

# The Wellness Deficit: Millennials and Health in America



# Table of Contents

---

4	Executive Summary
7	The Wellness Deficit
9	Delivering Wellness through Exercise
11	Exercise Evolution: Fitness Flexibility
14	Exercise Evolution: Personalized Health
17	Summary



The concept of wellness is particularly relevant to today's Millennial generation who have been dubbed "**Generation Stress**" by the media and arguably have more access to a greater array of tools to enable wellness than previous generations.



# Executive Summary

According to the World Health Organization, wellness is the active process of becoming aware of and making choices toward a healthy and fulfilling life. It is a state of complete physical, mental, and social wellbeing, and not merely the absence of disease or infirmity. The concept of wellness is particularly relevant to today’s Millennial generation who have been dubbed “Generation Stress” by the media and arguably have more access to a greater array of tools to enable wellness than previous generations.

Technogym, a leader in health and wellness, commissioned a study to better understand attitudes to wellness among US Millennials (defined as those aged 14 to 34 years old) and what is driving their health and fitness choices. The research finds a growing ‘Wellness Deficit’ emerging among the Millennial generation, primarily driven by financial insecurity, poor health and concerns over their appearance. Younger people are becoming increasingly self-conscious about their body image and worried about the implications of obesity.

However, Millennials do recognize that physical activity, as part of a healthy lifestyle, is critical if they wish to improve their wellbeing. Not only do they recognize the link between exercise and fitness, but significantly exercise is also seen as fundamental to reducing stress in this age group. Indeed, Millennials who exercise more frequently report greater satisfaction in their relationships with others, happiness in life, and, ultimately, their overall level of wellness.

The challenge is getting Millennials to make fitness a more intrinsic part of their lives if the ‘Wellness Deficit’ is to be addressed. In reality, Millennials today would like to exercise more frequently, but by their own admission they are often too busy and unable to properly devote the time to exercising. As such, the traditional notion of exercise needs to evolve if Millennials are to truly embrace it. Millennials require more control over how, where and when they exercise in order for it to become more intrinsic to their lifestyles. While flexibility is imperative to drive uptake, personalization is equally important in engaging this generation. Not only are Millennials

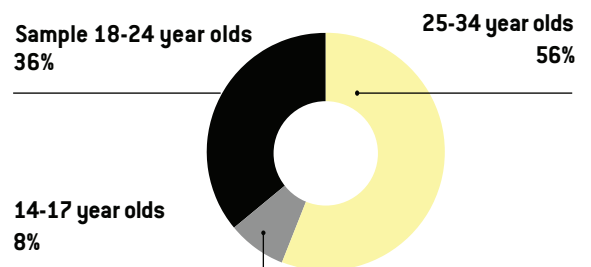
## RESEARCH METHODOLOGY

5,000 US Millennials, aged 14-34, completed an online survey.

Research was conducted by Loudhouse, an independent research agency based in UK.

**Figure A**  
Research Sample

Region	
<b>East North Central:</b> Illinois, Indiana, Michigan, Ohio, and Wisconsin	741
<b>East South Central:</b> Alabama, Kentucky, Mississippi, and Tennessee	297
<b>Middle Atlantic:</b> New Jersey, New York, and Pennsylvania	654
<b>Mountain:</b> Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, and Wyoming	362
<b>New England:</b> Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont	223
<b>Pacific:</b> Alaska, California, Hawaii, Oregon, and Washington	807
<b>South Atlantic:</b> Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, Washington D.C., and West Virginia	990
<b>West North Central:</b> Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, and South Dakota	328
<b>West South Central:</b> Arkansas, Louisiana, Oklahoma, and Texas	598
	<b>Total 5,000</b>



looking for workout experiences to be tailored to meet individual goals, but they are also motivated by the interactive and fun elements that exercise can include.

Some of the key highlights from the research include:

### **The Wellness Deficit**

- Just over half of Millennials (52%) rate their overall wellness as 'good' or 'excellent' compared to where they would like to be, falling to 46% among females
- Both physical health (75%) and body image (70%) are felt to be important to overall wellbeing - yet only 47% are satisfied with their physical health and body image
- 87% are aware of the obesity epidemic in the US and feel something should be done to address it
- 69% are self-conscious about their body image - 62% are personally worried about being or becoming obese in the future
- 62% believe the trend of fitness selfies on social media puts unrealistic pressure on young people
- 56% feel more stressed / anxious now than they did 12 months ago, with anxiety most likely to cause too much or too little sleep (64%), over-eating or under-eating (50%), or sudden mood swings (45%)

### **Delivering Wellness through Exercise**

- 90% of Millennials typically exercise on average of 4 hours each week, but like to spend 6 hours

- Walking (60%), cardiovascular training (53%), running (50%) and muscle strength training (48%) are the most popular types of exercise undertaken by those who typically exercise
- Improved health / fitness (83%), reduced weight (68%), lowered stress (60%) and improved overall motivation (51%) are the key benefits of physical activity
- The benefits of group exercise include increased motivation (70%), more enjoyable sessions (65%) and an opportunity to catch up with friends (48%)
- 72% find it hard to devote time to exercise, rising to 79% among infrequent exercisers
- Being too busy (50%) is the biggest barrier preventing Millennials from exercising more

### **Exercise Evolution: Fitness Flexibility**

- Location (52%) and cost (50%) are the main drivers of the physical activity chosen
- Gamification (27%), express workouts / HIIT (26%), CrossFit (24%) and digital gyms (23%) will be popular trends among Millennials in two years' time
- 69% believe physical competitions are a good way to keep fit while socializing
- 65% think it is important to track and monitor their fitness progress - 70% believe having all their fitness records and progress in one place would be a benefit
- The use of mobile app technology is set to rise from 56% to 74% over the next two years, with 40% planning to use wearable technology for fitness purposes



- Tracking progress wherever and whenever (72%), tracking progress in one place (48%) and accurate data (43%) are the biggest benefits of mobile technology – 29% believe it is easy to share progress with friends and family

### Exercise Evolution: Personalized Health

- 77% think the gym experience should be personalized to meet their individual goals
- Health blogs (38%), friends & family (32%), health mobile apps (31%) and health magazines (31%) are set to be the main sources of information on health trends in two years' time
- 77% would like their workout at the gym to be as interactive and fun as possible
- Gym users would like to be able to listen to music (77%), watch videos / TV programs (39%) and talk to friends and family on the phone (23%) and over one in

- five (22%) would like to compete with others virtually
- 39% like to share the results of their workout with their friends through social media
- 44% of Millennials believe the traditional gym as we know it will evolve by 2020. The gym of the future is seen as relaxed, interactive, customized and fun.

Millennials have become a generation defined by a desire for innovation and openness to change. Often considered the “selfie generation”, technology is central in helping Millennials become more confident, connected and controlled. Advances in health and fitness technologies, including the explosion of apps in this field, are creating new possibilities for Millennials to exercise wherever and whenever they want. Just as importantly, it is enabling them to become better connected, educated and organized, providing Millennials with a platform to tailor their workout experiences to better meet their own goals and needs.



44% of Millennials believe the traditional gym as we know it will evolve by 2020. The gym of the future is seen as relaxed, interactive, customized and fun.

# The Wellness Deficit

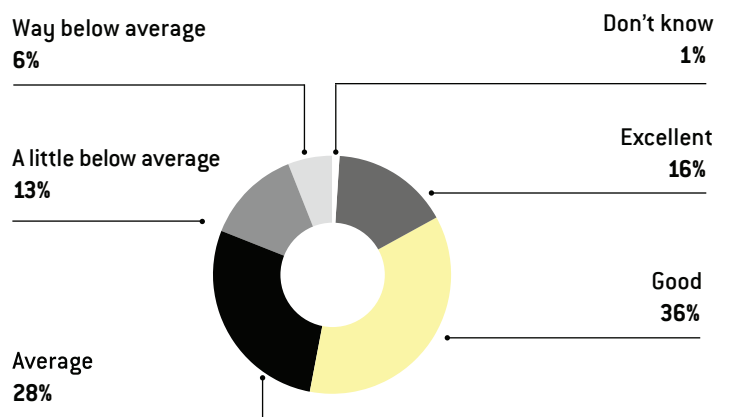
The research shows that wellness is becoming more important among Millennials. However, just half (52%) rate their overall level of wellness as either 'good' or 'excellent' compared to where they would like it to be, falling to 46% among females (see Figure 1). This suggests that wellness ambitions among today's younger generation, particularly among women, are far from being fulfilled. Indeed, over half (56%) say they feel more stressed or anxious than they did 12 months ago, resulting in either too much or too little sleep (64%), over-eating or under-eating (50%), or sudden mood swings (45%). Overall wellness varies significantly across the US, with perceptions of wellness being considerably higher in Alaska (70%) and North Dakota (70%), with Montana (33%) and Vermont (20%) expressing far lower levels of wellness.

Wellness among Millennials is made up of a range of physical, mental and social factors, all of which contribute to how they

feel in everyday life. However, satisfaction in these critical life areas is not meeting the high importance attributed to them. A "wellness deficit" is evident where levels of satisfaction lag behind attributed importance on a range of different factors. This deficit is most significant when it comes to financial security (difference of 39%), physical health (difference of 28%) and body image (difference of 23%) (see Figure 2).

Both physical health and body image are a concern among Millennials in the US. Over half (51%) believe they weigh more than they should, rising significantly to 61% among females. Such dissatisfaction with body image is highest in Montana (67%) and Oregon (65%), with those in New Mexico (38%) and Delaware (29%) reporting less dissatisfaction. Being overweight and obese not only puts pressure on Millennials' physical wellbeing, but it presents a challenge for their mental wellbeing, and indeed overall wellness. With 69% being self-conscious about their body image and 62% personally

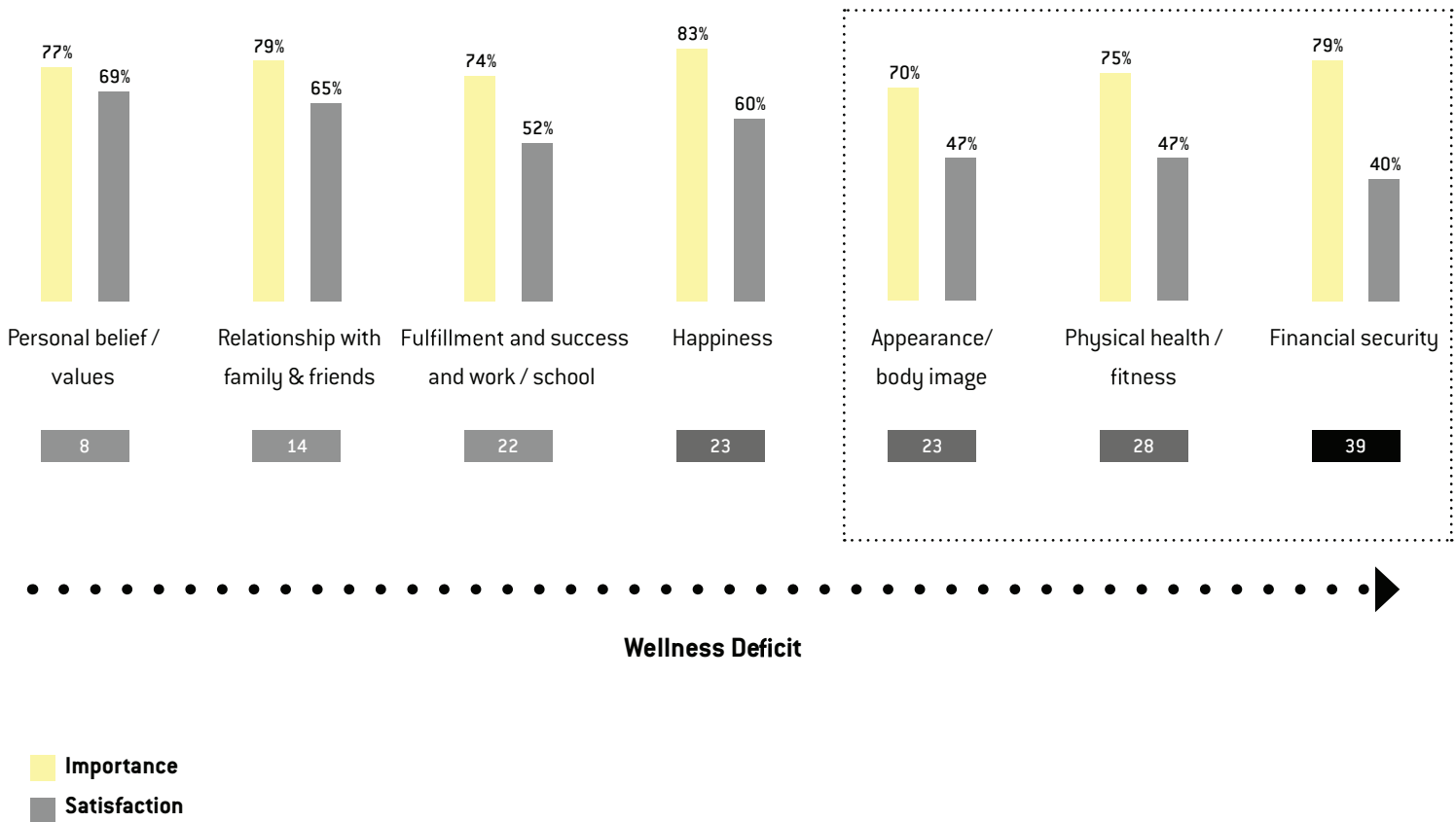
**Figure 1**  
Overall wellness



worried about being or becoming obese in the future, a ticking timebomb is emerging that ultimately means wellness may remain an aspiration rather than a reality for many. The situation isn't helped by growing 'external pressures' on body weight and image. 62% believe the trend of fitness selfies on social media puts unrealistic pressure on young people,

further compounding their self-consciousness around body image. However, whether dissatisfaction originates from 'within' (their own weight) or 'without' (comparisons to others), Millennials recognize the problem needs to be addressed. 87% are aware of the obesity epidemic in the US and feel something should be done to address it.

**Figure 2**  
The Wellness Deficit





# Delivering Wellness through Exercise

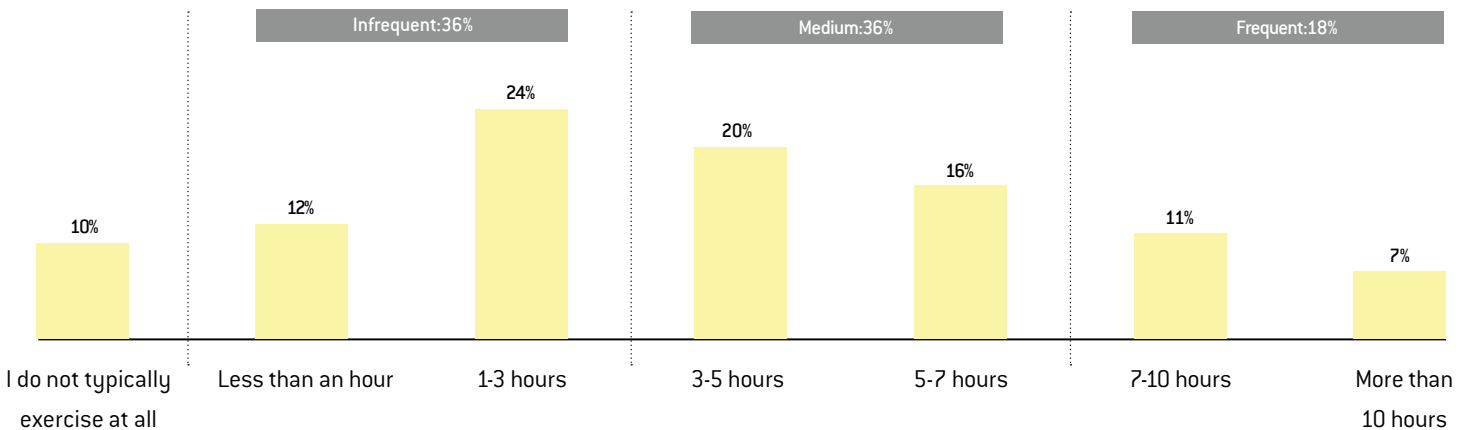
Uptake of exercise is fairly high among Millennials, with 9 in 10 (90%) typically exercising in a week (see Figure 3). Participation is strongest in New Hampshire (95%) and Hawaii (95%), with uptake lowest in Vermont (80%) and Nebraska (76%). Over a third (36%) devote up to 3 hours exercising each week, with a further 36% spending 3 to 7 hours working out. Just under 1 in 6 (18%) exercise over 7 hours each week. On average, Millennials spend around 4 hours exercising across a range of physical activities each week, although ideally they would like to increase this to 6 hours. Walking (60%), cardiovascular training (53%), running (50%) and muscle strength training (48%) are the most popular types of exercise undertaken, with 1 in 5 (20%) participating in team sports.

Millennials acknowledge that physical activity is integral to improving their overall level of health. Indeed, improving fitness (83%) and reducing weight (68%) are seen as the biggest benefits of exercise among this generation. However, they also recognize that exercise can play a greater role in their everyday lives, enhancing overall wellness. On top of improving overall motivation (51%), Millennials believe that physical activity can lower stress and improve levels of relaxation (60%). A further 22% believe they can benefit from the opportunity to spend time with friends when exercising.

Rather than just delivering greater physical fitness, regular exercise, in line with a healthy and balanced lifestyle, is seen as a route to improved wellness. Indeed, not only do frequent

**Figure 3**

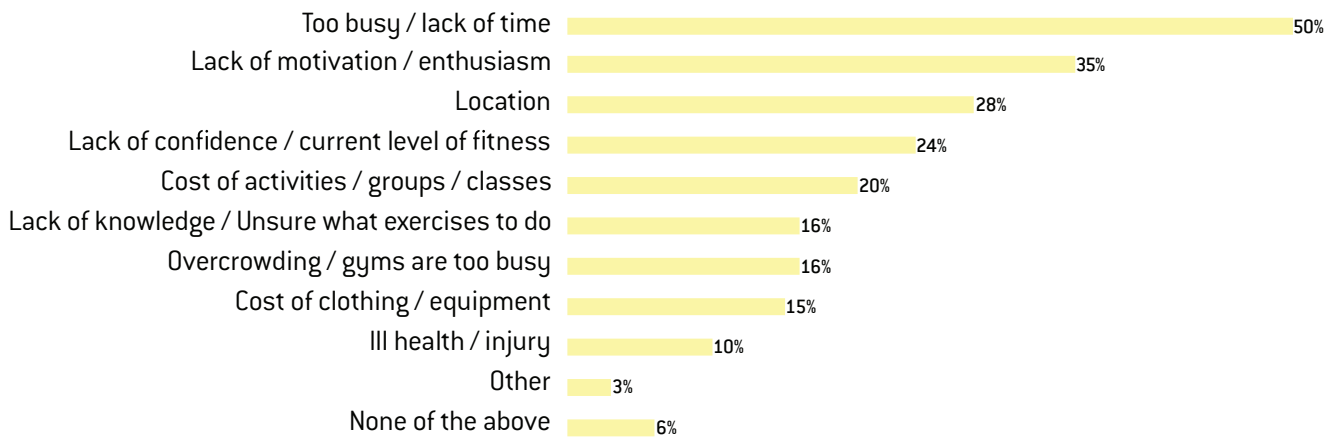
Time spent exercising in a typical week



exercisers experience greater satisfaction with their physical health (71%) compared to infrequent exercisers (35%), but they experience greater satisfaction in their happiness (72% compared to 58%), social relationships (72% compared to 64%) and fulfillment at work (67% compared to 47%). Critically, however, frequent exercisers are significantly more content with their overall level of wellness (76%) compared to infrequent exercisers (41%).

In order to drive participation in exercise, physical activity must become more inherent in everyday life. But for the short-term at least, Millennials are held back by time, financial and motivational constraints. Being too busy (50%), and lack of motivation (35%) are the biggest barriers preventing people from exercising more (see Figure 4 for more details). Indeed, 72% find it hard to devote time to exercising, and rising to 79% among infrequent exercisers. Millennials in the District of Columbia (90%) and Nebraska (84%) struggle the most with dedicating time to working out.

**Figure 4**  
Barriers to doing more exercise



# Exercise Evolution: Fitness Flexibility

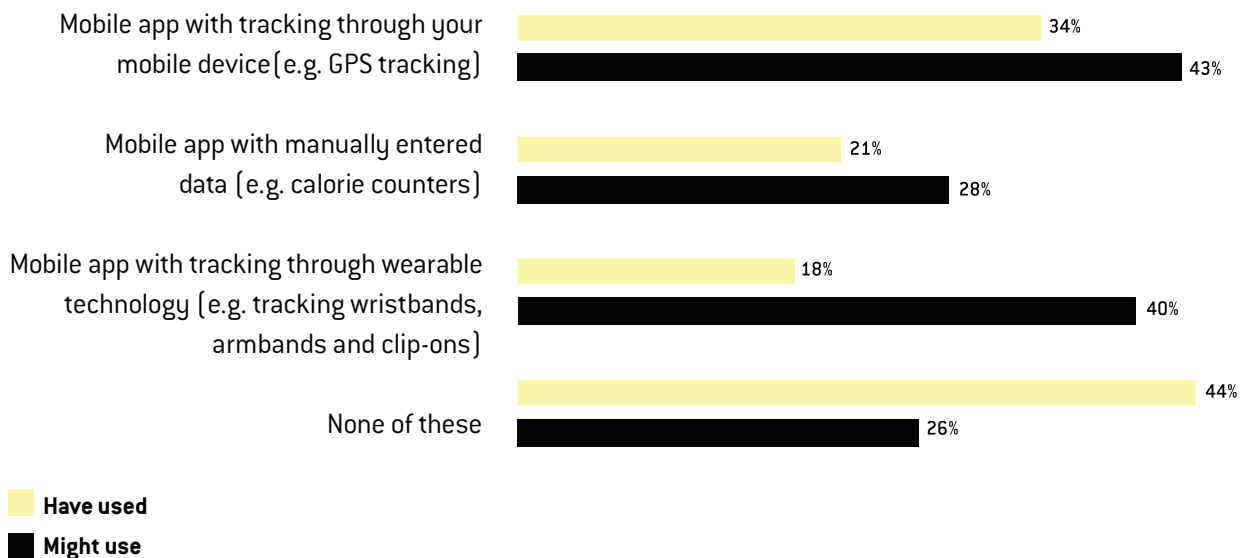
In light of the growing constraints experienced with traditional notions of exercise, the nature of how, when and where Millennials exercise is set to change. Location (52%) is the biggest factor influencing the type of physical activity people choose to participate in, with 39% prioritizing exercises based on the goals they want to achieve. Critically, Millennials are looking to control, manage and adjust their own exercise experience.

With people struggling to devote valuable time to physical activity, Millennials are looking to adopt short and sharp exercise formats which fit into their everyday schedule. After gamification (27%), express workouts / HIIT (26%), CrossFit (24%) and digital gyms (23%) are seen to be the most popular trends in two years' time. However, there is also a growing trend towards 'social exercise', as people look to combine

working out with spending time with their friends. Obstacle races (23%), intramural sports (14%) and group cycle (12%) are seen as popular future activities which Millennials would enjoy with their friends. Indeed, 69% believe physical competitions are a good way to keep fit while socializing.

The availability of health technology and applications has empowered Millennials in their pursuit for greater control. Use of mobile app technology for health is set to rise from 56% to 74% over the next two years alone, with Millennials in Montana (92%) and Alaska (90%) most likely to participate in uptake. Mobile apps with manually entered data are set to rise from 21% to 28% in the next two years, with the use of wearable technology set to increase the most from 18% to 40% (see Figure 5).

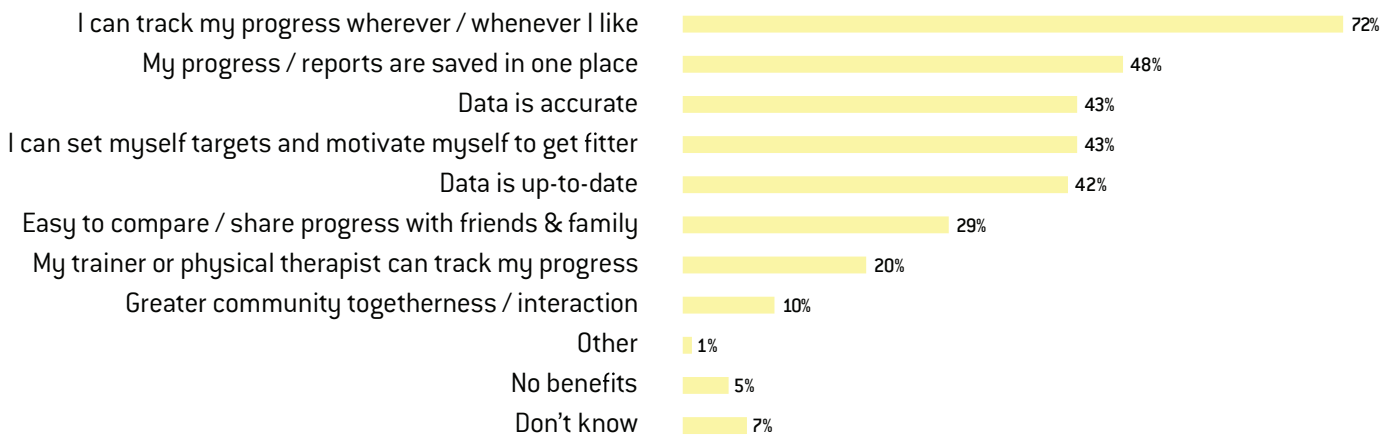
**Figure 5**  
Use of mobile app technology



Mobile technology plays a fundamental part in the future of Millennial wellness, allowing exercise to play a more intrinsic part in their lives. Two-thirds (65%) think it is important to track and monitor their fitness progress but, importantly, 70% believe having all their fitness records and progress in one place would be a benefit. Technology not only allows

Millennials to track their fitness, but it allows them to pick up their training any place, anytime and anywhere. The ability to track progress wherever and whenever (72%), saving progress in one place (48%) and providing accurate data (43%) are seen as the biggest benefits of using fitness technology, with 29% believing it is easier to share progress with friends and family (see Figure 6).

**Figure 6**  
Mobile app technology benefits



**77% of Millennials** would like their workout at the gym to be as interactive and fun as possible. Millennials no longer view exercise as a chore, but as an opportunity to enjoy themselves and share their experiences with others.



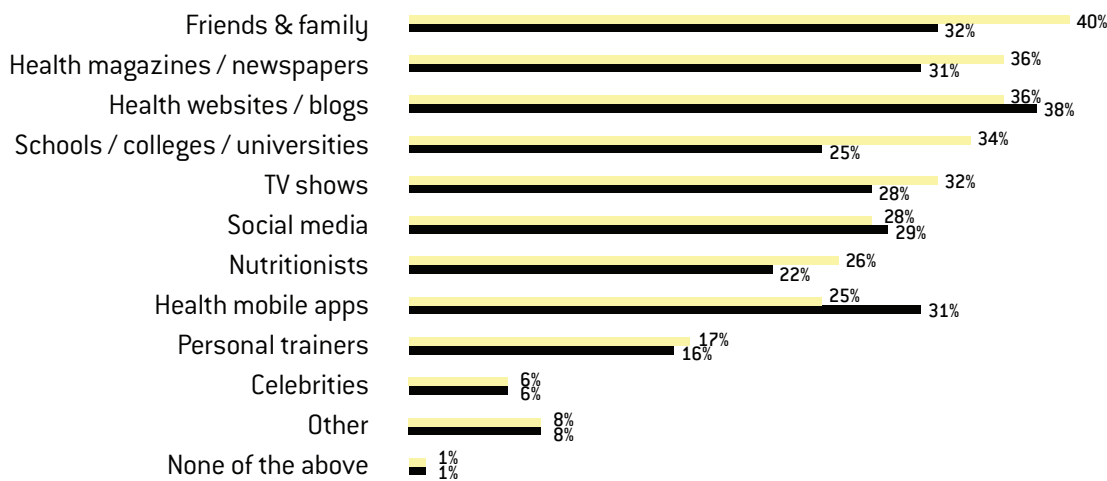
# Exercise Evolution: Personalized Health

Over the next two years, health websites and blogs (38%) are set to become the most influential sources of information among this age group, with 31% drawing upon information from health smartphone apps and 29% from social media (see Figure 7). Although friends and family still remain an important source of information (32%), the more traditional “instructor” roles such as nutritionists (22%) and personal trainers (16%) are seen to be less significant. The digital influence on Millennials is clear and set to grow with Facebook (59%), YouTube (35%) and Instagram (24%), for example, are likely to affect their attitudes to health and wellbeing.

With a wealth of information at their fingertips, Millennials have become better placed to make informed and more relevant decisions on their overall wellness. In addition, they are approaching exercise knowing exactly what they want to achieve from their workouts. 77% of gym users think their experience should be personalized to meet their individual goals, a view held most strongly in Connecticut (91%) and Oklahoma (91%).

While a workout should be customized, it should also be sufficiently fresh and exciting to drive engagement. 77% would like their workout at the gym to be as interactive and

**Figure 7**  
Most influential sources of health information



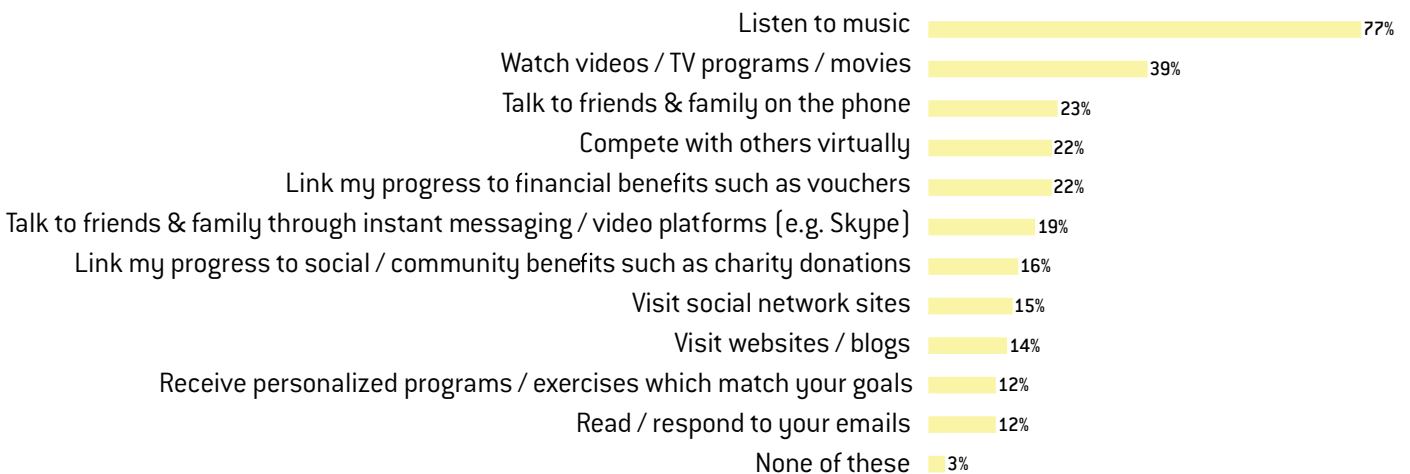
■ Now  
■ In two years' time



fun as possible. Millennials no longer view exercise as a chore, but as an opportunity to enjoy themselves and share their experiences with others. Such is the changing expectation that a significant minority (44%) of Millennials believe the traditional gym as we know it will evolve by 2020.

Instead, the gym of the future is seen as something that creates a relaxed, tailored and fun environment for users to enjoy. Gym users would like to listen to music (77%), watch videos / TV (39%) or talk to friends & family over the phone (23%) while working out (see Figure 8). However, critically, it should also allow Millennials to become more socially connected. 22% would like to compete with others virtually and 19% are looking to connect with friends through Skype or other instant messaging tools. Furthermore, 39% would like to share the results of their workout with their friends through social media.

**Figure 8**  
Future workout activities



Future trends in wellness reveal an ecosystem where **mobility, choice and social engagement** can make the difference to whether the wellness deficit can be effectively addressed.





## Summary

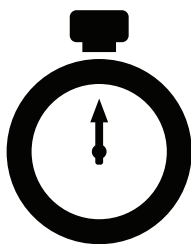
---

With obesity levels on the rise and increased accessibility of choices when it comes to information around health and fitness, wellness has reached an interesting crossroads. Millennials represent the future of wellness and their choices will ultimately determine how overall wellness in the US evolves over the next 10 to 20 years and beyond.

Millennials recognize the importance of wellness and factors that contribute to a state of wellbeing. Yet this recognition is not translating into behaviors that serve to actually enhance wellness. Millennials from across the health and fitness spectrum are represented in the study and there are significant differences between those who embrace healthy choices and those who, for whatever reasons, do not. There are also considerable geographical discrepancies with some states reporting far higher levels of Millennial wellness than others.

Closing the wellness deficit must be a priority not only for individuals but for entities with a stake in the wellness of the next generation, whether this be government, education or business. Technology has increased the awareness of health and fitness issues and provided methods for Millennials to more effectively embed exercise into their busy lives. Stress and anxiety are also on the increase in this generation and something that exercise is seen to play a particularly crucial role in managing.

Future trends in wellness reveal an ecosystem where mobility, choice and social engagement can make the difference to whether the wellness deficit can be effectively addressed. Both the desire and need to participate in exercise exist among Millennials, but if participation is to increase, the way that exercise is serviced must align itself with this generation.



**Closing the wellness deficit must be a priority not only for individuals but for entities with a stake in the wellness of the next generation, whether this be government, education or business.**

### **About Loudhouse**

As part of Octopus Group, Loudhouse is one of the UK's leading performance and influencer marketing agencies, working with blue chip clients in technology, business services, finance and retail sectors.

### **For more information, visit**

[loudhouse.co.uk](http://loudhouse.co.uk)

### **About Technogym**

Established in 1983, Technogym – The Wellness Company™ – a world leading company supplying products, services and solutions for fitness facilities, hotels, spas, rehabilitation centers, corporate gyms, universities, professional sports facilities, private homes, and beyond. Technogym was the official supplier for the last five Olympic Games, and the 2016 Olympic Games in Rio de Janeiro.

### **For more information, visit** [technogym.com](http://technogym.com)

