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.

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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?

<table>
<thead>
<tr>
<th>China</th>
<th>Population</th>
<th>% of Pop.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gen Z</strong> (15-24yo)</td>
<td>169.5 mln</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Millennials</strong> (25-39yo)</td>
<td>326.8 mln</td>
<td>23%</td>
</tr>
</tbody>
</table>
The opportunity

Gym, Health & Fitness Clubs
Total Rev 2019: US$8Bn
Annual Growth 2014-19 8.6%

Sportswear market
Total Rev 2020: US$43Bn

Gym memberships in China - 2016
6.6m (double vs 2008)

Number of marathons in China in 2017
400

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

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:

- **Individualistic**
  - free
  - selfish
  - self-reliant
  - open-minded
  - opinionated
  - have personality
  - “be yourself”
  - “Me Generation”

- **Confident & Optimistic**
  - striving
  - positive energy
  - cheerful
  - hopeful
  - improving
  - brave

- **Low Key**
  - “Buddha-like”
  - casual

- **Trend Setters**
  - avant garde
  - chic
  - trendy
  - fashionable
  - pathfinders

- **Under Pressure**
  - struggling
  - “mortgage slaves”
  - hardworking
  - burdened

- **Free Spenders**
  - paycheck to paycheck
  - rely on parents
  - “Moonlight Clan”
  - impulsive

- **Phone Addicts**
  - Internet Generation
  - “Head-Down Generation”

Q: Many people have coined different terms for your generation, but they may not be the most accurate. As a member of your own generation, what would you like to call yourselves? Base: Total, n=1,005
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

- GenZ: 60% more, 32% same, 8% less
- Millennials: 63% more, 29% same, 8% less

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

- GenZ: 70% more, 23% same, 7% less
- Millennials: 76% more, 15% same, 9% less

WELLGEN - Overall, do you feel more or less healthy than your parents are now? Base: n=1005

COMPGEN - Compared to previous generations, how much importance do you believe your generation places on personal wellness? Base: n=1005
Why is wellness important for this generation?

- It improves my quality of life: 60% Gen-Z, 43% Millennials
- I have more energy: 59% Gen-Z, 44% Millennials
- It makes me happy: 54% Gen-Z, 43% Millennials
- It helps me to succeed in life: 46% Gen-Z, 42% Millennials
- I look better: 42% Gen-Z, 41% Millennials
- I can live longer: 41% Gen-Z, 31% Millennials
- It is the right thing to do: 24% Gen-Z, 22% Millennials
- It is part of my culture: 10% Gen-Z, 9% Millennials
- My parents taught me its importance: 5% Gen-Z, 4% Millennials

WELLFROM. Why is wellness important to you? Base: 991
Women are more conscious about wellness...

- It improves my quality of life: 46% (Women), 56% (Men)
- I have more energy: 47% (Women), 54% (Men)
- It makes me happy: 44% (Women), 53% (Men)
- It is the right thing to do: 18% (Women), 28% (Men)

WELLFROM. Why is wellness important to you? Base: 991
A third rate themselves as ‘very healthy’ across all wellness dimensions
Women rate themselves higher than men in “spiritual”, “nutrition” and “social wellness”

I rate myself “very healthy” in...

- Spiritual wellness:
  - Women: 38%
  - Men: 29%

- Social wellness:
  - Women: 36%
  - Men: 30%

- Nutrition:
  - Women: 29%
  - Men: 36%
Majority devote between 3-9 hours per week on doing wellness activities; a large share do it alone

Hours devoted to wellness per week

- More than 12 hours: 10%
- 9-12 hours: 18%
- 6-9 hours: 33%
- 3-6 hours: 27%
- 0-3 hours: 12%

% Share of doing wellness activity alone/with companion

- Alone: 43%
- With friends: 21%
- With family: 16%
- With co-workers: 10%
- With others who share my passion: 10%

WELLTIME - How many hours do you devote to wellness overall every week? Base: n=1005

WHODOWITH - Do you practice your favourite wellness activity alone or with others? Base: n=1005
The gym is their main workout location, especially for women

% Share of doing wellness activity by location

<table>
<thead>
<tr>
<th>Location</th>
<th>Gen-Z</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gym</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Home</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Park</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>Public playground or sports facility</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Workplace</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Other public spaces</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>School</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

WHEREDO - Where do you like to practice your favourite wellness activity? Base: n=1005
Running and walking are the most popular physical activities

<table>
<thead>
<tr>
<th>Regular Physical Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Men</strong></td>
</tr>
<tr>
<td>1. Running/jogging</td>
</tr>
<tr>
<td>2. Walking</td>
</tr>
<tr>
<td>3. Basketball</td>
</tr>
<tr>
<td>4. Cardio/aerobics</td>
</tr>
<tr>
<td>5. Swimming</td>
</tr>
<tr>
<td>6. Badminton</td>
</tr>
<tr>
<td>7. Football/Soccer</td>
</tr>
<tr>
<td>8. Table Tennis</td>
</tr>
</tbody>
</table>

WELLEXER - Which physical activities do you do regularly? Base: n=1005
How do they keep themselves informed about wellness?

<table>
<thead>
<tr>
<th>Source</th>
<th>Gen-Z</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health-focused apps</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>News media</td>
<td>35%</td>
<td>52%</td>
</tr>
<tr>
<td>Online search</td>
<td>31%</td>
<td>43%</td>
</tr>
<tr>
<td>Friends</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>Family</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Blogs</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Social Media KOLs</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Workplace</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>School</td>
<td>14%</td>
<td>10%</td>
</tr>
</tbody>
</table>

WELLINFLU - How do you educate yourself about wellness? Base: n=1005
In terms of their diet, a quarter are not happy with what they eat

**Do you feel that your diet is healthy?**

- **Very Healthy**
  - Gen-Z: 20%
  - Millennials: 21%
- **Healthy**
  - Gen-Z: 35%
  - Millennials: 37%
- **Average**
  - Gen-Z: 18%
  - Millennials: 18%
- **Could do more**
  - Gen-Z: 22%
  - Millennials: 22%
- **Not very healthy**
  - Gen-Z: 4%
  - Millennials: 3%

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

- **Very Healthy**
  - Women: 18%
  - Men: 24%
- **Healthy**
  - Women: 35%
  - Men: 36%
- **Average**
  - Women: 19%
  - Men: 17%
- **Could do more**
  - Women: 24%
  - Men: 20%
- **Not very healthy**
  - Women: 4%
  - Men: 3%

WELLNUTRI - Do you feel that your diet is healthy? Base: n=1005
Most follow a diet, but a large share do not pay much attention to nutrition

WellDiet - Do you follow any particular diet? Base: n=1005

- Low or no carbs: 19% (Gen-Z), 25% (Millennials)
- High protein: 21% (Gen-Z), 19% (Millennials)
- No sugar: 17% (Gen-Z), 19% (Millennials)
- Supplements: 18% (Gen-Z), 18% (Millennials)
- Vegetarian: 15% (Gen-Z), 12% (Millennials)
- Paleo: 14% (Gen-Z), 10% (Millennials)
- Gluten free: 11% (Gen-Z), 10% (Millennials)
- Healthy fats: 10% (Gen-Z), 10% (Millennials)
- Vegan: 13% (Gen-Z), 7% (Millennials)
- None, I eat what I like: 25% (Gen-Z), 32% (Millennials)
Reading books helps mental wellness; Gen-Z do more for mental wellness

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 believes which help make sense of the world, intellectual passions. Which other activities do you do often? Base: n=1005

- Read books: 63% Gen-Z, 70% Millennials
- Meditate: 54% Gen-Z, 51% Millennials
- Meet with friends in a group: 58% Gen-Z, 51% Millennials
- Have a strong spiritual belief: 57% Gen-Z, 49% Millennials
- Take time off to recharge: 51% Gen-Z, 41% Millennials
- Pray: 37% Gen-Z, 32% Millennials
- Engage with art/creative activities: 45% Gen-Z, 29% Millennials
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

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

WELLDEST - How important are the type of wellness options available when deciding which destination you plan to visit next? WELLHOT - Do you check with health/wellness facilities available at your hotel of choice before you book? WELLTRAV1 - How important is it for you to continue your health regimen/practices when you travel? WELLTRAV2 - Overall, are you satisfied with the wellness/health facilities provided by hotels you usually stay at? Base: 1005
## Favorite & planned travel destinations

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

### Gen-Z

<table>
<thead>
<tr>
<th>Favorite past destination</th>
<th>Most want to visit in the future</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. South Korea</td>
<td>Australia</td>
</tr>
<tr>
<td>2. Australia</td>
<td>France</td>
</tr>
<tr>
<td>3. Hong Kong</td>
<td>South Korea</td>
</tr>
<tr>
<td>4. France</td>
<td>Canada</td>
</tr>
<tr>
<td>5. Japan</td>
<td>Japan</td>
</tr>
<tr>
<td>6. United States</td>
<td>Austria</td>
</tr>
</tbody>
</table>

### Millennials

<table>
<thead>
<tr>
<th>Favorite past destination</th>
<th>Most want to visit in the future</th>
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<tbody>
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<td>3. Australia</td>
<td>United States</td>
</tr>
<tr>
<td>4. Hong Kong</td>
<td>Australia</td>
</tr>
<tr>
<td>5. France</td>
<td>South Korea</td>
</tr>
<tr>
<td>6. United States</td>
<td>Ireland</td>
</tr>
</tbody>
</table>

What is your favourite overseas (and Hong Kong SAR, Macau SAR and Taiwan) travel destination that you have visited? / What destination are you most interested in visiting in the future? Base: n=1,005
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.
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