



GLOBAL WELLNESS
SUMMIT 2019

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

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Millennials & Gen-Z in China

Attitudes towards health and wellness

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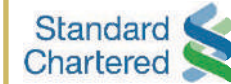
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China's Millennials and Gen-Z: Why Care?

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

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

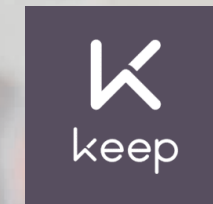
Total Rev 2020:

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



A dark, atmospheric photograph of the Shanghai skyline at night, featuring the Oriental Pearl Tower and other illuminated buildings reflected in the water.

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.

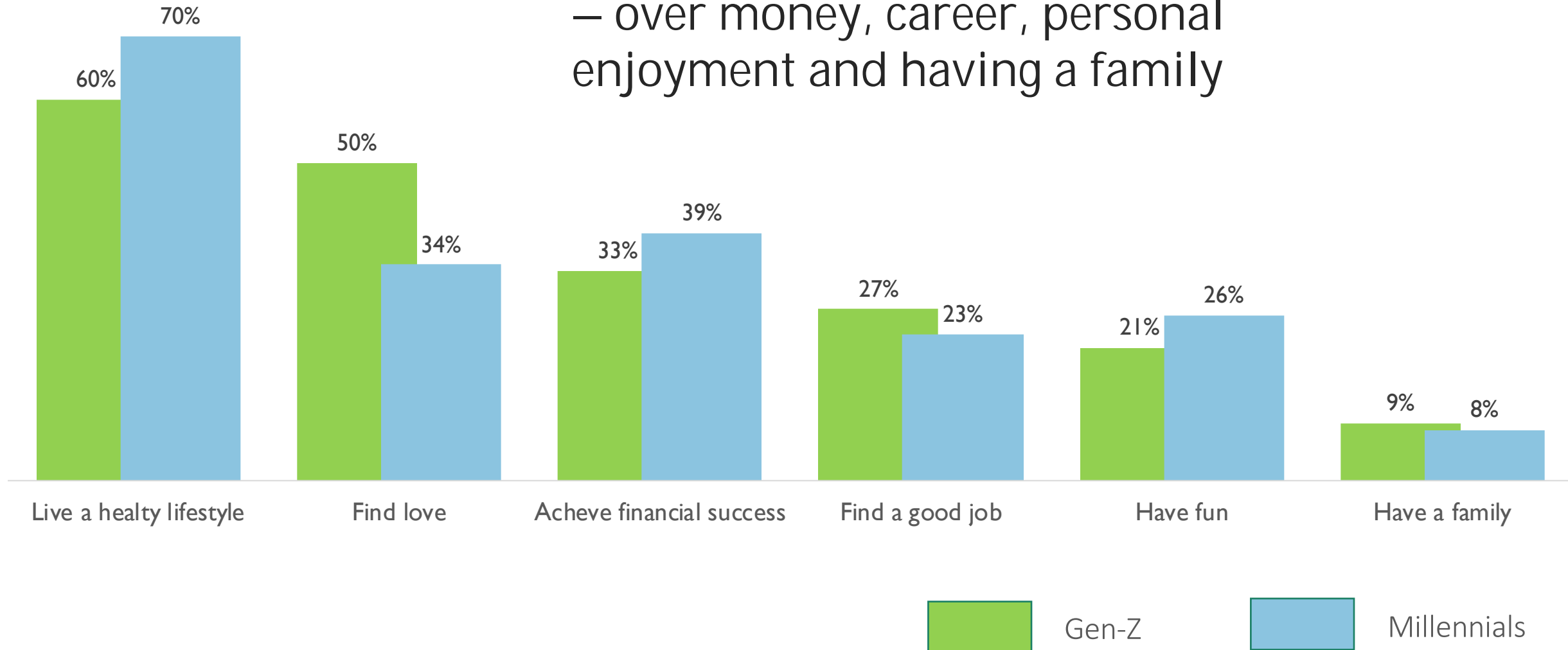
Millennials especially say they feel under pressure in their lives.

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

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

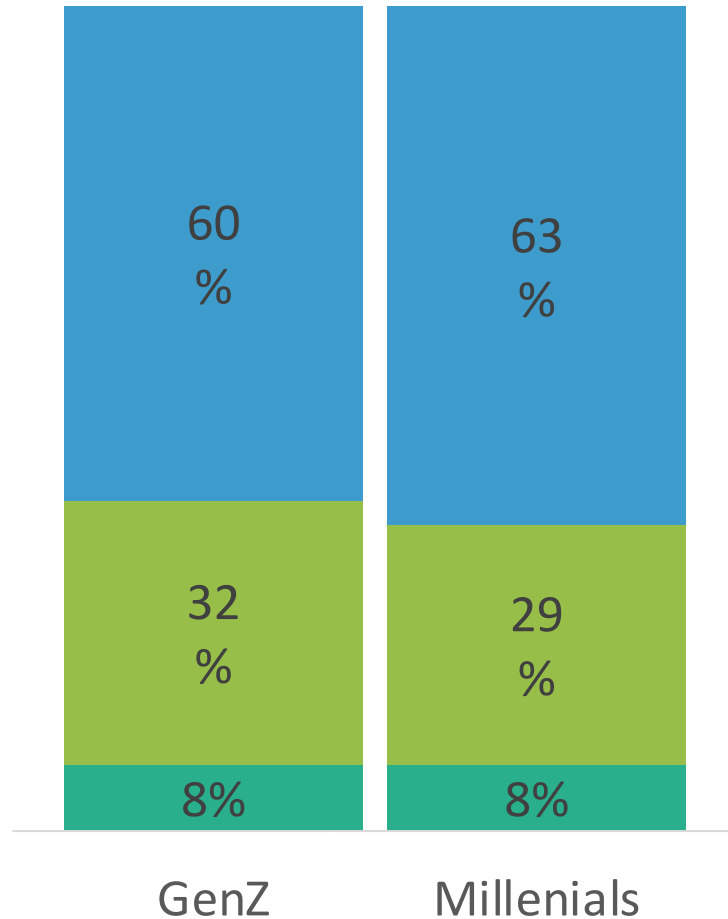
Key Life Priorities

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

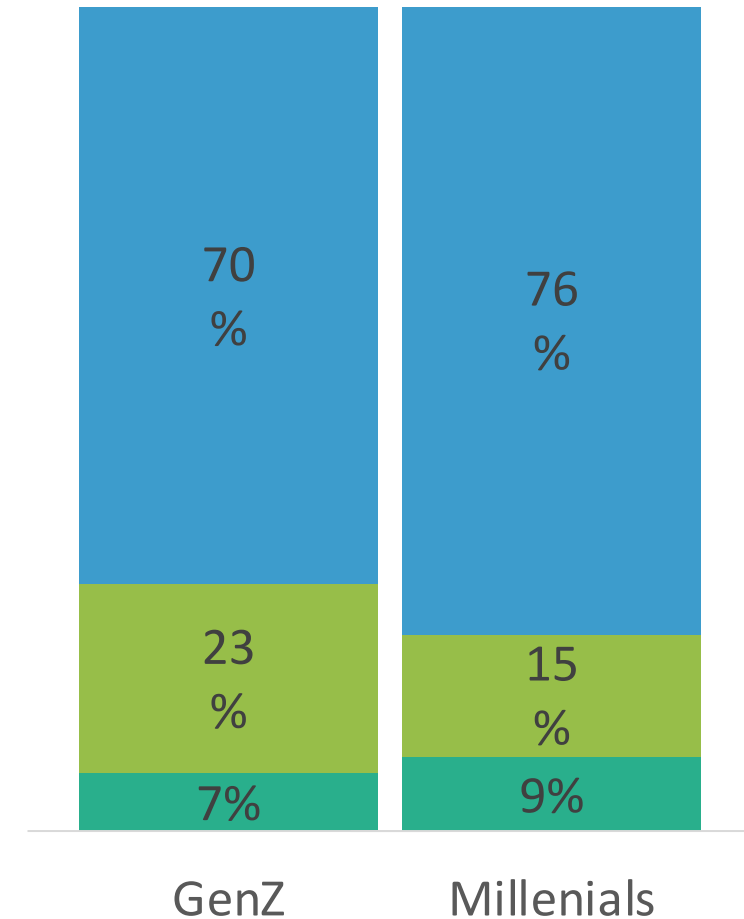


vs. previous generations, we place ... importance on wellness

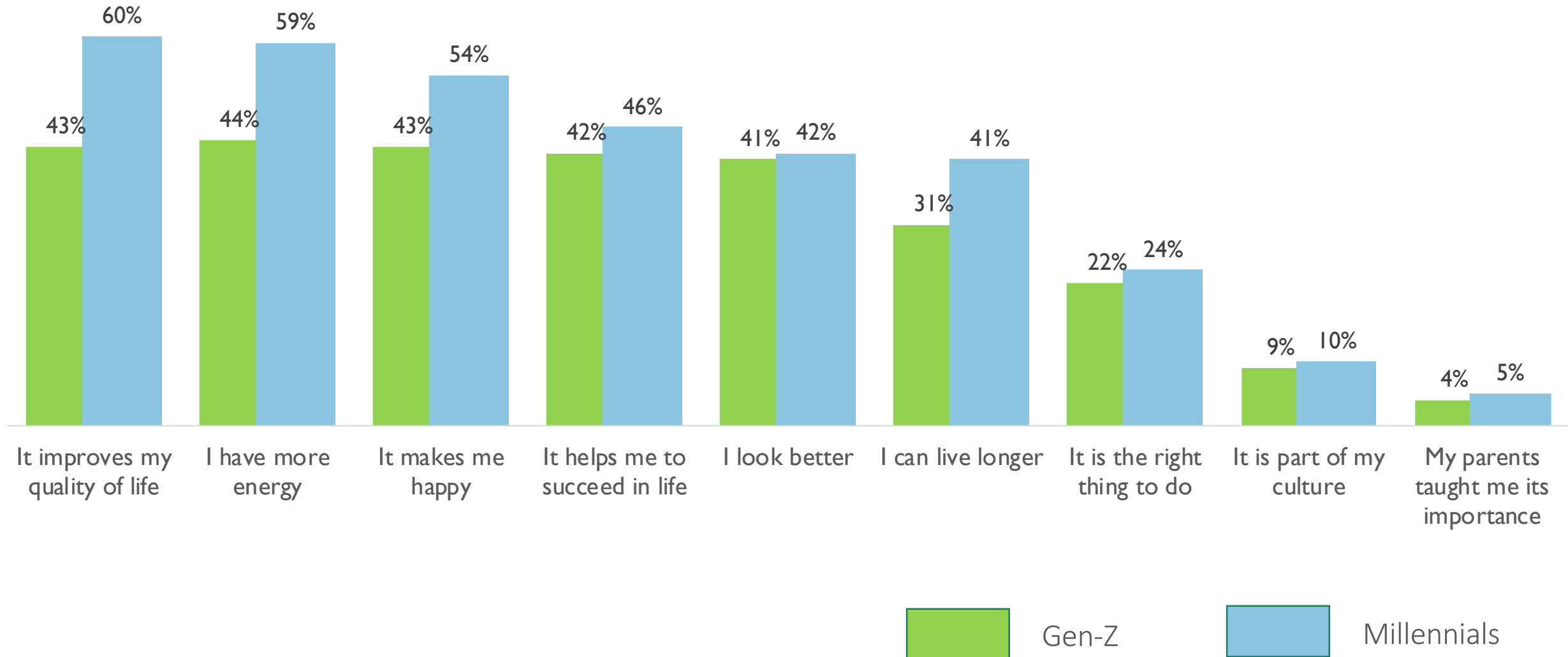
MORE

SAME

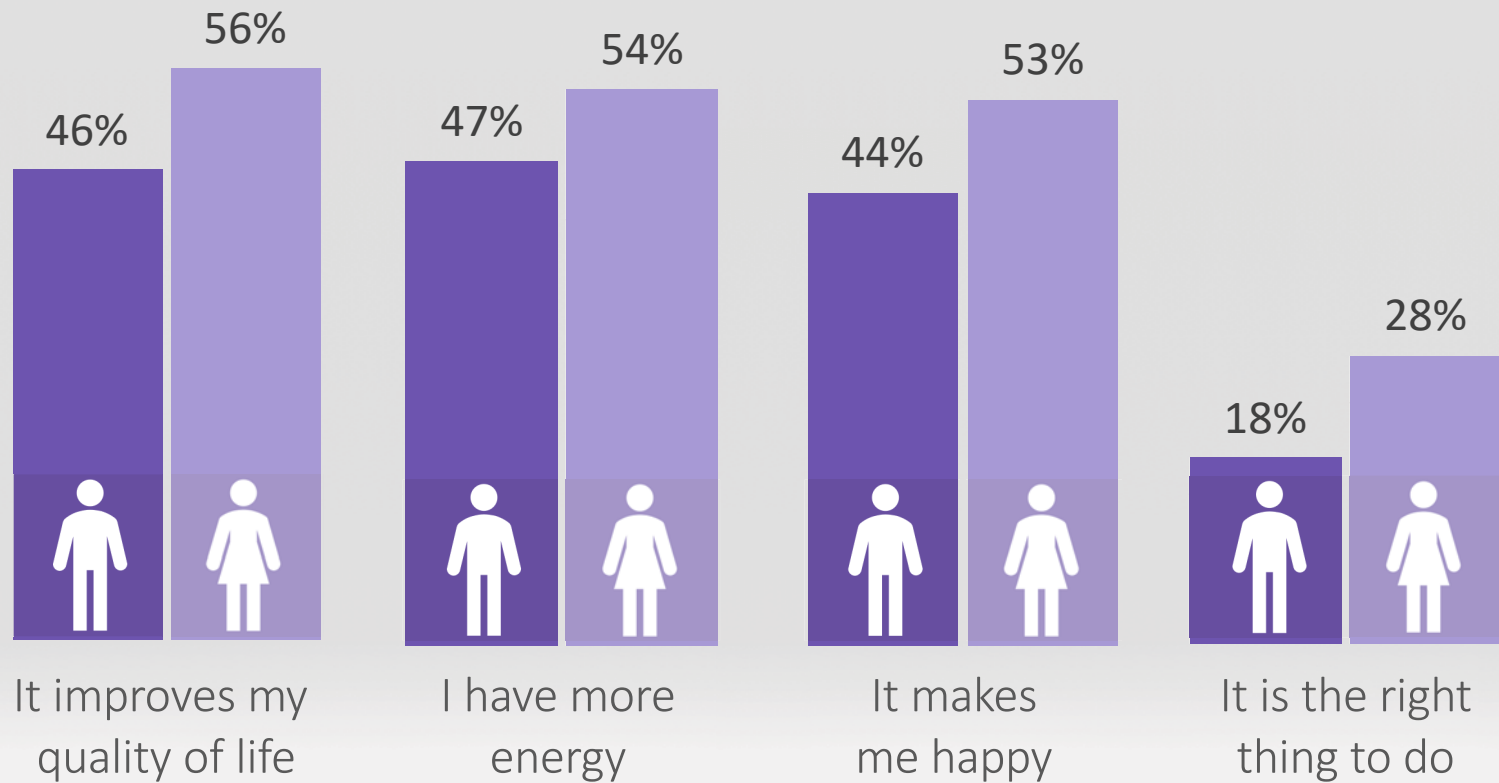
LESS



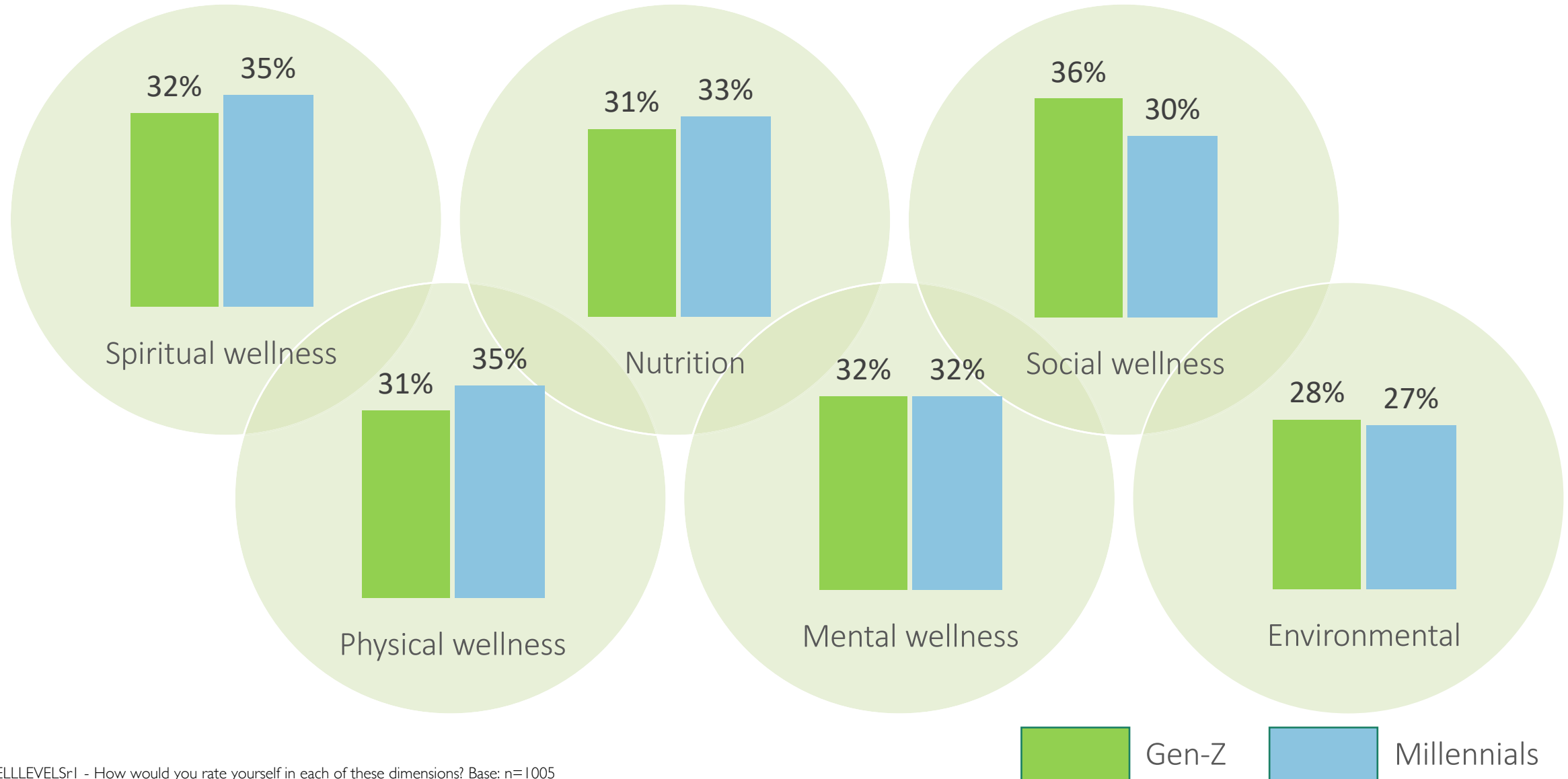
Why is wellness important for this generation?



Women are more conscious about wellness...

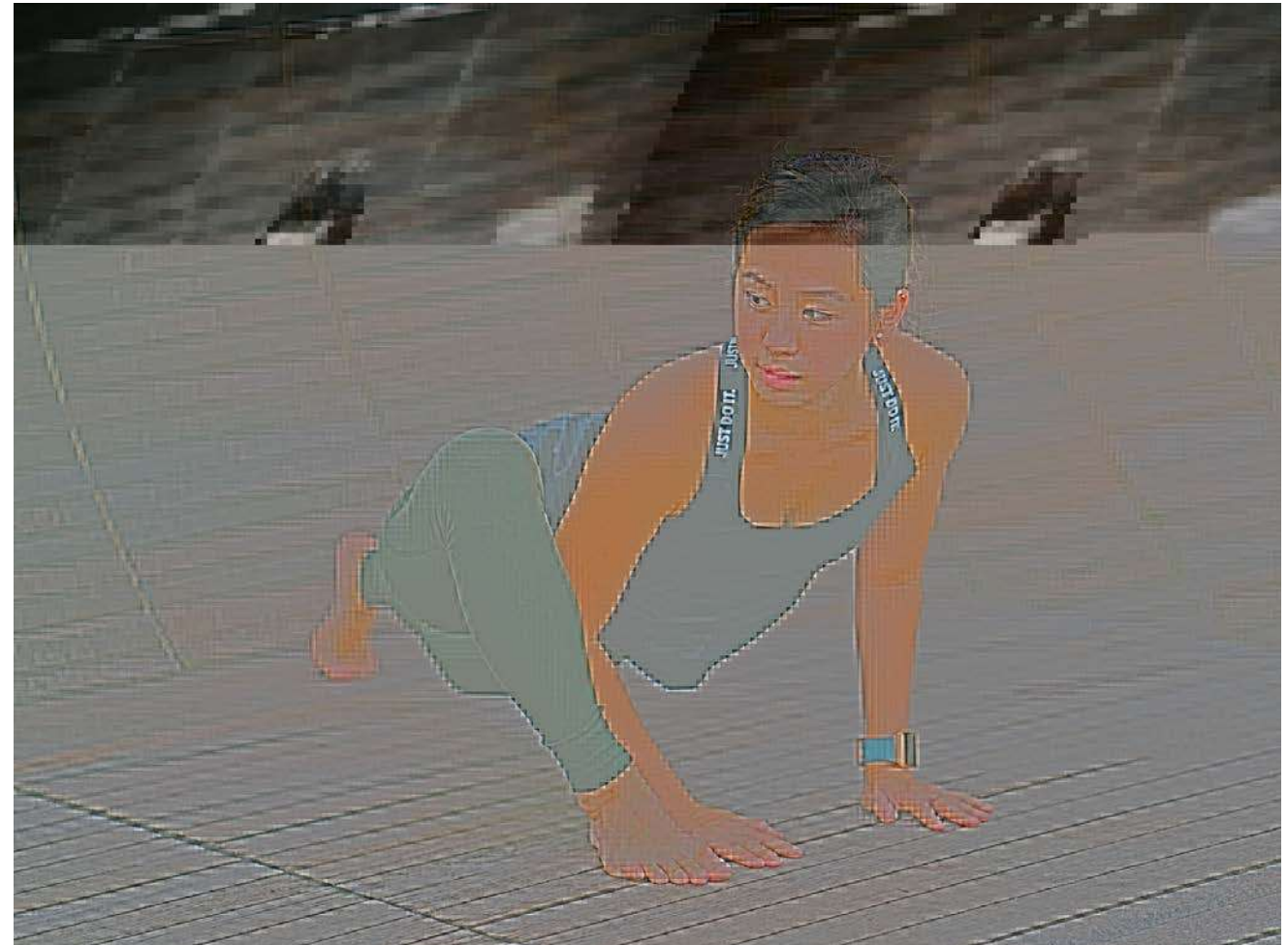
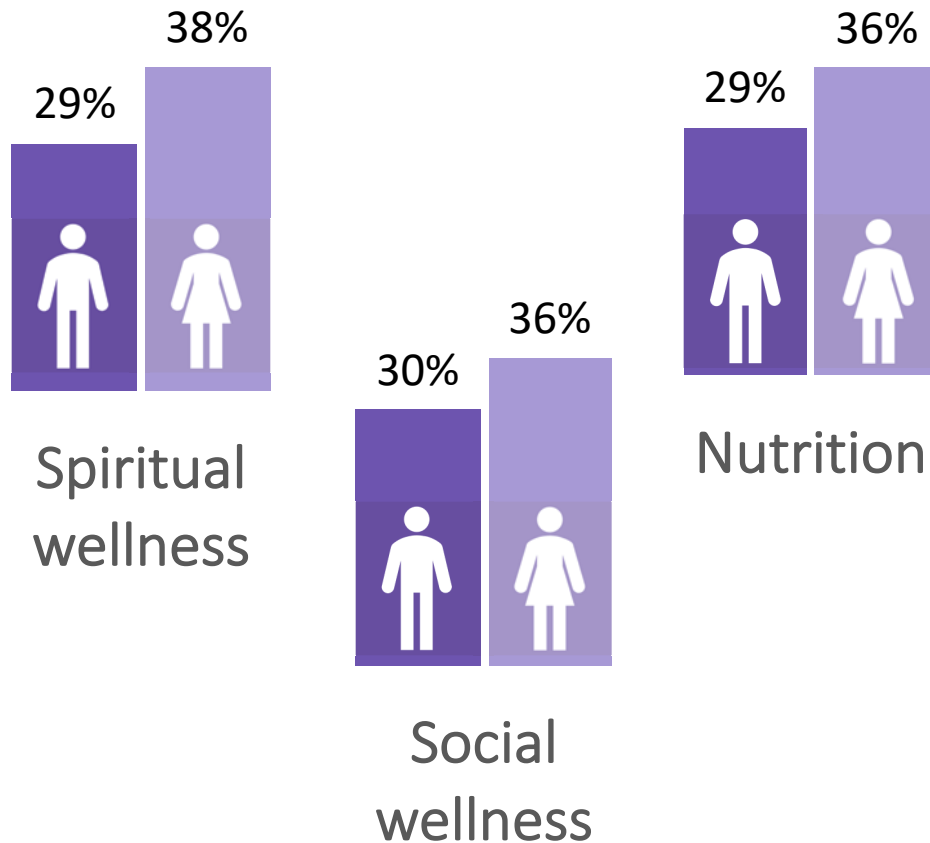


A third rate themselves as 'very healthy' across all wellness dimensions



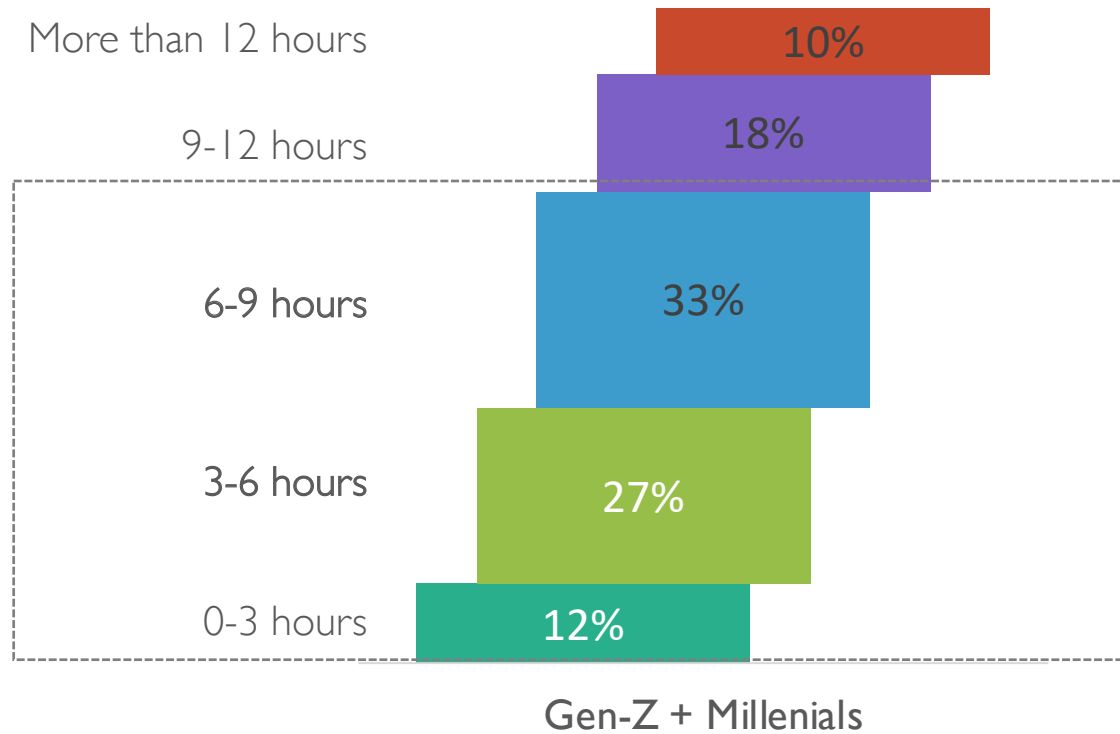
Women rate themselves higher than men in “spiritual”, “nutrition” and “social wellness”

I rate myself “very healthy” in...

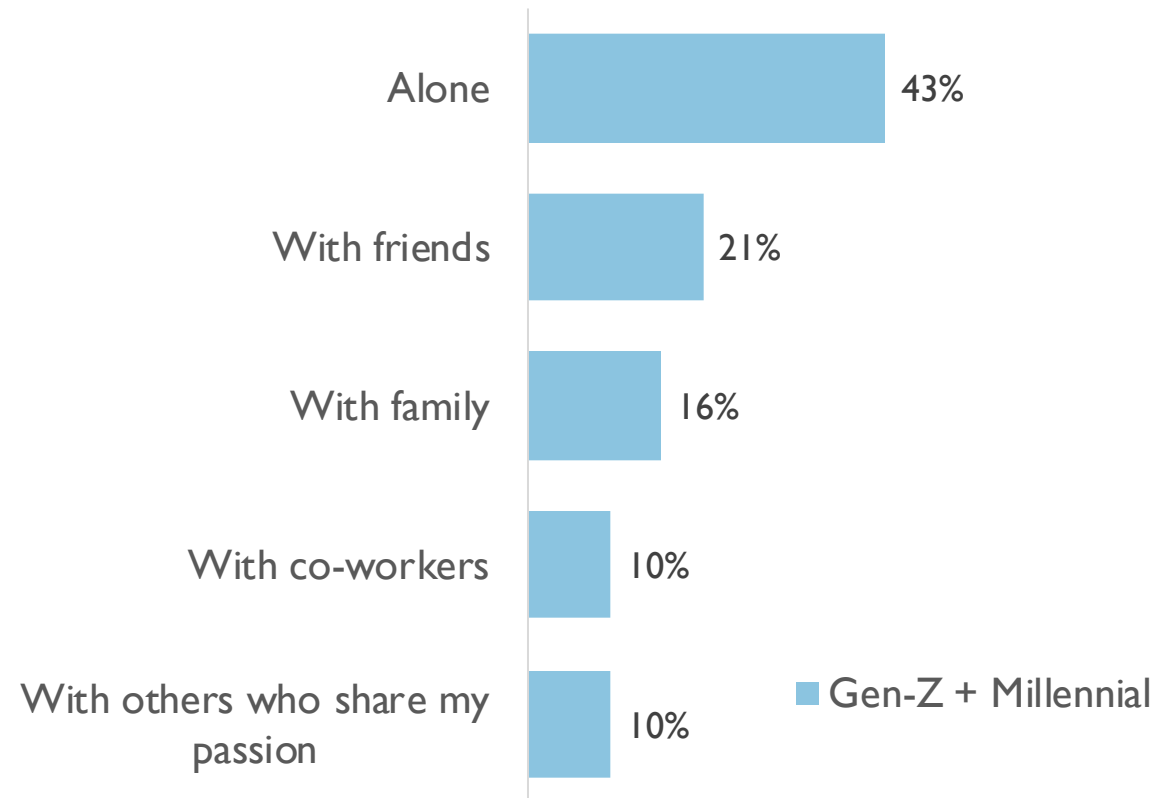


Majority devote between 3-9 hours per week on doing wellness activities; a large share do it alone

Hours devoted to wellness per week

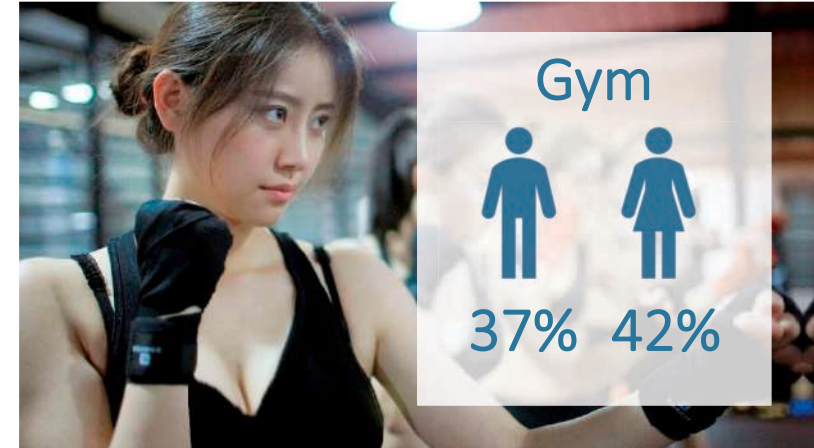
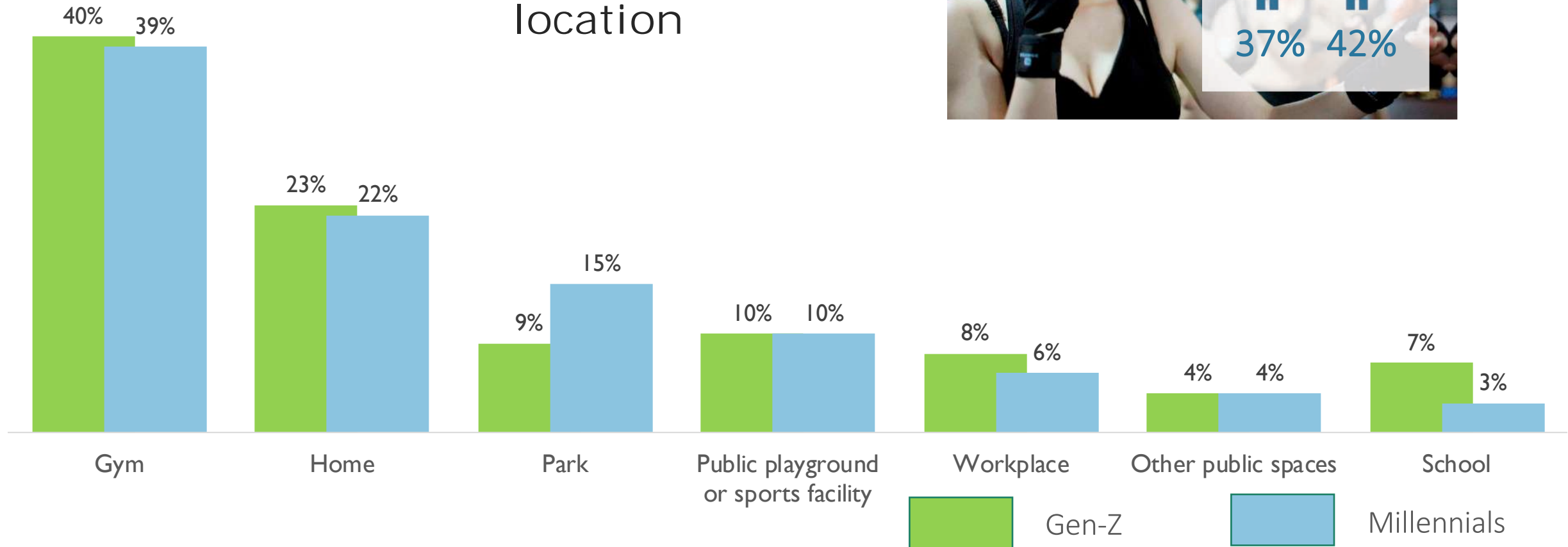


% Share of doing wellness activity alone/with companion



The gym is their main workout location, especially for women

% Share of doing wellness activity by location

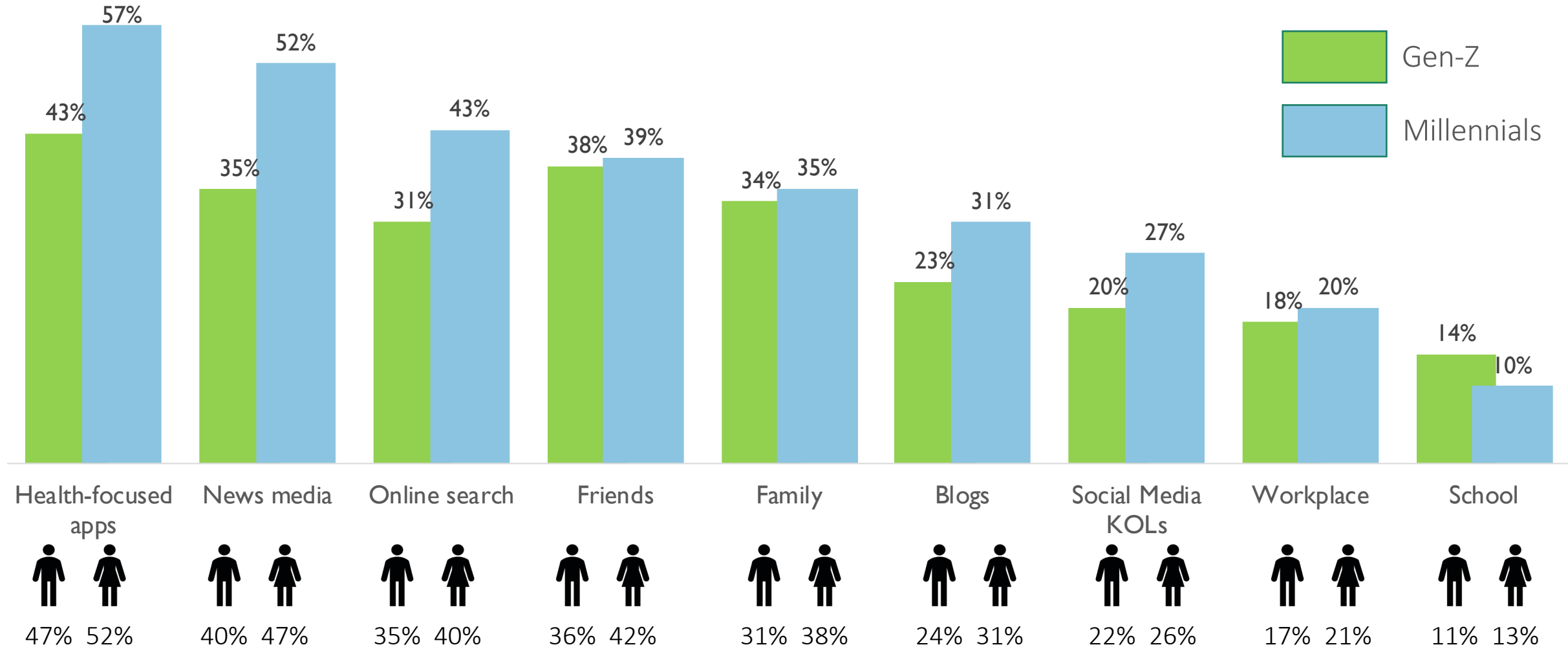


Running and walking are the most popular physical activities

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

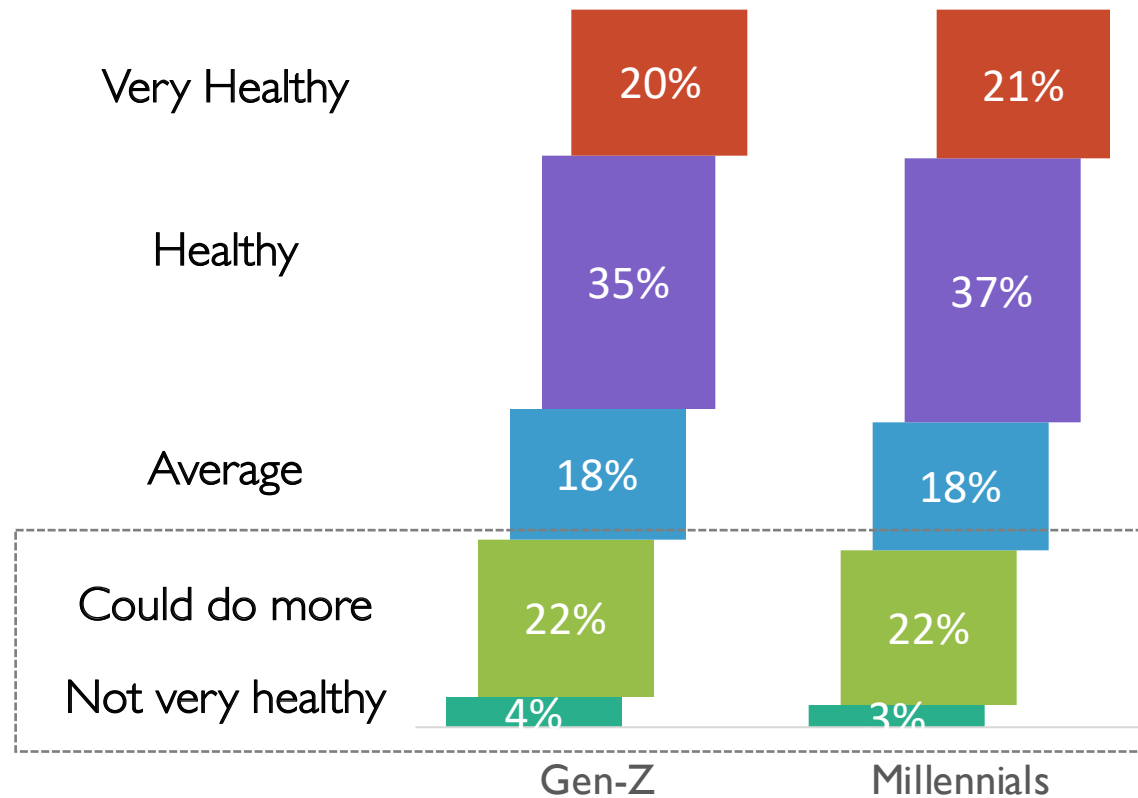


How do they keep themselves informed about wellness?

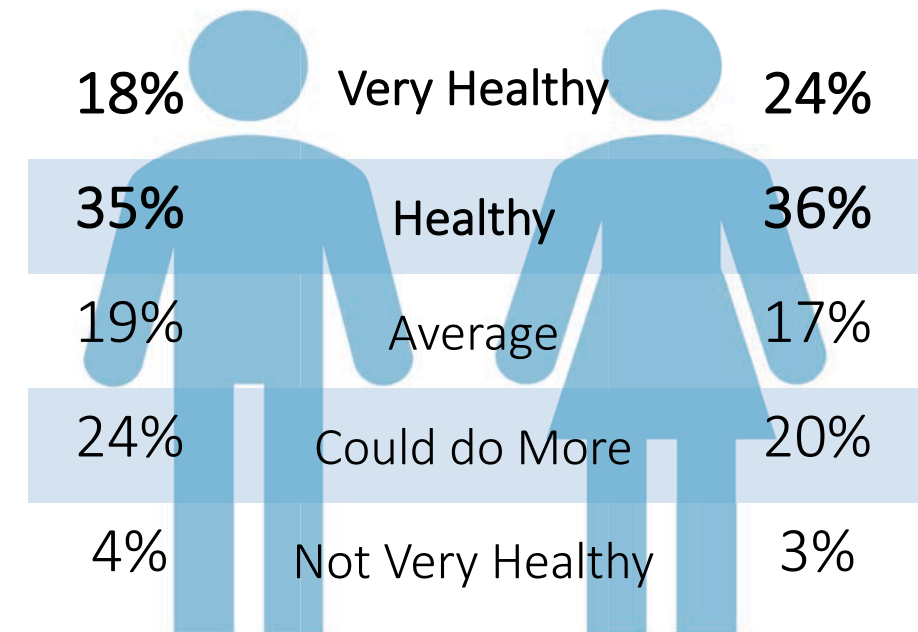


In terms of their diet, a quarter are not happy with what they eat

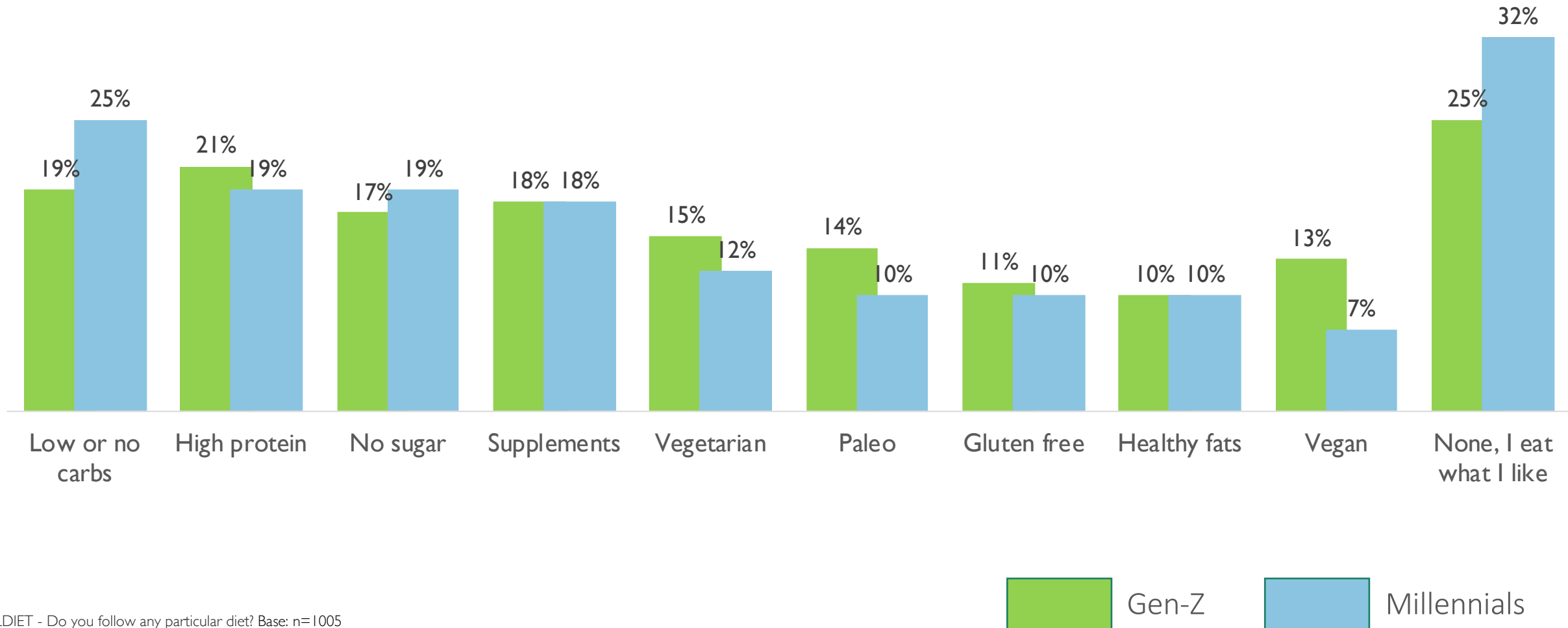
Do you feel that your diet is healthy?



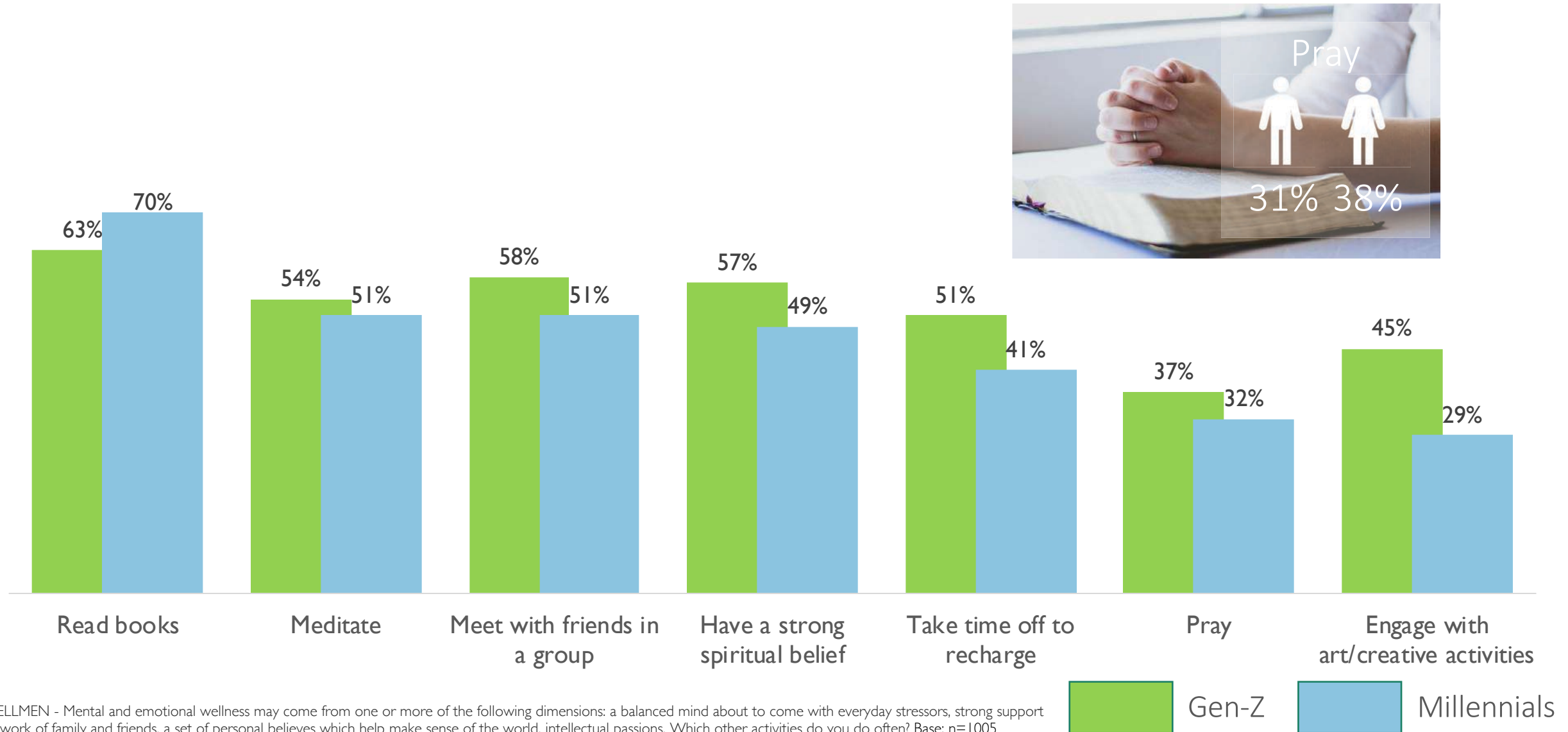
Once again, women pay more attention to their health than men



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



Gen "Z" en...

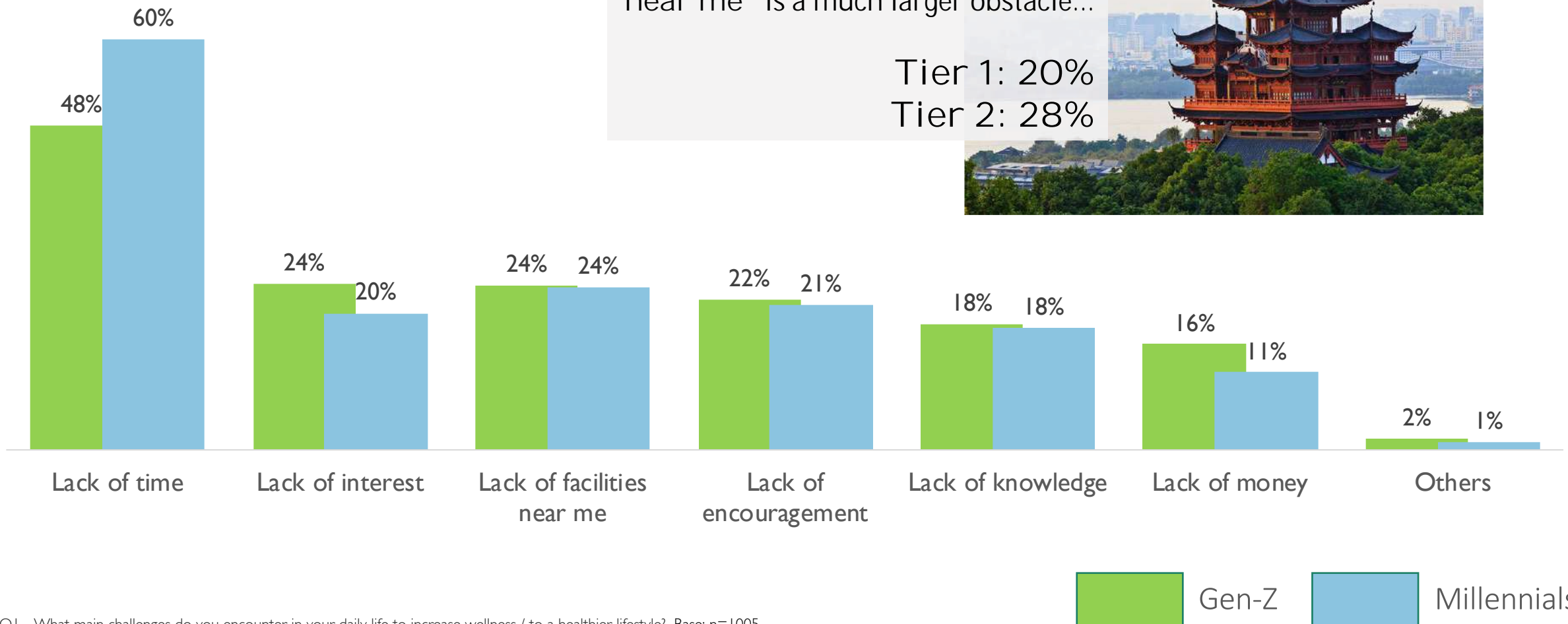
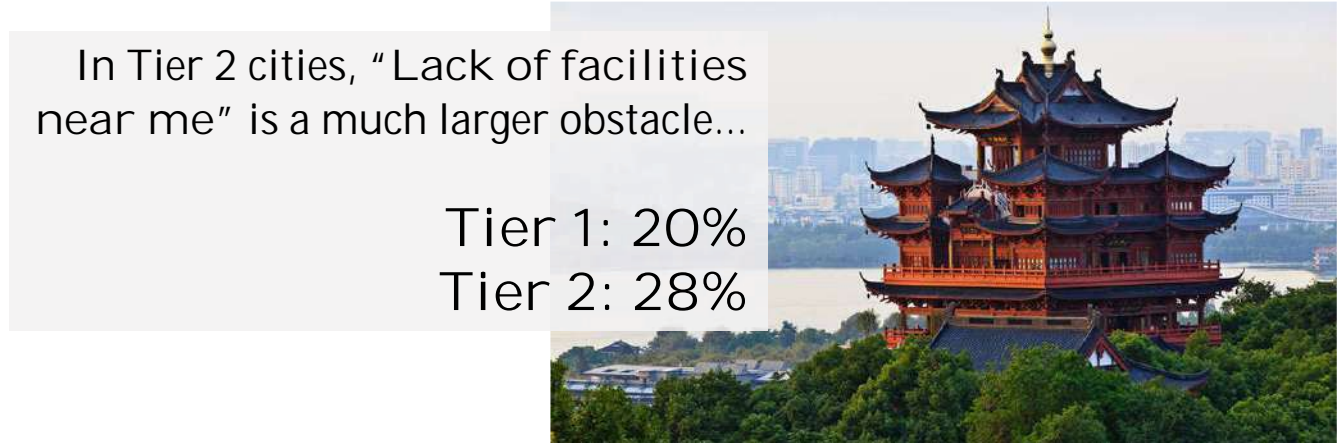
For many Gen-Zs, a response to life's pressures is to be "Buddha-like" or low-key:

- 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.



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.

A dark, atmospheric night photograph of the Shanghai skyline, featuring the Oriental Pearl Tower and other illuminated skyscrapers reflected in the water.

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