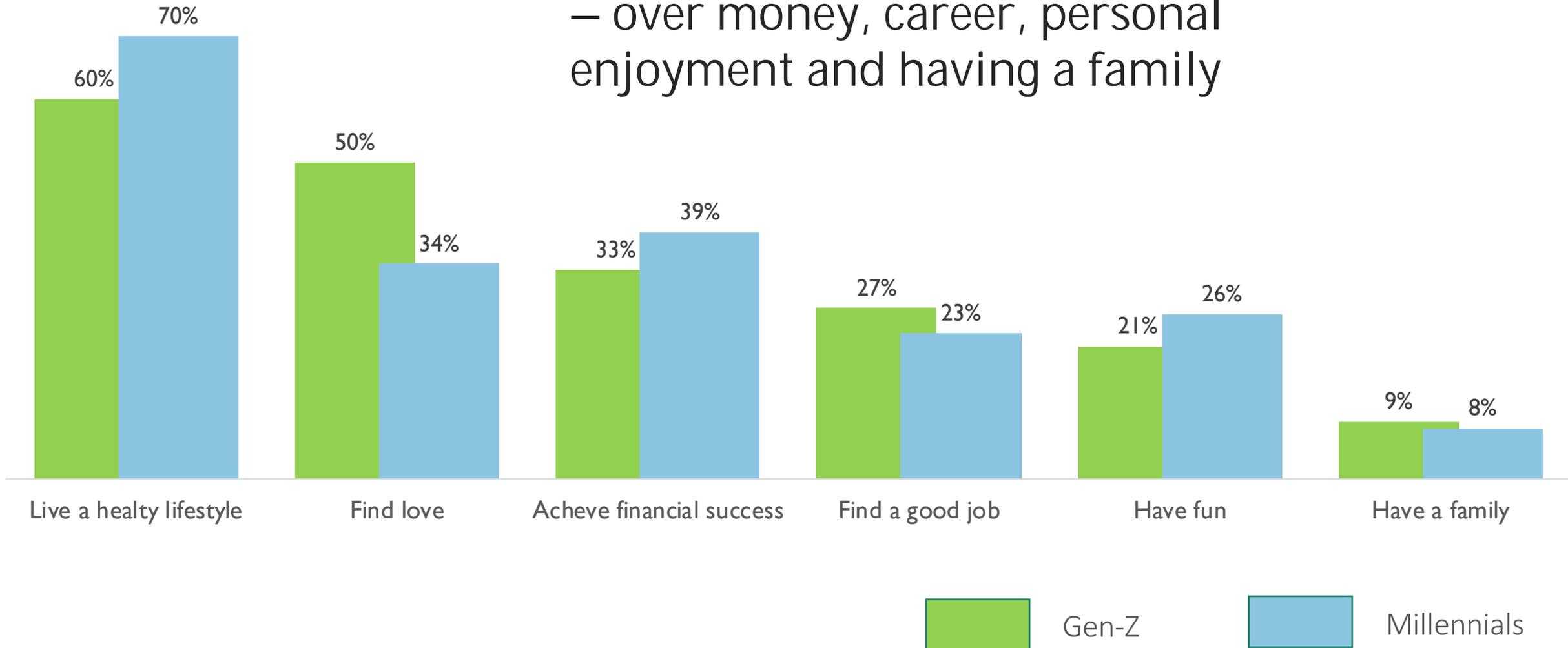
Millennials especially say they feel under pressure in their lives.

"We're both uninhibited and hardworking – both free and constrained."

"We live in the time of both opportunities and pressures."

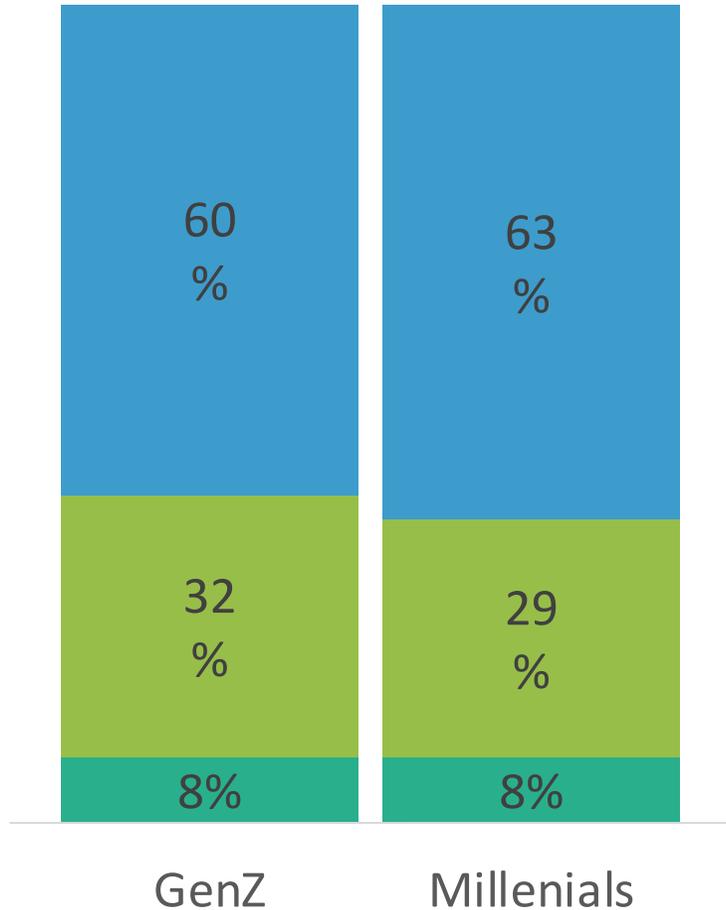
Key Life Priorities

Living a healthy life is a key priority – over money, career, personal enjoyment and having a family



They feel healthier compared to previous generations...

vs. my parents, I am ... healthy



vs. previous generations, we place ... importance on wellness

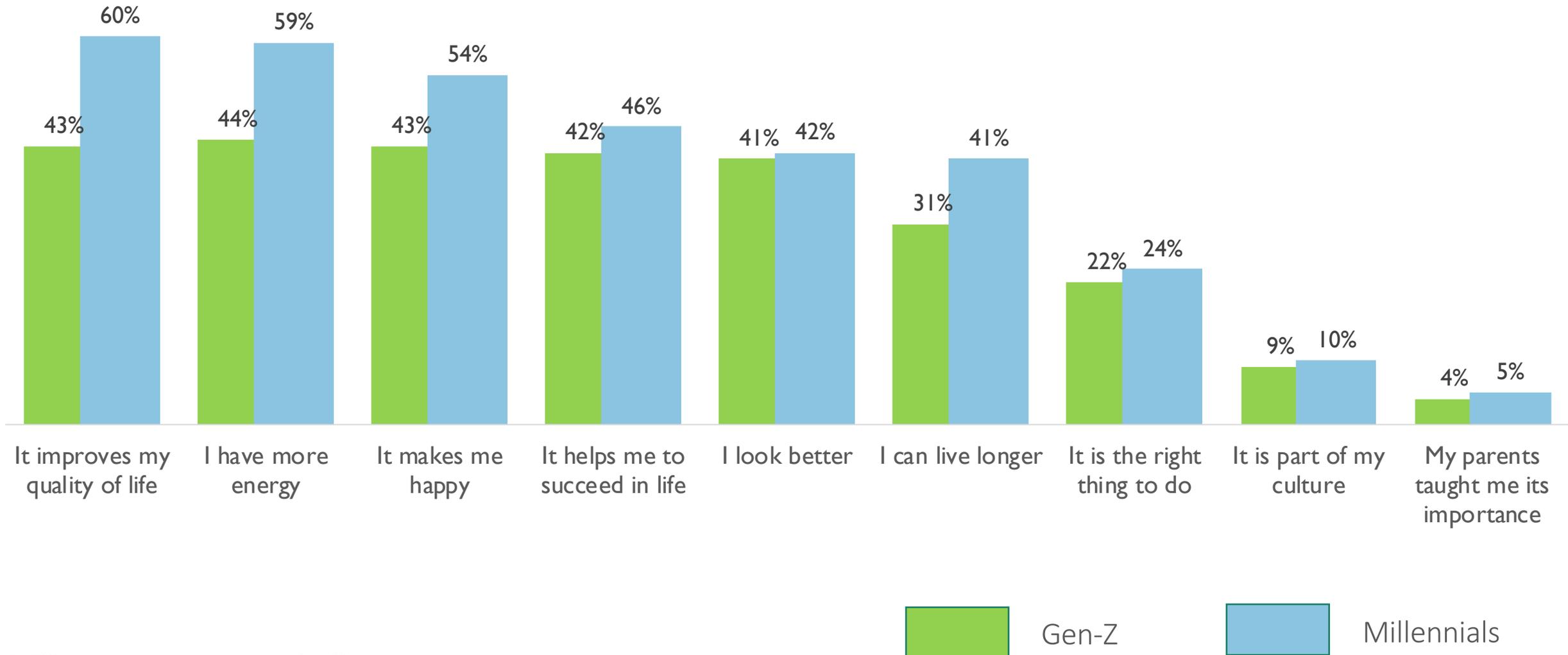
MORE

SAME

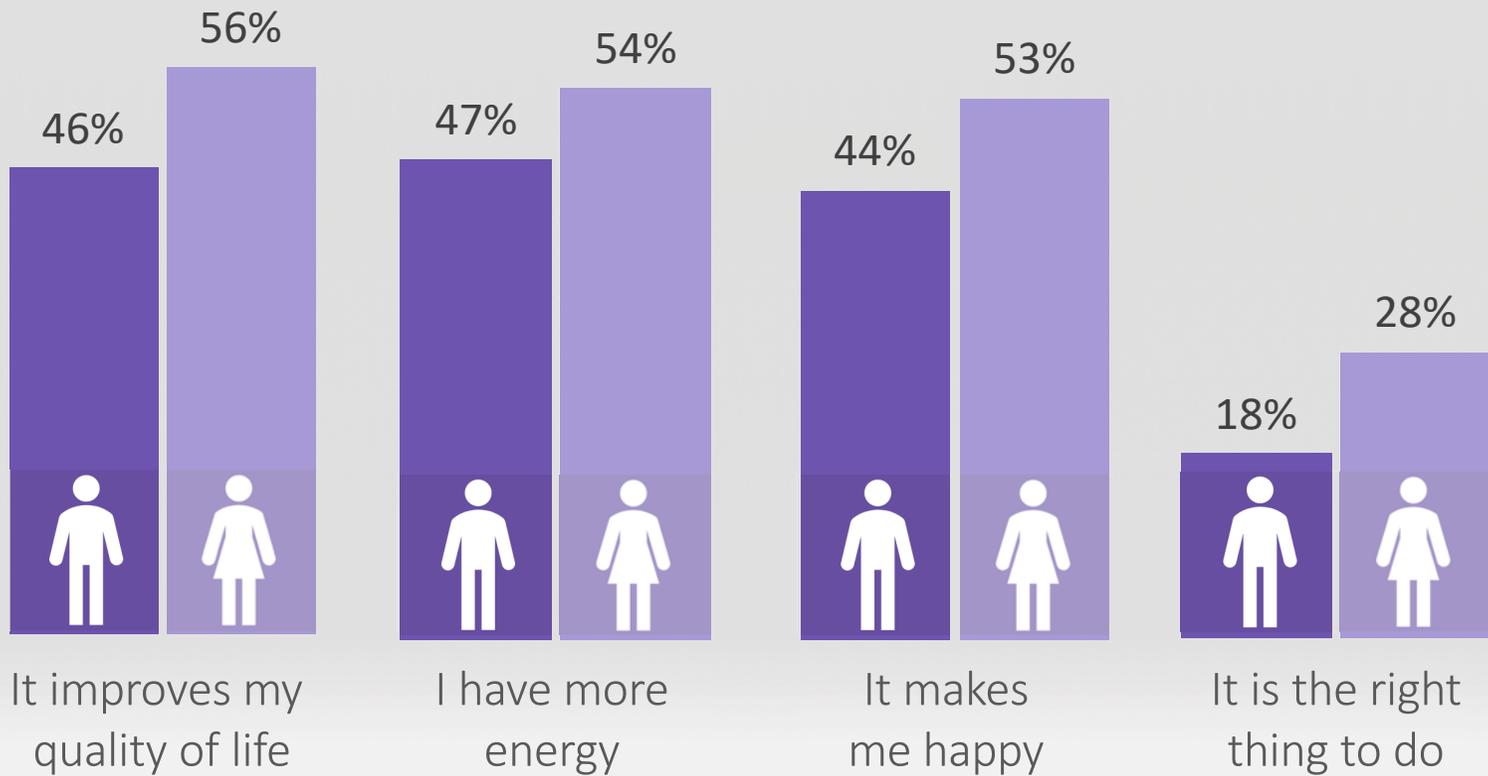
LESS



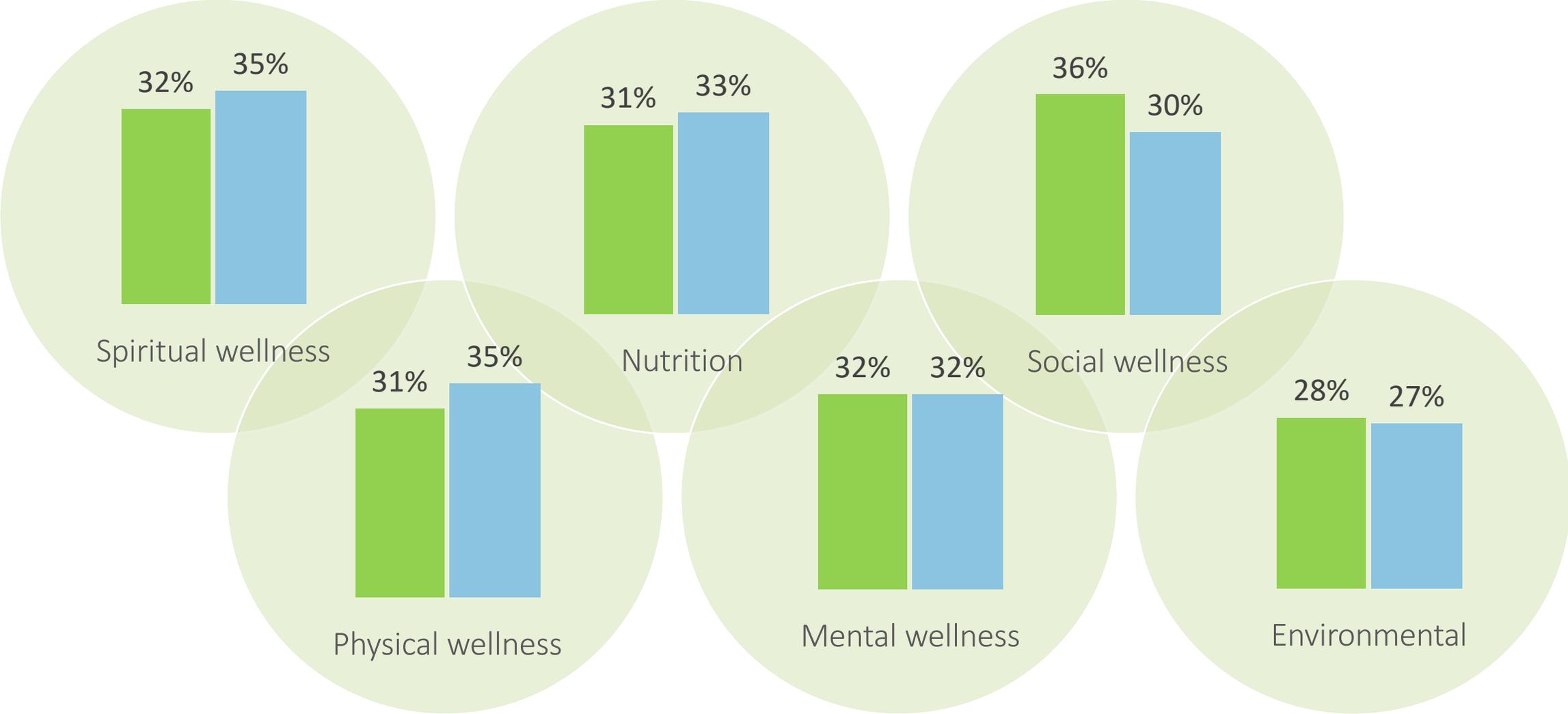
Why is wellness important for this generation?



Women are more conscious about wellness...



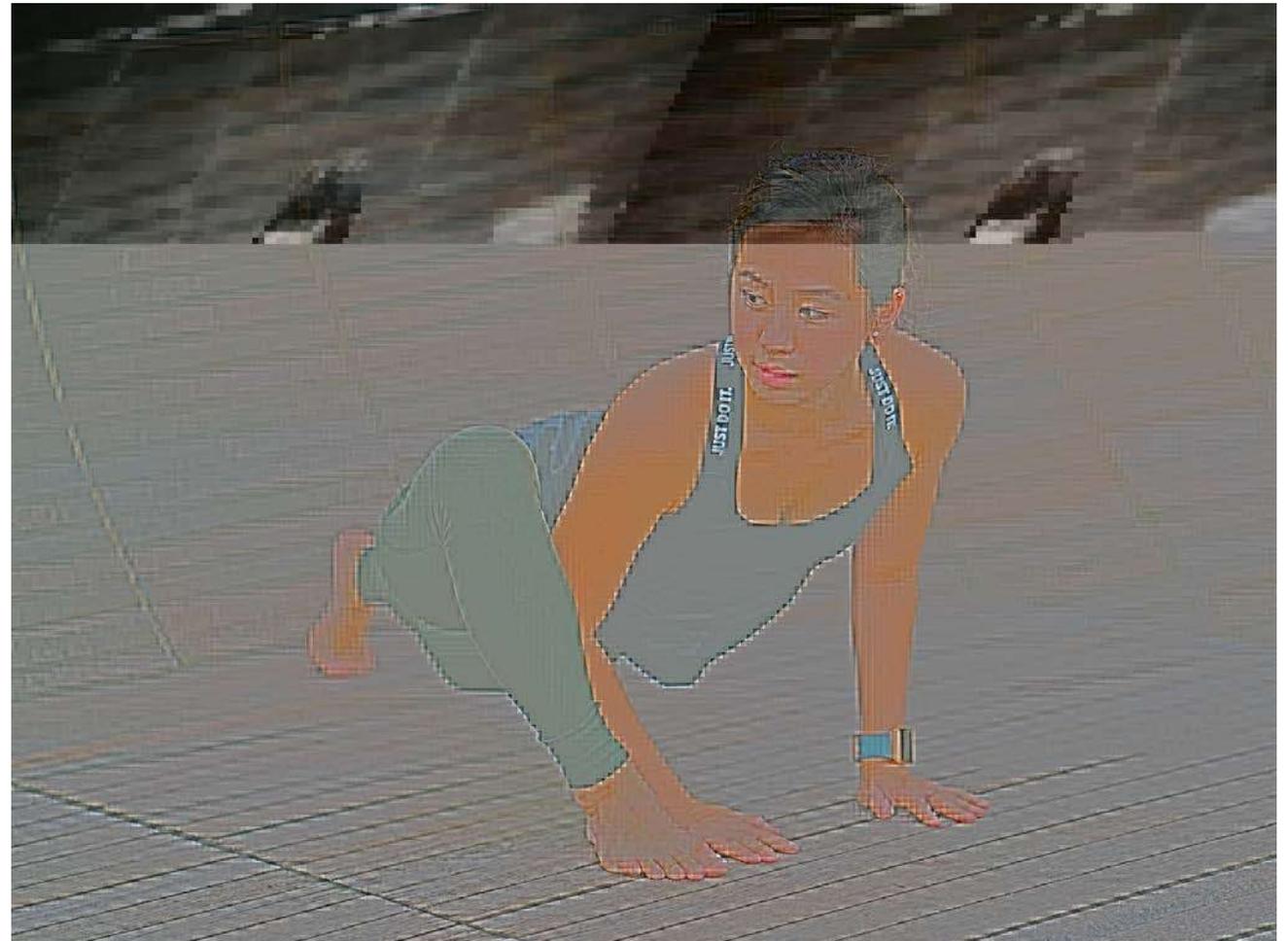
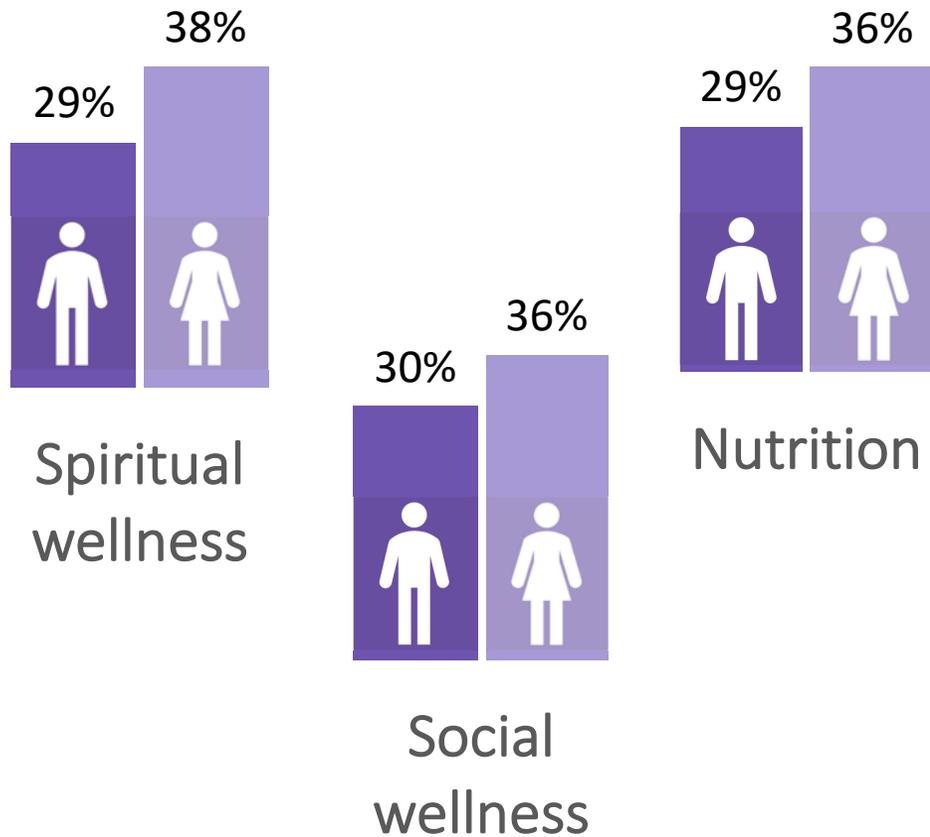
A third rate themselves as 'very healthy' across all wellness dimensions



Gen-Z Millennials

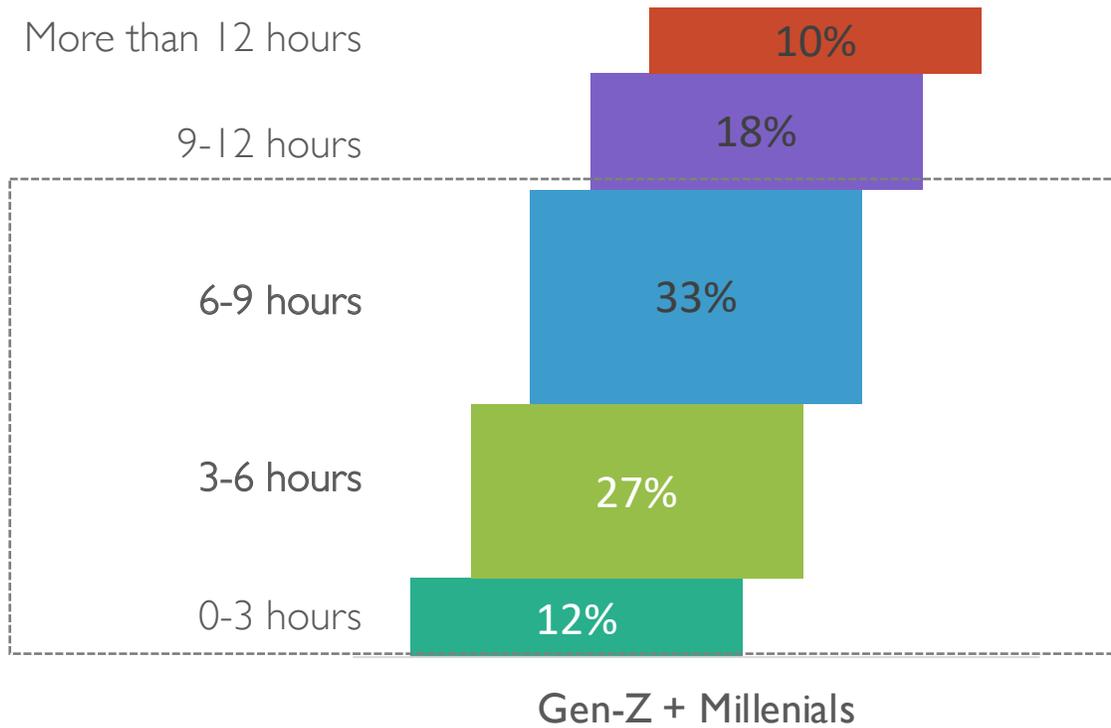
Women rate themselves higher than men in “spiritual”, “nutrition” and “social wellness”

I rate myself “very healthy” in...



Majority devote between 3-9 hours per week on doing wellness activities; a large share do it alone

Hours devoted to wellness per week

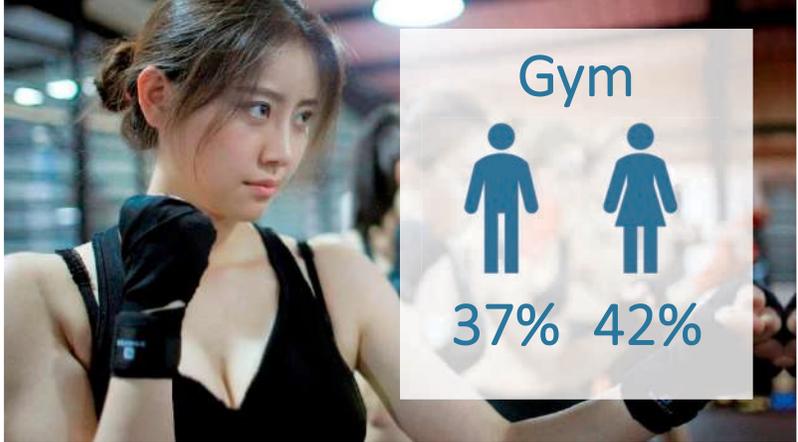
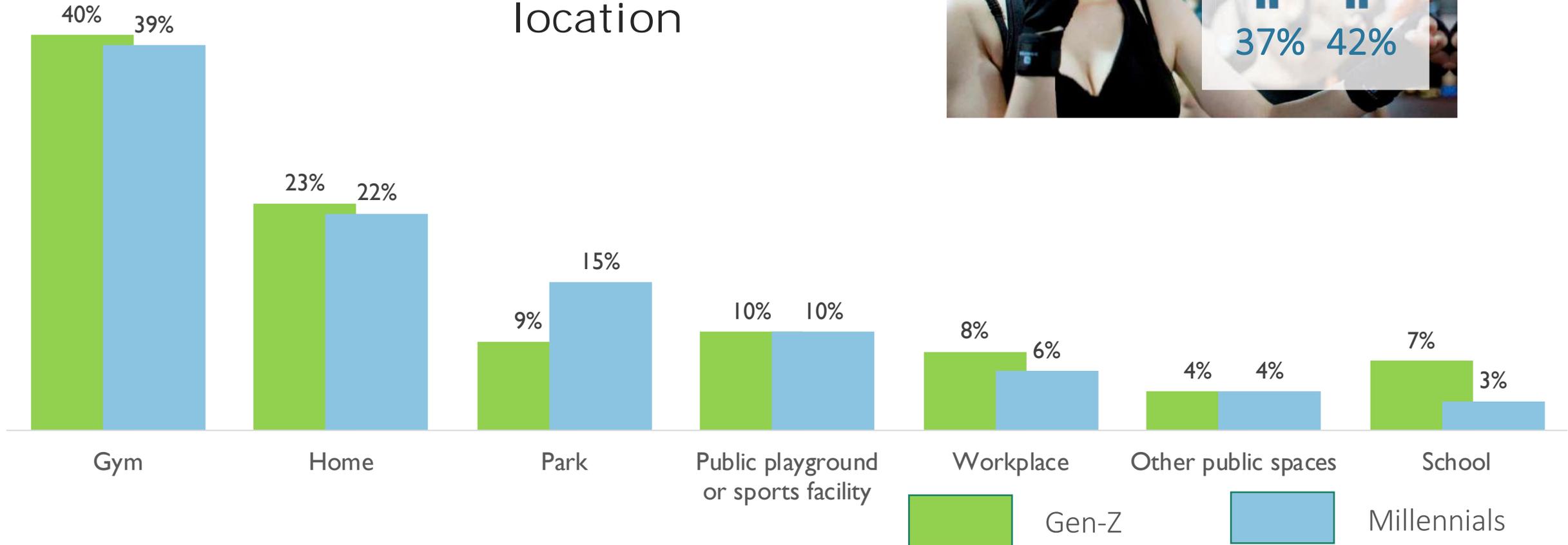


% Share of doing wellness activity alone/with companion



The gym is their main workout location, especially for women

% Share of doing wellness activity by location

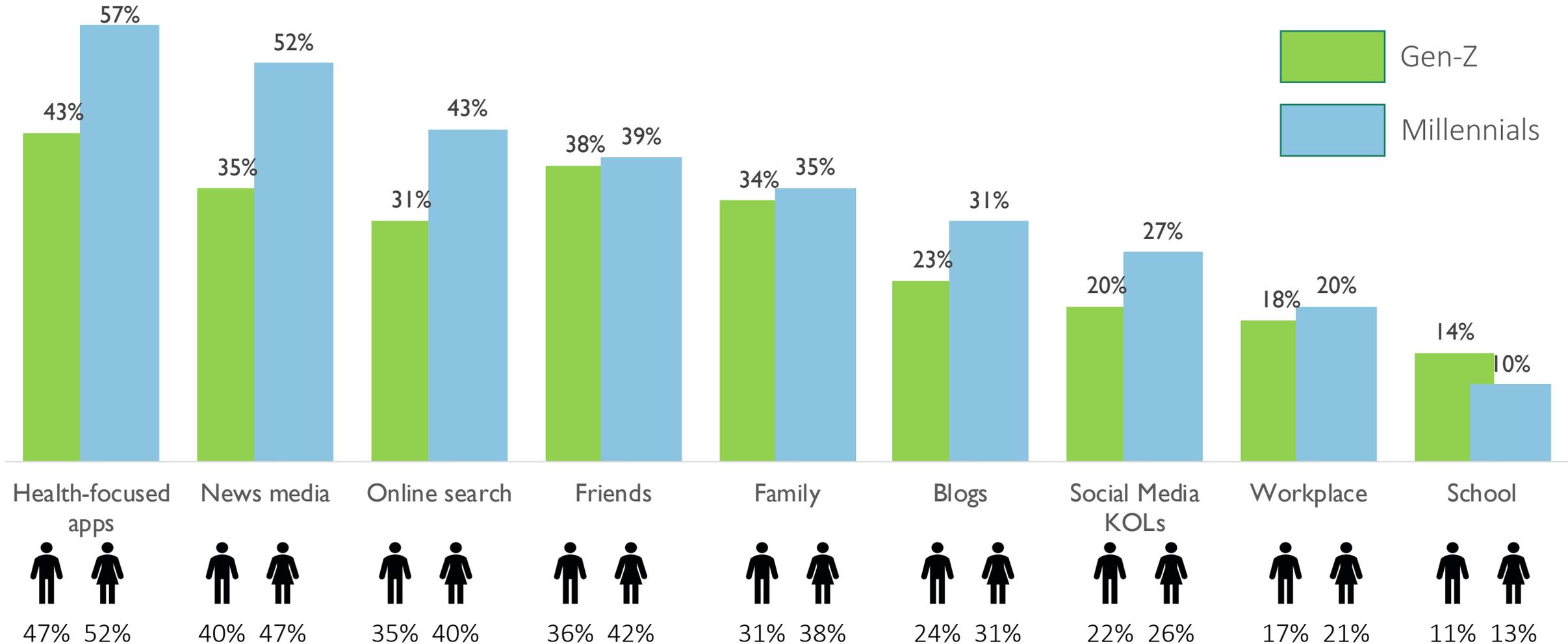


Running and walking are the most popular physical activities

Regular Physical Activities		
	Men	Women
1.	Running/jogging	Running/jogging
2.	Walking	Walking
3.	Basketball	Yoga
4.	Cardio/aerobics	Cardio/aerobics
5.	Swimming	Swimming
6.	Badminton	Badminton
7.	Football/Soccer	Dance
8.	Table Tennis	Cycling

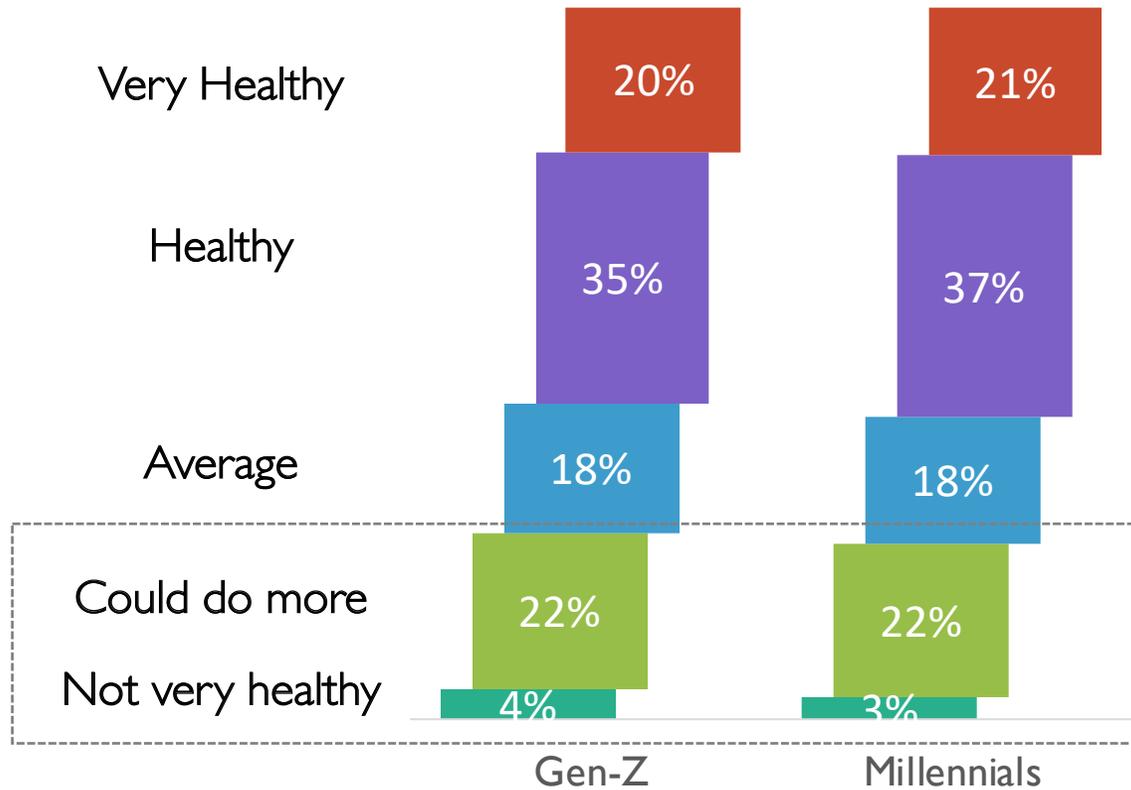


How do they keep themselves informed about wellness?

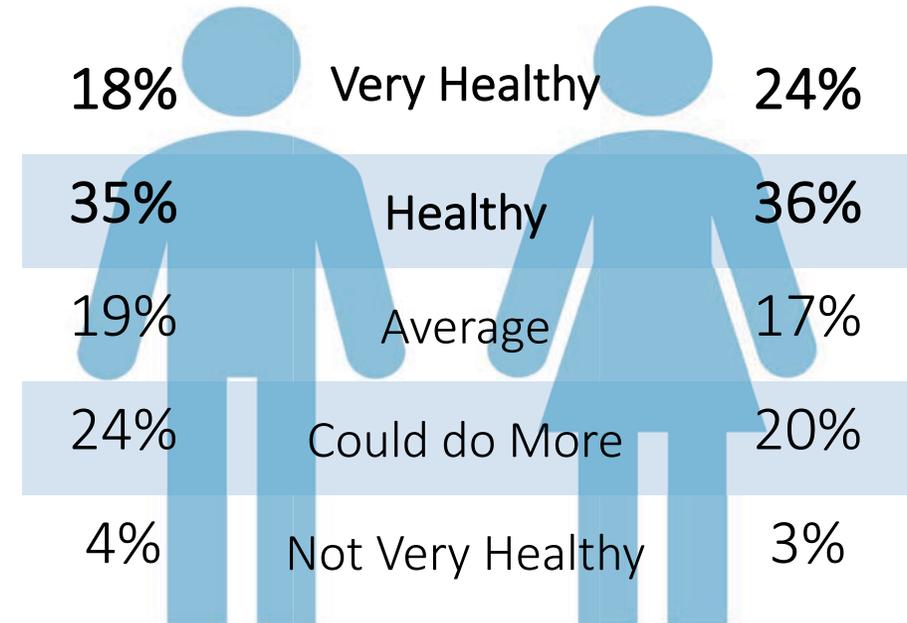


In terms of their diet, a quarter are not happy with what they eat

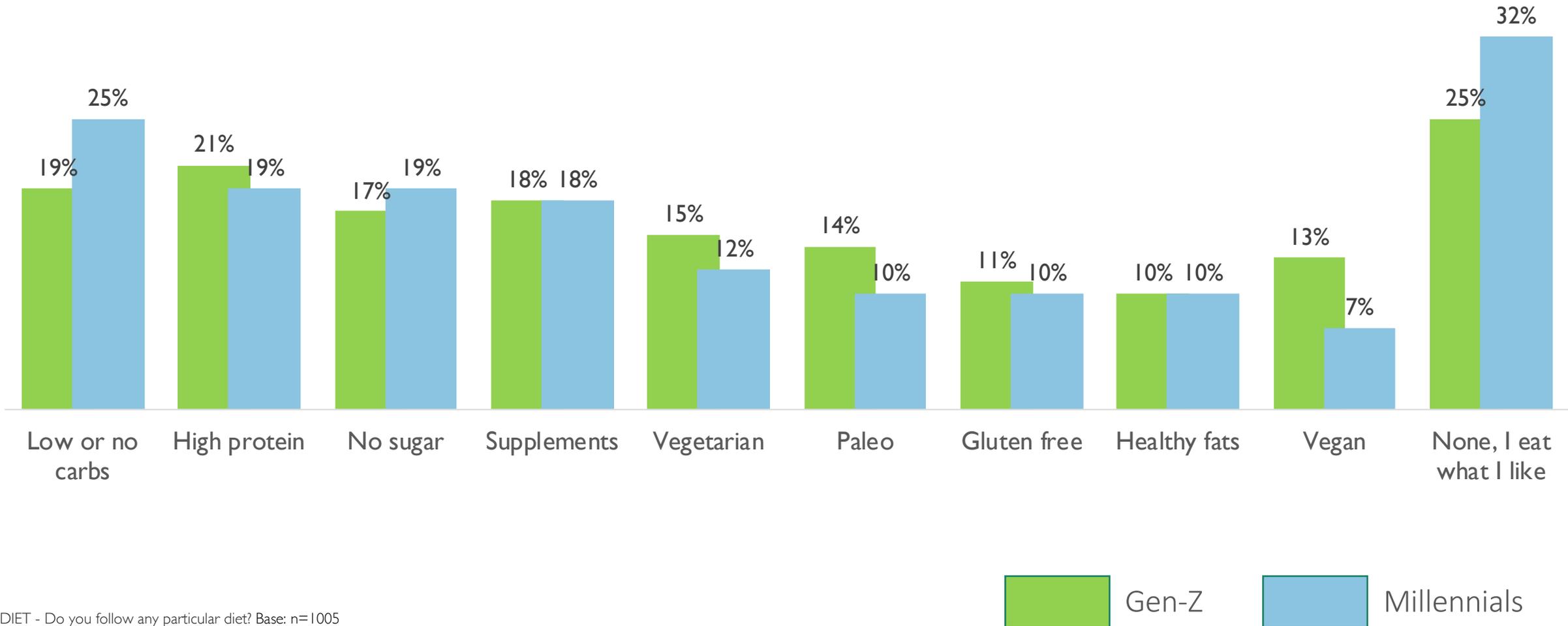
Do you feel that your diet is healthy?



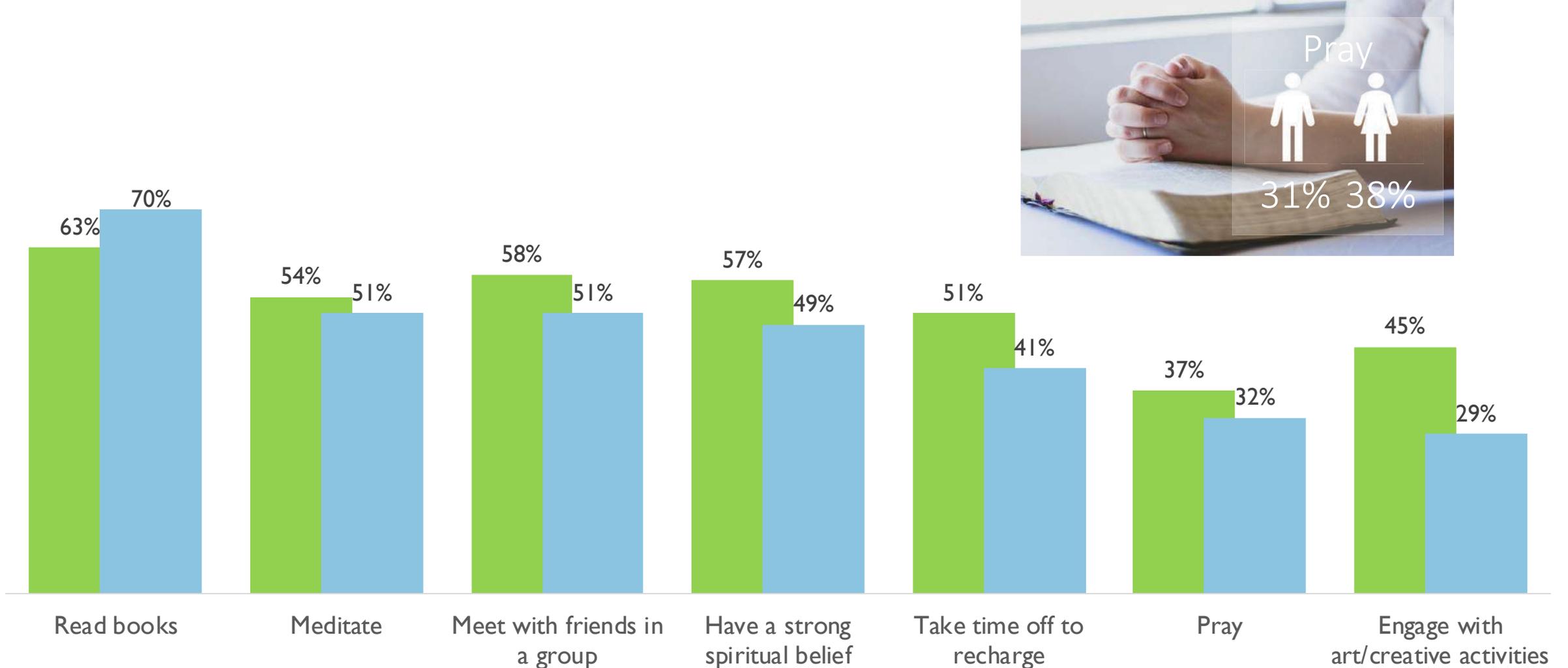
Once again, women pay more attention to their health than men



Most follow a diet, but a large share do not pay much attention to nutrition



Reading books helps mental wellness; Gen-Z do more for mental wellness



WELLMEN - Mental and emotional wellness may come from one or more of the following dimensions: a balanced mind about to come with everyday stressors, strong support network of family and friends, a set of personal beliefs which help make sense of the world, intellectual passions. Which other activities do you do often? Base: n=1005

Gen "Z" en...

For many Gen-Zs, a response to life's pressures is to be "Buddha-like" or low-key:

- Resist engaging too openly online and showing their passions openly
- Present an outward image of calm in the face of life's ups and downs

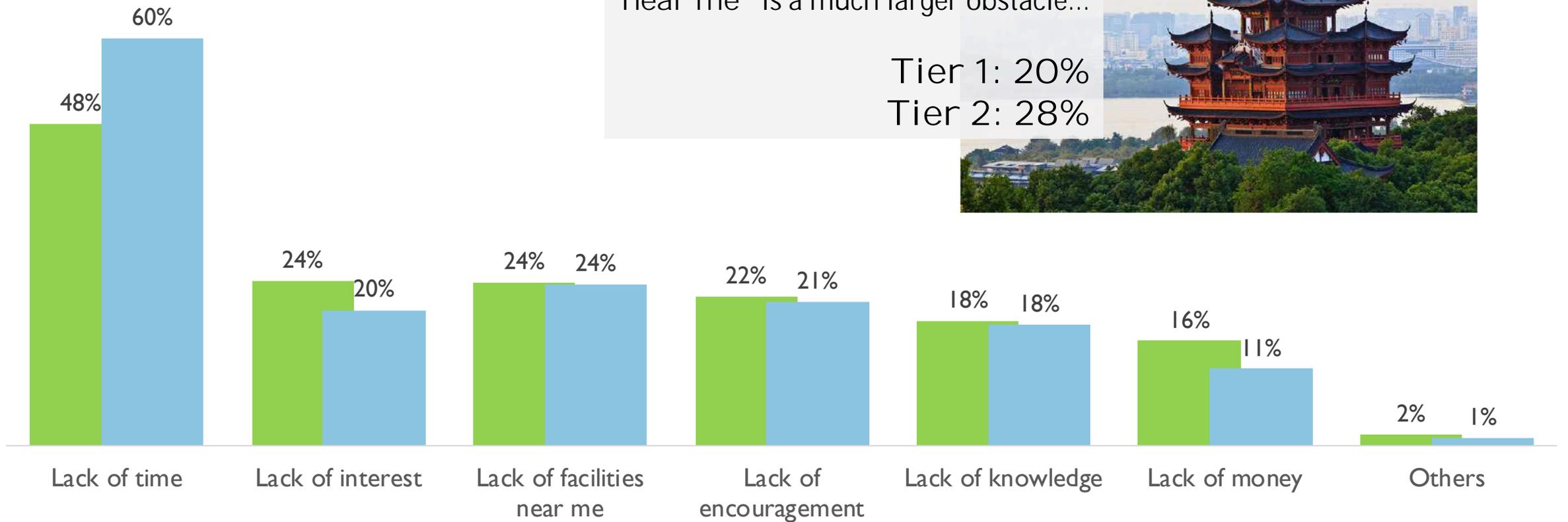


Most of the time I have a peaceful mindset – I can see through the little tricks people are trying to play but I play along. I don't like to seem aggressive, so I keep calm and quiet." – Male 24

Lack of time is the main barrier for living a healthier lifestyle, esp. among Millennials.

In Tier 2 cities, "Lack of facilities near me" is a much larger obstacle...

Tier 1: 20%
Tier 2: 28%



Wellness during travel is important to this generation

91%

say the type of wellness options available is important when deciding on a travel destination

89%

say it is important that they continue their health regimen/practices when traveling

WELLNESS TRAVEL

49%

often check the health / wellness facilities available at the hotel before booking

50%

are VERY satisfied with the health/wellness facilities provided by hotels they stay at

Favorite & planned travel destinations

Both Millennials and Gen-Zs show less interest in visiting Hong Kong in the future

Gen-Z

Favorite past destination		Most want to visit in the future	
1.	 South Korea	 Australia	
2.	 Australia	 France	
3.	 Hong Kong	 South Korea	
4.	 France	 Canada	
5.	 Japan	 Japan	
6.	 United States	 Austria	

Millennials

Favorite past destination		Most want to visit in the future	
1.	 Japan	 Japan	
2.	 South Korea	 France	
3.	 Australia	 United States	
4.	 Hong Kong	 Australia	
5.	 France	 South Korea	
6.	 United States	 Ireland	

KEY TAKEAWAYS

1 Both Millennials and Gen-Zs are overall **optimistic** and in pursuit of a higher quality of lifestyle. They are **individualistic**, the first two generations in China to have both the aspiration and wealth to set their own life course.

2 Living a **healthy life** is a key priority – over money, career, personal enjoyment and having a family. They believe that they are healthier than their parents. Being healthy is all about living a better life **now, to be happier, have more energy, succeed in life.**

3 One in three believes to be very healthy across the 6 wellness dimensions. **Women are more conscious overall about wellness than men** and rate themselves highly in spiritual wellness, nutrition and social wellness. Gym & home are where they prefer to practice wellness.

4 One in four respondents believe that they don't pay enough attention to nutrition, with one in three not following any particular diet.

5 Mental wellness & spiritual wellness are a priority, with one in two who regularly meditate and one in three who regularly pray in some form.





Introducing

China TrendLens™ 2020

Fresh insights delivered on a quarterly basis using Agility's proprietary Insights Engine and LuxeTalk™ China community

For further information and pre-ordering
please contact:

Jason@agility-research.com

Our Global Coverage



For research requests, please contact:
Jason@agility-research.com

AGILITY-RESEARCH.com | AFFLUENTIAL.com