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ANALYSIS OF WELLNESS CONSUMER MARKET OF GENERATION Y IN ESTONIA

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INTRODUCTION

Wellness industry has grown into a 3.4 trillion dollars global business; Europe generated the revenue of 29.8 million dollars in 2013 (Reaney, 2014). There are more than 289 million wellness consumers worldwide (Spa Finder, 2014). Today wellness becomes part of lifestyle in different cultures: from Europe to Americas and Australia more and more people start to be conscious about their diet, exercising, getting closer to nature, doing yoga and getting massages (Reaney, 2014). As the awareness and popularity of wellness philosophy, products and services grow, new potential consumer markets emerge. These markets: their profiles, attitudes and needs should be researched.

Since 1950 when baby- boomers revived health clubs and fitness industry, wellness and spa leaders have had an affection with this generation (Hritz, Sidman, & D'Abundo, 2014). However as the time passes and the generation ages, wellness service providers have to recognize the fact that baby-boomers will gradually fade out and be subsituted by younger generations. The industry's focus slowly started shifting to Generation Y- young people currently in the age of 12-34. There are other solid reasons behind this: Generation Y also known as Echo Boomers are about three times the size of Generation X . Their sheer size has been estimated at approximately 1,8 billion people worlwide (Jang, Kim, & Bonn, 2011). Already now, while not being at the peak of their wealth they have high discretionary incomes- more than any other youth grouping in history (Morton, 2002). They love to spend rather than save, and thus they make a large direct contribution to national economies (Jang *et al.*, 2011). Moreover they influence the majority of family purchase decisions and have even greater indirect economic impact

(Morton, 2002; Taylor & Cosenza, 2002). Today, Gen Y represents the most powerful consumer group in history (Farris, 2002).

In their book “Understanding the global spa industry: spa management”, Bodeker and Cohen (2010) foresaw that Gen Y generation of wellness consumers will flood the industry. On one hand, they have been raised by wellness- obsessed baby-boomers embracing the proactive attitude to holistic well-being. So they have an open attitude toward wellness services and products. On the other hand, the great pressure that they have been experiencing in their everyday life is a strong motivator to turn to wellness (Moscardo & Beckendorff, 2010; Valentine & Powers, 2013). Due to a limited research it is unknown if the current supply of wellness services and products will meet the needs of this generation. One may argue that all generations have common concerns why they turn to wellness products- aging issues, stresses etc.; however, lifestyles and attitudes, and therefore marketing methods and channels differ (Rogriguez & MacLellan, 2013). Gen Y is regarded as a fun-loving, social, digital, experience-hungry and easily bored generation (Moscardo & Beckendorff, 2010). Apparently such characteristics should warn service providers that usual marketing strategies used with baby boomers and Generation X might not work with these very heterogeneous demanding consumers. Wellness services and products as these are currently marketed might need to be modified to appeal to this younger generation (Monteson & Singer, 2004).

To analyse Generation Y different variables can be applied. As stated by Smith and Puczkó (2014) demographic segments such as age, gender, income level, life stage, geography, religion or education are important in the analysis of profiles of wellness consumers. However, in the wellness industry more and more importance is given to psychographic segments such as lifestyle, values, occupation, personality and hobbies. Lifestyle segmentation method has been increasingly used in service management and tourism research and started to gain popularity in wellness consumer behaviour research. Research has shown that there is a strong link between the way people behave in their everyday life (e.g. commitment to wellness practices) and their choice of leisure activities (Sandy, Gosling, & Durant, 2013). This allows to investigate potential wellness markets by analysing their lifestyle patterns.

Located on the seaside, Estonia boasts a rapidly developing spa and wellness industry. However, there is an apparent theoretical gap in the research of the Generation Y wellness consumer market in Estonia: to the author's knowledge no research has been conducted on this topic so far. As Generation Y represents an important potential consumer group for the Estonian wellness industry, information about the attitudes and lifestyles of this group are essential for businesses. Therefore, this paper focuses on the analysis of wellness segments within Generation Y in Estonia. This paper attempts to be the first step on the way to understanding this unique potential market.

The aim of this paper is to analyse wellness consumer market of Generation Y in Estonia. The objectives are:

- To analyse the characteristics of Gen Y in the context of consumer behaviour
- To investigate the values and attitudes of Estonian Generation Y
- To investigate lifestyle characteristics of Generation Y in Estonia

In order to achieve the stated study objectives, online survey questionnaire was designed based on the review of academic literature on topics of wellness, wellness segmentation models and etc. The survey was distributed mainly via Facebook.com and e-mail. Total of 234 responses were collected. Due to the small sample size the results of this study cannot be generalised to the whole population of Generation Y in Estonia, but the study can be considered as a first step towards deeper understanding of this unique consumer group. Thus, from a theoretical perspective the paper aims to bridge the gap in the research on wellness profiles of Generation Y in Estonia. From the industry perspective, such information would assist in creating more effective marketing strategies to better communicate and build relationships with Generation Y. Understanding of consumer market would give businesses tools they need for future product development (Hritz *et al.*, 2014).

The structure of the paper is as follows: it starts from the literature review on the topic. This chapter discusses lifestyle segmentation, delineates the concept of wellness, and presents available wellness segmentation models. It includes theoretical discussion of Generation Y and its attitude to wellness. Chapter 2 describes the methods employed in the research as well as data collection process. It then presents the results of the study. The last chapter is devoted to Conclusions and suggestions for further research.

CHAPTER 1: WELLNESS SEGMENTATON OF GENERATION Y

The chapter presents theoretical background on the topic as follows: first, introduction to segmentation as a marketing tool is given. Also, some of the lifestyle segmentation models that give an overview of wellness consumers' profiles are presented. Then, the paper delineates the concept of wellness and discusses major research on wellness consumers. The paper finally proceeds to the analysis of Generation Y, and looks into common characteristics of the generation as well as their attitudes towards wellness lifestyle.

1.1 Lifestyle Segmentation as a Marketing Tool

Modern service industry experiences great pressure from changing consumer markets. Consumer profiles, needs and demands fluctuate, competition becomes fiercer, yesterday's product or service cannot satisfy today's experience- hungry, rapidly bored consumer. Marketing managers and service providers had to recognize the heterogeneity of consumers' wants and demands. If before service design and marketing was aimed at masses, now highly differentiated consumer markets need to be offered tailor-made services and products that reflect their personality. Consumers are attracted to products and services that allow them to express their identity, status or sense of belonging to a group (Saviolo & Marazza, 2012). This has led to a battery of studies aimed at supplying marketing information needs (Yaman & Shaw, 1998).

To design and market such services, researchers and businesses apply different segmentation methods that allow arranging heterogeneous consumers into smaller segments based on certain characteristics and/ or needs. Such groups are likely to exhibit similar purchasing behaviour. There are many alternative segmentation methods as consumer decisions are based on both rational and emotional factors which include demographics, geographies, benefits, motivations/needs, purchasing habits etc. (Weinstein, 2013). The lifestyle segmentation has been recognised as one of the popular and effective approaches. Classification of customers based on their lifestyle is proven to predict demands and purchasing behaviour within consumer segments (Lin, 2014).

There is no universal definition of lifestyle, but numerous researchers attempted to define the concept. One of the first studies on use of lifestyle as a segmentation tool was conducted by Havighurst and de Vries (1969). In this study, lifestyle was defined as a behavioural pattern that has a certain theme which represents and reflects a specific group to which these behaviours belong. Chaney's definition (1996) echoed that of Havingurst and de Vris viewing lifestyle as a behavioural pattern that assists in distinguishing interpersonal differences, revealing why people do certain things. Kaynak and Kara (2001) connected lifestyle with consumer behaviour by defining lifestyle as the life pattern of individuals which describes how they use their time and money. These definitions imply that being a group phenomenon lifestyle in itself is a segmentation method which not only gives basic demographic information, but allows deep understanding of people's behaviour, values and attitudes. These characteristics comprise most of general lifestyle scales. The use of the lifestyle variable provides understanding of customers by looking at their activities, interests and opinions (Lin, 2014).

For the above reasons lifestyle segmentation became widely accepted in marketing and service management (Wedel, 2000). Kucukemiroglu, Harcar, and Spillan (2006) advocated lifestyle segmentation as a tool that could be used to identify the consumer market segments in service industry, because lifestyle dimensions have a direct effect on consumer behaviours. Other studies also showed that lifestyle variables can provide more effective marketing information about customers compared to demographic or socio-economic variables (Sandy *et al.*, 2013; Kahle & Valette- Florence, 2012; McCarty & Hastak, 2007). Saviolo and Marazza (2012) presented how brands build successful marketing techniques and strong intimate relationships with customers employing knowledge collected through lifestyle segmentation. The major limitation of lifestyle segmentation is that it is too narrow and lacks specific theoretical discussion, especially when echoing the concept of a leisure life (Stebbins, 2007).

Thus lifestyle segmentation can provide a deep insight into consumer behaviour which however can be narrow when used alone. Nevertheless, if supplemented with other appropriate information, lifestyle segmentation proves to be an invaluable resource of knowledge on diverse consumer markets.

1.2 Delineation of Wellness. Wellness Segmentation Models

It is not the main focus of this paper to elaborate on the topic of wellness. However given the ongoing debate about what wellness is, the author considers it important to define the term.

Wellness has become a popular term in many sectors of business and life such as nutrition and food products and supplements, fitness, spa and tourism and even human resources management and etc. There are a growing number of consumers who are willing to pay for the products and services that carry the label of wellness. Meanwhile other consumer segments may treat these products and services as brainwashing. Such attitude is mostly due to a vague definition of the term (Summit, 2010).

Being so widely used, it still remains unclear to the public what exactly the term wellness encompasses. There is already the word "health". Why would we need another term "wellness" and what does the term embrace?

Before proceeding with the definition of wellness, it is worth having a glance at the definition of health. In 1948 the World Health Organization produced a revised definition of health (Callahan, 1973). They defined health as not only a physical condition, but as a state of an integrated physical, mental and social well-being. According to this definition, "Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity". Nevertheless, while drawing up a more holistic understanding of health, this definition brought in more confusion of what the differences are between health and wellness. The differences become more obvious after looking at the themes that occur in various definitions of wellness.

As to definition of wellness, academia and industry recognized the necessity of defining the term since the emergence of it. Starting from Dunn (1959) who was the first to introduce the idea of wellness, there have been various attempts to define it. Dunn described it as “a special state of health comprising an overall sense of wellbeing which sees man as consisting of body, spirit, and mind and being dependent on his environment”. This definition underlines the core elements of wellness which are health and well- being. However Dunn went further than simply considering physical aspect of health and emphasized the importance of spirit and mind in the overall well- being of a person. The definition was a milestone in wellness industry; however, it is imperfect as it does not reflect the ways- activities or practices that could contribute to the balance of body, mind and spirit.

Four decades later, with accumulation of knowledge about wellness, Mueller and Kaufmann (2001) attempted to derive a more comprehensive definition by combining the understanding of wellness in North-America and in Europe. They suggested that wellness is a state of health featuring the harmony of the body, mind, and spirit, self-responsibility, physical fitness, beauty care, healthy nutrition, relaxation, meditation, mental activity, education, environmental sensitivity, and social contacts as fundamental elements. This definition follows that of Dunn featuring more specific examples of the aspects and practices that lead to the special state known as wellness. Unfortunately this definition reminds more a long list of wellness elements rather than defining the concept itself.

It is apparent that the term of wellness currently is very broad and elusive. Thus customers, industry leaders and general population might have differences in understanding what aspects, services and products constitute wellness. However several common themes occur in the various definitions of wellness (SRI, I., 2010):

- *Wellness is multi-dimensional.*
- *Wellness is holistic.*

- *Wellness changes over time and along a continuum.*
- *Wellness is individual, but also influenced by the environment.*
- *Wellness is a self- responsibility*

These points reflect the distinctive philosophy of wellness and explain how different it is from the reactive concept of health. There are various models that describe the wellness domains. One of the most recognized is the Wellness Wheel variations of which distinguish between 6- 7 or more wellness domains: physical, emotional, occupational, spiritual, intellectual, social and environmental (Miller & Foster, 2010). These domains should be worked on and balanced at every moment of one's life and in totality create a holistic state of wellness. Thus, wellness is holistic and comprises every aspect of person's individual life as well as the environment that the person lives in. This idea pinpoints the connection of one's life to the nature and community around. Health considers only the mental, physical and social condition of an individual not recognizing how the environment influences wellbeing of this individual. The idea of wellness continuum makes it a journey and a continuous effort to balance all the aspects of one's life. On the contrary, health is regarded as a fixed condition at a point of time- either you are sick or you are healthy. Very important distinction is a self- responsibility that is present in the wellness philosophy and not emphasized in the definition of health.

It is important to recognize that the concept of wellness is overused and misused these days. There is a wide range of products and services carrying the label of wellness some of which actually help one to promote personal wellness, but many just exploit the word due to its popularity and the effect on certain customer segments. Hence, wellness label on a product starts to raise suspicion and often becomes associated with an unreasonable supplement in the cost and no scientifically proven benefit. Customers become more cautious of the term and whenever they find no strong evidence for the claim of being beneficial to one's wellness, this adds to the common criticism of wellness being a vague term or even just one more buzzword. Another point that must be mentioned with regards to the wellness philosophy is that it is idealistic to a point of naivety as it is almost impossible to keep all the domains of personal wellness balanced at every moment of a life-span. Added to this some domains are out of one's control: e.g.

environmental or occupational. Hence for some core consumers it can even be frustrating instead of motivating. Thus it is important for the wellness industry to define the term clearly, state the scope of products and services that actually enhance one's wellness, create a uniform measurement system and indicators that specify the degree of wellness, create a reliable wellness products and services certification system and etc. Such and other similar systematic actions will eventually build up trust and recognition from customers.

A research by SRI International (2010) addressed the elusiveness of the concept by investigating opinions of industry and consumers on wellness and suggesting positioning of wellness products and services on the market. The findings revealed that industry and consumers define wellness in similar ways, and the following words and phrases were often mentioned: quality of life, physical fitness, happiness, balance, relaxation, emotional balance, stress reduction, and spa. However, consumers ranked mental and medical health among the top ten terms associated with wellness, whereas the industry members used holistic and spiritual health most often.

The results showed that consumers regard exercise, eating better and visiting a spa as the activities that enhance their wellness (SRI, I., 2010). Consumers also emphasized taking a holiday, vacation or retreat as important wellness activities. Thus, according to the research consumers' understanding of wellness includes nutrition, fitness and spas as primary constituents.

The changing demographics influence wellness industry in a way of what, how, and why customers consume. There is very little academic research on wellness consumer market. However data can be extracted from the reports and segmentation models presented by research companies such as Hartman Group and Natural Marketing Institute (NMI) or similar. Such data have to be treated with caution as these have not been reviewed by other academics and the method and data collection processes are not presented to the public. The other challenge is that the research publicly available is mostly based on American consumer market and therefore may not necessarily reflect trends or segments within Estonian Generation Y. However, the available segmentation models give one an example of criteria on which segmentation is built as well as proportions of consumer segments.

Hartman Group specialises on organic food consumption. Unfortunately to date they have not presented data regarding wellness consumer behaviour of Generation Y specifically. This is due to the reason that the young cohort has only started to attract the attention of researchers and industry. However, Hartman Group, Inc. (2014) produced a report which shows evolution of food consumption towards more wellness and organic over the period of time from Silent generation and Baby boomers to today's Generation Y. Following the model presented in the report, understanding of wellness has changed across generations. The dominant wellness mode of the past is characterised as perfunctory and is associated with reactive attitude to already existing illnesses, medicinal treatments, crises, quick- fix. For previous generations wellness activities were something customers felt that they “have to do” and perceived as “boring”. Today's young consumer views wellness as a positive notion and takes a proactive attitude towards long-term well-being. Wellness is more associated with indulgence, experience and fun. Young people perceive wellness to be about vitality and taking care of one's well-being. It is about preventing illnesses rather than treating existing ones (Hartman Group, Inc., 2014).

Hartman Group's comparative research (2014) conducted on American consumers in 2007 and 2010 revealed that *emotional wellness* is becoming the paramount motivation compared to “not being ill” that was the number one concern for the majority of consumers in 2007. The study reveals trends among American wellness consumers and one can only assume the applicability of these findings to Estonian younger consumers. It can be argued that whereas the older generation of Estonians experienced Soviet influence on medicine and public life, younger generation turns back to the Nordic way of living- running, cycling, skiing, visiting saunas and spas, and consuming organic food is a growing trend. Thus one can infer that the shift towards holistic understanding of wellness presented in Hartman’s report does exist among Estonian consumers as well.

The report by Hartman Group (2014) also presents segmentation of consumer market according to the degree of involvement in wellness lifestyle. According to this type of segmentation there are three types of consumers: core, mid-level and periphery. Core consumers are most committed to wellness- these are early adopters and trendsetters, whereas periphery consumers are least involved. Mid-level represent the majority of consumers who are not as involved as core type, but exhibit some features and behaviours of core consumers. The results show that currently in the US there are 13 percent of core consumers, 62 of mid-level and 25 per cent of periphery ones. The figures definitely vary across the countries, but these figures give the idea of proportions- the majority are mid-level consumers that are interested in wellness products, but not fully involved in the lifestyle. The three segments represent important markets for wellness industry, but need different marketing approach and may have different motives and attitudes to wellness products and services.

Another research company that has been focusing on American organic and wellness market is Natural Marketing Institute (NMI). NMI's segmentation research revealed several segments of wellness market (Nielsen Collaboration Health and Wellness, 2014). Compared to the segmentation offered by Hartman's Group this one is more precise and presents attributes of each segment. According to the model, there are 5 consumer segments:

- Well beings (17%): these are the most organic, green, health- proactive consumers, market leaders and trend-setters
- Food actives (15%): mainstream healthy, most influenced by physicians, price-sensitive
- Magic Bullets (23%): conveniently healthy, heavy use of pills, weight managers, least likely to exercise, health managers vs. Preventers.
- Fence sitters (20%): these are described as "wannabe healthy", most likely to have kids, stressed out, seeking help and control. These consumers have more

health kicks, but have no clear goals, active weight loss, and high use of social media.

- Eat, Drink and be Marrys (25%): Least health active, unconcerned about prevention, most price- driven.

Following the above the characteristics, the most segments attractive for the wellness industry are well beings and fence sitters. “Well-beings” segment is equivalent to the LOHAS consumer identified in segmentation model of sustainable consumption by Natural Marketing Institute. The abbreviation of LOHAS stands for Lifestyles of Health and Sustainability. These are environmentally and wellness conscious consumers- the segment estimated at 16 per cent in the US in 2006 (Nielsen Collaboration Health and Wellness, 2014; French, & Rogers, 2010).

Another lifestyle research by NMI revealed several categories across all generations. The research was aimed specifically at Healthy Aging (18+) market. While the previous wellness lifestyle segmentation model described the lifestyle and consumer behavior of the segments, this model is focused on values and motivations of wellness segments. According to this research, there are several segments of healthy aging consumers:

- Traditionalists: Belief- Home, health, and happiness are the markers of a life well-lived; Lifestyle factors- Maintaining brain health, Preventing disease, Relationships, especially with doctor.

- Help Seekers: Belief- Life is a challenge; but proper direction and guidance can turn challenges into opportunities; Lifestyle factors- Desire energy, Financial health, Stress relief would improve quality of life

- Que Sera, Seras: Life is a challenge; but proper direction and guidance can turn challenges into opportunities; Lifestyle factors- Important to have enough money to live on, Basic necessities.

- Balancers: Belief-Stay centred and keep all aspects of life balanced, Lifestyle factors-Balancing home and work, Eating nutritiously, Leisure time is important, Environmentally-oriented, Exercisers.
- Active agers: Belief- Live a good life by maintaining a positive attitude and staying healthy and active; Lifestyle factors-Relationships with family/friends, Vacations and travel, Good support system, Exercisers.
- First adopters: Belief- Stay current; seek out new solutions to stay at the top of your game; Lifestyle factors-Having a rewarding job, Experimental, Maintaining weight, Having money to retire.

Following the values, characteristics and lifestyle factors, one can conclude that the segments that are most attracted to wellness lifestyle are help seekers, balancers, active agers and first adopters. However as highlighted in the model they have different needs, motivations and expectations of wellness services and products.

Among various segmentation models, NMI produced a segmentation model for baby boomers. Unfortunately, there is no data available on health and wellness segments of Generation Y consumers. This paper attempts to bridge the gap by revealing wellness segments of Estonian Generation Y.

1.3 Generation Theory

Lifestyle is an important, but not the only determinant of purchasing behaviour. The data extracted through lifestyle segmentation have to be supplemented with the analysis of other dimensions and factors that influence consumer markets. This allows a more holistic analysis of customer profiles and attitudes. One of such factors is belonging to a certain generation.

Generation theory seeks to characterize and understand groups of people referred to as cohorts by classifying them into categories objectively determined by their year of birth. Thus the approach does not focus on individual characteristics and differences, but rather broadly suggests common features (Leask, Fyall, & Barron,2013).

Though being a useful research tool, generational theory brings with it certain challenges. For example, there is no consensus regarding the exact dates attributed to a generation. This can influence figures and statistics related to categorization as well as an outcome of a research (Leask *et al.*, 2013). This paper therefore refers to the common framework that considers a threshold of 20- 22 years for each generation. The table below presents an overview of living generations as of 2014 (Moscardo & Benckendorf, 2010):

1901–1924 Greatest Generation 90–113
1925–1942 Silent Generation 72–89
1943–1960 Baby Boomer 54–71
1961–1981 Generation X 32–53
1982–2002 Generation Y 12–32
2003 Generation Z 11 or younger

Generation Y (also known as Gen Y, Millenials, Echo boomers, Net Generation, Nexters, Nintendo Generation) is considered as a next big generation that has enormous power to transform every aspect of life just as their parents- Baby Boomers- did. For business, it has already become a profitable market of 80 million members with 600 billion dollars spent annually only in the US (Farris, Chong, & Dunning, 2002). Hence, it is a very lucrative segment for marketers that can turn into lifelong customers. However, this market has very different and special needs that have to be researched. These new demanding customers will not accept product- focused commercials that proved effective with baby boomers. The generation also have highly developed ability to identify hype and rely mostly not on what marketers say, but what their peers choose (Hughes, 2008). These are only a couple of instances on how this market is different and why it has to be researched and analysed separately. Neglecting to invest into understanding this segment would mean for businesses to lose a huge opportunity. Thus, only a business that knows and considers the needs of this segment can satisfy them and turn into loyal customers.

Generation Y has been receiving increasing attention in academic literature; however, the studies are almost exclusively limited to the US population. In contrast with other age-related market segments (i.e. seniors' tourism), surprisingly little research has been conducted on characteristics and consumer behaviour of Generation Y in service industry. To researcher's knowledge no studies have been carried out in the context of Estonian wellness consumer market to date. The results that are available show that there have been many misconceptions about the generation based on anecdotal evidences and contradictory claims (Moscardo & Benckendorf, 2010).

There is a further sub- categorization of Generation Y: Generation Why (born between 1982 and 1985); Millennials (MilGens; born between 1985 and 1999); and iGeneration (born between 1999 and 2002). Apparently, as members of the Generation Why directly follow X Generation, they share some common traits with that generation. Similarly, members of the iGeneration that overlaps with the Z generation are likely to display some of the traits typical for that generation. Millennials are the central band of the Y-Generation cohort, hence are likely to represent the patterns of that generation most compellingly (Moscardo & Benckendorf, 2010). Therefore, this research will focus on the category of young Estonians in the age of 18-30.

Howe and Strauss (2007) has attributed seven features common for Gen Y:

1. Special.
2. Sheltered.
3. Confident.
4. Team-oriented.
5. Conventional.
6. Pressured.
7. Achieving.

These characteristics were repeated in works of other theorists (Moscardo & Benckendorf, 2010). For instance, Pendergast (2010) describe Gen Y as the hero generation: they are conventional and committed, with respect for authority and civic pride. Y-Generation members are team-oriented, have a focus on how they feel and experience events. Theorists in the field such as Howe and Strauss (2007), and Huntley

(2006) consistently describe the generation as focused on brands, friends, fun and digital culture. The young heroes are confident and relaxed, conservative and the most educated generation ever. They have been «sheltered» or overprotected, but have had high expectations placed on them. They are multitaskers who are networked rather than individually focused. So they are strongly influenced by friends and peers (Moscardo & Benckendorf, 2010).

All the traits discussed above are due to the social, economic, political circumstances that the generation has been exposed to during the formation years as well as the attitude to upbringing adopted by the parent generation (Leask *et al*., 2013). This is the major argument that supports generation theory: such factors shape common perceptions and values within generations. Nevertheless, one should consider that these factors are not uniform across the cultures and geographical locations. A cross- cultural study by Corvi, Bigi, & Ng (2007) pinpointed differences in the events and social circumstances between European and American members of Gen Y. The results show that such differences led to significant differences in values and characteristics between generation members of the two continents. For instance, formation of European Union could have led to the new vision of world without borders, whereas 9/11 made notion of safety a paramount concern. Moreover, even same events may be perceived differently and have a different influence on representatives of the same generation from various cultures.

Looking at the features mentioned by theorists, one may get an impression of unanimity in the description of Generation Y. In fact the results of researches are often contradictory. It is not uncommon to see anecdotal evidences to be used to support contradictory conclusions and misinterpretations. While some claim that Gen Y aims to achieve- work- family balance and that they work to live (Howe & Strauss, 2003; Eisner, 2005; Lyons, & Kuron, 2014; Corvi *et al.*, 2007), others label them as overachievers ready to sacrifice their personal lives for career (Jorgensen, 2003). Being described as self- focused and individualistic they are also social, interactive and collaborative (Lyons *et al.*, 2014; Moscardo & Benckendorf, 2010).

Further complexity is brought by the possibility of existence of further subgroups within the Generation Y cohort. Little information is available on subgroups within Generation Y, but Benezra (1995) mention the following subgroups within the cohort : (1) Yup & Comers, the 28 percent who have the highest levels of income and education and the brightest future; (2) Bystanders, the 37 percent- mostly female minority members, have the lowest disposable income; (3) Playboys, the 19 percent who are predominately single males and are characterized as self-absorbed, fun- loving, impulsive, and living on the edge; and (4) Drifters, the 16 percent who are closest to the Gen-X stereotype and are the least educated. They seek security and status. This categorisation illustrates scattered findings about this generation that might be true in the context of a study, but may be inapplicable on a larger international scale.

It is obvious that the generation is heterogeneous and has to be analysed using additional segmentation models. However there are key common themes that are traced across the studies. Donnison (2007) identified three of these:

1. Digital media use, especially for entertainment, social networking and creative endeavours.
2. It has positive attitudes towards diversity, flexibility, social issues and its own future.
3. It has an orientation towards family and social groups.

These themes influence behaviour especially consumption. Generated by globalisation processes, digital era and pop-culture, the themes may prove to be applicable to cultures other than North American.

Unfortunately, there is no solid research on profiles of Generation Y wellness consumers. Since baby boomers revived health club industry, health and wellness leaders have had a love affair with this group (Hritz *et al*., 2014). Also very little relevant data can be extracted from research on consumer behaviour of Generation Y. However, Reyes (2011) presented the results of focus group with members of Generation Y: the group views themselves as socially conscious; they seek open and honest, quick and efficient communication; and have an inherent desire for health and happiness. Also, this group is more concerned with their overall health and wellness. Members of Generation Y do not look for quick ways to fix emergency health problems they read about on blogs, but rather seek advice about more holistic approaches to healthy living.

Hritz *et al*. (2014) suggest that Generation Y has been exposed to healthy initiatives in curriculum and facilities offered by school and higher education institutions. Physical activities, subjects on healthy nutrition, socialization all serve as a fundament for overall health and wellness. The researchers assume that Generation Y members carry on these wellness messages into the adulthood. This may influence their overall lifestyle and attitude to wellness.

Williams and Page (2011) describe Generation Y as ambitious, demanding, with core values of optimism, confidence, and achievement. They are determined to live their best lives now putting the meaning of being happy, predictable, and healthy in it as tomorrow may not happen. They want a work-life blend. According to Lu, Bock, and Joseph (2013), some studies have described Generation Y as the most environmentally conscious. Studies have also shown that educated Generation Y consumers are increasingly worried about the long-term effects of products on their health, community, and environment.

Some useful findings were presented by Valentine and Powers (2013). This study revealed three major groups within this generation: Experiencers, Strivers and Achievers. Experiencers' major consumer motivation is experience, while Strivers and Achievers are status- driven. The results are congruent with the common features attributed to generation Y: experience- hungry, goal- oriented and ambitious. These motivations may be relevant to the consumption of wellness products and services.

Hritz *et al.* (2014) conducted a study on college- educated Generation Y wellness travellers in the US. They identified 5 segments:

- Escapers- reported a mixture of perceived wellness: They feel relatively psychologically, spiritually, intellectually and emotionally well; however, they don’t feel socially or physically well. They feel the most physically unwell as compared to the other groups. Their primary motivation for travel is to escape the routine. They are more likely to travel alone than others. Men are more likely to travel for escape than in any other segment.

- After Hours: although feeling spiritually healthy and somewhat physically well, this group did not sense psychological, intellectual, emotional, or social wellness. Although they perceive themselves to be physically well, they are the least likely to engage in physical or outdoor activities compared to the other groups. The group is also least likely to travel and seek new experiences, or go to escape, purposely seek friends and/or family to travel with, or seek out familiar types of amenities (such as a beach/waterfront area) when they travel. This group is mostly interested in nightlife while on travel. Women were more likely to be a part of this group than others.
- Amenity seekers: One of the largest groups. Reported relatively higher levels of overall perceived wellness. In particular, they perceived greater social wellness than the other groups. Amenity seekers look for satisfaction from their travel destination based on external attributes, rather than looking at internal motivations. They search outdoor activities, tours, shopping opportunities, and familiar or standard types of amenities such as a fitness centre and clean and comfortable facilities.
- Most Unwell: the least well group with an overall perceived wellness score lower than any other group. This group was more significantly characterized by internal motivations: to be physically active, playing sports, trying new things, and being with others. Hritz *et al.* (2014) assumed that the group seek physical activity in their travel experiences and look to others for inspiration and participation companions a lot because they feel unhealthy and are aware of it. Characteristic of the Gen Y population, their strong motivation is socialization: they want to be with friends and family while they travel and pursue new experiences as well such as meeting new people or having adventures.
- Most well: The second largest group. The members perceived the highest level of wellness overall compared to the other groups. These individuals were more motivated by spending time with others and trying new things. They enjoy meeting new people, learning new things and seek adventure.

The conclusion presented by the study highlighted that amenity seekers- who perceived well in all dimensions- do not differ significantly from today's wellness traveller. They appreciate restaurants with healthy menu options, clean accommodation, as well as quality of natural resources. They enjoy saunas, beach and want to visit health club or gym during their stay. This study also had results contradictory to common perception of Generation Y- socialization was not an important motivating factor for two of the groups. However this proved to be a major motivation for the three other groups.

While these features characterise American adolescents, they will differ for generations brought up in different political and socio-cultural, historical and linguistic surrounding and geographical location (Ng, Schweitzer, & Lyons, 2010). We may assume that digital era, pop culture and globalization have spread some of the features among other nations. Yet we shall expect a significant discrepancy when applying the concept of generation Y in the analysis of the Estonian population.

2. A RESEARCH CONTRIBUTION: THE ANALYSIS OF LIFESTYLE AND ATTITUDE TO WELLNESS OF ESTONIAN GENERATION Y

2.1 Research strategy

As was mentioned earlier in the paper, there are no direct studies on wellness profiles of young Estonian people. Most of the research was done on the US consumer market. To get understanding of how similar or different Estonian Generation Y is from North American young health and wellness consumers the researcher decided to take a broader approach and investigate Generation Y from the perspective of culture.

Hofstede's cultural research offers a quantitative measurement of dimensions for individual country supplied by a qualitative description of the individual culture (Hofstede, 2001). The researcher used the information about Estonian culture to draw conclusions regarding the influence this culture has on lifestyle and attitude to wellness among young Estonian people (Hofstede Center, 2014; Huettinger, 2008). It should be noted that this model is based on the data obtained from previous generations (Baby Boomers, Generation X). Thus the results may not prove the same in the case of Generation Y.

According to the model, Estonia scores low on the dimension of *Power Distance* (40) which means that Estonian people do not readily obey and respect those in higher positions based merely on their rank and status. This is especially true in the case of younger members of Generation Y who were born in Estonia as a democratic country.

Estonia is an individualistic country. It scores 60 on the dimension of *Individualism vs. Collectivism*, which means that the degree of individualism is quite high. Estonians emphasize personal responsibility, and own achievement in order to be self- fulfilled.

The virtues of this culture are transparency and honesty. This is characteristic for a culture with a loosely knit social framework.

Estonian culture is *Feminine* which means that Estonians' main values are caring for others and importantly for wellness industry and quality of life. Feminine culture is naturally more attracted to wellness lifestyle. They are quite modest and fair. Estonians do not boast of their accomplishments, and prefer the results to speak for themselves. Being straightforward, they however shy away from conflicts. The new generation is informal and democratic.

Estonia has a high preference for *avoiding Uncertainty*: this culture maintains rigid codes of belief and behavior and does not tolerate unorthodox behavior and ideas. Estonians have an emotional need for rules, they value time. They are hard-workers and have an inner urge to be busy. Innovation may be resisted and security is an important element in individual motivation.

Estonian culture is highly *Pragmatic.* This means the culture can easily adapt to changed conditions. There is a strong propensity to save and invest, thriftiness, and perseverance in achieving results.

One more dimension of Estonian culture relevant for the wellness industry is their attitude to *Indulgence.* Estonia scores very low on this dimension- at 16 points only. The culture is described as restrained by Hofstede's model. Such culture has a tendency to cynicism and pessimism. Restrained societies do not put much emphasis on leisure time and control the gratification of their desires. People with this orientation have the perception that their actions are restrained by social norms and feel that indulging themselves is somewhat wrong. Thus there might be a danger that Estonians may perceive wellness products and services as a wasteful luxury and indulgence.

Below is the chart that categorises the characteristics of Estonians described in the above analysis according to wellness domains:

Table 1. The analysis of wellness domains of Estonian Gen Y based on Hofstede's cultural framework.

Wellness domain	Characteristics of Estonian population
Physical wellness	No information was extracted from the cultural analysis
Emotional wellness	Straightforward, however shy away from conflicts. Society maintains rigid codes of belief and behaviour and does not tolerate unorthodox behaviour and ideas. Need for security; cynicism and pessimism; avoid indulgence and gratification of own desires. Modest and fair, restrained and reserved. Can easily adapt to changed conditions.
Mental -Intellectual wellness	Personal responsibility. Society maintains rigid codes of belief and behaviour, and does not tolerate unorthodox behaviour and ideas, hence maybe resistant to innovation. Need for rules, value time. Propensity to save and invest, thriftiness, and perseverance in achieving results.
Occupational wellness	Own achievement in order to be self- fulfilled; do not boast of their accomplishments, and prefer the results to speak for themselves. Hard-workers and have an inner urge to be busy. Do not readily obey those higher in rank. Democratic.
Spiritual	As a highly pragmatic nation Estonians can easily adapt to changed conditions. Such type of cultures is usually not very religious.
Environmental wellness	Values are caring for others and quality of life, caring about environment
Social wellness	Reserved, individualistic, democratic, loosely knit social framework, transparency and honesty, informal. Direct communicators- say what they mean and mean what they say. Limited time for a small talk. Have perception that their actions are restrained by social norms.

Following the above analysis one can conclude that this culture definitely prioritizes wellness and quality of life. They are open to new ideas and changes, however, they need to feel safe. Estonians are hard- workers with limited time for themselves, and like to invest and save. They are also restrained.. All these features make Estonians a challenging market for the wellness industry. They are potential consumers, but may not readily accept wellness in its current form- they might regard certain wellness products and services as ones with limited scientifically proven effect. Thus to gain the trust of these consumers might be a challenge for the wellness industry.

The research design of a study is defined by the purpose of accomplishing the aim and objectives of the study. The aim of this research is to analyse wellness consumer market of Generation Y in Estonia. The objectives are:

- To analyse the characteristics of Gen Y in the context of consumer behaviour
- To investigate the values and attitudes of Estonian Generation Y
- To investigate lifestyle characteristics of Generation Y in Estonia

In this research questionnaire survey has been employed as the data collection method. This is the most popular and efficient way of collecting quantitative data (Creswell, 2009; Groves, Fowler, Couper, Lepkowski, Singer, & Tourangeau, 2013). The main reason why the researcher has decided to employ this method is as follows: questionnaire surveys are regarded as effective in lifestyle segmentation. A survey is considered as an appropriate method to evaluate people's attitudes, perceptions and motivations (Bulmer, 2004). This method allows covering larger populations and is suggested to be less biased and intrusive compared to other quantitative methods. It assures anonymity of respondents, and is also a cheaper and quicker instrument (Bowling, 2009; Roscoe, 2009; Vyncke, 2002).

In general, lifestyle research is based on extensive surveys using appropriate quantitative methods (Vyncke 2002). One of the most popular examples is AIO scale which measures activities, interests, opinions. Other scales are List of Values and Rokeach Value Survey that evaluate lifestyle based on values. These scales are broadly used in marketing and consumer behavior research as well as leisure and tourism studies. For example, AIO scale was used by Konu to identify potential wellbeing tourist segments in Finland (Konu, 2010). Quantitative data were collected by self-administered electronic questionnaires and analysed by using cluster- factor method. Another study by Hritz employed questionnaires to identify health and wellness traveller segments among college-educated Generation Y (Hritz *et al*., 2014). In this research, quantitative data obtained were analysed by using K-means clustering method. One of the limitations is that a questionnaire normally has to be kept short and it positions a challenge to a researcher when designing questions. It often happens that the data collected is superficial. The researcher does not have the possibility to follow up in case a subject did not fully answer the questionnaire. Another important limitation is that there is a certain level of researcher's imposition, as the researcher creates and determines the questions and the options, and decides on what is important and what is not. Thus the questions and options may not reflect how the respondents feel about the subject, but only represent the researcher's opinion. It can even be designed as the closest match to a preconceived hypothesis. Besides, participants may not always be honest and there is no way to avoid this possibility (Bulmer, 2004; Feinberg, Kinnear, & Taylor, 2012). The last drawback is that participants may understand same questions in different ways or be confused by statements or options. Therefore, measures such as testing and piloting have been taken to increase validity of the results.

The researcher also considered other methods of data collection such as interviews and focus groups. Focus group is an exploratory research technique that is very useful in developing a research hypothesis or stating a problem and it is invaluable as an additional tool in marketing research. However, it is not traditionally employed as the only tool in conclusive segmentation research. In order to collect necessary segmentation quantitative data a structured data collection technique such as structured interviews has to be employed. These are time- consuming and may be perceived as inconvenient by respondents. There is also a possibility of introducing a bias by bringing in interaction between an interviewer and a respondent. One more drawback is that it does not assure anonymity of a respondent and increases the percentage of a socially desirable answer (Feinberg *et al.*, 2012). Based on these concerns, an internet-based questionnaire was chosen as the most convenient, flexible and effective method of data collection.

This research was fully conducted on the web: the questionnaire survey was web- based (it was created on surveymonkey.com) and it was spread via social networking website- Facebook.com as well as e-mail. The choice of a web- based research method and tool has been determined by the efficiency it offers compared to traditional telephone or mail interviews. Further to all the benefits of questionnaire surveys mentioned above, online questionnaire surveys increase respondents' willingness to answer sensitive questions (Tourangeau, 2004) and reduce socially desirable responding (Chang & Krosnick, 2009).

There are some limitations associated specifically with web- based research. This type of research excludes the part of the population who lack computer skills and equipment (Couper et al. 2007). As a result, studies that use online surveys under-represent those with limited financial resources, members of some ethnic groups, older people, and the less educated (Couper, Kapteyn, Schonlau, & Winter, 2007; Best & Krueger, 2002). Such a method also does not allow reaching many people with serious concerns about Internet. Another drawback may be related to layout and readability of an online questionnaire that can vary across hardware and software (Evans & Mathur 2005). Electronic surveys can easily reach unintended recipients and are more readily taken multiple times (Theuri & Turner, 2002). And response rates are usually lower compared to phone or mail questionnaires (Converse, Wolfe, Huang, & Oswald, 2008; Greene, Speizer, & Wiitala, 2008).

However, measures can be taken to mitigate some of these concerns. For instance by using software that logs the IP (Internet protocol) address of the computer on which the survey was undertaken, a researcher can identify repeat responders (Gosling, Vazire, Srivastava, & John, 2004). Moreover, as the Internet penetration rate continues to increase, web-based samples become increasingly representative of the population of interest. Especially given high internet use by Generation Y, such a method was considered appropriate for this study.

The design of the questions was determined by the review of existing literature and previous research on the following topics: wellness dimensions, wellness measurement scales and indicators of personal wellness, as well as lifestyle research methods, measurement scales and segmentation models. The list of survey questions with respective topics and literature sources can be found in the *Table 2*.

The language of the questionnaire is English which limited the sample to English-speakers only and probably had an influence on the results. However young Estonians had English as a second language in the curriculum of secondary school and this should have mitigated the impact. The researcher also paid particular attention to the simplicity and clarity of questions as to enable an average speaker of English to be able to answer questions. As explained in a further section, the questionnaire was piloted with young Estonians. The feedback gathered at this stage helped to improve the questionnaire and made sure that the layout and questions were clear and appealing to the target group.

The initial design of the questionnaire was mainly based on the TestWell (National Wellness Institute, 1999). The scale was created by National Wellness Institute and employed for wellness segmentation models discussed in the section of literature review. This personal wellness assessment was chosen based on the review of the literature on personal wellness inventories (Brown and Applegate, 2012; Mareno & James, 2012; Roscoe, 2009). The first draft of the questionnaire contained 16 questions aimed to measure variables based on the wellness dimensions in the Wellness Wheel Model (Roscoe, 2009; Myers, Willse, & Villalba, 2011; Hattie, Myers, & Sweeney, 2004; Myers and Sweeney, 2004; Witmer, Sweeney, & Myers, 1998). The Likert scale was employed in question design with options ranging from Almost Never to Almost always.

Table 2. Literature review for the questionnaire design.

Question N.	**Topic**	**Main subject or model in the study**	**Previous studies**
16 10 11	Wellness dimensions	Personal wellness inventories	Roscoe, 2009; Myers *et al.*, 2011; Hattie *et al.*, 2004; Myers and Sweeney, 2004; Witmer *et al.*, 1998
5 6 7	Wellness dimensions	Wellness Wheel Model	Roscoe, 2009; Myers et al., 2011; Hattie et al., 2004; Myers and Sweeney, 2004; Witmer et al., 1998
9 14 15 16	wellness measurement scales; indicators of personal wellness	Personal wellness inventories, TestWell	National Wellness Institute, 1999, Brown and Applegate, 2012; Mareno and James, 2012; Roscoe, 2009
8 17 12	Well-being; quality of life	Indicators of well-being and quality of life	Gallup, 2013; Hallerood and Selden, 2013; Huppert and So, 2013
18 13	Happiness; quality of life	Indicators of happiness, EUI QuL	Theofilou, Aroni, Ralli, Gouzou, & Zyga, 2013; Eurofound, 2014

However, after consulting with the research supervisor several questions were omitted or amended. There were a couple of sensitive or too personal questions and these were either deleted or rephrased. One instance is a question: *I am able to develop intimate relationships.* This question was aimed to assess social aspect of wellness. As such formulation of question would be too personal; it was substituted by a question regarding frequency of socializing with friends (*See Appendix 1, question N. 10*). Some other questions, though related to wellness dimensions, did not correspond with the aim of the research and were also deleted. There were also problems with the options for multiple- choice questions. For example, the researcher was struggling to put relevant and the most important options of activities in the question: *I enjoy most and engage in on a regular basis (at least once a week) (See Appendix 1, question N. 11)*. After additional literature review the questionnaire was revised accordingly. Also the Likert scale was amended with the options ranging from „Always" to „Never" or other options that suited best the question type.

In addition to that, the unnecessary questions were substituted by the ones more related to the central aim and objectives of the research. These questions were developed based on the literature review of measurement scales and indicators of personal wellness, happiness and quality of life (Gallup, 2013; Halleröd, & Seldén, 2013; Huppert & So, 2013). As a result, the question on sleep quality was added (*See Appendix 1, question N.8*). The question regarding the attitude towards future opportunities was created: this aspect was mentioned as an indicator of wellness in the above researches (*See Appendix 1, question N.17*). An important ranking question on the elements that make one happy was designed based on the study by Theofilou, Aroni, Ralli, Gouzou, & Zyga (2013) and EIU QoL model (Eurofound, 2012) (*See Appendix 1, question N.18*). Other questions added during the revision included choice of leisure activities (*See Appendix 1, question N.12*) and preference of holiday type (*See Appendix 1, question N.13*).

The questionnaire then was coordinated and refined with the research supervisor until the final version had been input on surveymonkey.com. The final version consists of 18 questions. Part 1 contains 4 demographic questions on age, gender, education and city of residence. Part 2 includes items on nutrition, tobacco consumption, and exercising and sleep quality. Part 3 consists of 5 questions related to technological and social wellness; choice of wellness and leisure activities; and holiday types. Part 4 contains items designed to investigate attitude to work and leisure, life and future. This part ends with a ranking question on elements of one's happiness.

2.2 Data Collection and sampling method

Self- administered questionnaire survey was input and published on surveymonkey.com. This platform was chosen as it allows one to create professional- looking surveys with various types of questions ranging from yes/no, multiple choice, and ranking to open-ended ones and etc. The platform provides the possibility to design a survey, send it out, collect responses and analyse data by generating charts. This website makes a research faster as it eliminates the burden of inputting data manually into a data analysis programme. As an advantage one may design and personalise the survey by choosing themes and fonts. Surveymonkey.com allows dividing questions in sub- sections and adding titles to pages. This makes the overall design more structured and appealing which is believed to result in higher response rates (Feinberg, Kinnear, & Taylor, 2012). Besides, it allows marking specific questions as mandatory which reduces a chance of item non-response.

Internet- based research and in particular online questionnaire surveys became the most popular research method in marketing and business management sciences (Kahle & Valette-Florence, 2012; Feinberg *et al*., 2012). Online social-networking sites offer the possibility to conduct studies quickly, cheaply and more efficiently- especially when snowballing samples are constructed (Bhutta, 2012). This research was conducted using mainly a social networking site- facebook.com using a snowballing sampling. There are several disadvantages associated with snowballing sampling and using online social media as a sampling frame. The most important ones are as follows: the researcher has little control over the sampling method; representativess of the sample is not guarnteed and there is a high probability of a sampling bias. Since the subjects are nominated by the initial subjects, there is a high risk that they share the same traits and charactertistics (Baltar & Brunet, 2012). However, considering these limitations Facebook has been chosen as a sampling frame for the following reasons:

- Due to its size, features, intensive use and a continuous growth (currently exceeding 845 million users worldwide Facebook is the most popular social network) (Bhutta, 2012). Facebook allows snowballing and easy access to groups or "samples". This makes it a time and cost- effective research tool.

- Generation Y is described as a digital generation. Moreover Estonia is referred to as "e-country" with a relatively high level of Internet usage- 1,006,337 Internet users as of December 2013 which constitutes 80 per cent of population of the country (Passport to Trade, 2014; Internet World Stats, 2014). Out of this number, 501,680 have been registered as Facebook users by December 2012 (Miniwatts Marketing Group, 2012) - this is 50 per cent of registered internet users. Moreover, the largest age group of users is 25-34 (28 per cent), followed by users in the range of 18- 24- a quarter of all users (Passport to Trade 2.0, 2014).

Thus being the most popular social network among young Estonians, Facebook was chosen as the best tool to reach Estonian Generation Y.

Testing and piloting of a questionnaire are regarded as significant measures that facilitate success of a study (Andrews, Nonnecke, & Preece, 2003). Therefore, this study employed pilot testing to reveal inconsistencies and problems in the research. The convenience sampling allowed conducting testing of the survey in the period between 18- 25 November 2014. As a next step piloting- a small version of a study was conducted. 5 questionnaires were distributed to "typical" participants who took the survey using a "think- aloud" protocol and were observed by the researcher. This was followed up by retrospective interviews. During this stage survey language, question interpretation consistency, logical question sequencing, and survey "look and feel" were evaluated. Several problems were detected and eliminated during this stage.

The research targeted Estonian residents in the age of 18- 30. Thus the two criteria were:

1) Age: 18- 30
2) Country of residence: Estonia

As previously mentioned, the study employed a snowballing sampling method. The researcher distributed a link to the survey questionnaire on Facebook.com. The posts and private messages also contained the background information regarding the research and its purpose as to attract subjects and make them feel secure. Snowball technique was used to spread the questionnaire further: the text also requested participants to send the link to 5 of their friends. To attract the target audience the researcher identified and joined Facebook groups of students of Estonian universities and schools, and various other groups which are popular among the population of young Estonians. The researcher also distributed the link among friends and colleagues- most of them fitted the sampling criteria. However most of the sample also had higher education. This had an impact on the results of the study. For this reason as well as the fact that the sample was limited to an English-speaking population, the results of this study cannot be generalized to the whole population of Generation Y in Estonia.

The surveys were completed during the period from the end of November until the end of January. The 140 responses were collected between 24 November and 8 December, but then the response rate plummeted. In addition to Facebook the researcher had to use e-mail as a means of spreading the link to the e-questionnaire. The e-mail requests were sent to acquaintances who did not use Facebook as well as university e-mail addresses of Parnu College, Tartu University, Institute of International and Social Studies in Tallinn and Swissotel Tallinn. Both Parnu College and University of Tartu sent the survey to their students. The Institute of International and Social Studies did not respond. The researcher sent a reminder to the administration desk, however with no luck. The HR manager of Swissotel directed the e-mail to colleagues, however only one person filled out the questionnaire. A temporary technical problem with the link to the survey could have happened. When the researcher followed up with the e-mail twice, the HR director did not respond.

2.3 Analysis of the results

The total amount of responses collected in the course of this research is 234. Out of this number 201 are the respondents in the intended age category of 18-30. In this research only the results of these respondents were analysed.

The majority of respondents are females (82 per cent), and only 18 per cent are males (*See figure 1*).

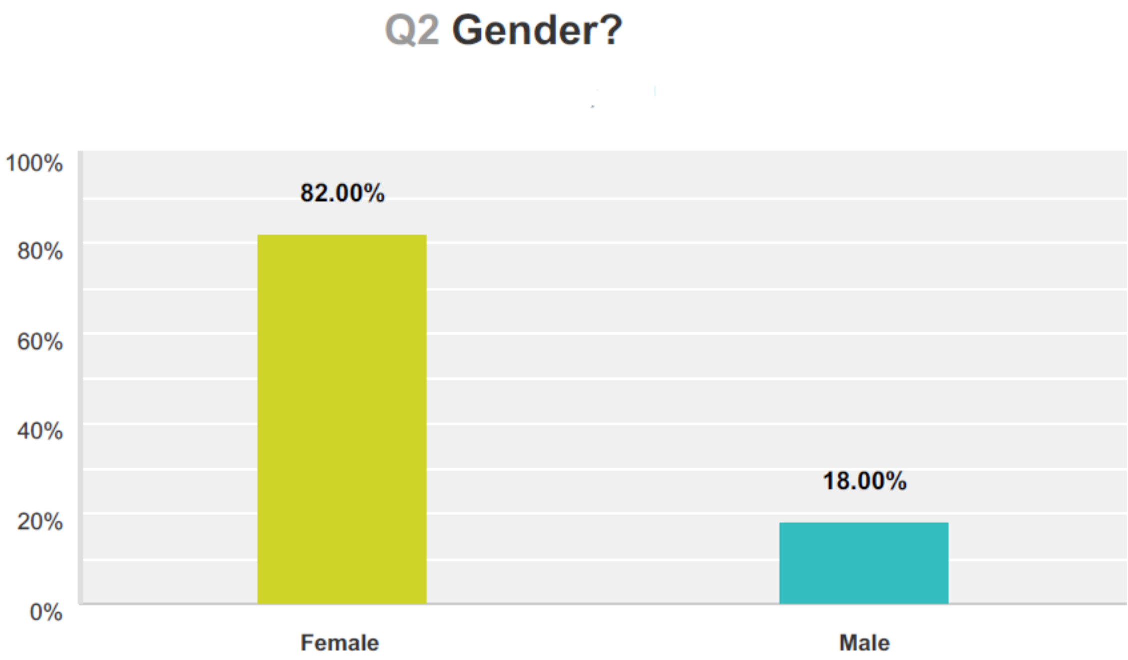

Figure 1. The percentage of female and male respondents.

This could be the result of the sampling method employed in the research- online snowballing. As the researcher is a female and has many female friends on Facebook.com this could have influenced the sample. However, the result is also predictable considering that women are more likely to fill out questionnaires in general and are more interested in the topic of wellness and healthy life- style (Smith & Puczkó, 2014; Bodeker & Cohen, 2010, Marković, Raspor, & Komšić, 2011).

The majority of respondents (66.17 per cent) reported to have higher education (*See figure 2*).

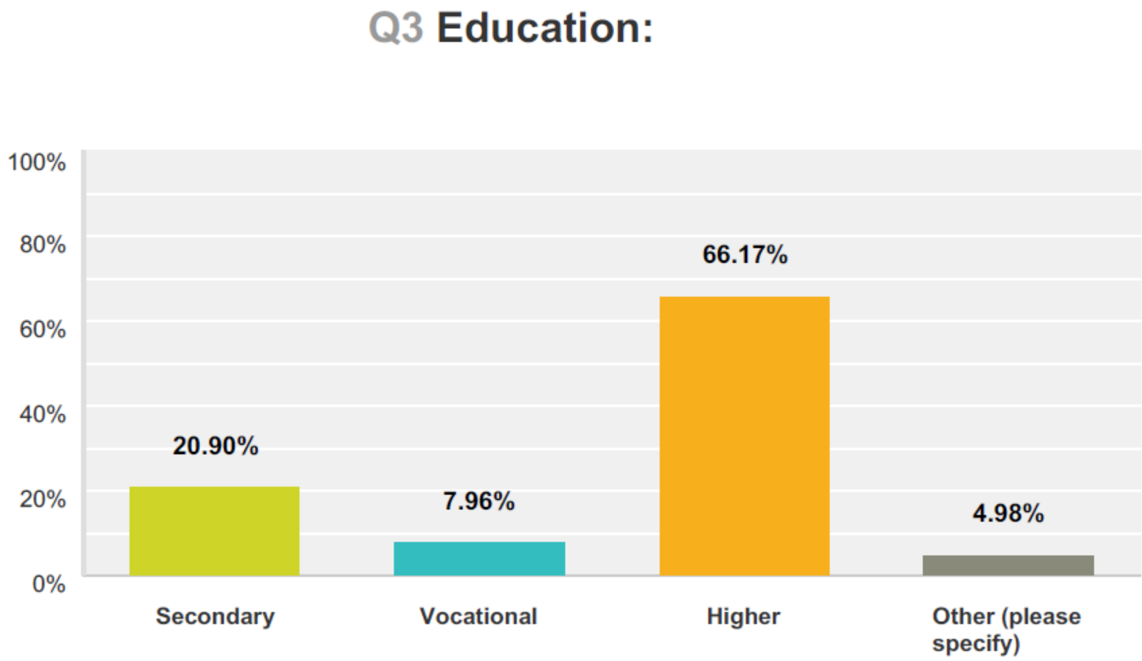

Figure 2. The bar chart indicating level of education of survey respondents.

Again, this is probably the influence brought in by the snowballing sampling method. The questionnaires were distributed among students of universities, colleagues and ex-colleagues- almost all of them are in the process of obtaining higher education. Also, the language of the questionnaire is English which might have reduced the audience to respondents with higher education. Ironically, this sample represents the perception of Generation Y as “the most educated generation in the history” (Moscardo & Benckendorf, 2010).

The majority of the respondents live in Tallinn, Tartu and Parnu. Various minor Estonian towns were mentioned as a city of residence as well such as Haapsalu, Viljandi, Rapina and etc. Some respondents stated that they live outside of Estonia in Helsinki, a few in Copenhagen, Portugal, Budapest etc. Unfortunately it is not possible to check whether they were Estonians or just responded to the survey for some reason. Therefore it would have been better to provide a dropdown list of Estonian towns to choose from in this question rather than a mere text-box. Although the research was conducted on Facebook.com and by e-mail, mostly residents of the major Estonian towns responded. This can be explained by the fact that the researcher sent the link to the colleagues who reside in Tallinn, students of Parnu College and Tartu University. The researcher has also posted the link on various Estonian Facebook pages, but as Tallinn, Tartu and Parnu are the major Estonian towns the populations of these towns are highly represented on social media.

The majority of respondents reported their diet to be either average (37.76 per cent) or healthy (37.24 per cent). Only a few respondents (4.59 per cent) consider their diet to be very healthy. Twice as many respondents (8.67 per cent) described their diet as unhealthy, and even more of young Estonian people acknowledge that they are not diet-conscious (11.22 per cent). No one described their diet as very unhealthy. Almost no-one chose the option: I do not know (0.51 per cent) (*See figure 3*).

The sample seems to be conscious about their nutrition to a certain extent. Nevertheless only a few respondents are extremely cautious about what they eat. Indeed one can doubt the findings of this question as the responses could have been a result of a socially- desirable responding, e.g. the respondents do not want to admit, are not aware or prefer to think that they eat healthily when the opposite is true. The results of studies in other countries are controversial. Some reflect a similar picture: the trend of healthy eating has been reported as growing among GenYers, and this generation is more likely to include healthier food in their everyday diet (Millennial Marketing, 2015; Lu *et al*., 2013). Other studies display the opposite: young people exhibit certain prerequisites of obesity, and middle- age Gen Y are in fact more likely to be obese than their parents (Allman- Farinelli, 2009).

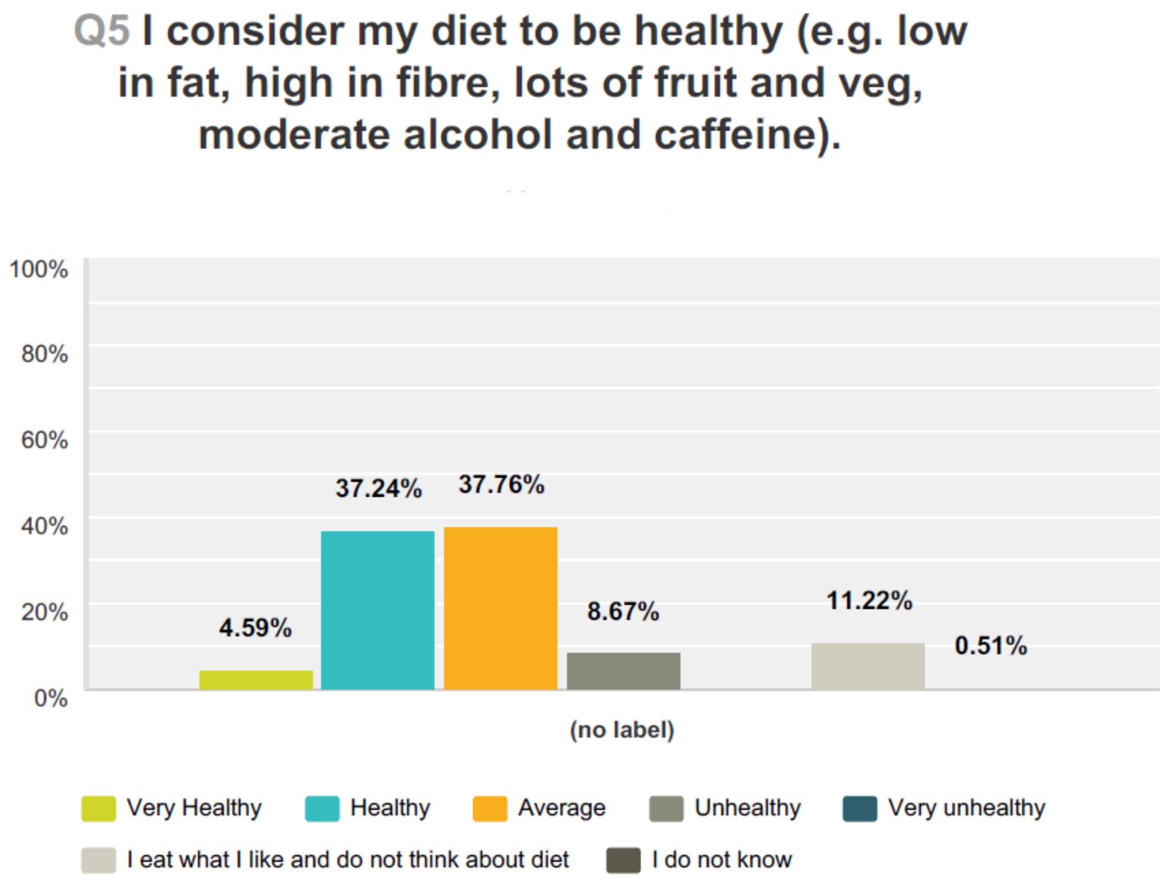

Figure 3. Bar chart illustrating the responses with regards to healthy diet.

As to smoking over half of young Estonians (56.63 per cent) do not smoke at all. Also a few respondents (12.76 per cent) try to avoid the use of tobacco products often. Only some respondents (6.12 per cent) answered that they rarely avoid smoking, and 11.22 per cent avoid smoking sometimes. A minority of respondents (13.27 per cent) admitted that they do not avoid the use of tobacco products (*See figure 4*).

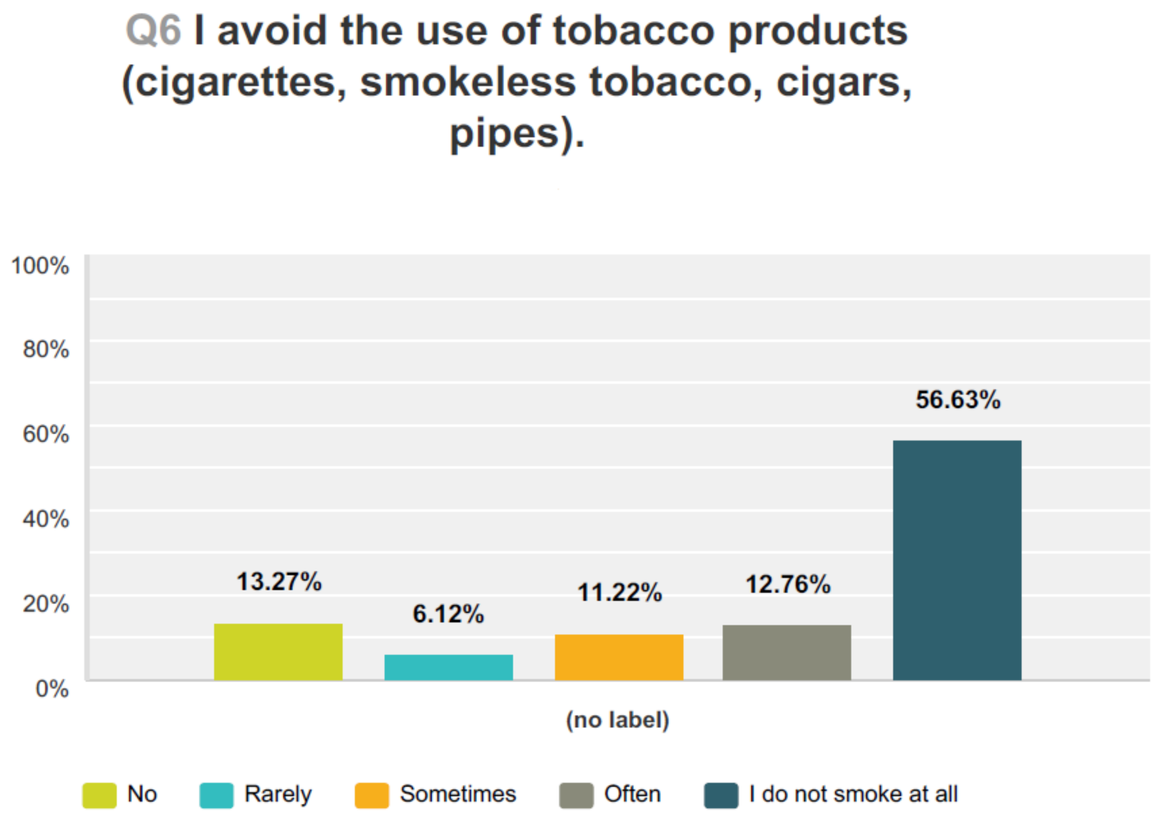

Figure 4. The bar chart illustrating the level of tobacco use among the respondents.

The results look impressive and depict Estonian GenY as a health- conscious generation. It is a challenge to find comparable scientific data from other countries that represent the attitude to smoking of GenY segment. The data available is mostly with regards to either kids or adults without specifying the generational cohort. However there are some available survey results that include data from the US, Australia and the UK. Surprisingly, in these countries GenY smoke significantly less than their parents. Moreover, they tend to be more health- conscious in general (Black, 2014; Millennial Marketing, 2015; Parnell, 2014; Hegina, 2014). The main reasons highlighted in reports and articles regarding teen smoking prevention are the laws forbidding smoking in public places (EU) or creation of smoke-free zones- parks, restaurants, casinos (the US). Also an important factor is price as in the countries where higher taxes were introduced for tobacco products, the number of teens who smoke significantly reduced (Egan, 2013; CDCP, 2012).

Concerning physical exercise there was no high discrepancy between the categories. Almost a third of respondents said they exercise rarely (27.55 per cent). Other respondents reported that they exercise sometimes- 24.47 per cent, often- 22.45 per cent, and always- 20.92 per cent. Only some respondents (5.61 per cent) admitted that they never exercise (*See figure 5*).

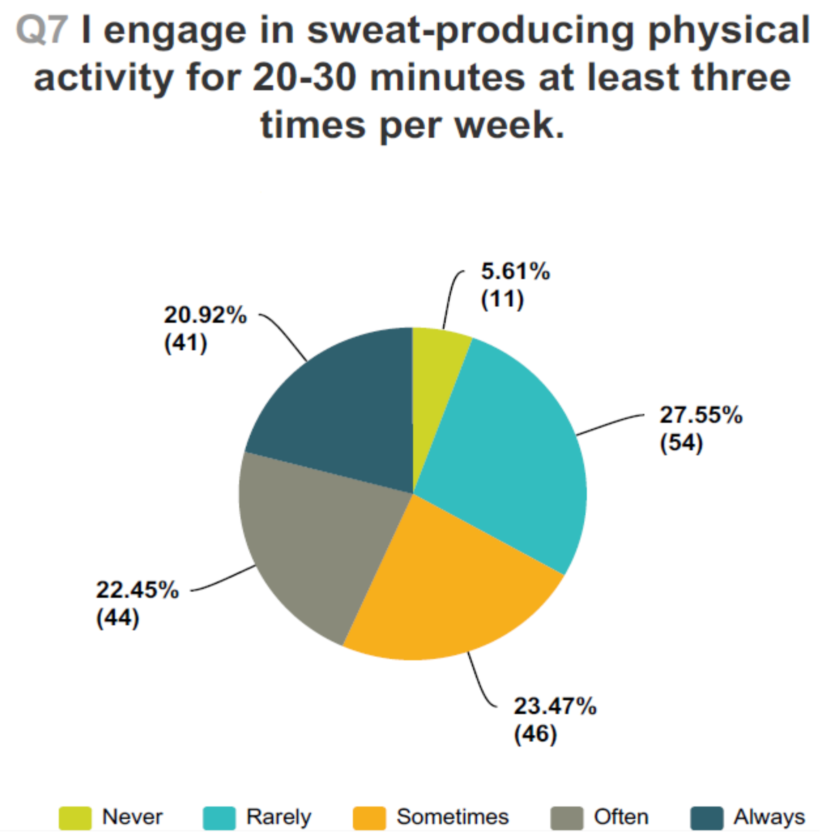

Figure 5. The degree of physical activity among young Estonian people.

It seems that young Estonian people do engage in physical pursuits, but the majority of them are moderate exercisers. Similarly, Australian researchers warn the general public that young Australians exercise much less than baby-boomers did when they were the same age. Moreover they exercise less than the older Australians do now. They generally live more sedentary lifestyles which researchers attribute to their high use of technology (The University of Sydney, 2009; Hindustan Times, 2009). The research on the US market pinpoints the opposite: GenY do exercise, however they prefer less competitive and more team-oriented sports that allow socializing. Similarly to baby boomers, they prefer group exercises, dance classes, cycling and aerobics. Moreover, they use a lot of mobile apps that keep them connected to their peers and allow comparing results. In the case of the US, there is also a reduction in the number of gym-goers which is ascribed to the fact that GenY thinks “exercise lacks excitement and sociability” (Hartwell, 2011). 80 per cent of customers who purchased gym packages do not use facilities because they lack a reason to come. Another important reason is that the gym packages are also too expensive for young people. (Lesonsky, 2012; Fromm, 2015; Sports and Fitness Industry Association, 2011).

The respondents are quite positive about their sleep- the majority characterized their night sleep as good (38.78 per cent) or very good (20.41 per cent). Still almost a third (28.57 per cent) identified their night sleep as average. Very few respondents (9.18 per cent) think they have a bad sleep. Only a small fraction of sample (2.55 per cent) does not consider sleep important for their wellness. Almost no one (0.51 per cent) chose the response: “I do not know” (*See Figure 6, Table 2*).

The research on sleep quality and communications technology in bedroom conducted in the US depicted the opposite picture: a prevalent number of young people in the age of 19-29 (67 per cent) bring cellphones to the bedroom and use them while trying to sleep. This affects their overall sleeping: they are less likely to report good sleep, feel unrefreshed in the morning and sleepy during the daytime (Olpin & Hesson, 2015; Gradisar, Wolfson, Harvey, Hale, Rosenberg, & Czeisler, 2013). As Estonian culture highly appraises quality of life, this might be the reason for significantly higher quality of sleep among the respondents of this survey (Hofstede Center, 2014). Another reason may be attributed to dark winters that logically may lead to longer sleep. However sleep studies conducted in Northern areas of Scandinavia and Finland differ in conclusions. Some suggest that people sleep longer when the exposure to the daylight is shorter, while the results of other studies show that people experience more problems falling asleep during winter than during summer (Friborg, Bjorvatn, Amponsah, & Pallesen, 2012). The other possible reason for a better sleep may be attributed to the fact that young people party more in bigger cities with more exciting night life, whereas many towns in Estonia lack much focus on night-life especially during cold winters. This allows Estonian adolescents getting a proper night sleep.

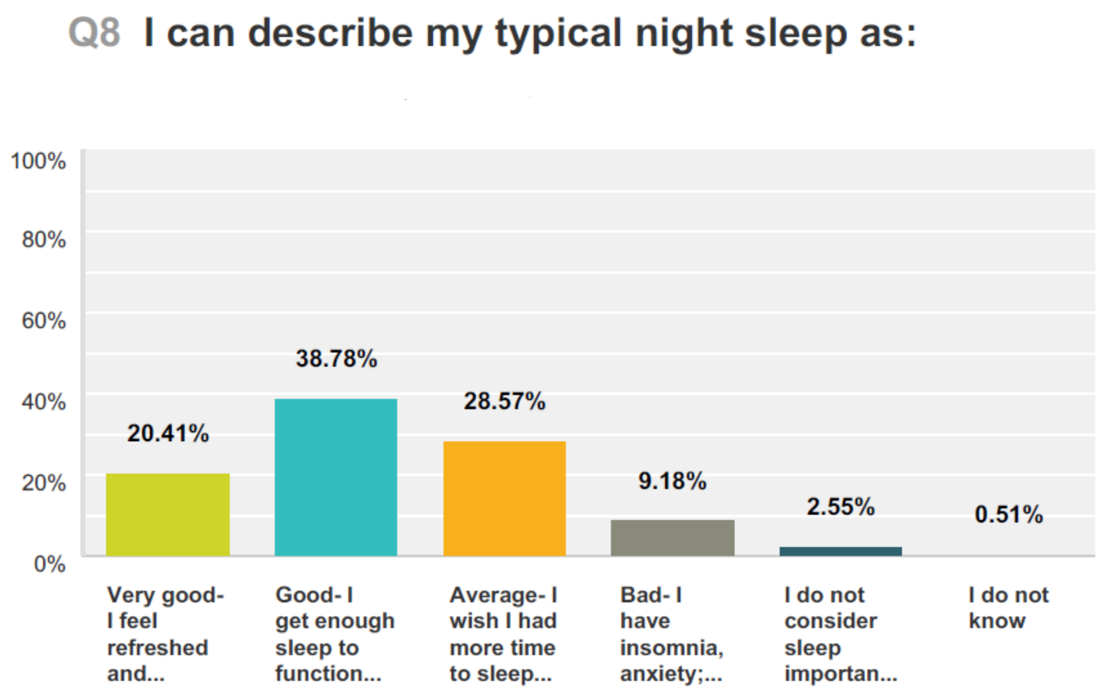

Figure 6. The bar chart illustrating level of sleep quality reported by survey respondents.

Table 3. The answer choices for Question 8.

Answer Choices
Very good- I feel refreshed and energised (8 hours sleep) (1)
Good- I get enough sleep to function next day (2)
Average- I wish I had more time to sleep, but my routine does not allow me to get a proper 8 hours sleep (3)
Bad- I have insomnia, anxiety; thoughts about work/relation/finances etc can't let me sleep (4)
I do not consider sleep important for my wellbeing- I prefer to stay awake and active as much as possible (5)
I do not know (6)

Concerning the dependence of young Estonians on technological devices like laptops, mobile phones, ipads and etc., a great majority of respondents do make use of technology. Very few of them (0.51 per cent) indicated that they do not have any devices. Interestingly, the majority of respondents (40 per cent) think that they are able to stay without mobile devices for 1- 2 days. 18.97 per cent assume they can stay disconnected up to a week, and 15.90 per cent do not think having devices or being connected is at all important. Although some respondents (14.97 per cent) feel the opposite- they cannot imagine staying without devices even for a moment. Only a few respondents felt they could stay disconnected for up to two weeks (9.74 per cent) (*See Figure 7, Table 3*). The results support the general perception of GenY as focused on digital media and technology (Donnison, 2007). Being connected 24/7 is important for this cohort. Nevertheless the results of this study do not suggest an extreme level of dependency on devices as for example in the US. Cabral (2011) in the study on addiction of Generation Y to social media concluded that young people do experience certain symptoms of addiction if disconnected from online social networks. International Centre for Media & Public Agenda at the University of Maryland produced the research which showed that students could function without technology, but they completely refused to remove it from their lives (Lenhart, Purcell, Smith, & Zickuhr, 2010). Nauert (2010) similarly inferred that young people hated staying disconnected. They felt that the strength of their relationship is completely based on their use of social media. To function normally, this sample needs the constant link to a flow of information. In a study by Wakefield Research and textbook provider CourseSmart 38 per cent of students said they could not go more than 10 minutes without checking their digital device (Walter, 2012).

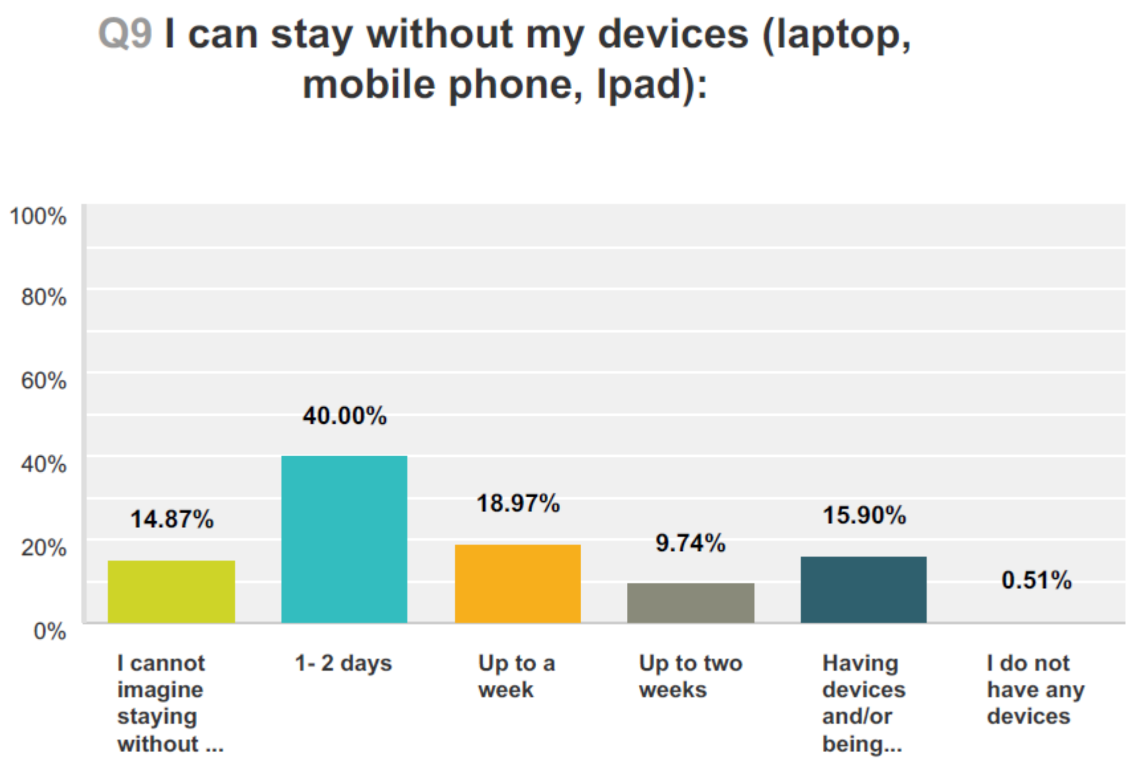

Figure 7. The bar chart illustrating the level of dependence on technological devices reported by respondence.

Table 4. The answer choices for Question 9.

Answer Choices
I cannot imagine staying without my devices even for a moment (1)
1- 2 days (2)
Up to a week (3)
Up to two weeks (4)
Having devices and/or being connected to mobile network/internet is not important for me at all (5)
I do not have any devices (6)

Young Estonian people are quite social- over a half of the sample (54.87 per cent) meet with friends at least once a week, and 29.74 per cent meet friends at least once a month. Only 6.67 per cent answered that they meet friends once in three months. Surprisingly for a technological generation only 6.15 per cent keeps in touch by phone or internet. Only 0.52 per cent responded that they do not have friends. An insignificant number of respondents (2.05 per cent) selected the response: “Other”. Here they mentioned they combine communication online and meeting face- to- face, or even that they meet with their friends every day *(See Figure 8, Table 4)*. These results completely support the common vision of Generation Y as a social group for whom connecting with peers is of primary importance. As to the result that only a few respondents keep in touch by phone or internet: in the light of studies on North American population this seems quite logical as well. While keeping up with the news and digital world is important for them, they consider as friends only the people they hang out with in real life. Spending quality time with family and friends is very important for them (Donnison, 2007).

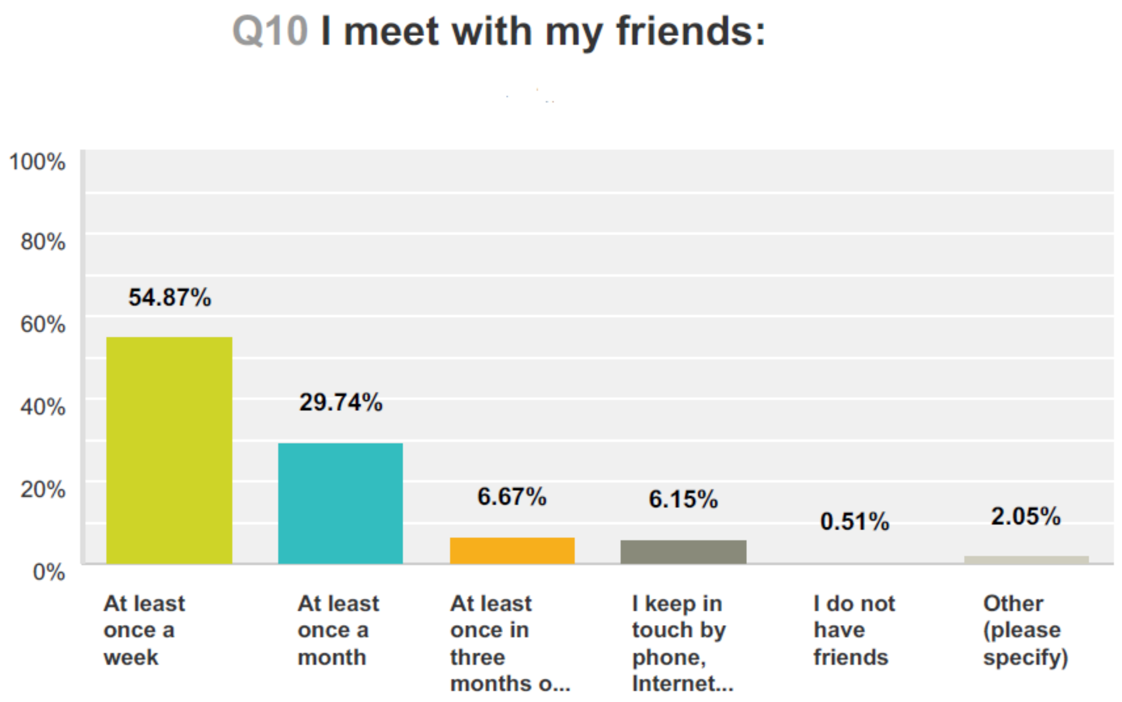

Figure 8. The bar chart illustrating the frequency of socializing with friends reported by survey respondents.

Table 5. The answer choices for Question 10.

Answer Choices
At least once a week
At least once a month
At least once in three months or more
I keep in touch by phone, Internet instead of meeting face to face
I do not have friends
Other (please specify)

The population is quite sporty: the majority (42.05 per cent) enjoys most different types of sports, gym and fitness, and engage in these pursuits regularly. However over one fifth of the respondents (22.05 per cent) do not engage in any of the activities listed in the question. 15.90 per cent enjoy more saunas, steam rooms and massages- this could be attributed to the fact that saunas are a part of Estonian culture. The least popular type of activities among young Estonians are body-mind-spirit- only 10.77 per cent of respondents chose this category as their preferred type of activities. Low participation in body-mind- spirit activities might be explained by the fact that these are relatively new pursuits that Estonian people were not previously exposed to. 9.23 per cent of respondents chose the category "other" and the responses included walking, dancing, singing, playing board games or doing crosswords. Some respondents mentioned that they combine all of the listed activities (*See Figure 9, Table 5*). According to 2012 Participation report North American Gen Y dominate in all sports, but their participation is especially pronounced in team sports (Physical Activity Council, 2012). More than 30 million Gen Yers participate in team sports, compared to only 10.6 million Gen Xers and 5.4 million Boomers. Similarly to the findings of this research, fitness is the most popular category for GenY in the US (Wenzel, 2012; Hiestand, 2011; Lachman & Brett, 2013).

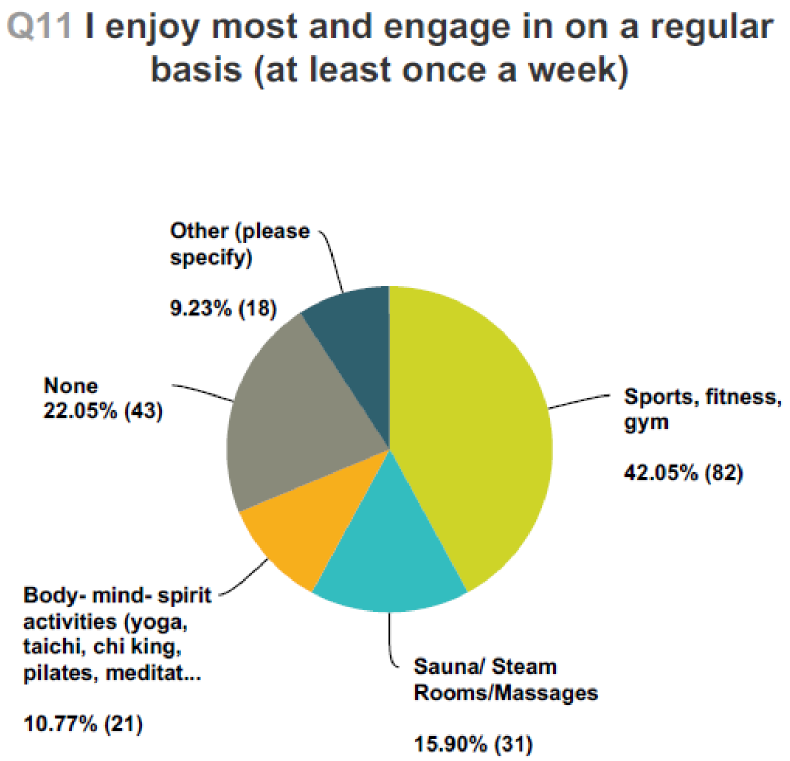

Figure 9. The chart indicating types of activities popular among Estonian youth.

Table 6. The answer choices for Question 11.

Answer Choices
Sports, fitness, gym (1)
Sauna/ Steam Rooms/Massages (2)
Body- mind- spirit activities (yoga, taichi, chi king, pilates, meditation etc.) (3)
None (4)
Other (please specify) (5)

As a social generation, more than a half of Estonian adolescents (56.41 per cent) prefer to eat out with friends or family. Results from the US market indicate that 80 per cent go out for an evening meal multiple times a month. 6 out of 10 Gen Yers in the US love to gather at restaurants (Lachman & Brett, 2013). The same report highlights how important spending time with family and friends is for Generation Y: most had happy childhoods and remained closely tied to their families and their friends' families. As an MTV raised digital population young Estonian people also like to go to concerts and music festivals or listen to music (42.56 per cent) (*See Figure 10, Table 6*).

They also love going to movie theatres (40.51 per cent). Similarly, going to movies is a popular social activity for a third of respondents of ULI/Lachman Associates survey (2013). A third of respondents (33.33 per cent) of this survey prefer to spend the night in a pub, club or bar. A bar was also chosen as the favourite place of gathering by 30 per cent of respondents in the ULI/Lachman Associates study (Lachman & Brett, 2013).

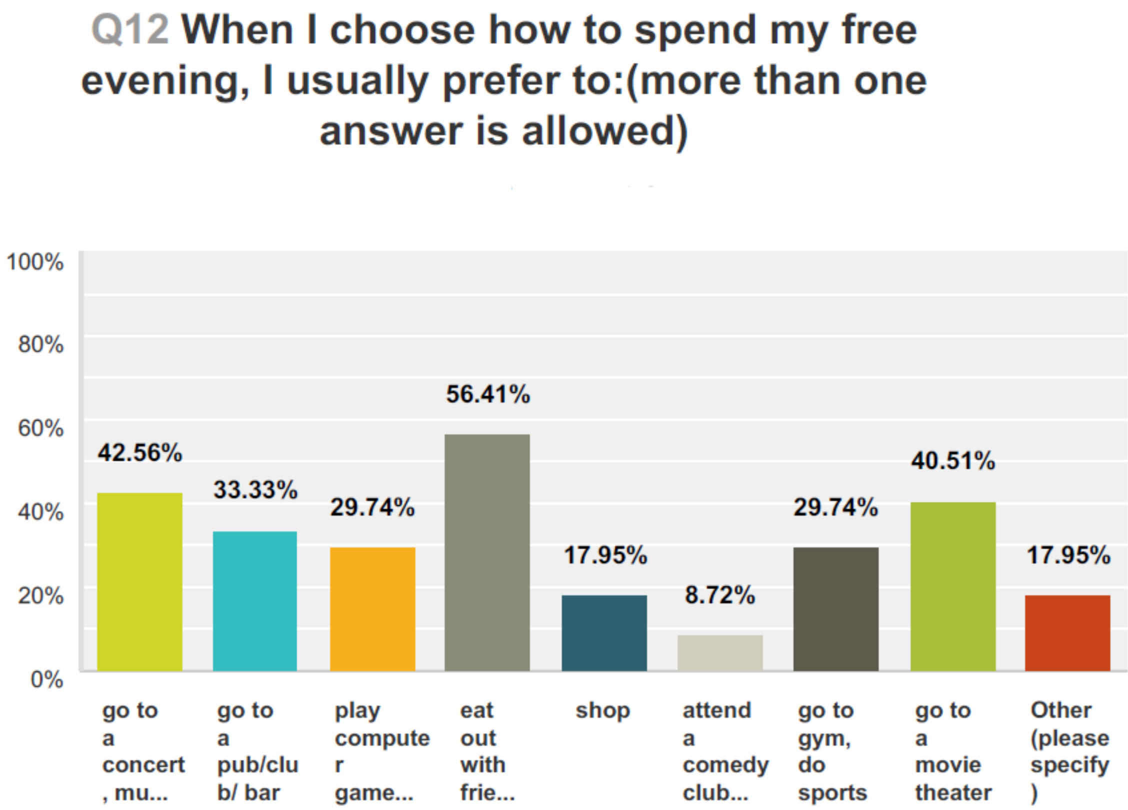

Figure 10. The bar chart illustrating the preferences of free-time activities among Estonian GenY.

Table 7. The answer choices for Question 12.

Answer Choices
go to a concert, music festival/listen to music (1)
go to a pub/club/ bar (2)
play computer games/browse internet/online social networking (3)
eat out with friends/family (4)
shop (5)
attend a comedy club show (6)
go to gym, do sports (7)
go to a movie theater (8)
Other (please specify) (9)

Interestingly, even though this is a technological generation, less than a third of the respondents like to spend evenings playing computer games. About a third of the sample (29.74 per cent) said they go to the gym, do sports as a way to spend a free evening. Another striking result is that this most powerful consumer group in world's history does not seem to be so excited about shopping- only 17.95 per cent chose this option. It would be also interesting to examine the variation between male and female respondents with regards to preference for shopping, however as the sample is predominantly feminine the results would not be comparable. Also, some respondents (17.95 per cent) chose the category "other". The most common leisure activities mentioned by these respondents were staying at home, reading or watching TV, walking or going to nature. 8.72 per cent chose the option of a comedy club show- similarly American GenYers attend comedy clubs infrequently (Lachman & Brett, 2013).

This population is definitely very heterogeneous in their preference for a type of holiday. The majority of respondents prefer adventure, and sun and sand types of holidays (average weight 6 for each) (*See Figure 11*).

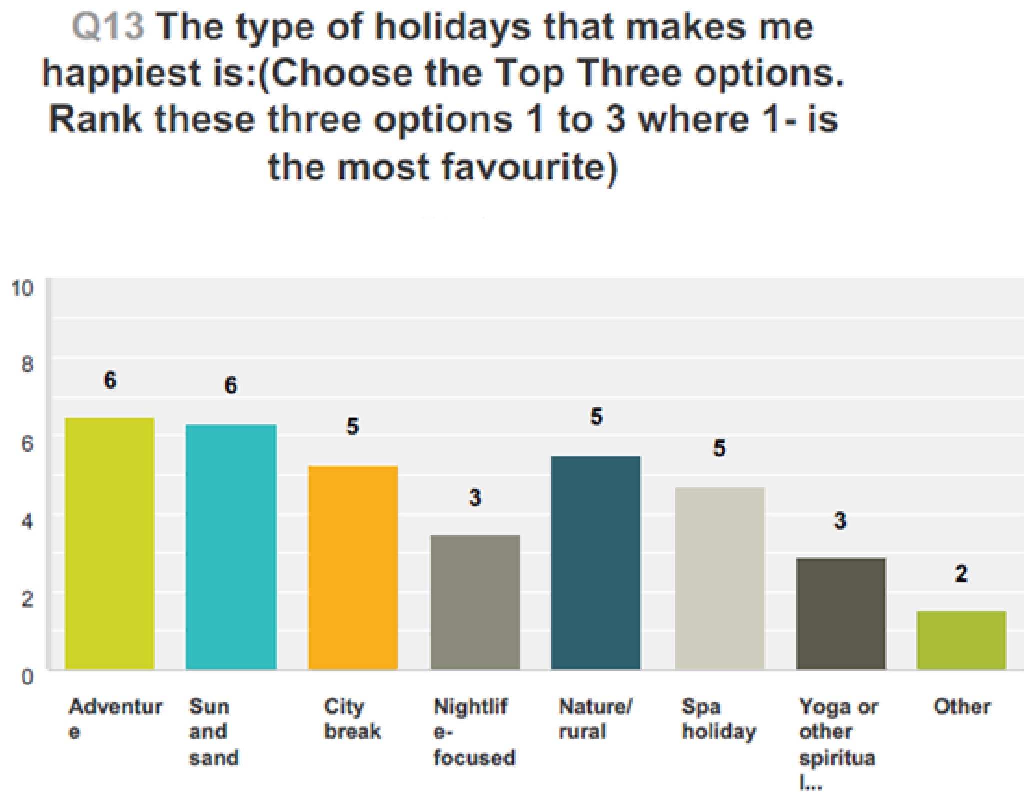

Figure 11. The bar chart illustrating respondent's preferences of holiday types.

However many respondents are also happy with a city break, nature/ rural or a spa holiday (average weight for the three categories is 5). The least popular types were night-life focused, and yoga or other spiritual holiday (average weight 3 for both). Some young Estonians did not find the favourite type of holiday among the given options and chose other types of holiday (average weight 2). The holiday preferences of Estonian GenY are quite similar to those of Australian youth: according to the results of a research by Kattiyapornpong (2009) Australian GenY do not engage in a very active holiday, however they are more likely to take this type of holiday than older generations. They are more likely to prefer a holiday in a vibrant cosmopolitan place where they re-energise themselves. While they are more active on their holiday, they also seek rest and relaxation. A research on North American consumers also showed that 56 per cent of respondents have been on a trip they classified as “adventure” (Xola Consulting, Inc., 2011).

Overall young Estonian people seem to have a very positive attitude to work and study- the majority of them (60.32 per cent) enjoy work or study often. One fifth enjoy work or study sometimes (20.11 per cent), and 14.81 per cent are always happy about their work and study (*See Figure 12*).

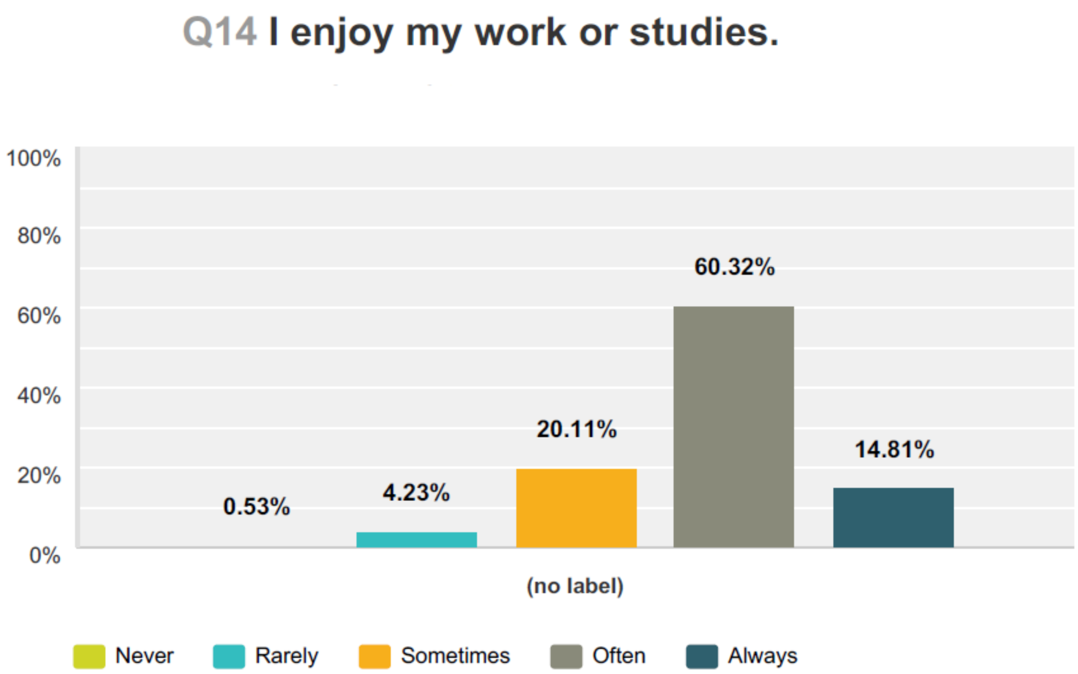

Figure 12. The bar chart illustrating the attitude to work/ study among Estonian youth.

The results are quite impressive and show how positive this new generation Y is. This could be ascribed to their youth or to the virtue of Estonian culture highlighted in Hofstede's cultural analysis- diligence (Hofstede's Center, 2014).

The third of respondents (35.64 per cent) are often satisfied with the balance between their work and leisure. Another third is less satisfied- they chose the option “sometimes” to this question (34.04 per cent). 18.09 per cent are rarely satisfied, and very few (3.72 per cent) are completely dissatisfied with their work-leisure balance. Only some respondents (8.51 per cent) reported that they are always satisfied with the distribution of work-leisure time (*See Figure 13*). The results of this survey show that Estonian GenY strive to have work-life blend and are not always satisfied with their working hours. The research on Gen Y shows contradictory results: some studies claim that Gen Y aim to achieve- work- family balance and that they work to live (Howe and Strauss, 2003; Eisner, 2005; Lyons *et al*., 2014; Corvi *et al*., 2007), others label them as overachievers ready to sacrifice their personal lives for career (Jorgensen, 2003).

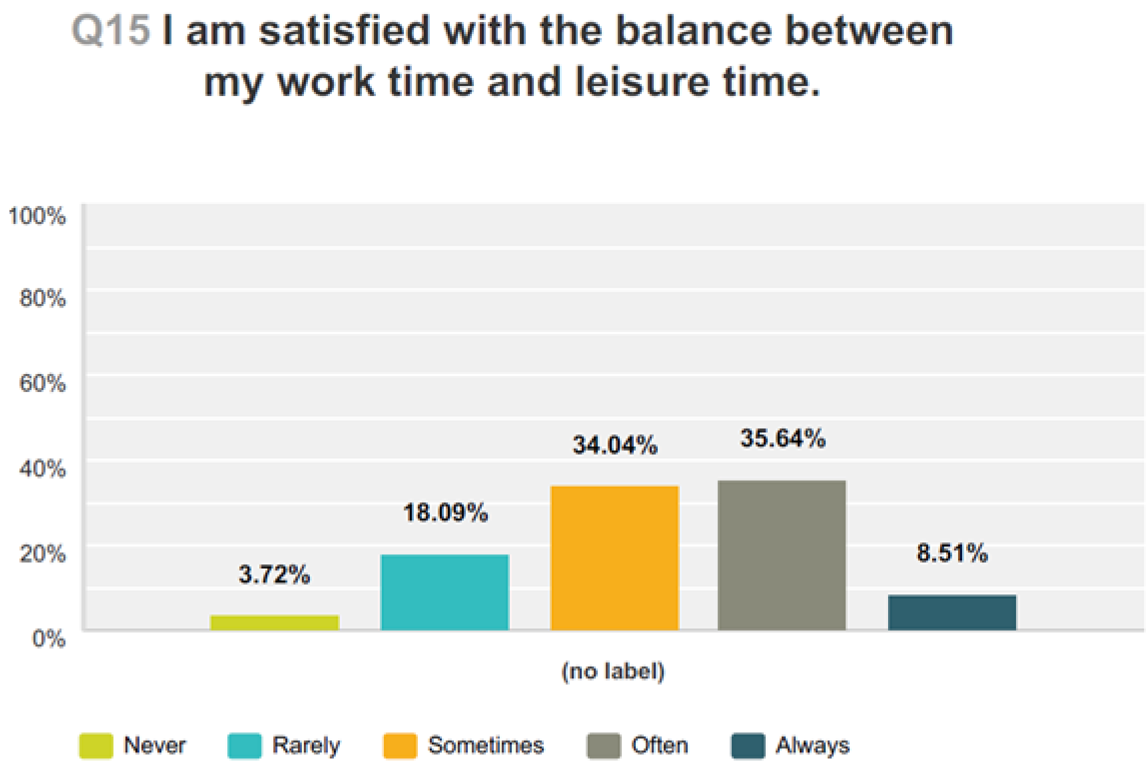

Figure 13. Bar chart illustrating respondents’ satisfaction with leisure- work balance.

The majority of young Estonian people have a very positive outlook- almost half of the sample (45.50 per cent) feel often that their life has a positive purpose, and a third of them feel always positive about this (32.28 per cent). Some respondents (14.81 per cent) feel only sometimes positive about their life purpose, and only few ones (5.29 per cent) rarely feel positive about the purpose of their lives. Only one per cent of respondents never feel positive about their life purpose (*See Figure 14*).

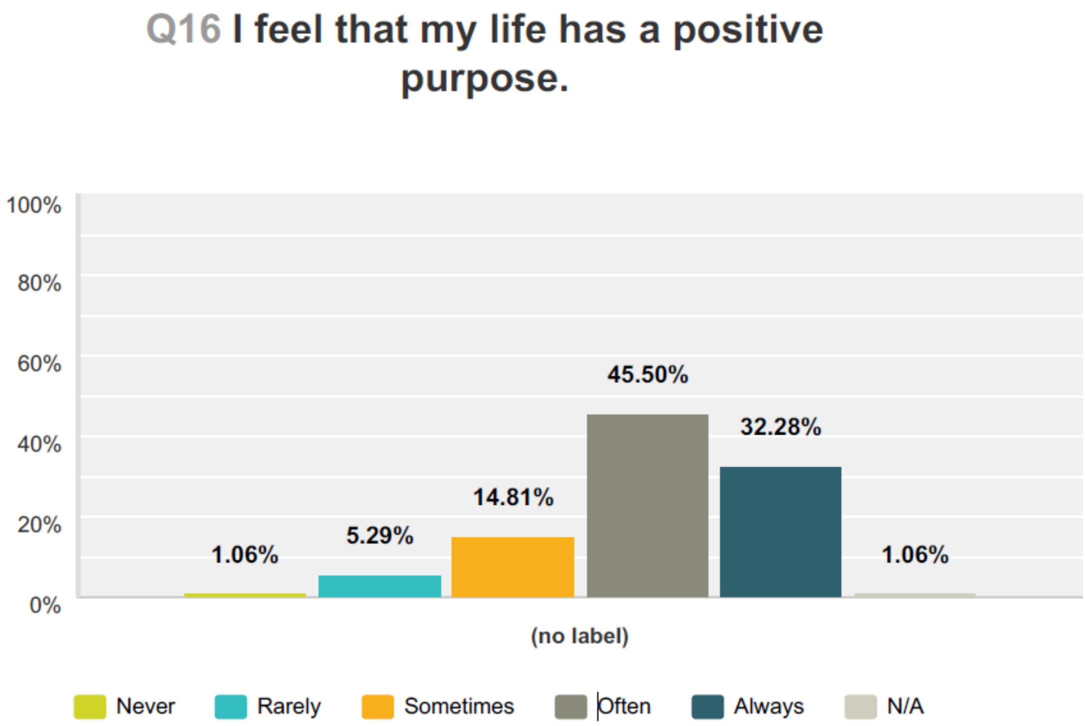

Figure 14. The bar chart illustrating the respondent's attitude to life.

Similarly, almost half of the respondents are rather positive about future opportunities for themselves and their friends (46.56 per cent) (*See Figure 15*). 16.40 per cent of all respondents are *very* positive about future opportunities. It is interesting to note that 14.29 per cent are neutral, and 13.23 have mixed feelings about the same. Only some respondents (7.41 per cent) admitted that they do not feel very positive about the future. An insignificant number of young people feel negative about future (1.41 per cent). Donnison (2007) conducted a literature review of various studies on Gen Y and extracted one of the main features of this Generation: they have positive attitude towards social issues and their own future. Williams and Page (2011) describe Generation Y as ambitious, demanding, with core values of optimism, confidence, and achievement. They are determined to live their best lives now putting the meaning of being happy, predictable, and healthy in it as tomorrow may not happen. A survey by Telefonica (2014) on three continents showed that the members of this generation are satisfied with and positive about their personal lives, and are optimistic about their future and possibilities. Thus the results of this study support the international vision of Gen Y as a cohort who are positive about their life and future opportunities.

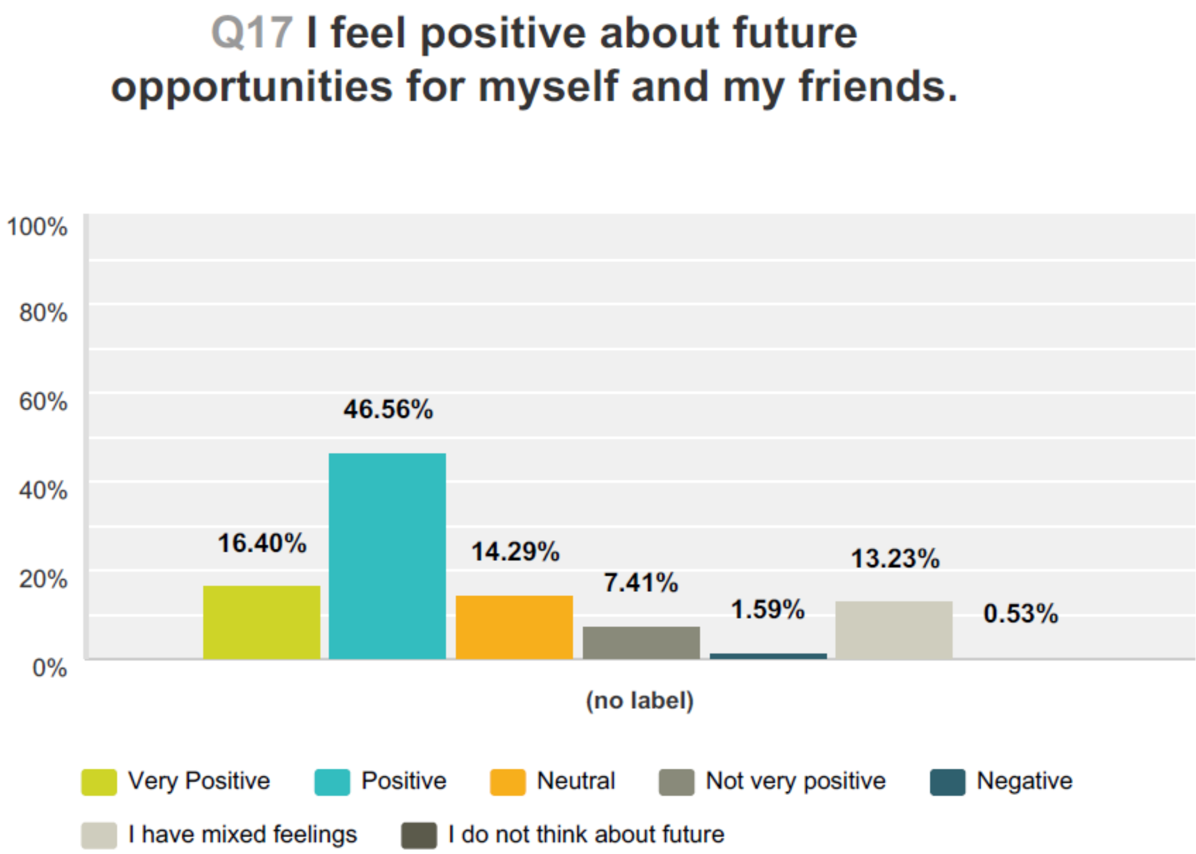

Figure 15. The bar chart illustrating the respondents' attitudes to future opportunities for them and their friends.

The last question collected information about the most important things that make Estonian Generation Y happy. It appears that health and love are the most important notions for them (average weight for each is 13) (*See Figure 16, Table 7*). Other important things are "Close bond/good relationship with relatives and friends" and “being content with one-self” (average weight for each is 12). These top values are similar to the general perception of generation Y as a health conscious and family-oriented group (Donnison, 2007; Williams and Page, 2011). Surveys on both the UK and American Gen Yers showed somewhat similar results: communication with family is the top one thing to make them happy, and communication with friends follows next (Statista, 2015; Alfonso Serrano, 2007). Another important asset is material wellbeing (average weight is 11). The less important notions include active social life (average weight 9), political security and job security (average weight for each 8). Gen Y is generally depicted as a social generation. It is interesting to note that active social life is ranked lower than close bond with family and material well-being. Options of “Enough opportunities for leisure and travel”, and “recognition and respect from society” got average weight 7. The least important things are certain type of climate (average weight 6), freedom of speech (average weight 6) and an outstanding career (average weight 5). This is an important insight- they are described as overachievers by some researchers and as the ones who work to live by others. This result of this survey show that they do prioritize family, health and love high over career.

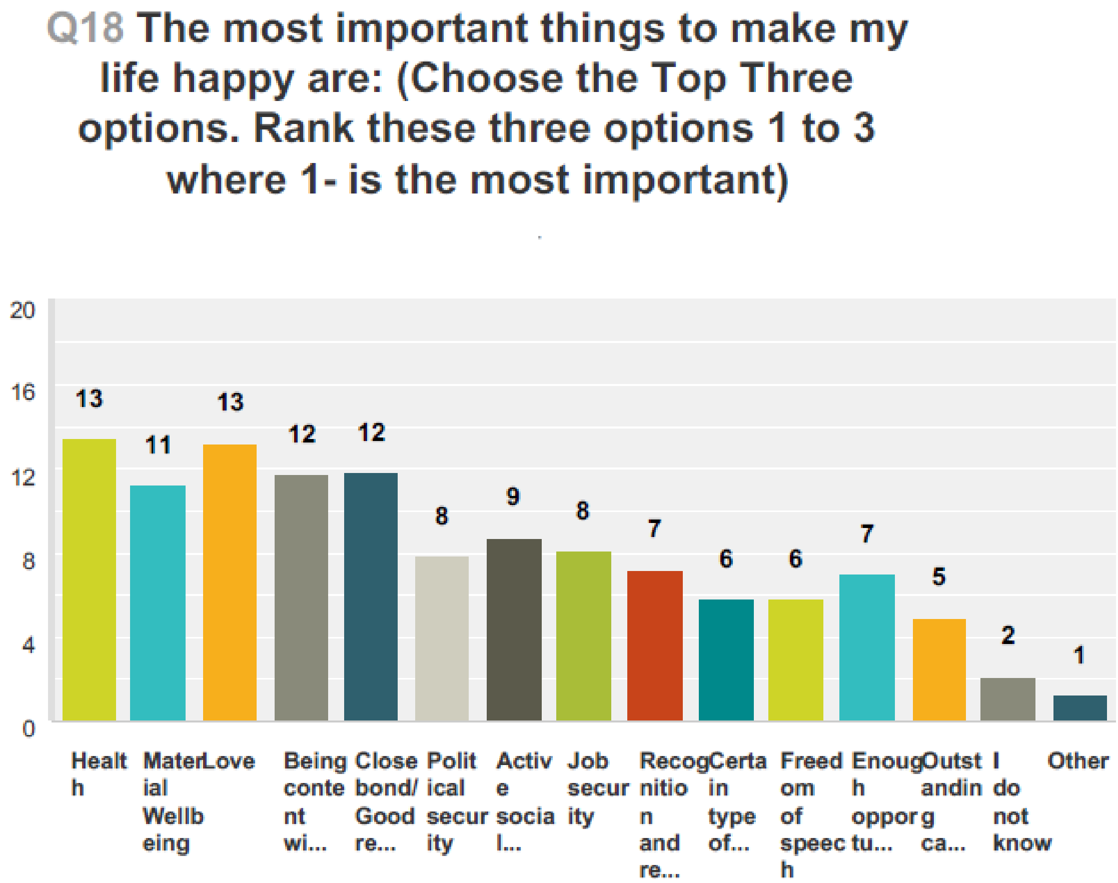

Figure 16. The bar chart illustrating priorities of personal values among Estonian youth.

Table 8. The answer choices for Question 18.

1-Health	9- Recognition and respect from society
2- Material Wellbeing	10- Certain type of climate and environment I live in
3- Love	11- Freedom of speech
4- Being content with oneself	12- Enough opportunities for leisure and travel
5- Close Bond/ Good Relationship with relatives and friends	13- Outstanding career
6- Political security	14- I do not know
7- Active social life	15- Other
8- Job security	

Relating the results of this study to the wellness domains, the physical and emotional domains are highly regarded by the respondents. Though Gen Y is generally depicted as careerists, the respondents of this survey put less emphasis on occupational domain of wellness. However material wellbeing is essential and respondents strive to balance leisure and work time. Also the Estonian Gen Y do not position active social life as the most important aspect of their happiness, but they regularly socialise with family and peers and attend various social gatherings. Regarding mental wellness, being content with them is critical for GenYers. They are optimistic about their future. The respondents do not emphasize the environmental domain as the important aspect of their happiness (e.g. climate and environment). Besides, they do not focus on enhancing the spiritual aspect of wellness; however, they feel optimistic about their life purpose.

The table below categorises the findings of this study according to the wellness domains:

Table 8. The analysis of wellness domains of the sample of Gen Y based on the results of this study.

Wellness domain	**Characteristics of the sample of this study**
Physical wellness	Good health is a primary value. Healthy nutrition, majority is non- smoking, moderate exercisers, engage in various kinds of sports, good night sleep.
Emotional wellness	Love is a primary value, and being content with one-self is important. Close bond with family and friends is a supreme value; like to spend time with family and friends.
Mental -Intellectual wellness/health	Being content with one-self is essential. Freedom of speech and political security are not regarded as the important aspects. Feel optimistic about future opportunities for themselves and their peers.
Occupational	Material wellbeing is very important. Enjoy their work or studies, not necessarily satisfied with the balance between work and leisure time. Outstanding career and job security are not important.
Wellness domain	**Characteristics of the sample of this study**
Spiritual	The least engaged in body- mind- soul activities. Feel that their life has a positive purpose.
Environmental	The environment and climate are not of primary importance.
Social wellness/health	Socialising with friends and engaging in various social activities on a regular basis. Active social life is important, but not the most important aspect; recognition and respect from society is not essential.

These results show that this generation is very heterogeneous in their life-styles and preferences. However there are some common traits that unify them as a generation. They are health-conscious, active; caring about their family and friends, and an optimistic generation. The same features were highlighted in previous studies of Generation Y conducted in other countries.

3. CONCLUSION

The aim of this study was to analyse the wellness consumer market of Generation Y in Estonia.

To achieve this main aim several objectives were set:

- To analyse the characteristics of Gen Y in the context of consumer behaviour
- To investigate the values and attitudes of Estonian Generation Y
- To investigate lifestyle characteristics of Generation Y in Estonia

The first objective was fully achieved in the course of the research. Consumer behaviour literature reveals many misconceptions about Generation Y. Some studies describe them as ambitious overachievers that are self-focused and individualistic (Jorgensen, 2003). Other studies suggest that Gen Y prioritize family and they try to balance their work and family life. They are social, interactive and team- oriented (Howe and Strauss, 2003; Eisner, 2005; Lyons *et al*., 2014; Corvi *et al*., 2007).

Even though there is a lot of contradictory information, some common features were repeatedly mentioned in various studies. These features describe Generation Y as: techno- savvy, social and family-oriented, and with a positive attitude towards diversity, flexibility, social issues and their own future (Donnison, 2007). GenYers seek open, honest and efficient communication. Due to the political and economic situation being so unstable, they also have inherent desire for health and happiness. They understand that they need to live their best lives now as tomorrow may not happen. This group is concerned with their overall health and wellness, and seek holistic and sustainable ways to maintain healthy living (Reyes, 2011).

Certainly the events that happened during formation years of the generation affected Gen Y across the globe differently. Digital era, pop culture and globalisation spread some common trends, but further research in individual countries is needed in order to understand this unique versatile market.

The second study objective was also achieved. In line with studies on American youth, this study has shown that overall Estonian Gen Y seems moderately aware of and interested in wellness. They are generally health and diet- conscious. These are moderate exercisers who value quality of life, and try to balance various aspects of their life to maintain wellness. Strikingly, Estonian youth is predominantly non-smoking.

Similarly to studies on American and Australian Gen Y, Estonian Gen Y is quite positive about their life and future opportunities. They highly appraise family and friends; socialising with them and having leisure- work balance is essential for Estonian adolescents. In fact, they value love and close bonds with family and friends much higher than career. American Gen Y was illustrated as different from Gen X in a sense that they do not associate success and material wellbeing with hard work. Estonian Gen Y seems to have a similar concept. While outstanding career is not prioritised, material wellbeing is ranked high among the list of their values.

An important insight from this study is that political and job security is less important for young Estonians. In the ever-dynamic world where everything changes so rapidly, this generation learnt that nothing is eternal. Thus they learnt to not depend on security as much as previous generations. This also supports the cultural analysis by Hofstede that describes Estonian culture as highly adaptive to changing circumstances (Hofstede Centre, 2014). Moreover, raised in a democratic community they take freedom of speech for granted. Another conclusion that is congruent with the cultural analysis introduced in the second chapter of the paper is that Estonian Millennials do not position recognition and respect from society on the top of the list of their values. This is one characteristic of an individualistic and restrained nation. The strong value that is typical for such culture is being content with one-self. This was chosen as one of the top values by the majority of respondents of this study.

The third objective of the study was accomplished as well, and revealed an interesting insight into lifestyles of Estonian Millennials. The general conclusion is that young Estonians do exercise, but on average are not extreme about it.

Most of them have a good night sleep- something that youngsters in the US, UK and Australia do not boast. Dark long winters and less vibrant night life could be some reasons for this. This is a technological generation who makes use of technology; however, Estonian people are not too dependent on it. It is important for them to be connected to get the news fast, and keep in touch with friends and family. The majority of them meet friends at least once a week. Rather than only chatting online, they meet up for eating out or going to a movie theatre. As an MTV- raised generation Estonians love music and happily attend concerts or music festivals. They also enjoy simply listening to music. Typically for young people, night life is of importance: they gather in bars, pubs and clubs. Some of them stay home playing computer games. Others go to gym even on a free evening. Not so many attend comedy shows however.

As to wellness activities, the most popular choice is the category sports/ fitness/ gym. Fewer respondents prefer steam rooms and massages, and only a minority is engaged in body-mind-soul activities still perceived as exotic in Estonia. The results generally support the perception of Gen Y as active, sporty and adventurous.

When it comes to holiday choice the favourite holiday types for the majority are adventure, and “sun and sand”. They are adventurous, but they also like to relax. They also love city breaks and rural holidays, and importantly for spa industry- spa vacations. Surprisingly the night-life focused holidays are not the top choice of Estonian Millennials. The same is true for yoga holidays- yoga providers need to put more effort to promote their product offer and educate the market.

As all of the objectives were accomplished, the aim of the study was also achieved. The study produced a comprehensive analysis of the wellness consumer market of Estonian

Generation Y. Unfortunately as the sample is not big enough the results of the study cannot be generalised to the whole population.

As a suggestion for further research, segmentation of the wellness consumer market of Generation Y in Estonia would be the next logical step. Information about meaningful segments existing within the market could further equip industry leaders and marketing specialists with tools for developing effective targeting strategies.

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APPENDIX

Appendix 1. Questionnaire Survey

Dear Friends,

I am a graduate student of MA Wellness and Spa Service Design and Management in Tartu University- Parnu College. I have been conducting a research for my master thesis the aim of which is to analyze attitudes to wellness among young Estonians (18-30). This is the first research of its kind in Estonia. I would really appreciate if You spend max 10 minutes of your precious time to answer it. You will help me even more by sending the link to 5 other friends (Estonians, 18-30 years old).

Find the survey by clicking on this link:

https://www.surveymonkey.com/s/wellnessEstonia

I hope You enjoy it and thanks a lot for Your support!

Best Regards,
Lana.

Welcome to My Survey

Dear Respondent,

This questionnaire is part of a research the purpose of which is to investigate attitudes to wellness among young Estonian residents. I would appreciate if you could spend some minutes to answer the questionnaire (maximum 10 minutes). Please recommend this survey to 5 other people you know. Thank you in advance for your time and support

Wellness Lifestyle survey for Estonian Residents (18-30 years old)

Part 1: Demographic Questions

Please circle or underline the correct answers:

1. Age

- 18-30
- 31-40
- 41-50
- 51-60
- 61-70
- 71+

2. Gender?

- Female
- Male

3. Education:

- Secondary
- Vocational
- Higher
- Other (please specify)___________________

***4. What city do you currently live in? ________________________**

Part 2: Nutrition, physical wellness and sleep quality

5. I consider my diet to be healthy (e.g. low in fat, high in fibre, lots of fruit and veg, moderate alcohol and caffeine).

- Very healthy
- Healthy
- Average
- Unhealthy
- Very unhealthy
- I eat what I like and do not think about diet
  I do not know

6. I avoid the use of tobacco products. (cigarettes, smokeless tobacco, cigars, pipes).

- No
- Rarely
- Sometimes
- Often

- I do not smoke at all

7. I engage in sweat-producing physical activity for 20-30 minutes at least three times per week.

- Never
- Rarely
- Sometimes
- Often
- Always

8. I can describe my typical night sleep as:

- Very good- I feel refreshed and energised (8 hours sleep)
- Good- I get enough sleep to function next day
- Average- I wish I had more time to sleep, but my routine does not allow me to get a proper 8 hours sleep
- Bad- I have insomnia, anxiety; thoughts about work/relation/finances etc can't let me sleep.
- I do not consider sleep important for my wellbeing- I prefer to stay awake and active as much as possible
- I do not know

Part 3: Social wellness; sports, leisure and holiday choices

9. I can stay without my devices (laptop, mobile phone, Ipad):

- I cannot imagine staying without my devices even for a moment
- 1-2 days
- Up to a week
- Up to two weeks

- Having devices and/or being connected to mobile network/internet is not important for me at all
- I do not have any devices

10. I meet with my friends:

- At least once a week
- At least once a month
- At least once in three months or more
- I keep in touch by phone, Internet instead of meeting face to face
- I do not have friends
- Other

***11. I enjoy most and engage in on a regular basis (*at least once a week*):**

- Sports, fitness, gym
- Sauna/ Steam Rooms/Massages
- Body- mind- spirit activities (yoga, taichi, chi king, pilates, meditation etc.)
- None
- Other (please specify) ___________________________

***12. When I choose how to spend my free evening, I usually prefer to:**

(*more than one answer is allowed*)

- go to a concert, music festival/listen to music
- go to a pub/club/ bar
- play computer games/browse internet/online social networking
- eat out with friends/family
- shop

- attend a comedy club show
- go to gym, do sports
- go to a movie theater
- Other (please specify)__________________________

***13. The type of holidays that makes me happiest is:**

(*Choose the Top Three options. Rank these three options 1 to 3 where 1 is the most favourite*)

- Adventure
- Sun and sand
- City break
- Nightlife- focused
- Nature/ rural
- Spa holiday
- Yoga or other spiritual holiday
- Other

Part 4: Work- leisure balance, attitude to future

14. I enjoy my work or studies.

- Never
- Rarely
- Sometimes
- Often
- Always

15. I am satisfied with the balance between my work time and leisure time.

- Never
- Rarely
- Sometimes
- Often
- Always

16. I feel that my life has a positive purpose.

- Never
- Rarely
- Sometimes
- Often
- Always
- N/A

17. I feel positive about future opportunities for myself and my friends.

- Very Positive
- Positive
- Neutral
- Not very positive
- Negative
- I have mixed feelings
- I do not think about future
- Other (please specify): ________________________

***18. The most important things to make my life happy are:**

(*Choose the Top Three options. Rank these three options 1 to 3 where 1 is the most important*)

- Health
- Material Wellbeing
- Love
- Being content with who I am
- Close bond/ Good relationship with relatives and friends
- Political security
- Active social life
- Job security
- Recognition and respect from the society
- Certain type of climate and environment i live in
- Freedom of speech
- Enough opportunities for leisure and travel
- I do not know
- Other

SUMMARY/ РЕЗЮМЕ

Данная работа является диссертацией выпускницы магистерской программы Веллнесс и Спа Менеджмента Университета Тарту- Пярну колледжа.

Название темы диссертации следующее: "Анализ потребительского рынка веллнесс индустрии среди Поколения Y в Эстонии". Основная цель исследования- анализ потребительского рынка Поколения Y по отношению к велнесс продукции и сервисам в Эстонии. Поколение Y- это категория молодежи в возрасте примерно от 12 до 34 лет.

В соответствии с основной целью диссертации было выдвинуто несколько исследовательских задач:

- анализ характеристик Поколения Y в контексте потребительского поведения
- изучение ценностей и жизненной позиции Поколения Y в Эстонии
- изучение характеристик образа жизни Поколения Y в Эстонии

Таким образом, с теоретической точки зрения данная работа ставит целью заполнить пробел в исследовании группы потребителей Поколения Y в Эстонии. С точки зрения промышленности, данная информация способствует созданию более эффективных маркетинговых стратегий и, в конечном счете, служит ключом к пониманию и укреплению отношений с Поколением Y. Понимание потребительского рынка предоставляет предприятиям средства для развития и совершенствования продукта.

Для достижения поставленных задач был разработан соответствующий онлайн опросник на основе академической литературы по таким темам как веллнесс, модели веллнесс сегментаций и так далее. Предложения к заполнению опросника были распространены методом снежного кома на социальной платформе Facebook.com. Всего были собраны результаты 234 заполненных опросников.

Поставленные исследовательские задачи были достигнуты. Анализ литературы показал что несмотря на разрозненную информацию о Поколении Y, следующие характеристики упомянаются в работах большинства ученых: технологически-подкованные, социальные и семейно- ориентированные, с позитивным отношением к многообразию и различиям, гибкости, социальным вопросам и своему будущему.

Результаты данного исследования подтверждают общее восприятие Поколения Y как поколения, оптимистично настроенного по отношению к своей жизни и будущему. Так же, любовь и близкие отношения с родными для них превыше карьеры. В то же время материальное благосостояние первостепенно.

Так же, данное исследование освещает образ жизни эстонского Поколения Y и их отношение к здоровью и благополучию. Основной вывод- Поколение Y в Эстонии ведут довольно здоровый образ жизни: большинство умеренно занимаются спортом, не курят и считают что едят полезную пищу. Однако немногие респонденты заинтересованны в спа сервисах и занятиях категории "body- mind-spirit" (т.е. тай- чи, чи- кинг, йога и т.д.). Поставщикам данных типов сервисов стоит обратить особое внимание на обучение и привлечение молодежи.

Несмотря на то, что объем выборки является нерепрезентативным всей группы Поколения Y проживающих на территории Эстонии, данное исследование-первый шаг к пониманию этой уникальной группы потребителей.

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