



Global Health and Wellbeing Study 2020

What customers across 15 countries
need for their self-managed
health optimisation

Global Health and Wellbeing Study 2020

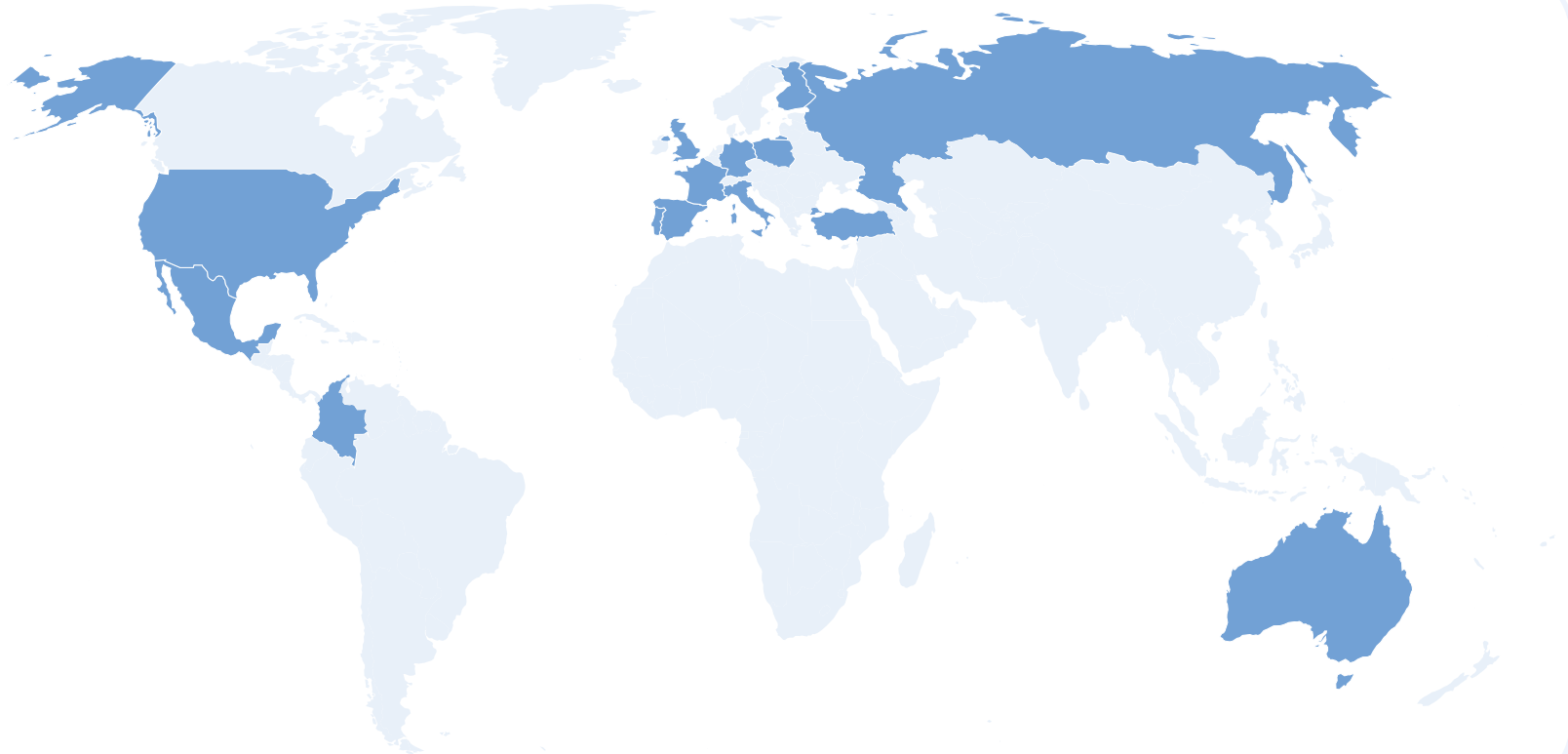
Health, fitness and wellbeing are trending topics all around the world. Achieving a better health status has never been of more interest. The health, wellbeing and fitness markets are growing and with the current global COVID-19 situation during which people must self-isolate, self-guided health optimisation is soaring.

The impetus for this research is the desire to explore whether the motivations for maintaining and optimising one's mental and physical health and personal wellbeing differ between countries and cultures. We are equally interested to understand what impact, if any, COVID-19 and the associated restrictions has had on people's attitudes towards this topic. We wanted to investigate whether as a result of the changes in the way we live during this time, people's health behavior has changed and how it might differ between countries and cultures.



We conducted 128 remote in-depth interviews with participants across 15 different countries:

- **Germany** (DE)
- **France** (FR)
- **Italy** (IT)
- **Spain** (ES)
- **Portugal** (PT)
- **United Kingdom** (UK)
- **Russia** (RU)
- **Poland** (PL)
- **Finland** (FI)
- **Turkey** (TR)
- **Mexico** (MX)
- **Colombia** (CO)
- **USA** (US)
- **Australia** (AU)
- **Singapore** (SG)



As we were interested in discussing health, we recruited participants with already established health goals that they were working towards (e.g. fitness, mental health, stress reduction, better sleep, longevity or losing weight). The participants were aged 18 to 58 years and either use, or have considered the use of, apps or trackers that assist with achieving health goals.

A rather holistic definition of health was identified across participating countries

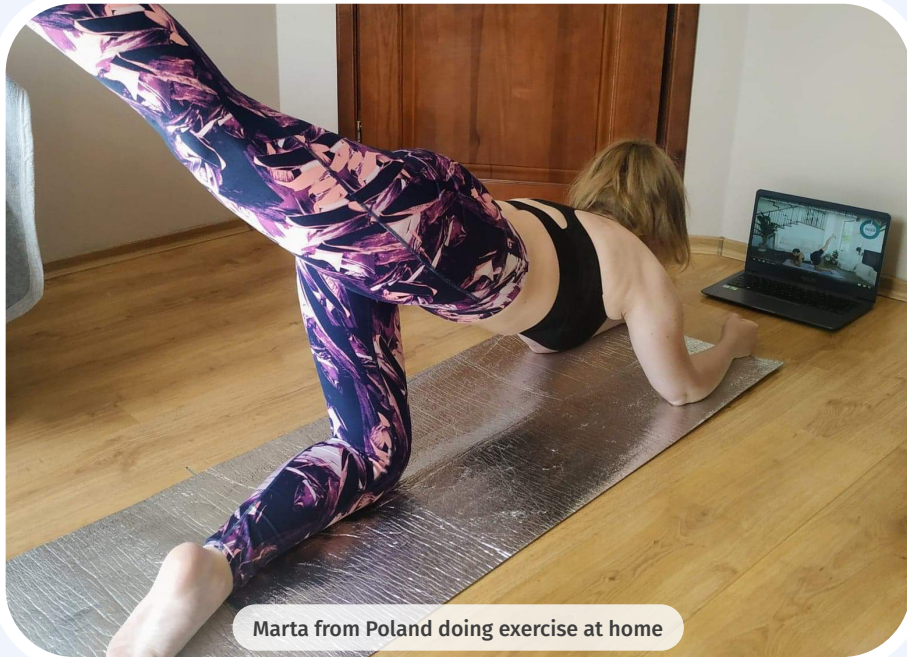
Participants in all countries view health holistically, encompassing both mental and physical health. Being in good health means being able to function every day, being unrestricted by chronic issues, sleeping well and eating healthily. Whilst it is a factor, for our participants health is not just the absence of disease or illness. This aligns well with the World Health Organisation's (WHO) definition of health which states, "Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity". Only the social aspect of the WHO's definition was not mentioned by our participants. Not surprisingly, good health was highly valued – something that was especially emphasised by participants in Italy and Poland.



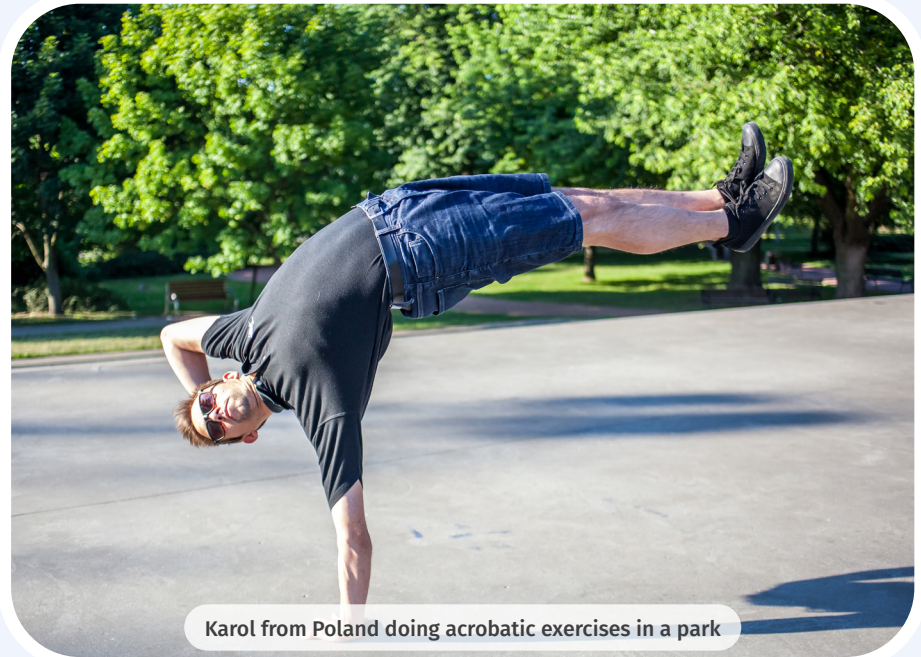
"Health is a mix of everything. It's not just a checkup, it deals with your way of life, the balance you find between professional and private life, your physical and your mental health"

Bianca (36), IT





Marta from Poland doing exercise at home



Karol from Poland doing acrobatic exercises in a park

"Health for me means not to have physical weaknesses, no pain, no negative thoughts, basically living without constraints."

Daniel (36), DE



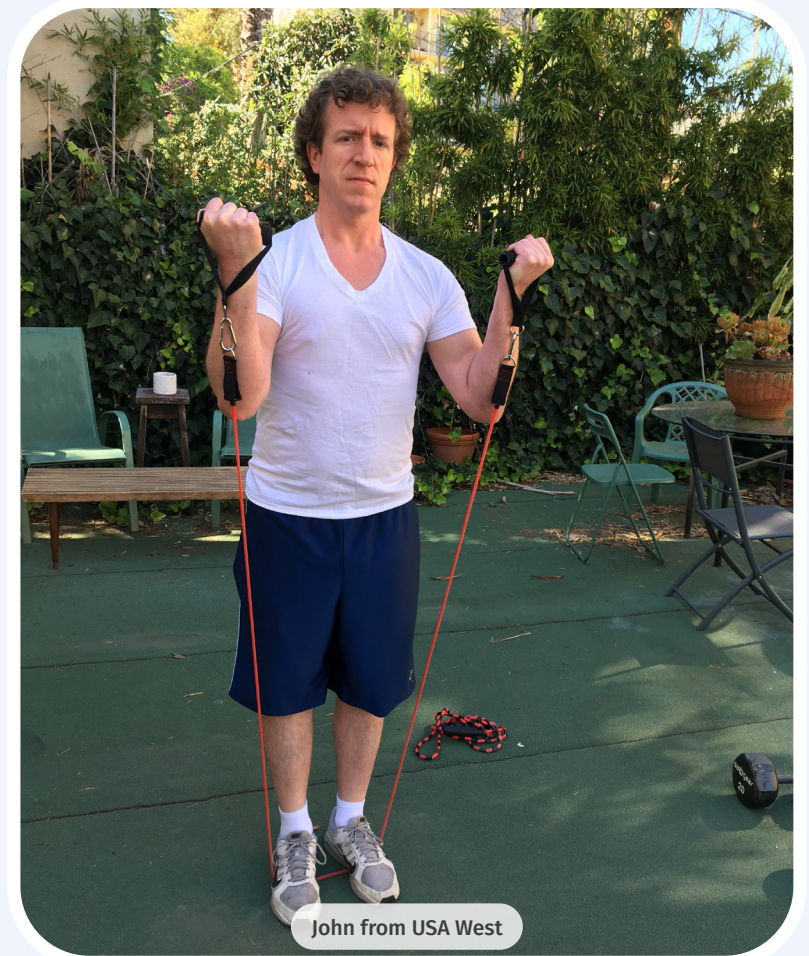
Whilst the range of physical activities our participants engaged in and their intensity varied, there were surprisingly little cultural differences in their intention and ability to live a healthy lifestyle in a pre-COVID world.

Regardless of which country they call home, our interviewees all aspire to a healthy lifestyle, which meant setting personal goals that allowed them to strike a good balance between physical and mental wellbeing. Highest on the list of these personal goals was being physically active and having a balanced diet. Physical health and activity were seen as significant determinants of mental health.





Asyraf from Singapore



John from USA West

"I used to have chronic fatigue. That was a massive wake up call, and catalyst in my life. I want to be vibrant, real, and enjoy my life."

Jane (44), UK



In particular, the main health goals mentioned across all cultures were maintaining or losing excessive weight, doing regular exercise, getting enough sleep and maintaining a healthy diet.

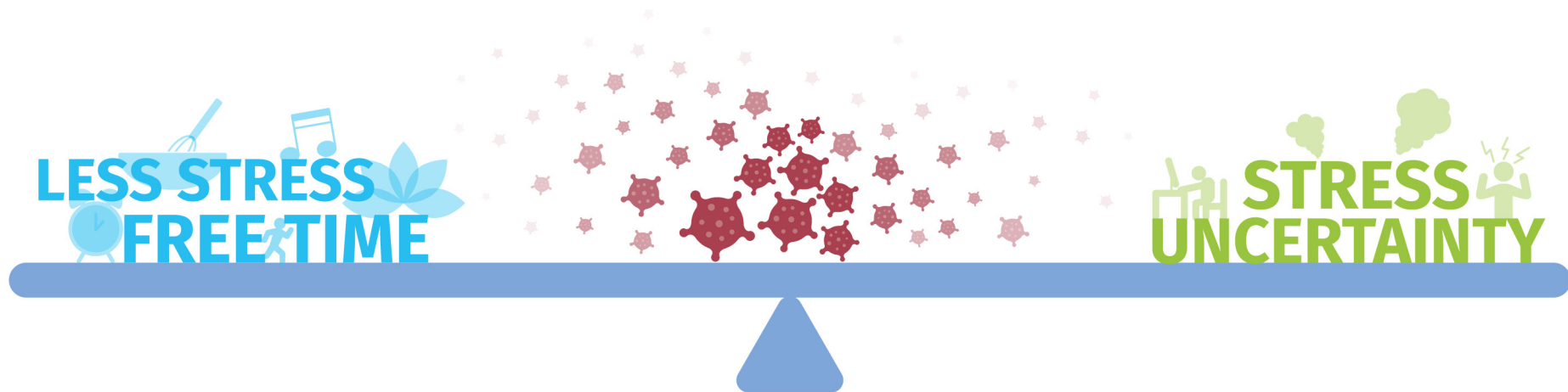
Some responses that stood out included our UK and Australian participants being more likely to comment on reducing anxiety as a means to improving mental health, whilst our participants in Russia and Poland emphasised the prohibitive expense of visiting a doctor as a motivator for maintaining good health.



Coronavirus restrictions were seen to produce both positive and negative effects

We identified two distinct reactions to the COVID-19 pandemic, that was typically attributable to personal circumstances and disposition rather than location.

1. Due to social distancing and working from home, some participants felt that they had more free time and less stress than usual, thus finding more time for cooking, exercising and discovering new hobbies. Those rather positive effects were more likely to be commented upon by participants in France, Italy, Spain and the UK.
2. Conversely, for others, the shutdown associated with COVID-19 caused more stress and uncertainty. Participants in the USA and Russia were more likely to comment on finding it more difficult to disconnect from work than before and feeling overwhelmed by the dual burdens of managing household responsibilities and work.



The pandemic impacted participants' approach to achieving health related goals

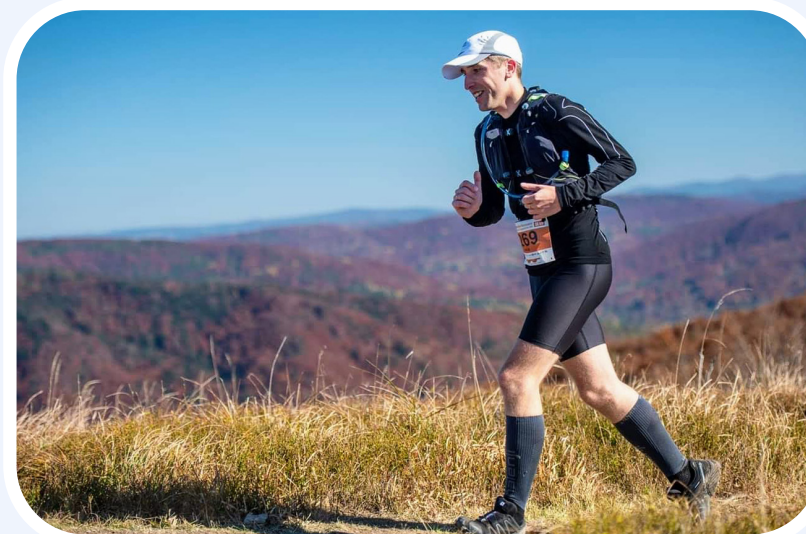
As a result of widespread gym closures, the restrictions on using equipment in parks, the shut-down of organised sports and group physical activities, people had to find new ways and places to stay active. This typically translated to exercising at home which was a novel experience for many participants. Yoga classes, gym workouts, group running, swimming at the pool, bootcamp in the park, all had to be replaced with things people could either do at home, or outside within whatever local restrictions were in place.



Jakub from Poland had to stop running outdoors and found himself exercising at home:

"At first, when I gave up my outdoor activities overnight it started to cause frustration. After a week I got tired of the lack of exercise, so I started looking for something I could do at home and did exercises from the phone. It was something I had not done before."

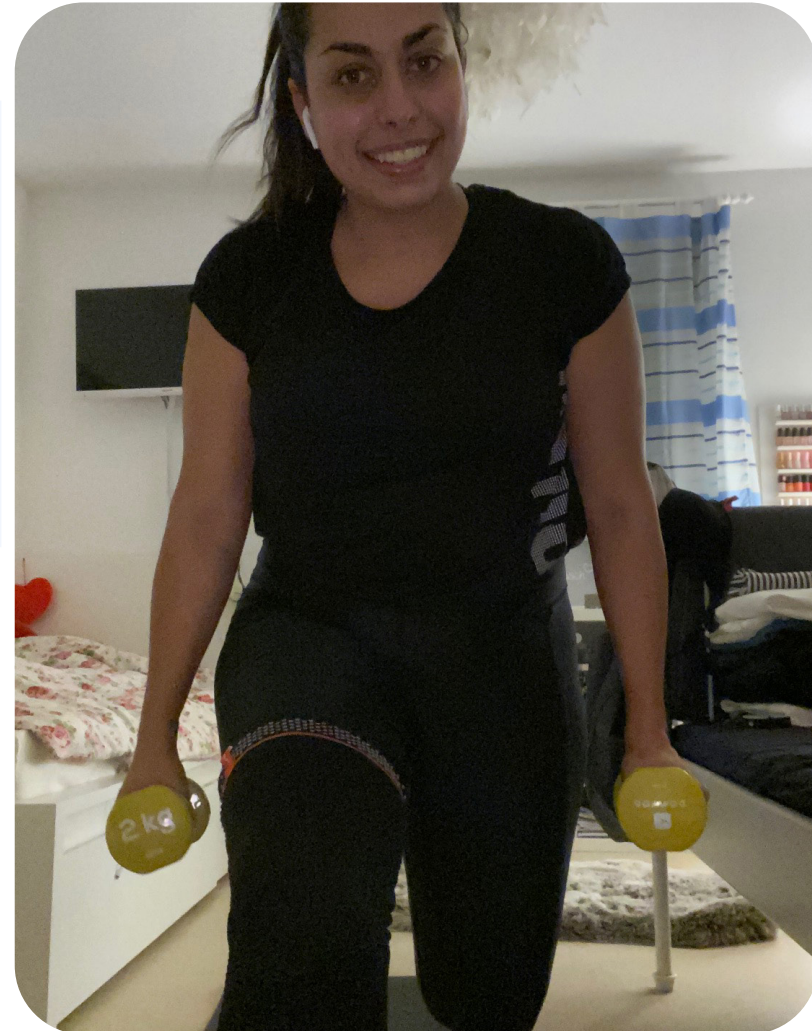
Jakub (36), PL



Sabrina from Germany had to give up her football training and found several alternatives indoors and outdoors:

"Now that I cannot go to my football training anymore, I have to exercise at home and go cycling. I bought a new bike, weights and reactivated my Freeletics account."

Sabrina (24), DE



Finding the motivation to exercise or train alone at home was difficult in the beginning for many participants.

Suzannah from Australia told us that the coronavirus restrictions resulted in a reduced amount of activity due to a lack of motivation or because the equipment was limited.

"I am spending a lot less time on things than I did pre-COVID. I am a social person and enjoy that environment. Without that, the motivation is reduced at home. I wanted to buy some equipment when the lockdown occurred, but the stores ran out."

Suzannah (20), AU



Vivian from Colombia had to change her cycling training from 7 days a week of cycling outdoors to home training with a bike roller:

"I used to train the whole week, now I train 5 days per week, because it's not the same going cycling outdoors than indoor cycling, besides is harder outdoors."

Vivian (27), CO



Participants in Germany, Italy and Australia were more likely to comment that the intensity of workouts was reduced as a result of exercising alone, they were missing the motivation of matching what others are doing in a gym class or the guidance they'd receive from a personal trainer or coach.



"Physical effort is dramatically lower than in the past. I don't sweat from the effort, but because I exercise at home."

Roberto (45), IT





Weight lifting equipment in Australia



Home training device on a German balcony

Interestingly, participants in the UK reported a different experience due to the nature of the government restrictions in place there. Many said they had become fitter as they had the time to prioritise their physical wellbeing and had to change their training strategies. Due to the restricted amount of time they were allowed to spend outdoors, many were running or cycling at a higher intensity than usually, as they felt the need to make the session count more.



"It's definitely more intense exercise because I can't leave the house as often, so I'd go for a shorter, more intense bike ride."

Samuel (19), UK





Sleeping room used for a home workout in the UK



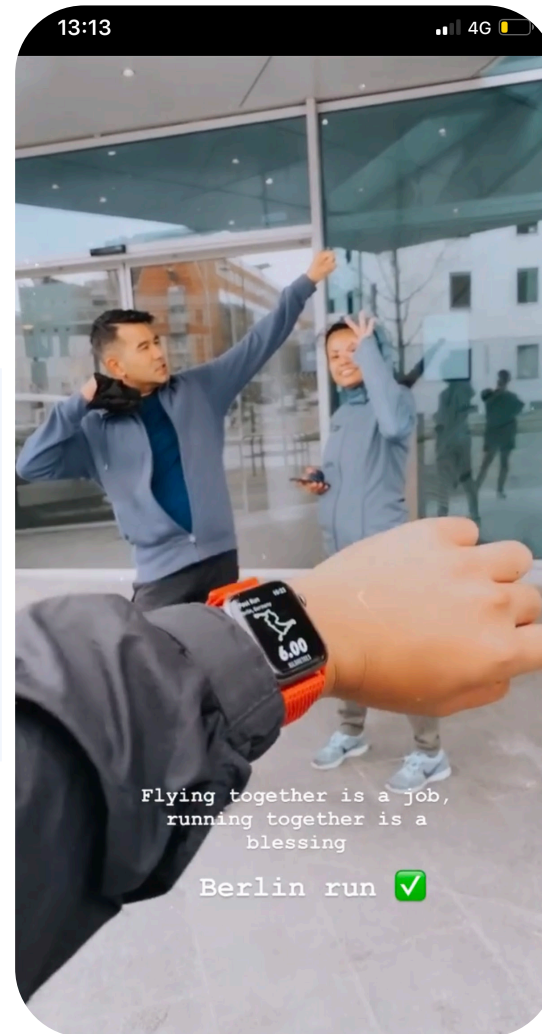
Ryan lifting weights at home in the UK

People are missing the social aspect of exercising

For the majority of participants, the social interaction made possible through exercise, or simply being able to compare their performance to others, is an important part of their experience and motivation. There is considerable frustration at having to exercise alone, or just with family members, this was particularly the case for people who are involved in team sports.

"When I do the workouts by myself, I sometimes don't push myself enough as compared to when I do it with friends. You kinda wanna like slack off a bit."

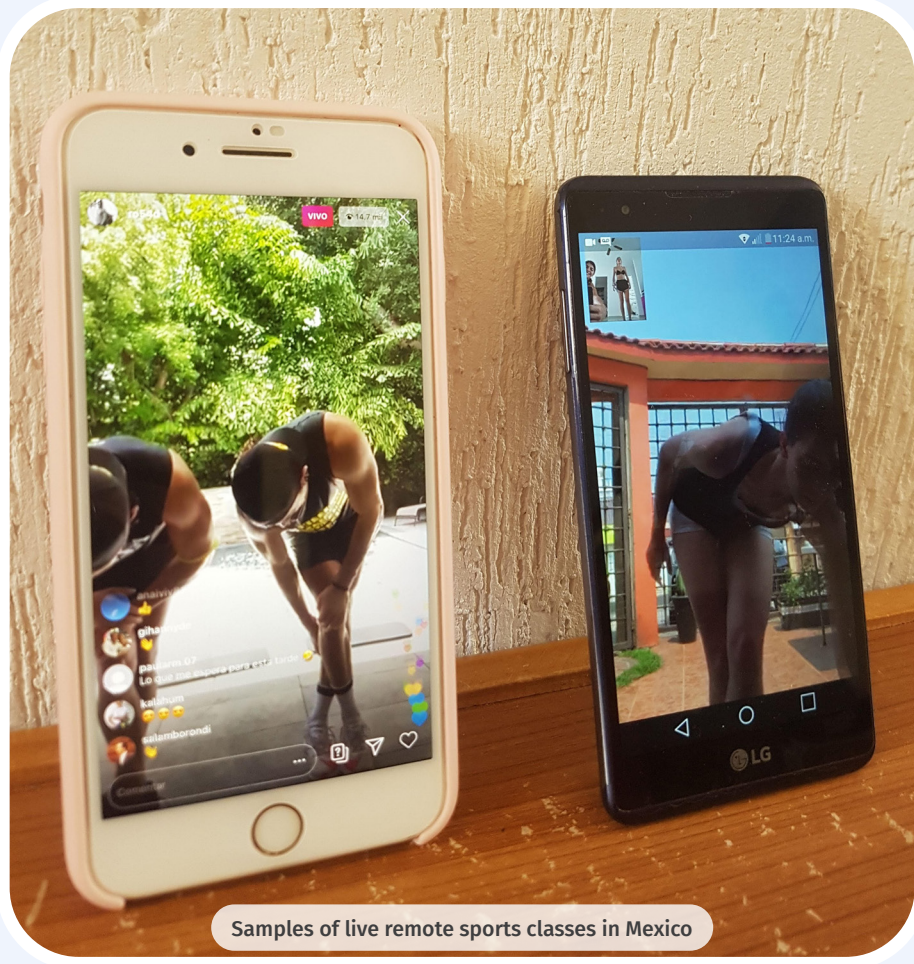
Syahrizad (26), SG



"Exercising home alone is so boring, it's difficult to get started and motivated. The role of exercise company is to motivate and support, and to share thoughts and socialize. Both support each other."

Heli (44), FI





Samples of live remote sports classes in Mexico



Workout location at the US West Coast

The limited range of workout options along with the lack of equipment and space at home are the biggest issues facing those wanting to stay physically active

Brigitte from Germany misses the advantages of going to the gym:

"I really miss going to the gym, the whole routine including the way there, the long shower and the sauna. Exercising at home just does not have the same wellness effect. Only in the gym I can disconnect from everyday life."

Brigitte (41), DE



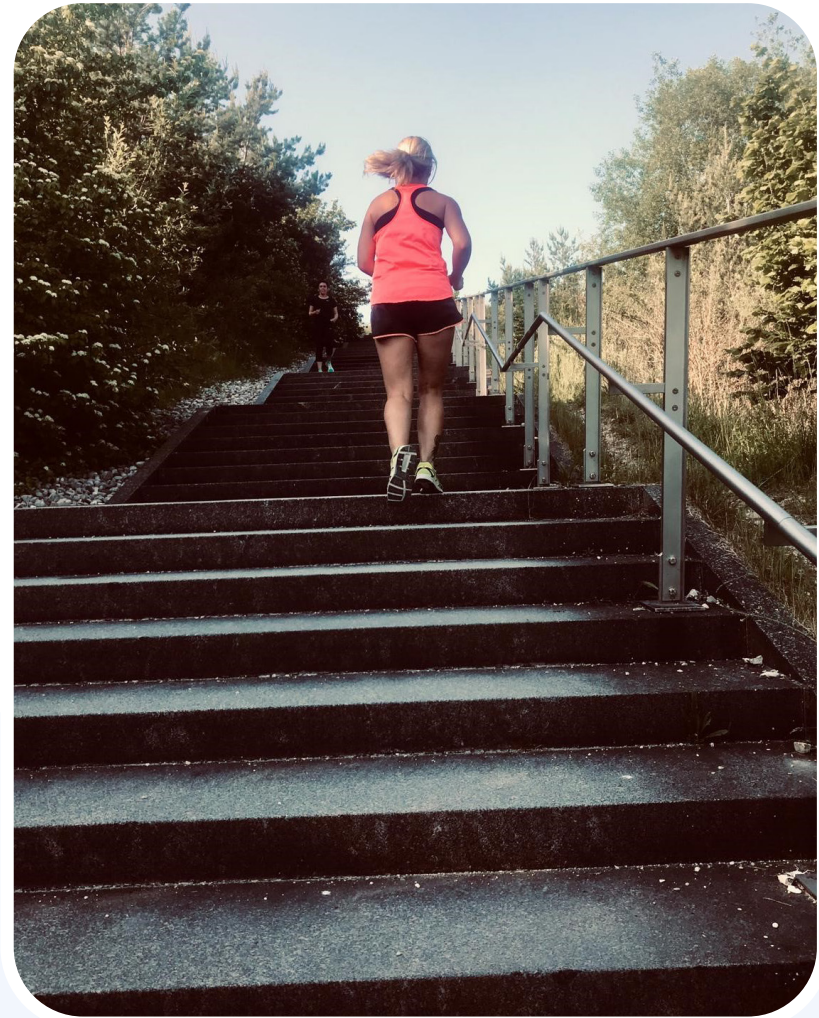
Physical health is seen as a key determinant of mental health

Participants from all countries saw a strong connection between mental and physical health, with exercise described as playing a key role in achieving and maintaining good mental health. Meditation, yoga and breathing techniques, were also often mentioned as contributors to good mental health. Apps were instrumental for some participants in learning about meditation, yoga and breathing techniques.



"When I do enough exercise, I feel mentally good as well."

Marina (33), DE



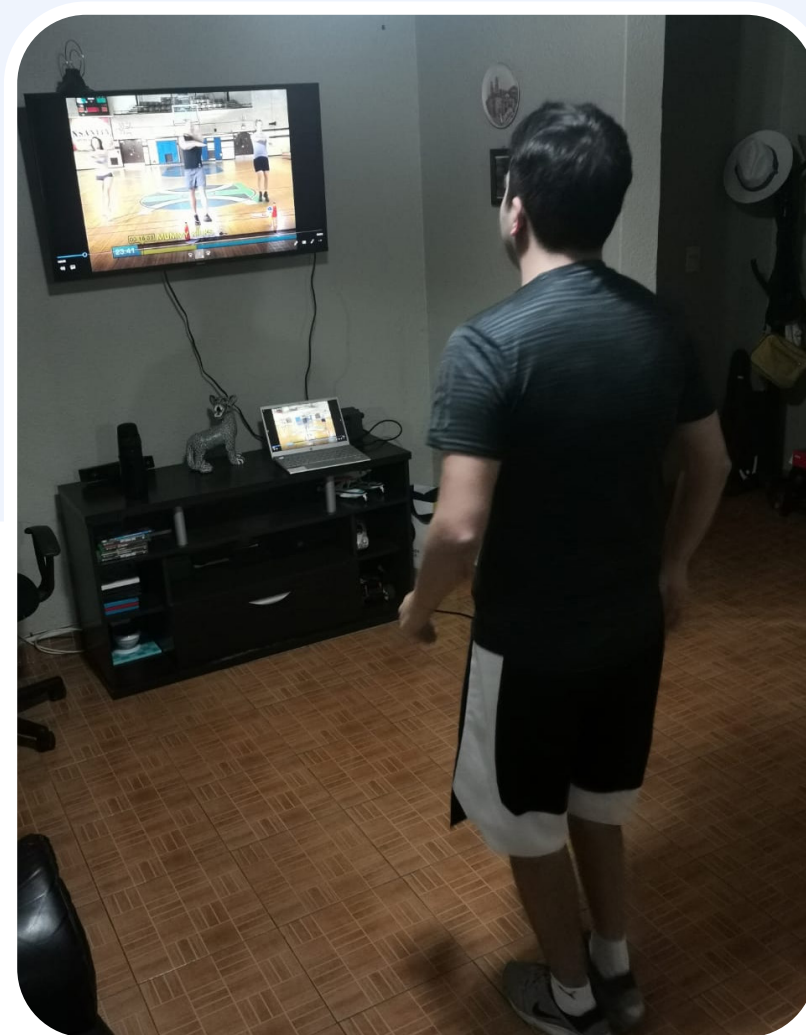
"Exercise helps me release the energy of that worrying (sweat it out)."

Anne (39), US



"My meditation is the exercise in silence, because that's the moment I think about how I am feeling and what I need"

Oscar (27), MX



MUNI
YOGA

LUN/MIE/VIE
7:00 AM (COL)

DOMINGO
9:00 AM (COL)

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Online yoga class taken by a participant in Colombia

Yoga With Adriene

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Online yoga classes taken by a participant in Singapore

Amount and quality of sleep is being affected by COVID-19 restrictions

Techniques employed to promote good sleep included deep breathing, exercising in the evening to promote tiredness and the use of mobile phone apps.

The impact of COVID-19 restrictions on sleep, and perceived sleep quality, varied across participants. Some of our participants reported sleeping more because they weren't commuting to work, whilst others mentioned getting to sleep was more problematic due to the disruption to their normal patterns and routines. This was sometimes compounded by a sense of anxiety induced by pandemic related news – this was especially mentioned in Spain, Mexico and Colombia.



"Now it has gotten worse and I don't have time for anything. I have no routines at all and neither do I have a good sleep."

Alejandro (26), ES

One positive of the lockdown seems to be improved nutrition

Participants from all countries commented that during the lockdown they felt more in control over what they were eating, typically leading to better food related choices. The ability to make better choices was perceived to be the result of a few different factors: having more time to plan and prepare meals at home; being more conscious of what they were buying and eating (due to limited grocery store trips); and because they were eating out less - where they were more likely to choose unhealthy options.

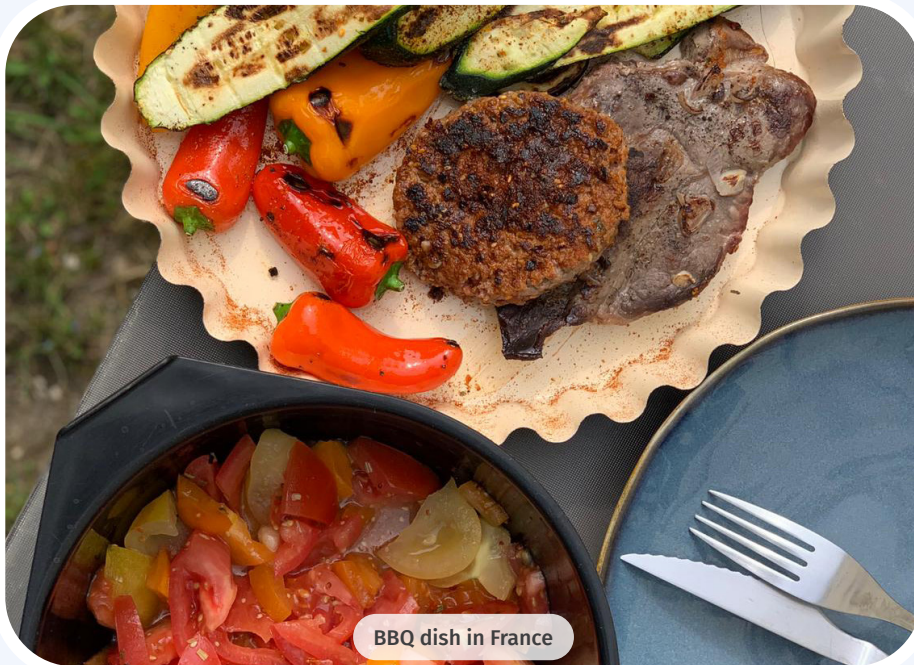


"I am able to eat healthier and I am able to control when I eat a lot more. Like during school I don't get a chance to eat lunch or breakfast because I am running around in the morning."

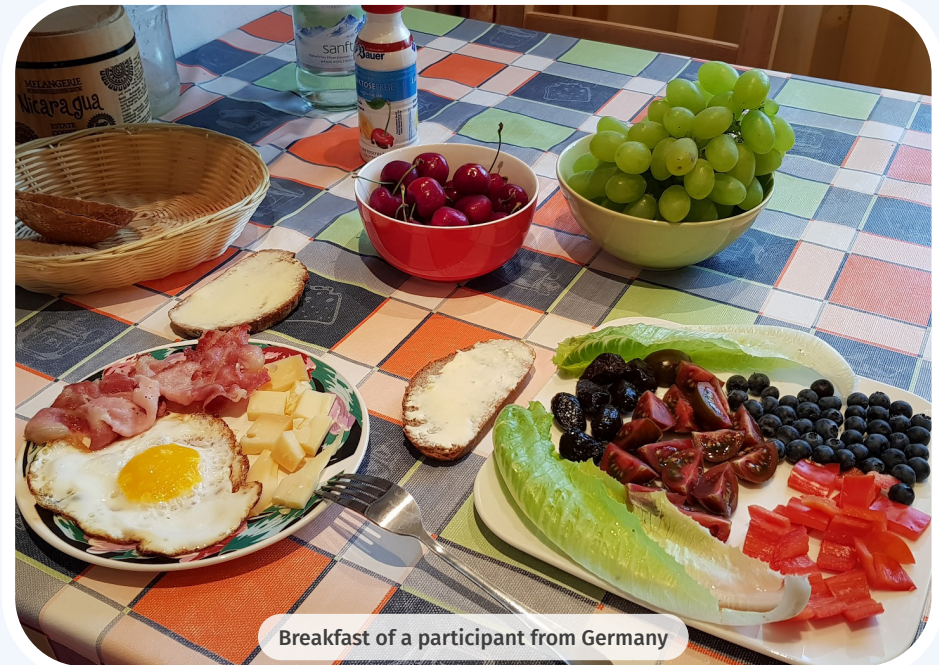
Lizzy (32), US



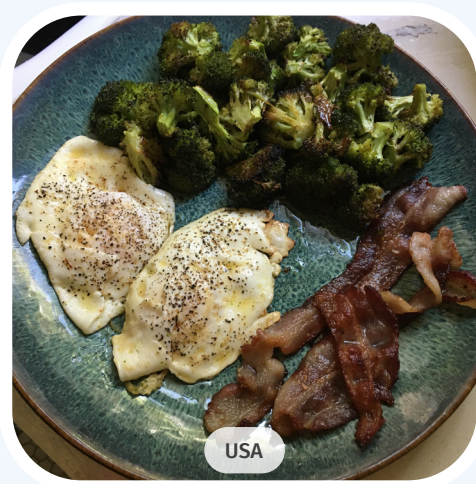
Some Russian participants reported that they were less hungry and lost weight because they felt too nervous to eat due to the pandemic and the uncertainty it created. Countering this was some people feeling that they snacked more whilst working from home – mainly in Germany, France and Singapore.



BBQ dish in France



Breakfast of a participant from Germany



Technology can play a significant role in optimising health

In every country, fitness trackers or smartwatches were reported to be commonly used to collect data and benchmark activity either whilst engaging in specific activities like running, cycling and swimming or for more passive pursuits such as step counting, and floors climbed during the day.

Distance, heart rate and calories burnt were the most used functions of those devices, and typically the primary motivation for their purchase. Other features such as sleep and nutrition tracking were considered less relevant, particularly if it meant manually entering data which meant extra work. Apps specifically designed for activities like running, cycling, yoga or fitness workouts were also frequently used in all countries.



"I have some apps for guiding my meditations and following up yoga routines for beginners, I prefer those specialised apps instead of YouTube videos"

Lesly (24), MX



Ride

Mafalda Costa
May 17, 2020 at 8:50 AM

I've never waited so much for my dad

Peniche

Distance	44.70 km	Elevation Gain	352 m
Moving Time	3:03:06	Avg Power	67 W
Avg	14.6 km/h	Calories	823 Cal

Running app used by a participant from Portugal

8:13

RUN THE DISTANCE WITH JPG

Ended 8 May 2020

41.65 / 25.00 km

Place: 62 / 150
Percentile: Top 50%

[View Leaderboard](#)

Challenge Details

Total Distance: 25.00 kilometres
Duration: 8 Apr - 8 May
Participants: 150 runners

Running app used by a participant from Singapore

May Mon 4 May

Outdoor Run
Open Goal
11:52 - 12:35
Stockport

Total Time	0:42:23	Distance	8.05km
Active Calories	791cal	Total Calories	893cal
Elevation Gain	23m	Elevation	▲ 86M MAX ▼ 57M MIN
Avg. Cadence	168spm	Avg. Heart Rate	165BPM
Avg. Pace	5'16"/KM		

Splits

Heart Rate

Running app used by a participant from UK

connect

- Pulpity
- Codzienne podsumowanie
- Wyzwania
- Kalendarz
- Kanał wiadomości
- Aktywności**
- Statystyki zdrowia
- Golf
- Trening
- Sprzęt
- Informacje Insights
- Raporty
- Znajomi
- Grupy
- Odznaki
- Osobiste rekordy
- Cele

←

Aktywności

Szukaj aktywności Porównaj 0 z 4

+ Ręcznie wprowadzana aktywność Importuj Eksportuj do pliku CSV

Wszystko

	Maj 12 2020 ★ M-Cross 10km BIEG	9,39 km DYSTANS	55:03 CZAS	5:52 min/km ŚREDNIE TEMPO	248 m WZROST WYSOKOŚCI	162 ud./min ŚREDNIE TĘTNO
	Maj 11 2020 ★ E 6km + H 10x 100m/100m BIEG	8,13 km DYSTANS	56:15 CZAS	6:55 min/km ŚREDNIE TEMPO	65 m WZROST WYSOKOŚCI	125 ud./min ŚREDNIE TĘTNO
	Maj 10 2020 ★ Przejazdka z Olą pętlą przez Bełwin KOLARSTWO	34,43 km DYSTANS	2:43:03 CZAS	12,7 km/h ŚREDNIA PRĘDKOŚĆ	462 m WZROST WYSOKOŚCI	-- ŚREDNIA MOC
	Maj 9 2020 ★ M-Cross 22km BIEG	22,00 km DYSTANS	3:49:49 CZAS	10:27 min/km ŚREDNIE TEMPO	1.732 m WZROST WYSOKOŚCI	136 ud./min ŚREDNIE TĘTNO
	Maj 8 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	37:30 CZAS	87 ud./min ŚREDNIE TĘTNO	136 ud./min MAKSYMALNE TĘTNO	143 C KALORIE
	Maj 7 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	35:02 CZAS	94 ud./min ŚREDNIE TĘTNO	120 ud./min MAKSYMALNE TĘTNO	153 C KALORIE
	Maj 7 2020 ★ E-Cross 10km + SB 5x 300m/300m BIEG	13,06 km DYSTANS	1:36:14 CZAS	7:22 min/km ŚREDNIE TEMPO	404 m WZROST WYSOKOŚCI	155 ud./min ŚREDNIE TĘTNO
	Maj 6 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	35:56 CZAS	97 ud./min ŚREDNIE TĘTNO	127 ud./min MAKSYMALNE TĘTNO	174 C KALORIE
	Maj 6 2020 ★ E-Cross 21km BIEG	21,39 km DYSTANS	2:17:50 CZAS	6:27 min/km ŚREDNIE TEMPO	705 m WZROST WYSOKOŚCI	156 ud./min ŚREDNIE TĘTNO
	Maj 5 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	33:31 CZAS	95 ud./min ŚREDNIE TĘTNO	148 ud./min MAKSYMALNE TĘTNO	160 C KALORIE
	Maj 4 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	31:03 CZAS	81 ud./min ŚREDNIE TĘTNO	123 ud./min MAKSYMALNE TĘTNO	98 C KALORIE
	Maj 3 2020 ★ Siła/Kardio KARDIO	-- Serie RAZEM SERII	40:47 CZAS	92 ud./min ŚREDNIE TĘTNO	122 ud./min MAKSYMALNE TĘTNO	178 C KALORIE
	Maj 3 2020 ★ E-Cross 9km BIEG	8,91 km DYSTANS	1:24:23 CZAS	9:29 min/km ŚREDNIE TEMPO	153 m WZROST WYSOKOŚCI	140 ud./min ŚREDNIE TĘTNO

Pomoc Stan Facebook Instagram Twitter Oświadczenie o ocenie

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Detailed training plan of a participant from Poland

Dokładność śledzenia aktywności

Nisan 2020

5 antrenman 89 dakika



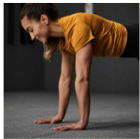
Güçlü Başlangıç

29 Nis Çar 35:10



Kalça ve Kalça Kası Kuvveti

27 Nis Pzt 20:18



Kasları Gevşeten Basit Hareketler

26 Nis Paz 11:50



Hızlı Karın Egzersizi

26 Nis Paz 10:00



Digital workout plan used by a participant from Turkey



OUTDOOR

Outdoor Cycling Stretching Bootcamp Walkii

45 min Power Walk
SELENA SAMUELA · WALKING
Thu 2/27/20 @ 8:00 AM

30 min Hip Hop Fun Walk
JESS SIMS · WALKING
Thu 2/13/20 @ 8:00 AM

FILTER 1

Featured Classes Schedule Profile More

App for outdoor exercises used by a participant from the USA

Back Exercise

Pilates
Monday at 12:31 pm
14 min 47 calories
63 avg bpm

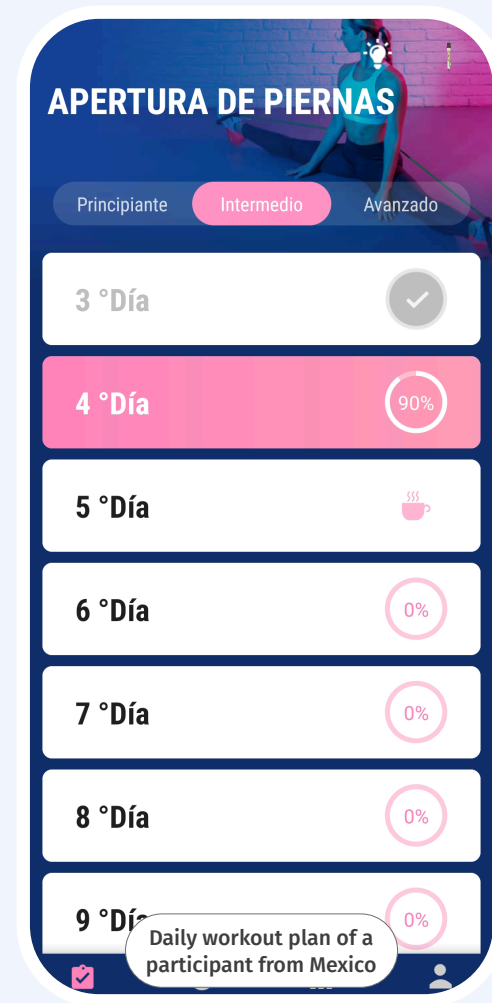
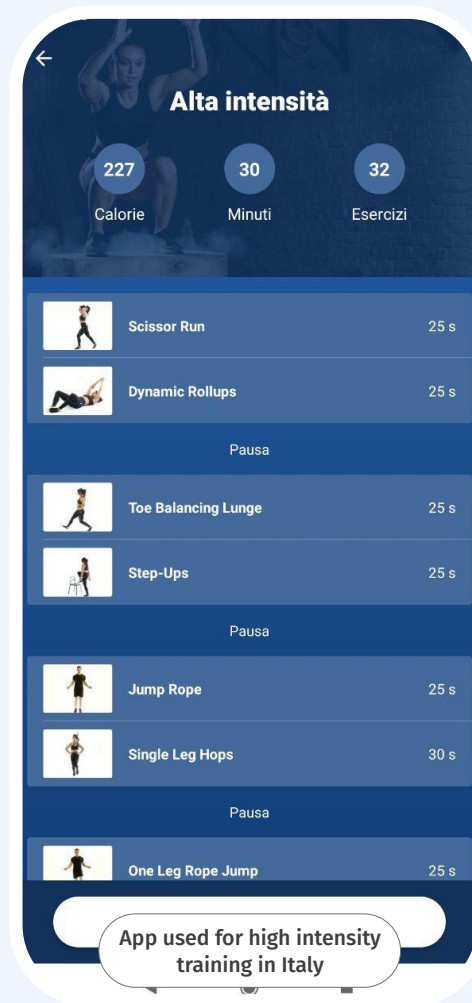
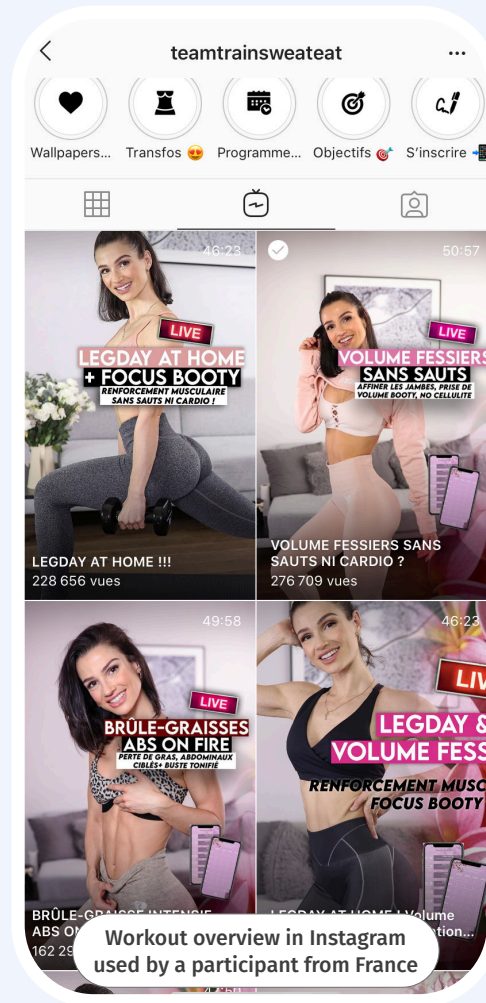
Stretching
Monday at 12:12 pm
15 min 41 calories
65 avg bpm

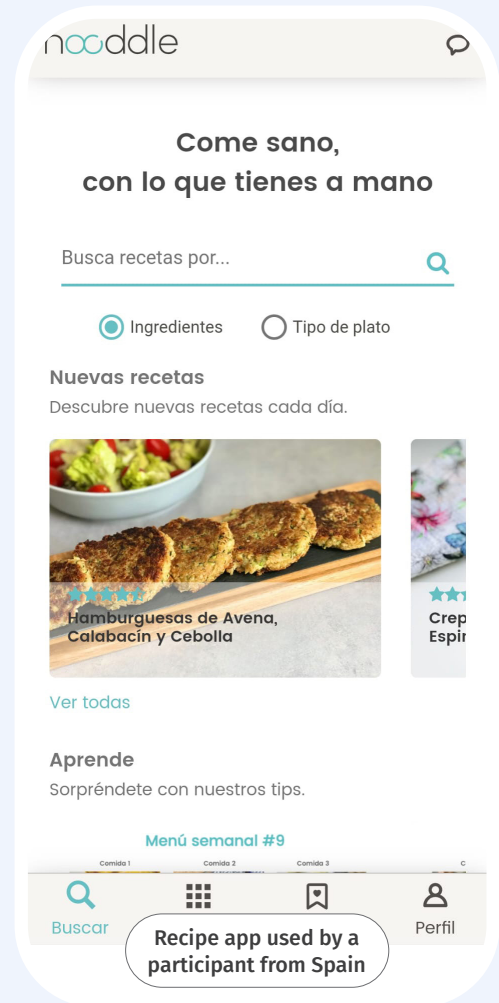
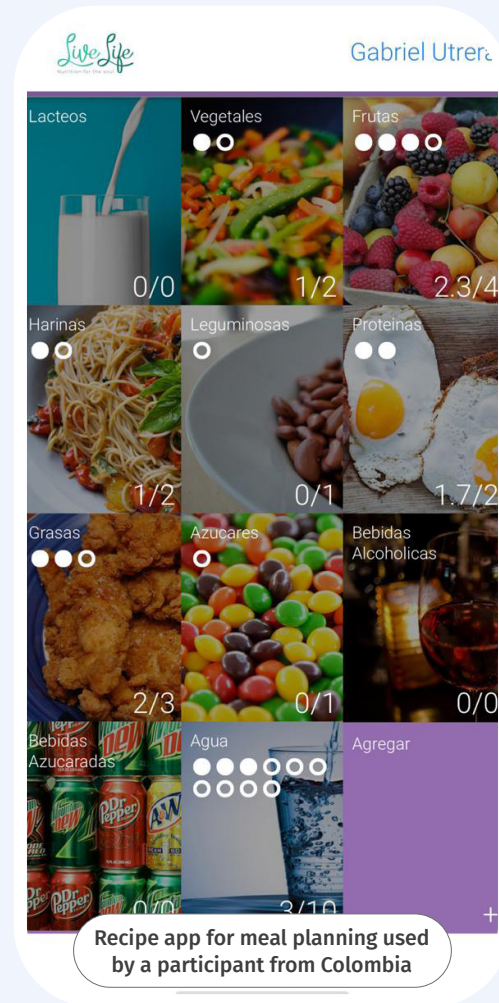
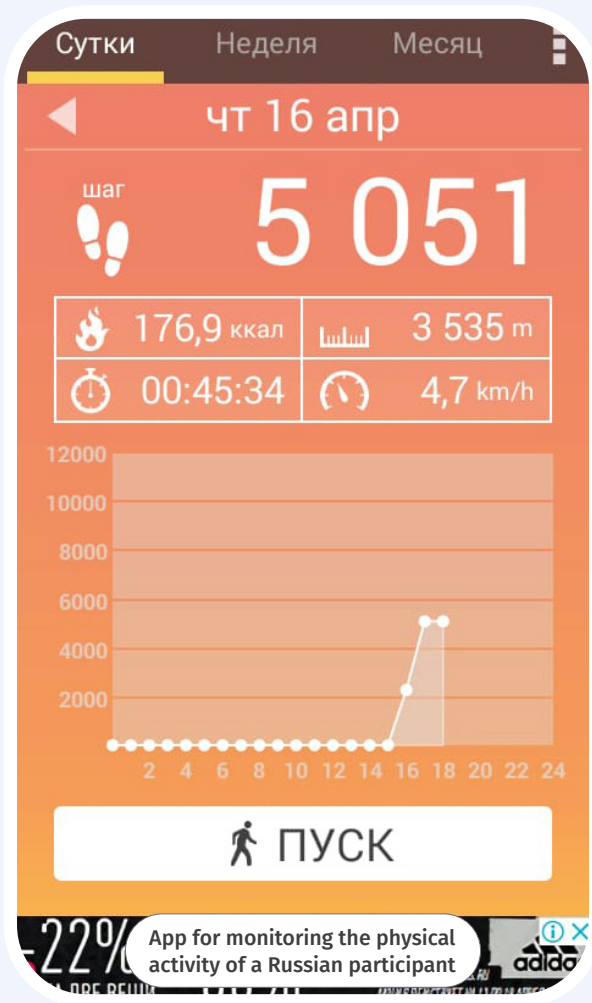
Last Week 3 hr 16 min

5 of 5 Days

Walk
Saturday at 6:19 pm
20 min 153 calories
107 avg bpm
80% Fat Burn

App for activity tracking used by a participant from the UK



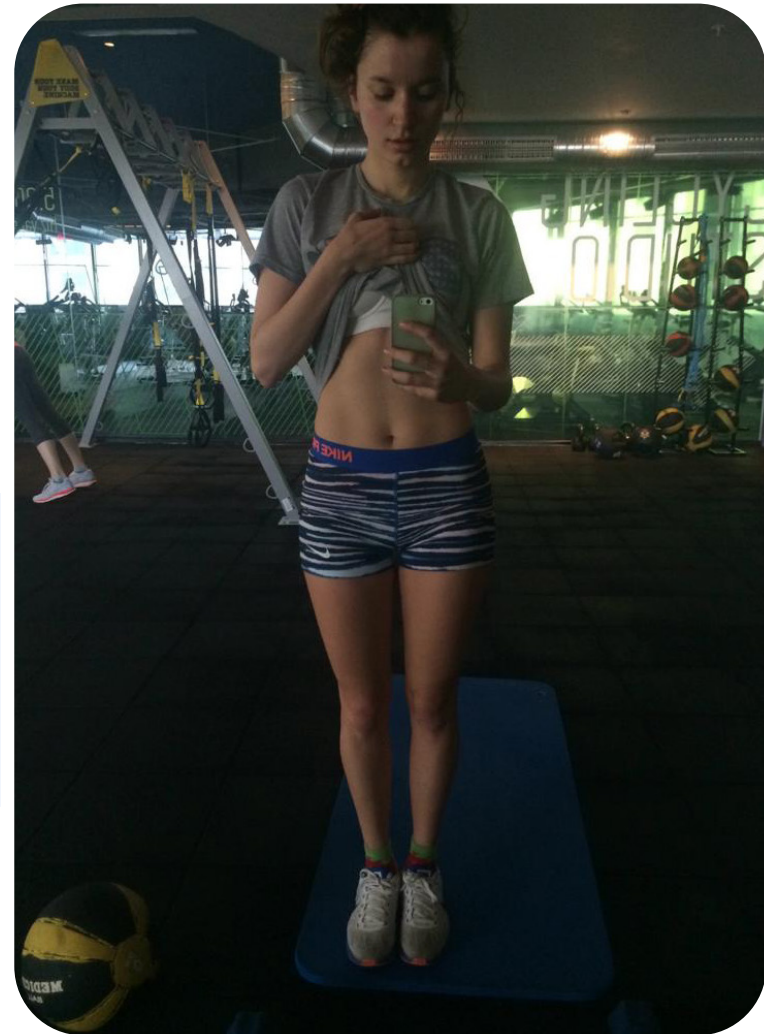


For many participants, counting the number of steps throughout a day provides good motivation to move more and sit less during the day. However, some participants mentioned they have stopped doing so as the limits on their movements during COVID-19 restrictions means they are disheartened by the reduced number of steps they are able to take.



"I haven't used my smartwatch for a while, because I don't want to see "70 steps" on the screen."

Irmak (30), TR



When it came to devices other than a smartphone for tracking activity, watches by Garmin were popular amongst participants in Singapore and Australia whilst Fitbit devices were particularly popular in the US, UK, Germany, Portugal and Spain.



"The Fitbit wasn't very expensive for what I wanted, it helps setting goals and motivating, it's a good device for monitoring and it connects with my smartphone."

Camila (25), PT





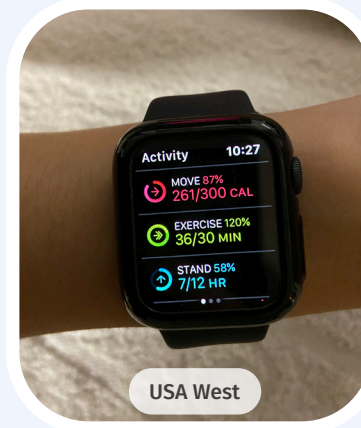
Singapore



Singapore



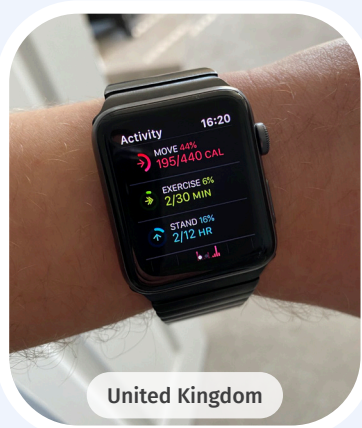
USA West



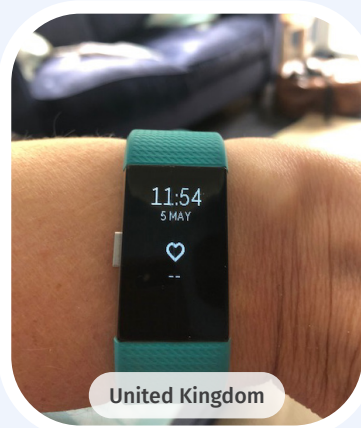
USA West



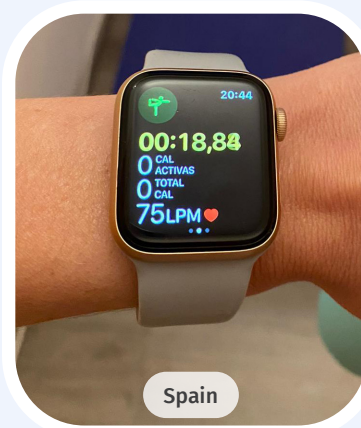
Portugal



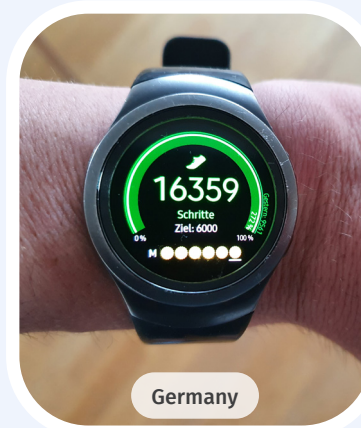
United Kingdom



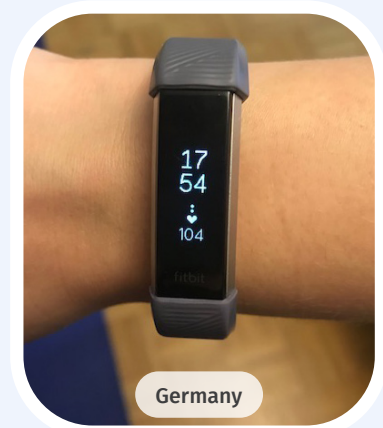
United Kingdom



Spain



Germany



Germany

A digital personal assistant could assist with achieving health goals

When exploring the potential role of digital assistants in achieving and maintaining health goals, participants expressed a preference for a technology that was able to view health holistically, rather than focus on a single aspect such as physical activity. The optimal implementation would connect across multiple devices and inputs and provide contextual, personalised observations and suggestions without being too intrusive.

"One to bring them all together would be great, but difficult to achieve. If they could feed into health section on your phone, and bathroom scales, it would be great!"

Kerry (47), UK



German, Turkish and Russian participants however mentioned their doubt about a digital assistant or device being able to track every person's individual health properly and providing reliable data.

"I don't think those devices are intelligent enough to track everything as good as we expect it, because every person is different. Those devices would need to be tested scientifically before I believe that they really give an added value."

Aleksandar (32), DE

"How will it work and how will know me? It needs to guess my routine to be smart and the data should be reliable."

Ömer (27), TR



Participants from the USA and Poland were more positive about the concept and emphasised the advantage and practicality of using only one device.

"I'd prefer to integrate a tool, we already have a lot of gadgets, it would be much easier to make a habit of using it if it was one device"

Bartosz (30), PL



"It's nice to have them altogether so you don't have to fumble around and then you can streamline the devices"

Kurt (47), US



Cultural difference seems to influence perceptions about COVID-19 contact tracing apps

Willingness to use a COVID-19 contact tracing app differed between countries, with trust in authorities and concerns about the management of personal data the main influences. Australia and Singapore were the only countries represented in this study where such an app is already in use, so for most participants this was a theoretical rather than practical discussion.

Generally, many participants were in favor of the concept of such an app and indicated a willingness to install and use it. However, doing so would be dependent on a clear understanding of what data is being collected, how and where it will be stored and who will have access to it. Given the perceived personal nature of the data such an app would collect, a certain level of trust in the local government was indicated as a necessary prerequisite.

There was strong support for such an app amongst participants from Finland, Italy, USA and Colombia



"I hope that the app will be safe to use and no problems regarding data privacy will occur. I feel that the app should be taken into use if needed."

Sanna (39), FI



Participants from Russia viewed the concept of such an app less favourably. Most participants were extremely resistant to the idea of their government "interfering" with their personal health information, expressing little trust in this kind of app.

Olga from Russia told us:

“If my friends started using this app – I'd have seriously reconsidered them being my friends”

Olga (34), RU



In Australia and Singapore, the app is already in use, but most participants were not convinced of its benefits, as the practical implementation of data collection is not considered realistic.

"It looks like the biggest waste of time. The person who has COVID 19 must have their phone on, with bluetooth on, and the app on to let people know if they come into contact with them. If there is an infected person, they would want to remain anonymous, so what is the point of the app?"

Chris (35), AU



This quote from Chris also highlights the importance of clearly communicating what data is being recorded and how and when it will be shared, as his interpretation of how the app will work does not align with the reality of how the app actually works.

CONCLUSION

Whilst technological health support is already embraced around the world, the pandemic seems to have made this ground even more fertile

Our findings demonstrate that technology has been instrumental in keeping most participants active during these recent difficult times, whether through features that allow them to compare their own performances, their performance with that of others or demonstrating how they can exercise in their home environment.

Assistant solutions to attain and maintain health and wellbeing that deliver a holistic perspective on one's health and integrate across multiple devices are most likely to succeed. Given that many participants also reflected on the importance of social interaction in maintaining motivation levels for activity and exercise, technology also has a role to play in connecting people who are not able to be in the same place but are exercising at the same time. Ultimately, any technology of this type needs to offer a personalised experience that is low maintenance in terms of manual data entry, is trustworthy and seamlessly integrates with an individual's existing devices and encourages without becoming annoying.



Implement video here

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