

A woman with dark hair, wearing a black athletic top and shorts, is sitting on a rock in a desert canyon. She is looking upwards and to the right. The background features large, reddish-brown rock formations under a clear blue sky. The overall mood is serene and adventurous.

Global Wellbeing Report 2023



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Methodology



Defining Wellbeing

Each person's definition of wellbeing varies. For some, it encompasses the holistic idea of mind, body, and soul. For others, it centers around specific factors, like having a sense of community or living in an inviting physical environment.

For the purposes of this research, "wellbeing" is defined by three core elements. The balance of these three elements makes up the core of being well and feeling your best.

Physical wellbeing

Feeling empowered and able to give one's body what it needs for health and quality of life.

Mental wellbeing

Feeling emotionally prepared, and able to handle what the future holds.

Social wellbeing

Feeling connected to others, a part of something larger than oneself, and contributing to a supportive community.



Methodology

lululemon commissioned an **online survey** managed by Edelman Data & Intelligence (DXI) that fielded in 14 markets between **May 1, 2023 – June 6, 2023**.

14,000 respondents in total

n=1,000 per market;
general population, aged 18+

NOTE: The 2021 Global Wellbeing Report was conducted across 10 markets [Hong Kong S.A.R., Spain, Thailand, and New Zealand have since been added to the survey]. In any year-over-year comparisons, China Mainland 2023 figures have been compared with China (inclusive of Hong Kong S.A.R.) in 2022.

Survey sample is representative of the market population by age, gender, region, and income – and, where applicable, race/ethnicity.

The survey mirrors the markets where lululemon operates commercially (owned or franchise), as that offers the most potential for lululemon to positively impact people's wellbeing. Please note for legal reasons, race/ethnicity was only asked in the United States, United Kingdom, Canada, and Australia and as such, is referenced to only where a significant theme can be drawn across all four markets. Additionally, LGBTQIA2S+ status was not asked in Singapore.

Not all percentages sum to 100% due to rounding, and total global percentages have a margin of error of <1%.

Please note that research is not necessarily predictive of future outcomes and captures opinions for a point in time. All sample surveys and polls may be subject to other sources of error, including, but not limited to, coverage error and measurement error. Statistical margins of error are not applicable to online nonprobability sampling polls.





Executive Summary



The Wellbeing Dilemma

People are increasingly prioritizing their wellbeing—yet the state of wellbeing is not improving. This paradox reflects an uphill battle that people around the world are taking on with courage and little support. They often feel overwhelmed by the idea of wellbeing and the barriers around it. Wellbeing has become another “goal to hit”, and people are increasingly anxious that they are failing themselves and those around them.

Institutions, brands, and society at large have an important role to play in enabling and supporting the pursuit of wellbeing, without creating stressful imperatives and upholding unachievable standards. It's time to introduce a softer take on self-care—one where the journey towards being well includes enjoyable, simple acts of movement, mindfulness and connection.

Our goal with this report is to reveal a glimpse into the world's state of holistic wellbeing, as we continue our journey to advocate and unlock greater possibility and wellbeing for all.

Overall,

67%

of people place wellbeing as a **top priority**.

BUT

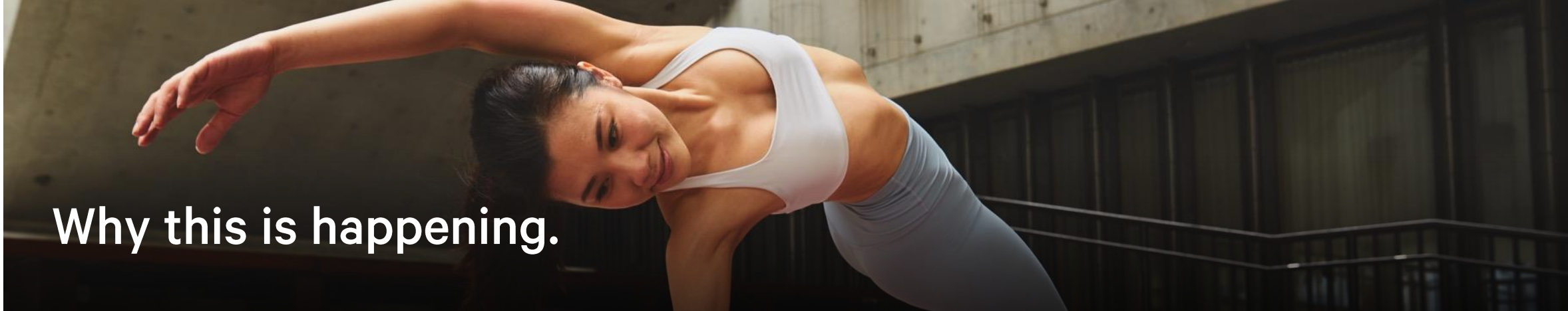
44%

feel achieving wellbeing as a top priority is **impossible to achieve**.

AND ONLY

12%

say their wellbeing is **where it should be**.



Why this is happening.

There is no post-pandemic morale boost.

1 in 3

say their wellbeing is **lower than it has ever been before.**

&

41%

feel **hopeless** when they think about the state of the world.



The **global wellbeing score** has not improved for the past three years.

Barriers to wellbeing are hard to overcome.

30% don't have the **time** to think about their wellbeing.

33% don't seek help for their wellbeing because they **don't feel comfortable** talking about it.

51% are **deprioritizing** their wellbeing due to **cost** concerns.

Social pressures make wellbeing feel harder to achieve.

55% believe **society is judgmental** towards those who have lower mental wellbeing.

42% feel **pressure to pretend to be happy** even when they're not.

39% feel the **pressure to conform** to societal norms negatively impacts their mental wellbeing.



How it manifests.



Everyone is struggling, one way or another.

58% cannot be the best versions of themselves when their wellbeing is low.



People **missed 5 days of work in the past year**, on average, due to low wellbeing.

37% of people **fall behind on work responsibilities** when their wellbeing is low.

Students with low wellbeing are nearly 3X more likely to **struggle with achieving good grades**.

44% feel they are not the **parent** their children need them to be when their wellbeing is low.

Gen Z is suffering in silence.

Mental health taboo is a significantly higher barrier for Gen Z compared to older generations:

74% of Gen Z feel it is important that, as a society, we be **more open to talking** about mental health.

60% of Gen Z wish they could **express how they actually feel**, instead of always pretending to be fine.

45% of Gen Z **don't seek help** for their wellbeing because they **don't feel comfortable talking** about it.

Male wellbeing is hindered by societal and gender norms.

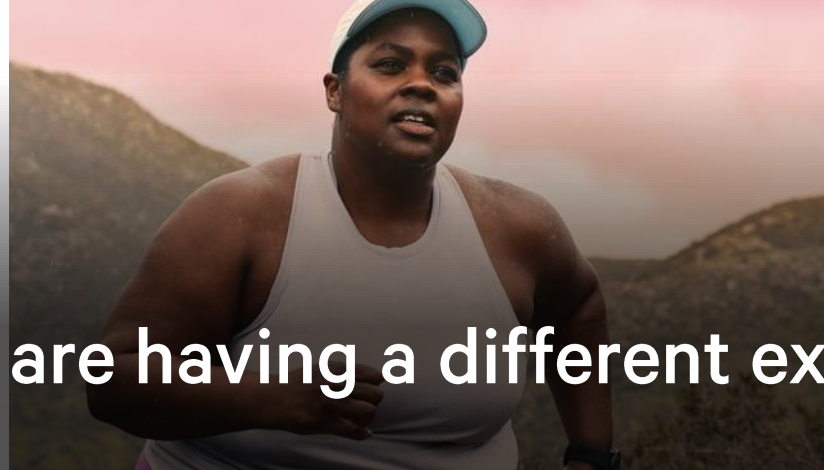
Societal and gender norms are stopping men from speaking up about or improving their mental health:

48% of individuals identifying as men feel society has made it **more difficult for men** to speak up about their mental health than women.

43% of individuals identifying as men **wish they wouldn't be judged** for showing an interest in improving their mental wellbeing.

39% of individuals identifying as men feel **societal expectations for men** in their market make it difficult for them to express their emotions.

*Please note for legal reasons, race/ethnicity was only asked in the United States, Canada, United Kingdom, and Australia.



HOW IT MANIFESTS:

Marginalized groups are having a different experience.

Marginalized groups feel the impacts of lower wellbeing more strongly.

69% of **people living with disabilities** feel they **cannot live their life to the fullest** when their wellbeing is low (vs. 51% without disabilities).

63% of **BIPOC** in the U.K. **struggle to get out of bed** in the morning when their wellbeing is low (vs. 49% white).

53% of **BIPOC** in the U.S. feel some of the topics in their **local news makes them worried** for their personal wellbeing (vs. 46% white).

29% of **LGBTQIA2S+** feel that **fewer spaces for exercise** in their neighborhood has negatively impacted their wellbeing (vs. 24% Non-LGBTQIA2S+).

Marginalized groups also face more challenges in addressing low wellbeing.

63% of **people living with disabilities** are worried about how they will afford their current lifestyle as **cost of living rises** (vs. 52% without disabilities).

4 in 10 of **BIPOC** in Canada and the U.K. don't seek help for their wellbeing because they **don't feel comfortable talking** about it (Canada: 42% vs. 31% white; UK: 41% vs. 31% white).

48% of **BIPOC** in Canada wish they had the **language or tools to express** how they actually feel (vs. 35% white).

34% of **LGBTQIA2S+** don't feel like they have the **time** to think about their wellbeing (vs. 29% Non-LGBTQIA2S+).

But marginalized groups are also more likely to be taking action.

60% of **BIPOC** in the U.S. are actively trying to make sure they **express their full range of emotions** (vs. 49% white).

50% of **BIPOC** in the U.K. are now **investing more time** to focus on their mental wellbeing (vs. 36% white).

36% of **BIPOC** in Australia are **setting better boundaries at work**, compared to pre-pandemic (vs. 23% white).

33% of **people living with disabilities** are **setting boundaries in their personal life** more now than pre-pandemic (vs. 28% without disabilities).

*Please note for legal reasons, race/ethnicity was only asked in the United States, Canada, United Kingdom, and Australia.



HOW IT MANIFESTS:

The experience is different across markets.

China Mainland shows greater wellbeing and increased optimism and hope.

78
wellbeing score
vs 66
global average

&

67% feel **optimistic** about the future
| vs. 42% global average
75% lean into **hope** to cope with bad news
| vs. 54% global average

Thailand tops wellbeing charts, but is threatened by social pressures.

79
wellbeing score
TOP wellbeing score globally

BUT

Over half feel pressure to pretend to be happy even when they are not.
| vs. 42% global average
feel the pressure to conform to societal norms negatively impacts their mental wellbeing.
| vs. 39% global average

South Korea faces lack of time as the main barrier to achieving wellbeing.

59
wellbeing score for those who say **lack of time** is a barrier to their wellbeing.
| vs. 68 for those who don't see lack of time as a barrier

&

1 in 2 stress that **having "me time"** has become more important to them in the past year.
| vs. 43% global average

To improve their wellbeing, the U.S. is setting boundaries at work and in their personal lives.

2 in 3 of those with high wellbeing say that **setting boundaries at work** has made them more productive employees.

&

1 in 3 are **setting boundaries in their personal lives** (with friends, family, etc.).

Germany needs focus on digital detox and physical activity to improve wellbeing.

2x Gen Z are nearly 2X as more likely than other generations to feel that **social media negatively impacts their wellbeing.**
| vs. 1.4X for global Gen Z

&

38% are turning to their **community for physical initiatives.**
| vs. 48% global average

Women in Spain need support.

1.5X Women are 1.5X more likely than men to feel that their wellbeing is lower than ever before.
| 37% women vs. 25% men

&

69% of women feel like their life is passing them by when their wellbeing is low.
| vs. 56% of men



Moving towards progress.



Work to break the stigma.

49%

wish it was **acceptable to express their full range of emotions.**

BUT

43%

feel it is **not widely acceptable in their community to talk about mental health** challenges.

Support small but powerful personal actions.

67%

want to feel **unconstrained and free** when they choose to be physically active.

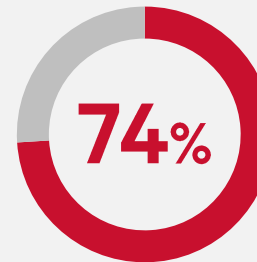
62%

believe **feeling their full range of emotions is necessary** to have strong mental wellbeing.

30%

are **setting boundaries** in their personal life (i.e.. with friends, family, etc.).

Recognize that wellbeing challenges are societal challenges.



feel institutions (including government, media, businesses, and NGOs) are **not doing enough to facilitate societal wellbeing.**



We're all in it together.

With global anxiety at an all-time high, people are also coming together, specifically around climate change.

41%

agree thinking about **climate change heightens their feelings of anxiety.**

BUT

43%

also agree **global unity around climate change makes them hopeful** for the future.

People are turning to their community for support in improving their wellbeing.

Nearly
1 in 2

turn to **their community** for physical wellbeing initiatives.

AND

report that **their community has played an active role** in improving their wellbeing.



* To learn more about what lululemon is doing in the space and where we are against our goals, please see our [Impact Report](#).



What this means for you: learning from those with higher wellbeing.

Clear actions that contribute to higher wellbeing:

1 Work out/exercise with other people when possible.

1 in 2

of those with high wellbeing are **working out with other people** more now than pre-pandemic.

VS

1 in 4

of those with low wellbeing.

2 Prioritize spending time with your loved ones.

2 in 5

of those with high wellbeing are **prioritizing spending time with loved ones** more now than pre-pandemic.

VS

3 in 10

of those with low wellbeing.

3 Work to express all your emotions, not just the positive.

1 in 2

of those with high wellbeing are actively trying to make sure they can **express their full range of emotions, not just ones linked to happiness.**

VS

2 in 5

of those with low wellbeing.



Detailed Findings



Key Chapters

01 WHY THIS IS HAPPENING
After three years, people are starting to take action against low wellbeing – but it feels impossible to achieve.

02 HOW THIS IS MANIFESTING
Wellbeing is not a nice to have – it’s key to whether or not people can function.

03 HOW TO ADDRESS IT
People not only demand change from themselves, but also from the institutions they interact with most.





**After
three
years,**

Detailed
Finding / 01

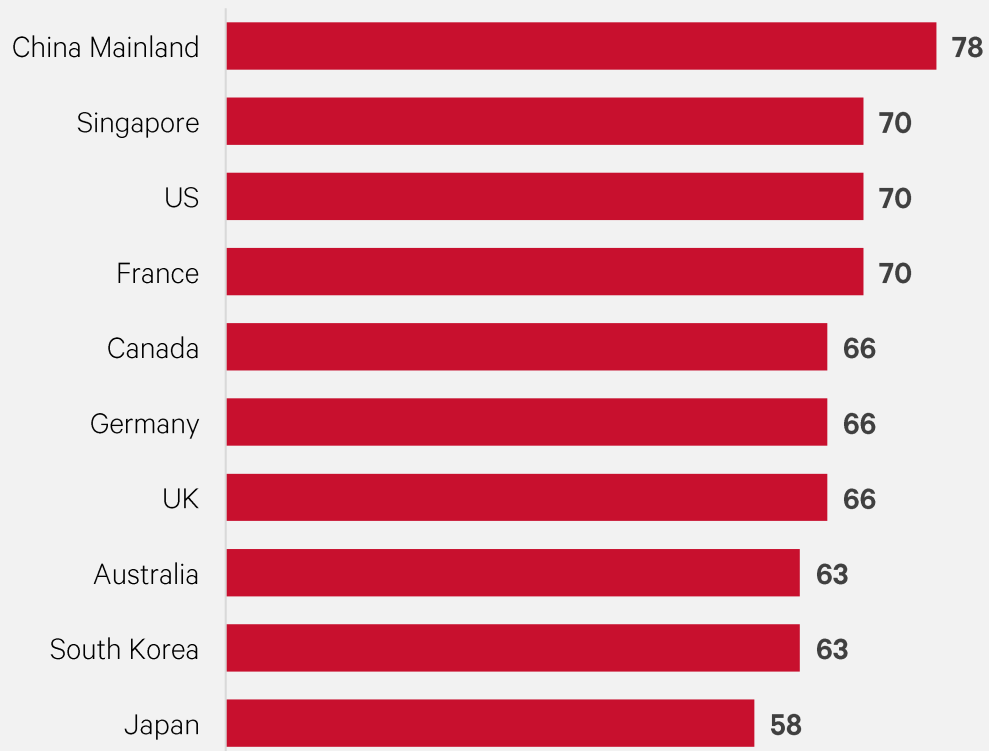
**people are
starting to
take action
against low
wellbeing –
but it feels
impossible
to achieve.**



Global wellbeing levels have not improved over the past three years.



* Note that wellbeing scores across all three dimensions (physical, social, and mental) also have, not improved over the past three years.



△ 2022

+3

+2

+3

+2

-

+1

+4

+1

-2

-3

Not surveyed across all three years, included for added detail:

Thailand	79
Hong Kong S.A.R.	75
Spain	71
New Zealand	62

Q2 Now we'd like for you to tell us how you think you are doing on each of these elements that allow you to feel your best. Please don't think about comparing yourself to others, but instead think about your own personal feeling of 'best.' For each element below, please tell us how you feel you are doing on a scale of 1 to 9, where 1 means you're feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area. <Showing Top 3 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand). *Note that Thailand, Spain, and New Zealand are not included in global comparisons year-over-year as they were newly added to the survey in 2023.



Global concerns further exacerbate wellbeing challenges.

52%

agree some of the topics in the news make them worried about their way of life.

Additionally, 41% feel hopeless when they think about the state of the world

1 in 2

agree some of the topics in global news media make them worried for their personal wellbeing.

Topics include **the global recession**

56%

agree they are worried about how they are going to afford their current lifestyle as the cost of living continues to rise.

54%

are worried about managing their finances in the coming year. *Gen Z are especially concerned (65% vs. 59% Millennial, 59% Gen X, 43% Boomer+)*

Q8: We'd like you to think about how you feel about the current state of the world and how it impacts your physical, mental, and social wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Size: 2023 Global Total (n=14,000), Gen Z (n=1,630), Millennial (n=3,863), Gen X (n=3,419), Boomer+ (n=5,088)



Climate change is especially concerning, though people are hopeful about global unity surrounding the issue.

41%

agree thinking about climate change heightens their feelings of anxiety.

BUT

43%

also agree global unity around climate change makes them hopeful for the future.

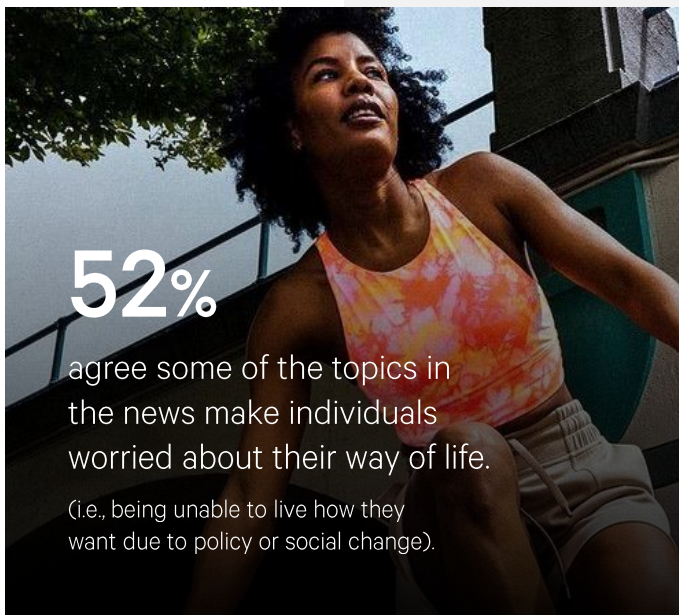
► The anxiety is especially felt in **South Korea** and **Thailand**.

By market

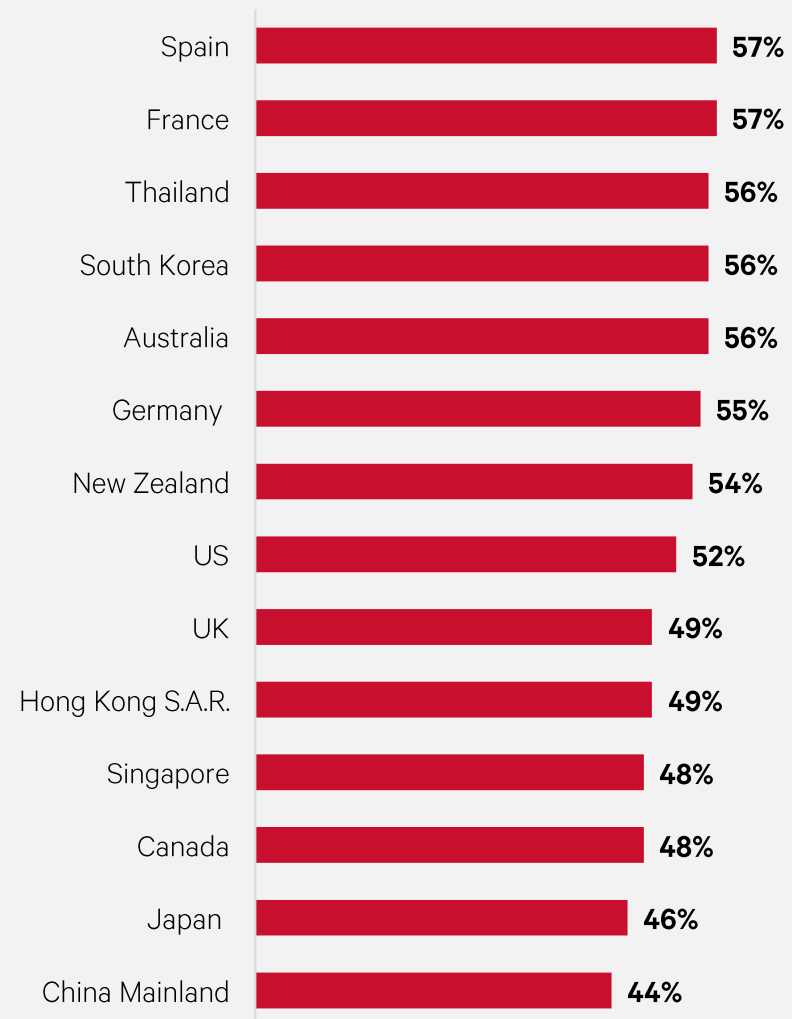
Thailand	59%
South Korea	58%
Hong Kong S.A.R.	44%
France	44%
Spain	43%
US	40%
Japan	39%
UK	38%
Singapore	38%
China Mainland	38%
New Zealand	36%
Canada	35%
Australia	34%
Germany	34%



Q8: We'd like you to think about how you feel about the current state of the world and how it impacts your physical, mental, and social wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), N=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).



The anxiety impact of global media coverage is experienced across many markets but is felt strongest in Spain and France.



Q8: We'd like you to think about how you feel about the current state of the world and how it impacts your physical, mental, and social wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), N=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).



77% say they have a significant responsibility in helping improve their **own** overall wellbeing.



67% feel that wellbeing is a **top priority**.



By market

Spain	80%	Germany	67%
Singapore	72%	UK	67%
Thailand	72%	Australia	67%
Canada	71%	Hong Kong S.A.R.	66%
US	69%	New Zealand	65%
China Mainland	68%	South Korea	62%
France	68%	Japan	44%

People are taking their wellbeing into their own hands and actively prioritizing it.

O6. Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Agreement> / Q21: Using the scale below, please indicate who has a responsibility in helping you improve your overall wellbeing. <Showing Choice 3> / Base Sizes: 2023 Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).



Efforts to improve wellbeing mentally, physically, and socially are surging globally.

Compared to pre-pandemic:



78%

are making **any** positive improvement to their **mental wellbeing**:

- “ 34% setting aside more personal time for the things they enjoy.
- 34% spending more time with loved ones.
- 26% learning about strategies to better manage their mental wellbeing.

76%

are making **any** positive improvement to their **physical wellbeing**:

- “ 34% moving their bodies more in inexpensive/free ways.
- 34% prioritizing eating healthy more often.

72%

are making **any** positive improvement to their **social wellbeing**:

- “ 34% re-evaluating what is important to them in relationships with their friends and loved ones.
- 32% saying no to social events that do not positively impact them.

Q11. Please think about any changes you have made in your life to save money due to the state of the economy (i.e., rising costs, inflation, a global economic softening/recession, broad layoffs, etc.). Compared to pre-pandemic times, have you been doing the following more or less often if at all? Q12: Please consider all the activities you do and actions you take in relation to your mental wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often, if at all? <Showing Do This More> / Q17: Please consider all the activities you do and actions you take for your physical wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often than you do now, if at all? <Showing Do This More> / Q19: Please consider all the activities you do and actions you take to have strong social wellbeing. Compared to pre-pandemic times, have you been doing the following activities/actions more or less often, if at all? <Showing Do This More> / Base Size: 2023 Global Total (n=14,000)

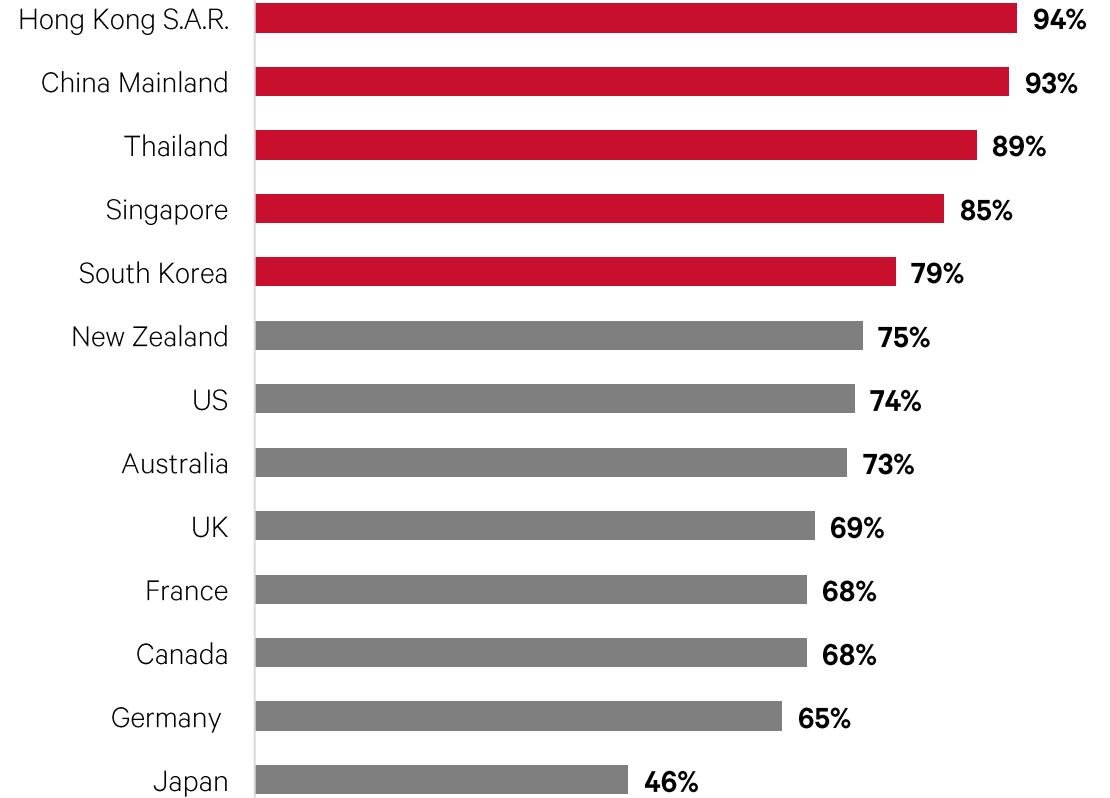
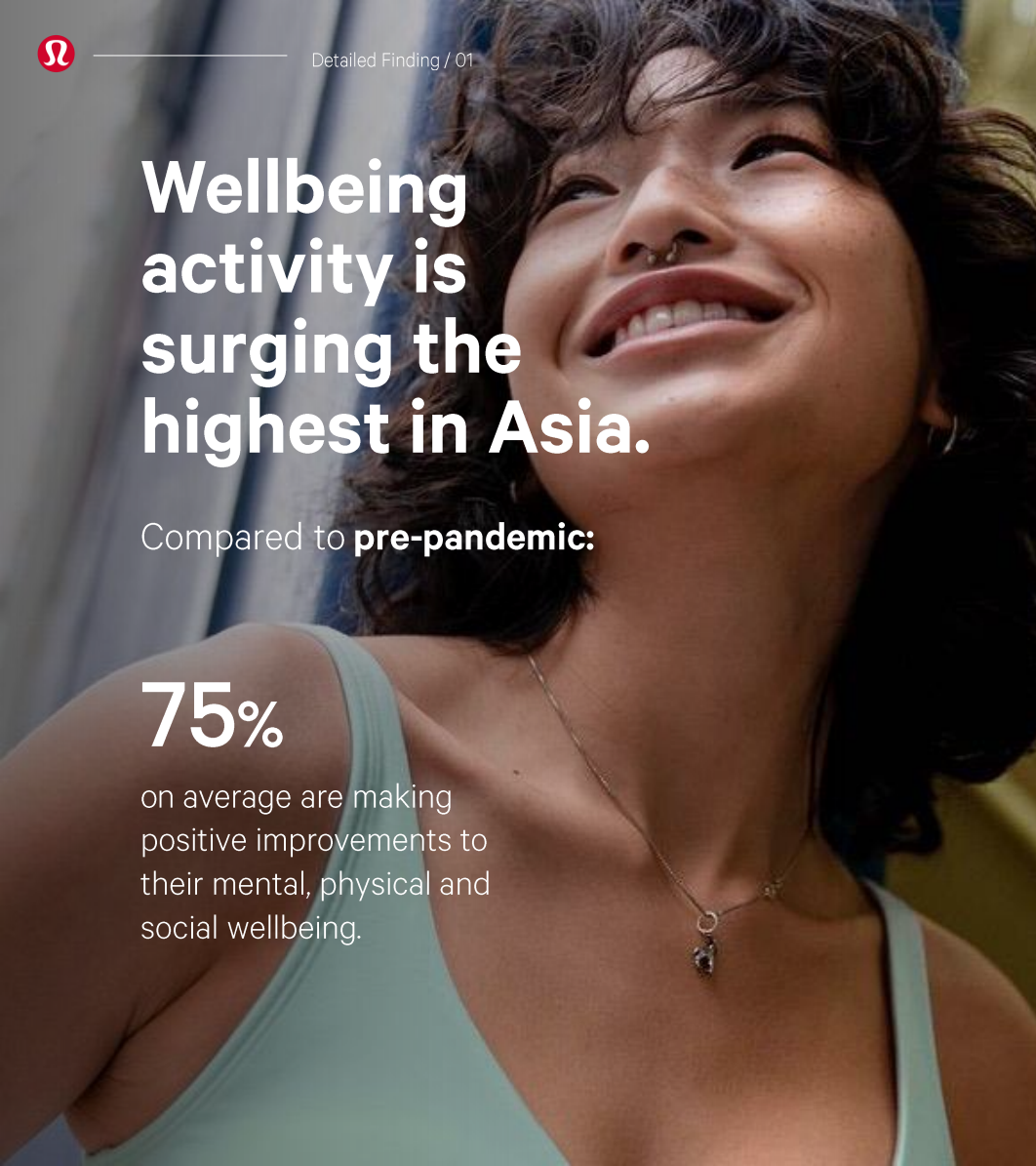


Wellbeing activity is surging the highest in Asia.

Compared to **pre-pandemic**:

75%

on average are making positive improvements to their mental, physical and social wellbeing.



Q12: Please consider all the activities you do and actions you take in relation to your mental wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often, if at all? <Showing Do This More> / Q17: Please consider all the activities you do and actions you take for your physical wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often than you do now, if at all? <Showing Do This More> / Q19: Please consider all the activities you do and actions you take to have strong social wellbeing. Compared to pre-pandemic times, have you been doing the following activities/actions more or less often, if at all? <Showing Do This More> / Base Sizes: 2023 Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).

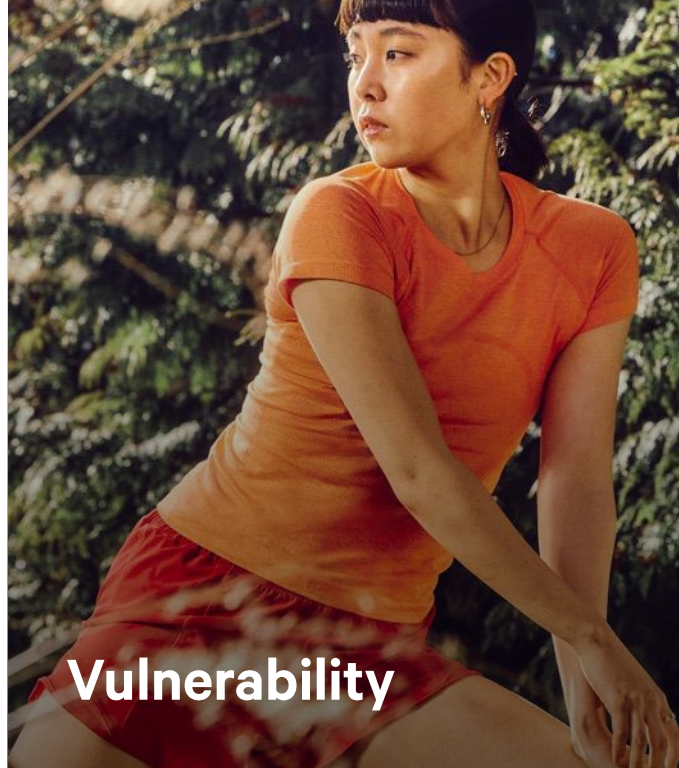


Detailed Finding / 01 (cont.)

We're seeing the rise of a more holistic wellbeing journey – one that emphasizes vulnerability and setting boundaries.



Wellbeing is increasingly synonymous with listening to yourself, with an emphasis on vulnerability and setting boundaries.

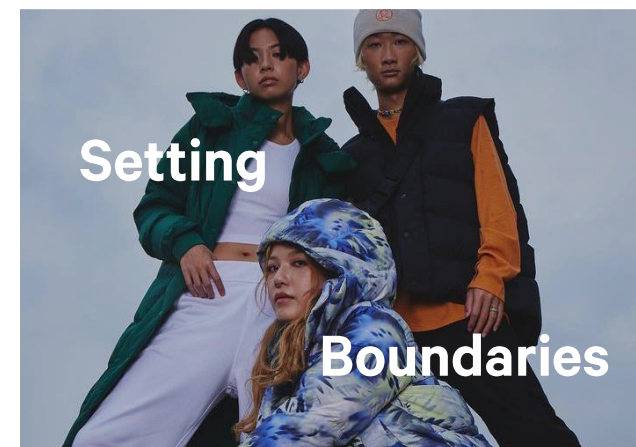


57% are letting themselves feel their emotions as they come and refrain from forcing happiness.

26% are allowing themselves to experience all the emotions.

25% are vocalizing their problems more to trusted loved ones.

BIPOC in the U.S. are actively trying to make sure they express their full range of emotions (**60% U.S. BIPOC** vs. 49% white).



64% are more vocal about their needs in friendships, relationships, and with family.

30% are setting better boundaries in their personal life.

26% of people are setting better boundaries at work.

Q12: Please consider all the activities you do and actions you take in relation to your mental wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often, if at all? <Showing Do This More> / Q19: Please consider all the activities you do and actions you take to have strong social wellbeing. Compared to pre-pandemic times, have you been doing the following activities/actions more or less often, if at all? <Showing Do This More> / Q20: Thinking broadly about your social wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), Employed (n=8,852)



There is
a renewed
effort to find

joy in

movement.

71%

agree physical wellbeing is important for mental wellbeing.

65%

agree when they move their body, their mental wellbeing improves.

68%

feel it is more important to go at their own pace when they are physically active than try to keep up with those around them.

67%

want to feel unconstrained and free when they choose to be physically active.

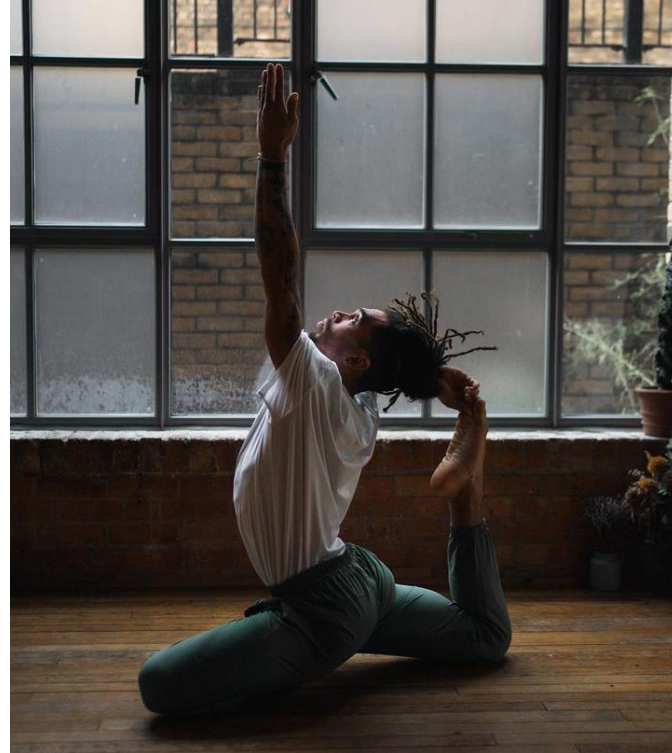
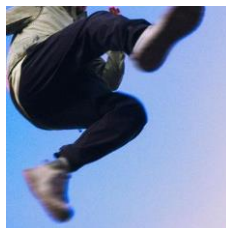
57%

feel rather than have a specific workout routine, they prefer to move their body in a way that feels good at the time.

36%

refuse to be physically active in an environment that doesn't feel inclusive.

Q13: Thinking broadly about your mental wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Q18: Thinking broadly about your physical wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Base Size: 2023 Global Total (n=14,000)



To find this joy, people are experimenting with where—and how—they move their bodies.

Compared to pre-pandemic:

44%

are working out with others more.

27%

are being more intentional in the way they choose to move their body.

26%

are diversifying the ways in which they move their body more.

24%

are exercising in new ways they had not tried before.

Q17: Please consider all the activities you do and actions you take for your physical wellbeing. Compared to pre-pandemic times, have you been doing the following more or less often than you do now, if at all?
Note: While wellbeing is interconnected across all three dimensions, mental, physical, and social, we'd like you to specifically consider your physical wellbeing when answering the next three questions. <Showing Do This More> / Base Size: 2023 Global Total (n=14,000)



Detailed Finding / 01 (cont.)

Prioritizing wellbeing feels impossible, especially among marginalized groups



44% feel maintaining wellbeing as a top priority is impossible.

This dissonance is felt most in **Singapore, South Korea, and Thailand.**



By market

Singapore	48%	Spain	46%
South Korea	48%	Hong Kong S.A.R.	45%
Thailand	48%	Germany	45%
Australia	47%	US	43%
New Zealand	47%	China Mainland	40%
Canada	46%	France	40%
UK	46%	Japan	29%

And only

12%

feel their wellbeing is where it should be.

Q2 Now we'd like for you to tell us how you think you are doing on each of these elements that allow you to feel your best. Please don't think about comparing yourself to others, but instead think about your own personal feeling of 'best.' For each element below, please tell us how you feel you are doing on a scale of 1 to 9, where 1 means you're feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area. <Showing Top 1 Box Agreement> / Q6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand)

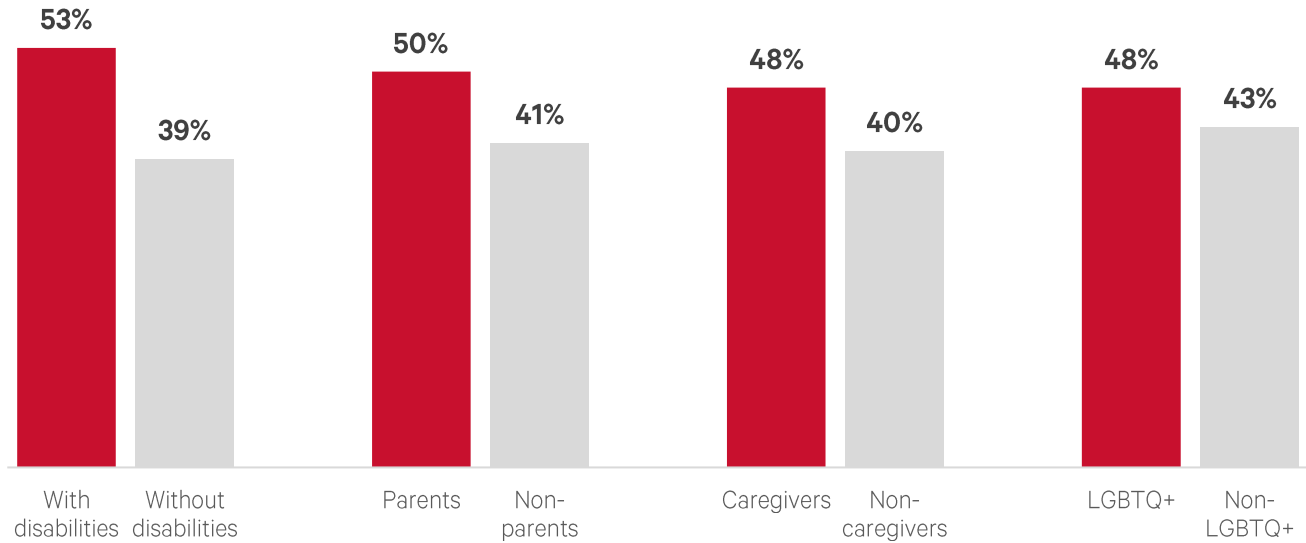
Groups who have been historically less visible are most likely to struggle with seeding wellness as an achievable goal.

44%

feel achieving wellbeing as a top priority is impossible to achieve.



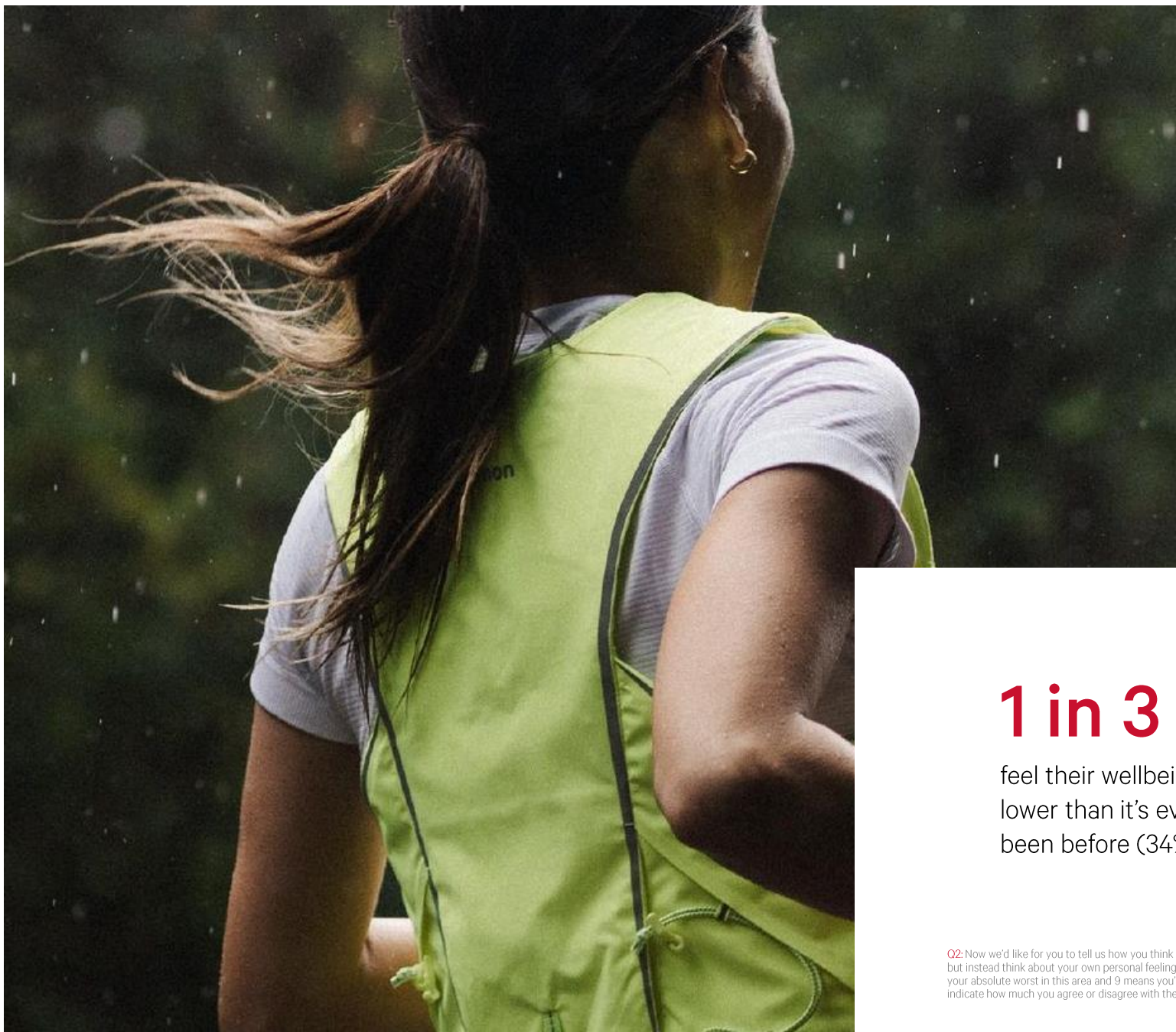
This is **even higher** among certain groups:



Gen Z is also more likely to feel that maintaining wellbeing as a top priority is impossible to achieve (**56% Gen Z** vs. 50% Millennial, 48% Gen X, 33% Boomer+).

Further, Gen Z Parents are especially likely to report this difficulty (**63% Gen Z Parents** vs. 49% Millennial, 50% Gen X, 43% Boomer+).

Q6. Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: 2023 Global Total (n=14,000), people living with disabilities (n=4,921), Those without disabilities (n=8,748), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777), Gen Z (n=1,630), Millennial (n=3,863), Gen X (n=3,419), Boomer+ (n=5,088), Gen Z Parents (n=320), Millennial Parents (n=2,282), Gen X Parents (n=1,647), Boomer+ Parents (n=515)



**In addition,
an alarming
1 in 3 feel their
wellbeing is lower
than it has ever
been before.**

1 in 3

feel their wellbeing is lower than it's ever been before (34%).

— EVEN —

1 in 4

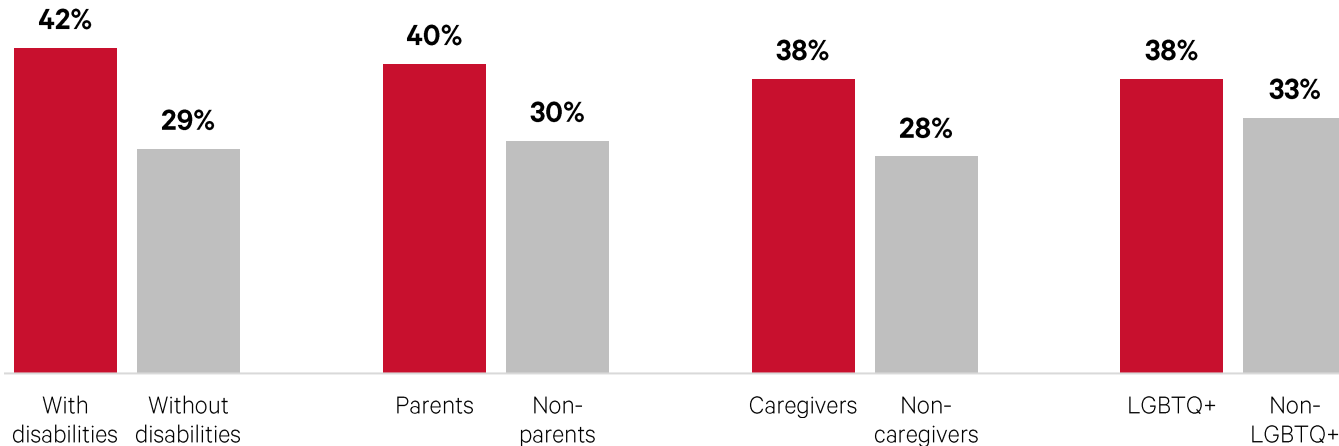
of those with high wellbeing still rate their wellbeing lower than ever.

Q2: Now we'd like for you to tell us how you think you are doing on each of these elements that allow you to feel your best. Please don't think about comparing yourself to others, but instead think about your own personal feeling of 'best.' For each element below, please tell us how you feel you are doing on a scale of 1 to 9, where 1 means you're feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area. <Showing Top 3 Agreement> / Q6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Global High Wellbeing (n=5,339)



Low wellbeing is an even more significant problem for certain groups.

Caregivers, parents, the LGBTQIA2S+ community, and people living with disabilities are significantly more likely to report their wellbeing is lower than it's ever been before.



Especially significant for **Gen Z**
Parents: 46% agree (vs. 38% Millennial, 40% Gen X, 37% Boomer+)



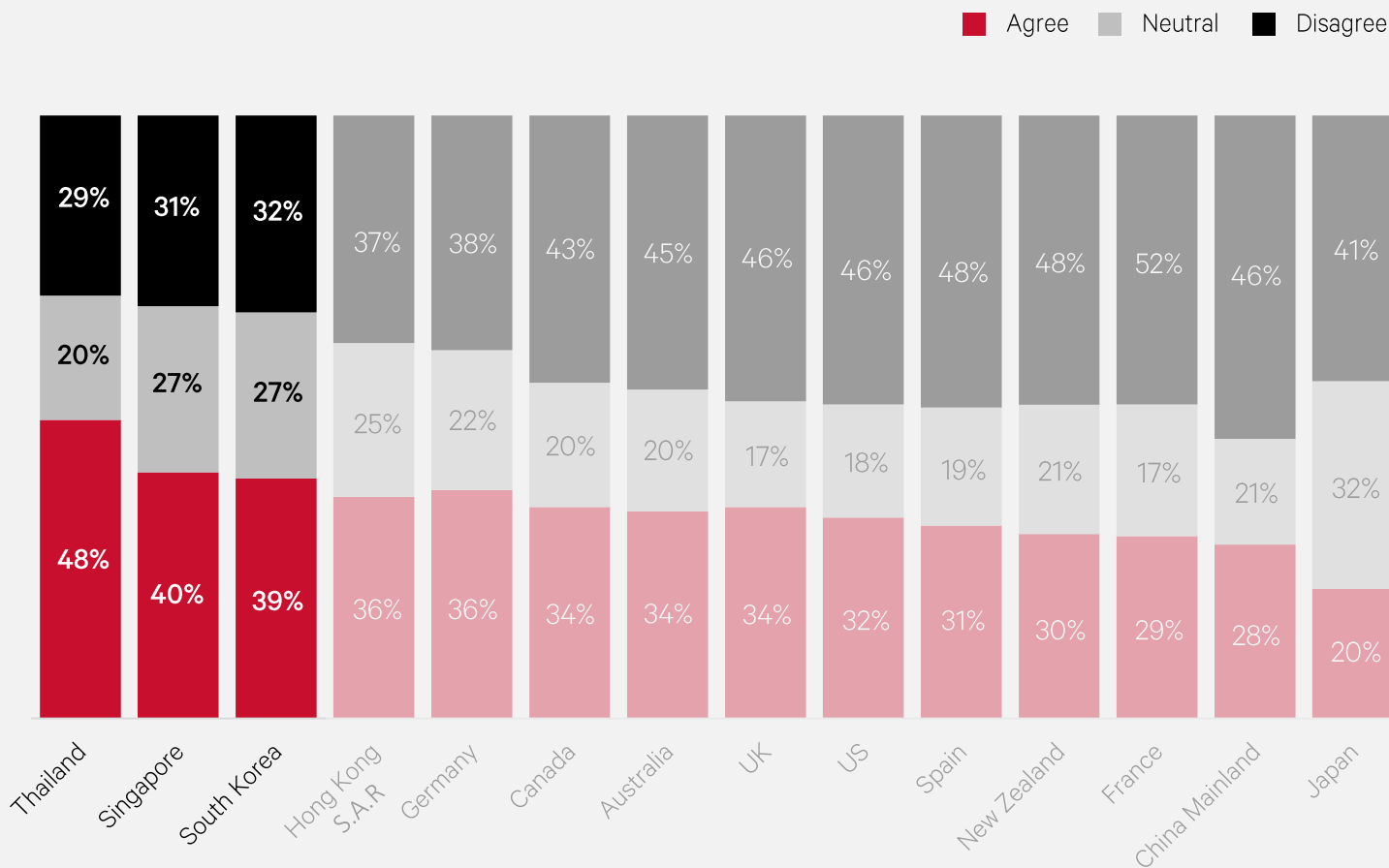
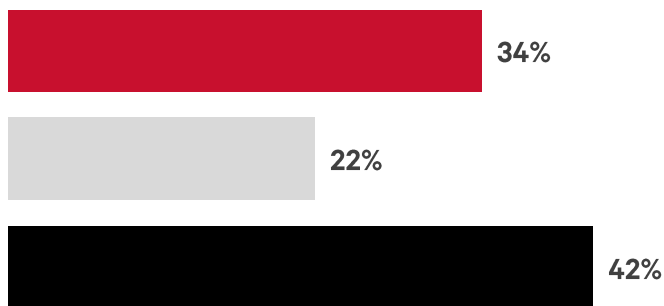
O6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), people living with disabilities (n=4,921), Those without disabilities (n=8,748), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777), Gen Z Parents (n=320), Millennial Parents (n=2,282), Gen X Parents (n=1,647), Boomer+ Parents (n=515)



There is a dramatic split across all global markets between those who feel in crisis and those who do not.

These results show the percentage who feel **their wellbeing is lower than it's ever been before.**

Global



*Note that above percentages may not add up to 100, as the survey included the option of "does not apply to me."

Q6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement, Bottom 2 Box Disagreement, Neutral> / Base Sizes: Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R, Spain, New Zealand).



Detailed Finding / 01 (cont.)

**Critical barriers
limit people from
fully realizing their
wellbeing potential.**



Barriers—such as taboo, lack of time, financial insecurity, and lack of access to physical exercise spaces—limit people from prioritizing their wellbeing.

33%

don't seek help for their wellbeing because they don't feel comfortable talking about it.

26%

feel that fewer spaces / closing down of spaces for exercise in their neighborhood has meant fewer opportunities to exercise.

51%

are deprioritizing their wellbeing due to cost.

30%

don't feel they have the time to think about their wellbeing.



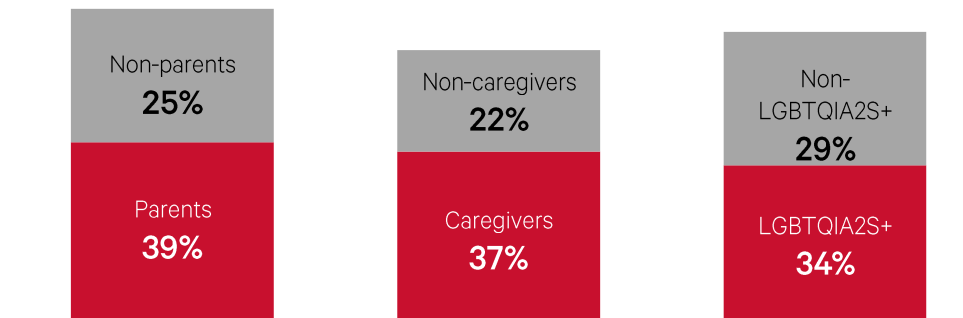
Q6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Q10: Now, please think specifically about the current state of the economy (i.e., rising costs, inflation, a global economic softening/recession, broad layoffs, etc.) and how it is impacting your life and wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000)



Crucially the groups with lower overall wellbeing are disproportionately facing barriers, an urgent sign that new forms of support are needed:

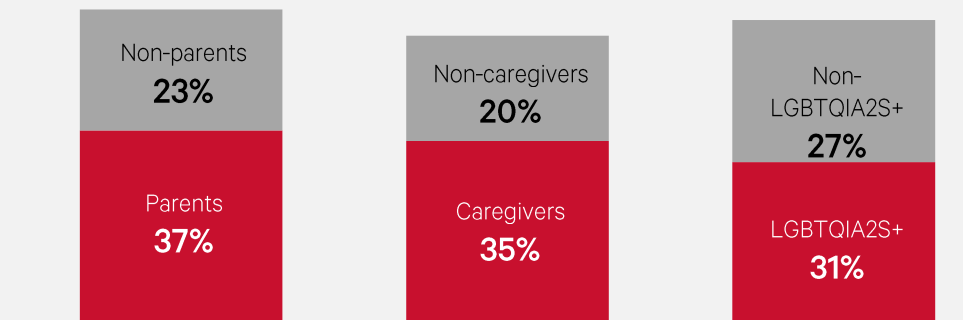
Lack of time

30% ▶ don't feel they have the time to think about their wellbeing.



Half of **employed parents** (53%) also agree juggling responsibilities at work and home causes them stress.

28% ▶ do not seek help for their wellbeing because they don't have the time.



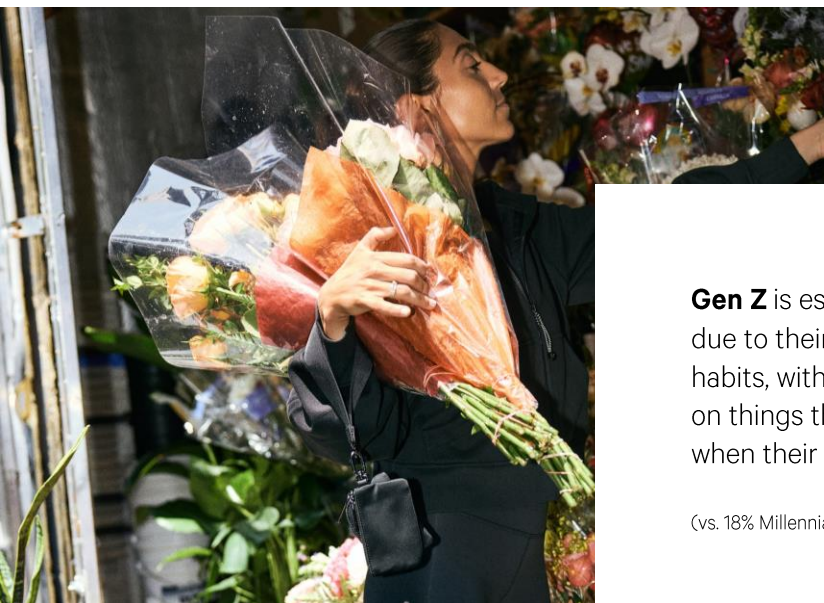
Especially significant for **Gen Z Parents**: 49% agree (vs. 37% Millennial, 35% Gen X, 35% Boomer+).

Q6: Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777), Gen Z Parents (n=320), Millennial Parents (n=2,282), Gen X Parents (n=1,647), Boomer+ Parents (n=515), Employed Parents (n=4,022)



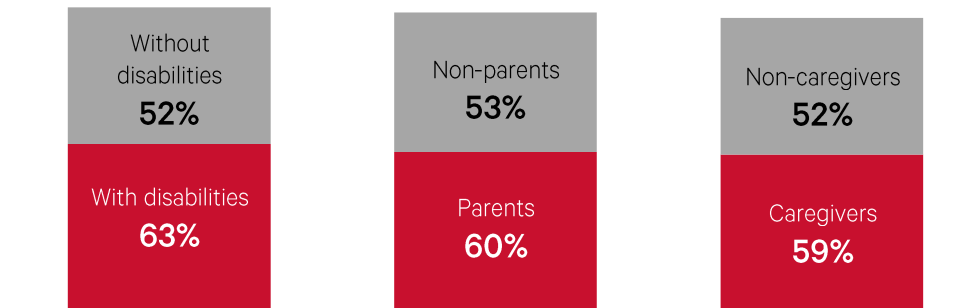
Crucially the groups with lower overall wellbeing are disproportionately facing barriers, an urgent sign that new forms of support are needed:

Financial insecurity



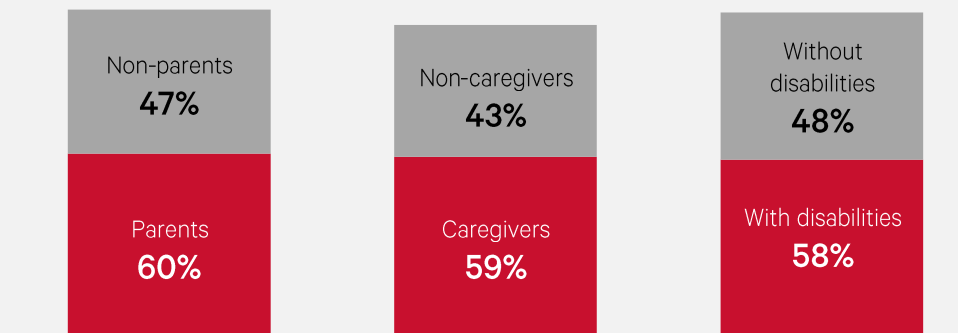
56%

are worried how they will afford their current lifestyle as cost of living rises.



51%

are deprioritizing their wellbeing due to cost.



Gen Z is especially vulnerable due to their poorer financial habits, with 27% overspending on things they don't need when their wellbeing is low.

(vs. 18% Millennial, 13% Gen X, 7% Boomer+)

— AND —

Gen Z is also most likely to be deprioritize their physical, mental, or social wellbeing due to cost concerns.

(65% Gen Z vs. 60% Millennial, 55% Gen X, 38% Boomer+)

Q10: Now, please think specifically about the current state of the economy (i.e., rising costs, inflation, a global economic softening/recession, broad layoffs, etc.) and how it is impacting your life and wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), people living with disabilities (n=4,921), Those without disabilities (n=8,748), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777), Gen Z (n=1,630), Millennial (n=3,863), Gen X (n=3,419), Boomer+ (n=5,088)

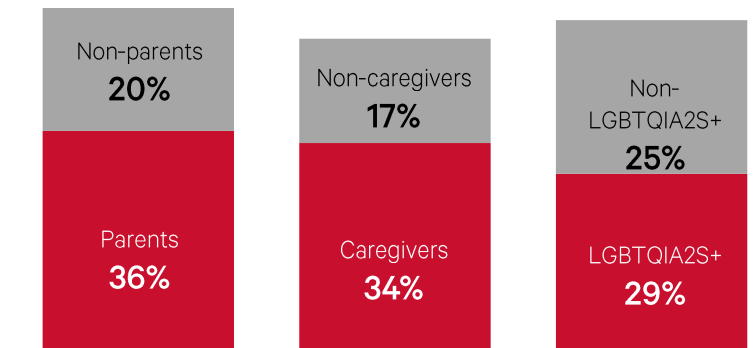


Crucially the groups with lower overall wellbeing are disproportionately facing barriers, an urgent sign that new forms of support are needed:

Accessibility to physical space

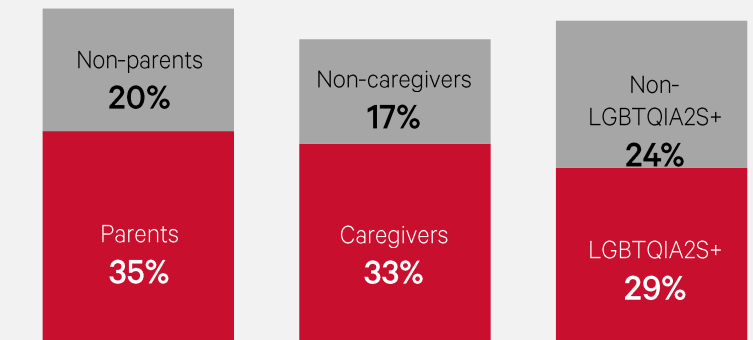
26%

feel that fewer spaces / closing down of spaces for exercise in their neighborhood has meant fewer opportunities to exercise.



25%

feel that fewer spaces / closing down of spaces for exercise in their neighborhood has negatively impacted their wellbeing.



Q10: Now, please think specifically about the current state of the economy (i.e., rising costs, inflation, a global economic softening/recession, broad layoffs, etc.) and how it is impacting your life and wellbeing. Using the scale below, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777)



When it comes to mental health specifically, persisting taboo and stigma forces people inward.

75%

BUT

feel it is important that, as a society, **we be more open to talking about mental health.**

56% tend to keep emotions to themselves.

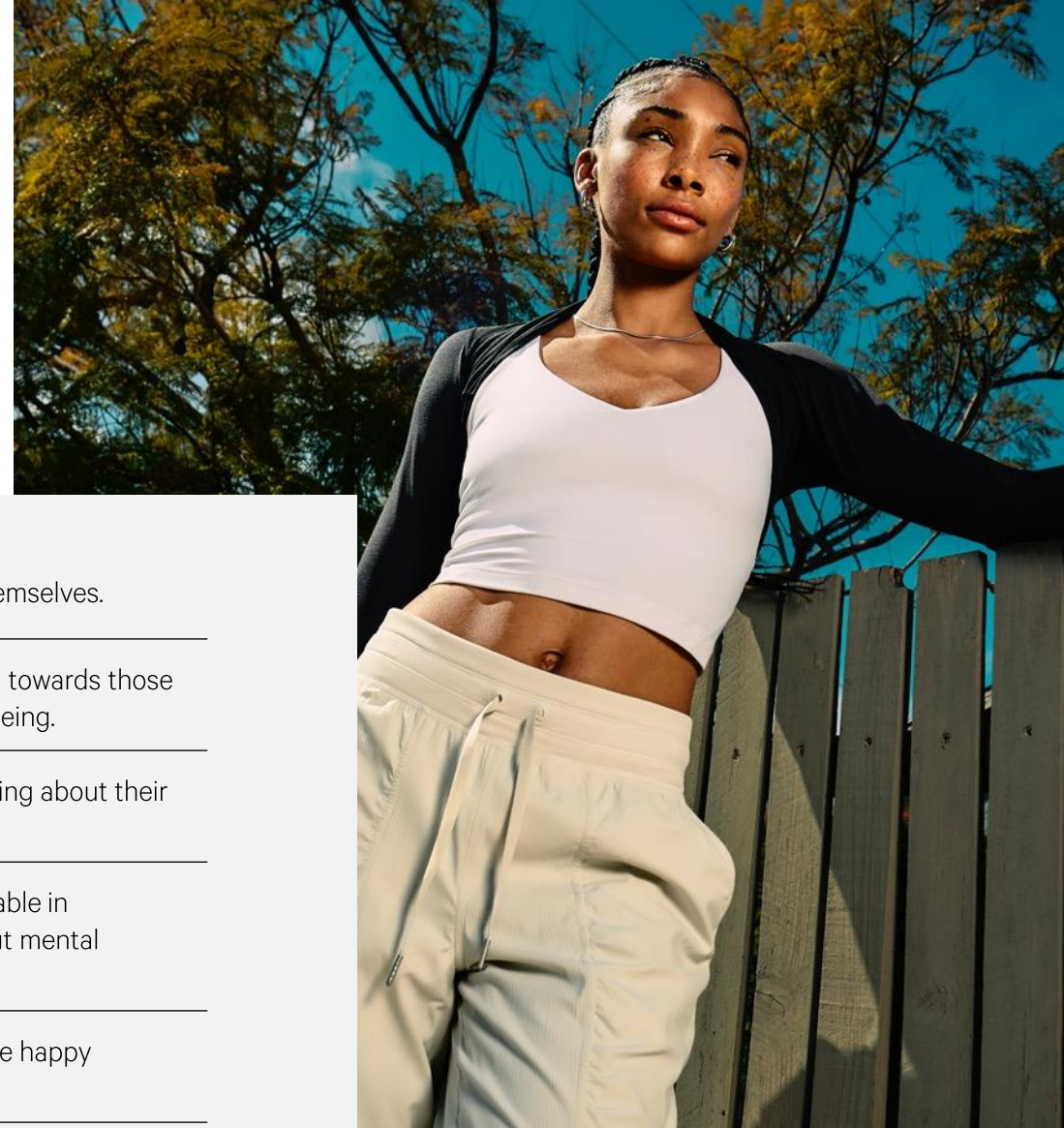
55% believe society is judgmental towards those who have lower mental wellbeing.

50% don't feel comfortable speaking about their mental health at work.

43% agree it is not widely acceptable in their community to talk about mental health challenges.

42% feel pressure to pretend to be happy even when they're not.

40% agree societal pressures to look a certain way negatively impacts their mental wellbeing.



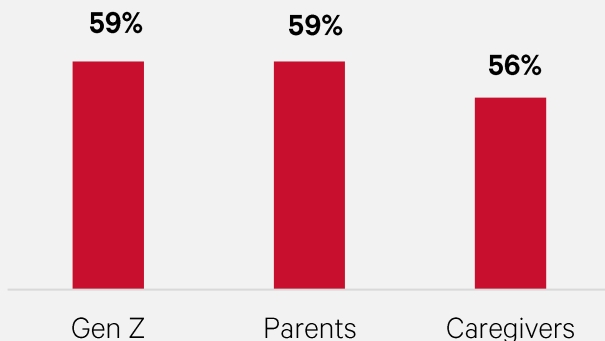
Q13: Thinking broadly about your mental wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Q14: Thinking broadly about mental health in society, please indicate how much you agree or disagree with the following statements using the scale below <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Employed (n=8,852)



Gen Z, parents, and caregivers are most likely to struggle with mental health taboo.

75% feel it is important that, as a society, we be more open to talking about mental health.

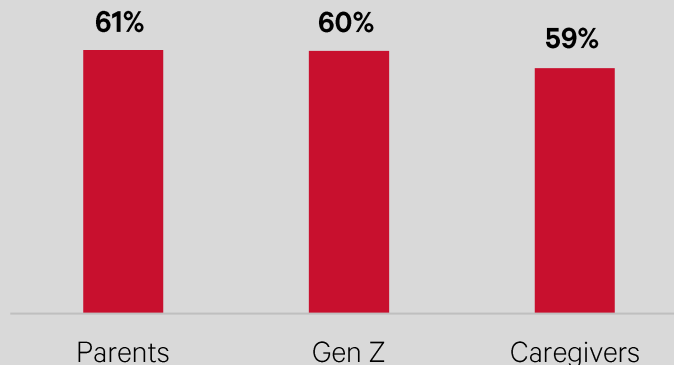
Importantly, relative to the **49% of those globally,**



wish it was more socially acceptable to express their full range of emotions.

vs. 58% Millennial, 50% Gen X, 37% Boomer+, 44% Non-Parents; 41% Non-Caregivers

And compared with **52% of those globally,**

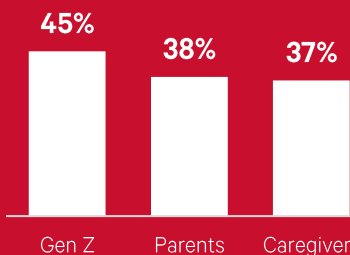


wish they could express 'how I actually feel' instead of always pretending to be fine.

vs. 61% Millennial, 55% Gen X, 41% Boomer+, 47% Non-Parents; 44% Non-Caregivers

FURTHERMORE

Compared with **33% globally,**



don't seek help for their wellbeing because they don't feel comfortable talking about it.

vs. 37% Millennial, 35% Gen X, 26% Boomer+, 31% Non-Parents; 30% Non-Caregivers



Q13: Thinking broadly about your mental wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Agreement> Q14: Thinking broadly about mental health in society, please indicate how much you agree or disagree with the following statements using the scale below <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Gen Z (n=1,630), Millennial (n=3,863), Gen X (n=3,419), Boomer+ (n=5,088), Parents (n=4,764), Non-parents (n=9,236), Caregivers (n=7,201), Non-caregivers (n=6,799)



Among men:



50%

agree that norms make it difficult for them to express their emotions.



48%

agree society has made it more difficult for men to speak up about mental health than women.



43%

wish they wouldn't be judged for showing an interest in improving their mental wellbeing.

Gender also pressures the conversation—where half of men feel that norms make it hard for them to be vulnerable.

Q13: Thinking broadly about your mental wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Q14: Thinking broadly about mental health in society, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Base Sizes: Global Men (n=6,141)



This is especially true for young men: Gen Z are most likely to struggle in silence, especially when it comes to mental health.



1 in 2 men (48%) agree that

society has made it more difficult for men to speak up about their mental health than women.

Only half (49%) of Gen Z men

report they are 'feeling good' in their mental wellbeing, significantly lower than Millennials and Boomer+ alike.



Versus

65%	Millennial
61%	Gen X
72%	Boomer+

Men are significantly more likely (39%) to feel that

physical wellbeing plays the most important role in their overall wellbeing.

Gen Z men are the least likely (57%) to

feel that society has made progress in recent years on mental health awareness.



Versus

33%	Women
-----	-------



Versus

65%	Millennial
63%	Gen X
63%	Boomer+

By the same token, women are significantly more likely to feel their mental wellbeing plays the most important role in their overall wellbeing. (50% vs. 43% men)

Q1: The balance of these three elements makes up the core of being well and feeling your best. First, we'd like you to consider these elements and tell us which, if any, of them plays the most important role in your own overall wellbeing. Please select one answer from the options below. / Q2: Now we'd like for you to tell us how you think you are doing on each of these elements that allow you to feel your best. Please don't think about comparing yourself to others, but instead think about your own personal feeling of 'best.' For each element below, please tell us how you feel you are doing on a scale of 1 to 9, where 1 means you're feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area <Showing Top 3 Box Agreement> / Q13: Thinking broadly about your mental wellbeing, please indicate how much you agree or disagree with the following statements using the scale below <Showing Top 2 Box Agreement> / Q14: Thinking broadly about mental health in society, please indicate how much you agree or disagree with the following statements using the scale below <Showing Top 2 Box Agreement> / Base Sizes: Men (n= 6,141), Women (n=6,556), Gen Z Men (n=485), Millennial Men (n=1,518), Gen X Men (n=1,495), Boomer+ Men (n=2,643)



**Wellbeing is not
a nice to have—**

**it's key to
whether or
not people
can function.**

Detailed
Finding / 02



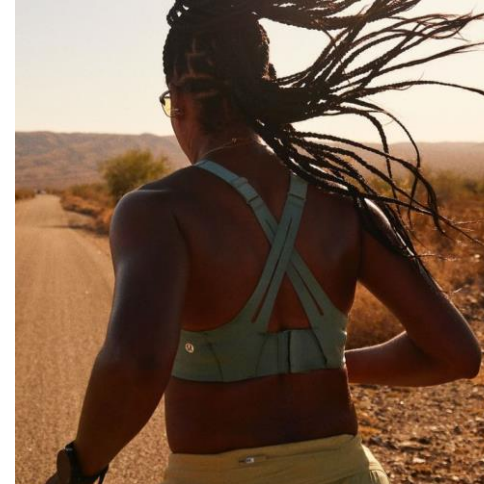
Low wellbeing stunts the way people experience life.

When wellbeing is low:

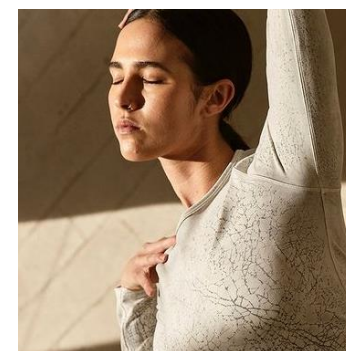


57% cannot live life to the fullest.

Up to **69%** for people living with disabilities (vs. 51% without disabilities).



53% feel like life is passing them by.





Low wellbeing significantly impacts all aspects of an individual's life.

When wellbeing is low:



50% fall behind on their personal or work responsibilities.

47% don't have energy to participate in societal change.



49% feel their low wellbeing affects their relationships.

44% feel they are not the parent their children needs them to be.

35% feel they are not a good partner or friend.



58% cannot be the best version of themselves.

53% lack motivation to participate in hobbies.

46% struggle to get out of bed in the morning.

Society

Family

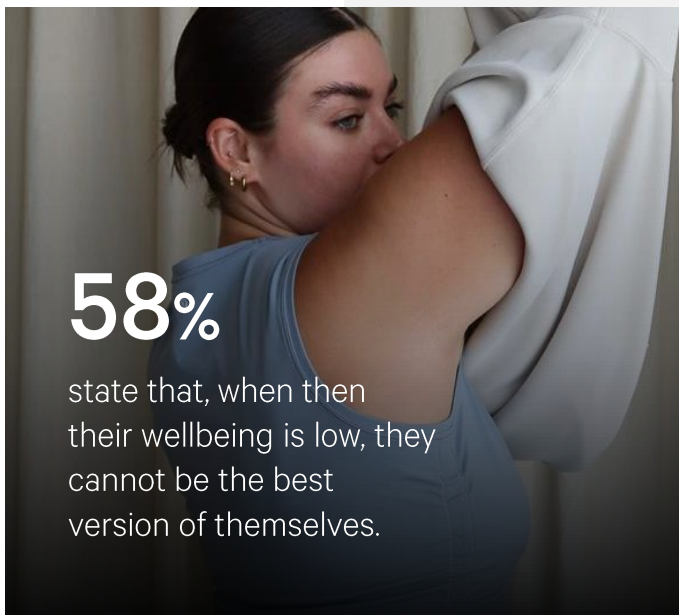
Individual

Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements? <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Parents (n=4,764)

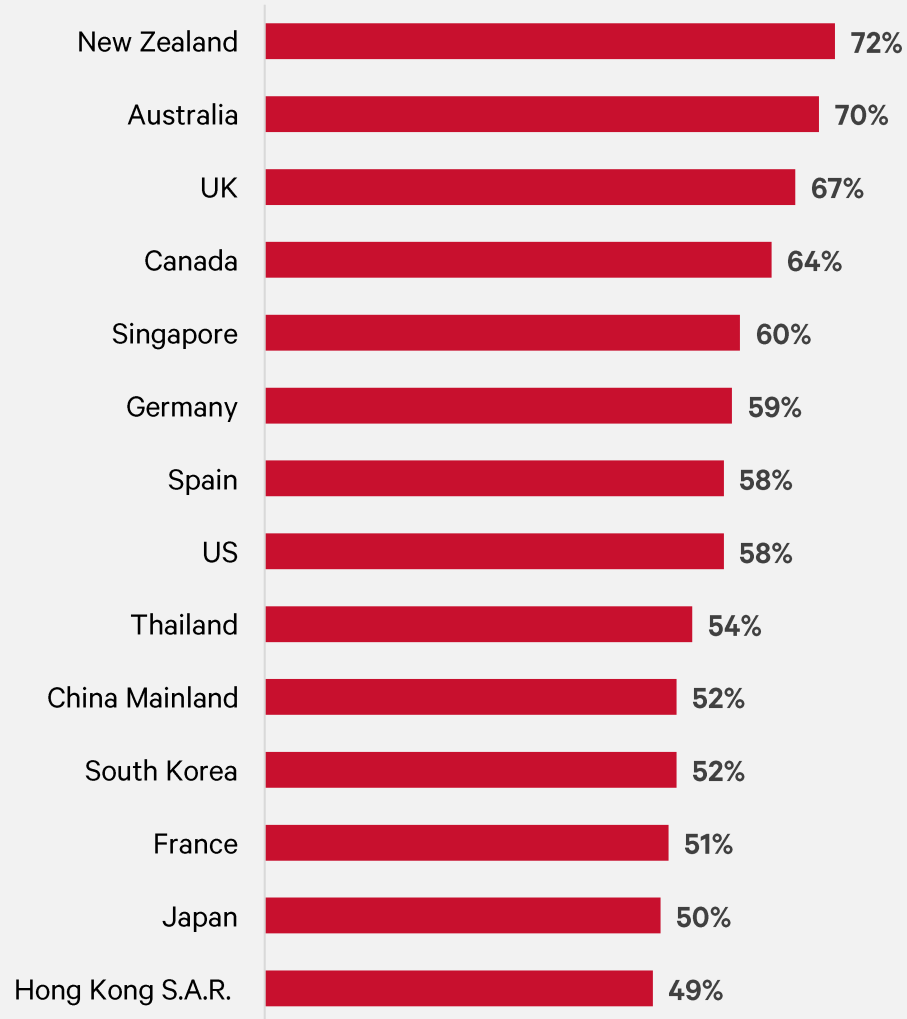


Detailed Finding / 02 (cont.)

**The ripple effect
of low wellbeing
is distinct
across markets.**



Impact of low wellbeing on the individual is heavily pronounced in all markets, especially New Zealand and Australia.



Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements? <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand)

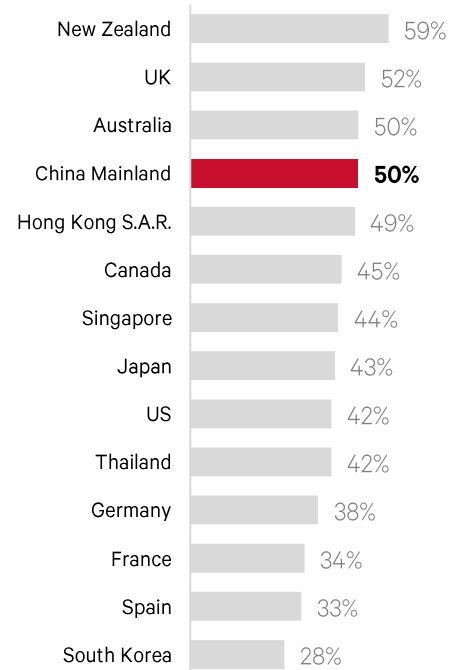
Personal relationships are the most impacted in China Mainland by low wellbeing.

49%

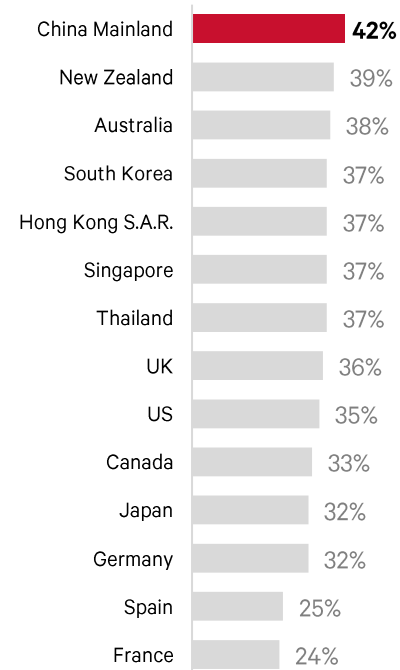
feel their low wellbeing affects their relationships.



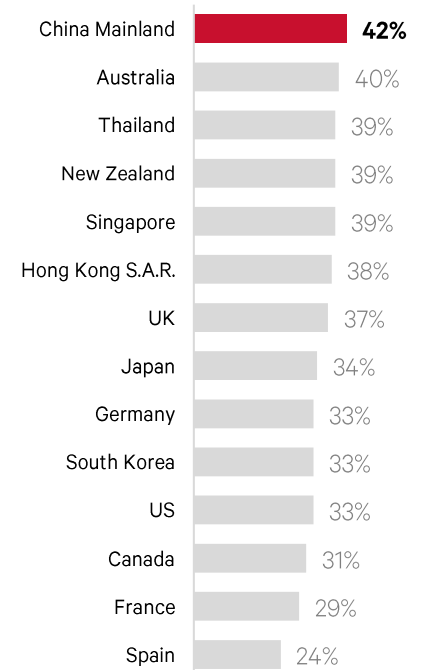
Am not the parent my children need me to be



Cannot be a good friend



Am not a good partner



Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements? <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Parents (n=4,764), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).

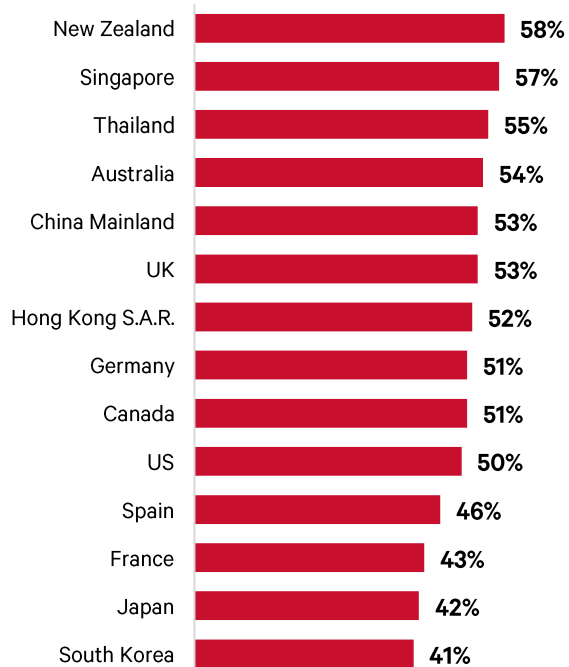


Low wellbeing consistently impacts people's ability to advance **society** across the world.

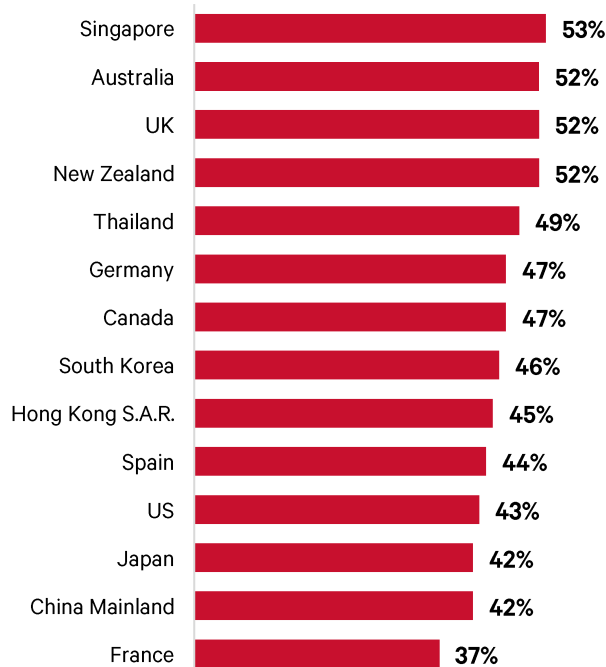
▼
47%

feel they don't have energy to participate in societal change when their wellbeing is low.

Feel like I'm falling behind



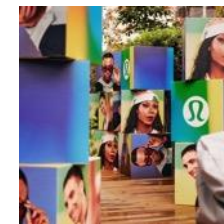
Don't have the energy to participate in societal change



Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).



The negative impact of poor wellbeing is disproportionately experienced by less visible groups.



▼ People living with disabilities are nearly 2x more likely

than those without to struggle to find the motivation to move their body and be physically active (1.7X).

They also report having called in sick, on average, 7 days in the last 12 months because of low physical, mental, or social wellbeing, compared to only 4 days on average for those without disabilities.

▼ The LGBTQIA2S+ community is significantly more likely

than the non-LGBTQIA2S+ community to struggle with mental health.

Higher among the LGBTQIA2S+ community (28%) compared to those who are not LGBTQIA2S+ (23%),

▼ BIPOC employees** are significantly more likely

than white people to report a negative work impact.

(44% feel less engaged at work, 37% fall behind on work responsibilities, vs. 34% and 26%, respectively),

**In US, CA, UK, AU only

Q3: Please think about a moment in the past year where you have had low physical, mental, or social wellbeing. Which of the following are signs, for you, of your low physical, mental, or social wellbeing? Please select all that apply. / Q4: In the text box below, please indicate how many days of [IF EMPLOYED (S12/1-2): work] [IF STUDENT (S12/5): school] you have missed or called in sick during the past 12 months because of low physical, mental, or social wellbeing. / Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), people living with disabilities (n=4,921), Those without disabilities (n=8,748), LGBTQIA2S+ (n=2,663), Non-LGBTQIA2S+ (n=10,777), Global POC employees (US, CA, UK, AU only) (n=582), Non-POC employees (n=2929)



When **wellbeing is low**:



44%

of parents feel they are not the parent their children need them to be.

Higher among Moms (47%)

Higher among parents with a disability (52%)



44%

of those who are parents **and** caregivers struggle to be a good friend.



43%

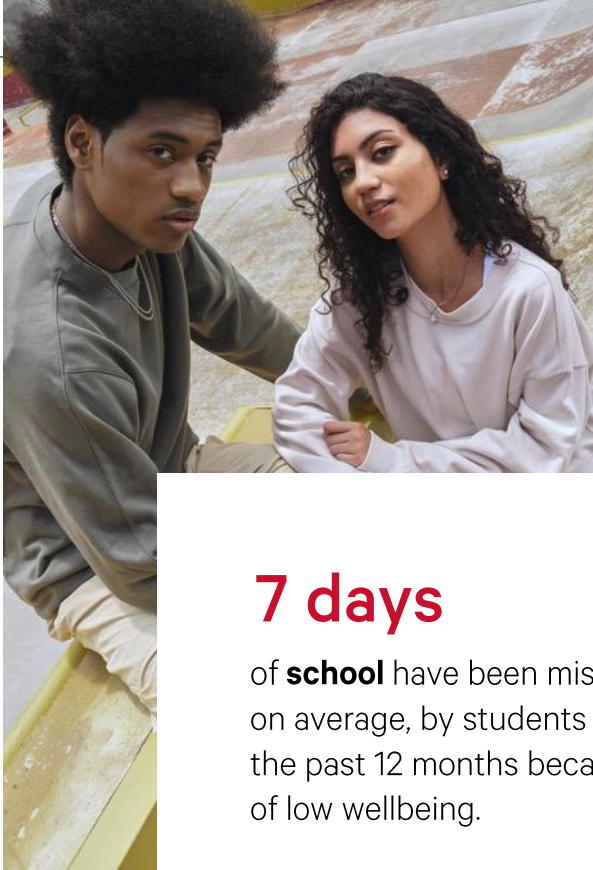
of parents struggle to be a good partner.

Higher among parents of infants (49%)

Higher among Gen Z parents (48%)

For those responsible for caring for others, low wellbeing can mean critical unmet needs and negative downstream consequences on their other relationships.

Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements. <Showing Top 2 Box Agreement / Base Sizes: Global Total (n=14,000), Parents (n=4,764), Moms (n=2,400), Parents with a disability (n=1,439), Parents AND Caregivers (n=565), Parents of Infants (n=769), Gen Z Parents (n=320)



7 days

of **school** have been missed, on average, by students in the past 12 months because of low wellbeing.



38% of students are less productive at school.

29% of students struggle to achieve good grades.

Students with low wellbeing are nearly **3X** as likely to struggle to achieve good grades.

47% of students with low wellbeing struggle with achieving good grades, vs. just 18% of those with high wellbeing.

Low wellbeing permeates the boundaries of school and work, creating a ripple effect of negative impact that extends **beyond the individual.**

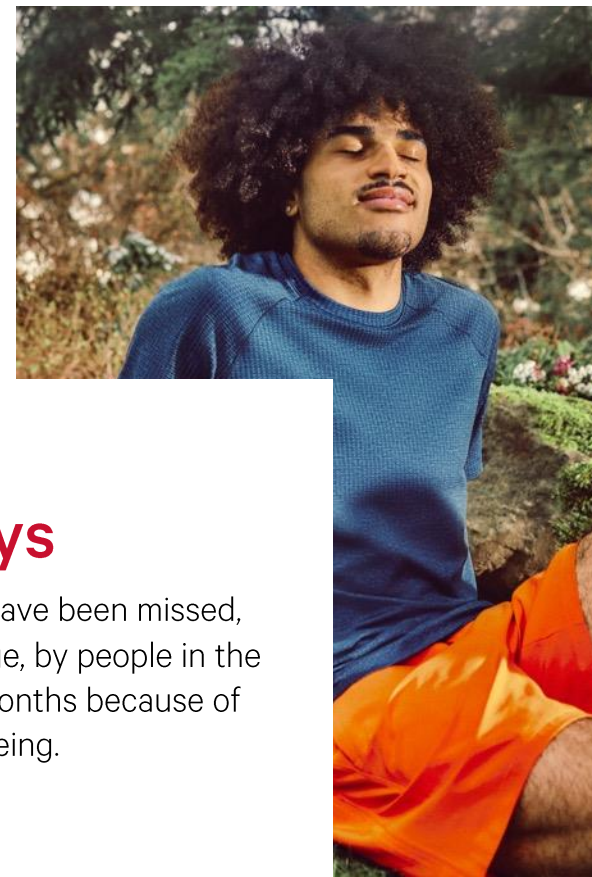
When wellbeing is low:

5 days

of **work** have been missed, on average, by people in the past 12 months because of low wellbeing.

48% of people feel less engaged at work when dealing with low wellbeing.

37% of people fall behind on work responsibilities.



Q3: Please think about a moment in the past year where you have had low physical, mental, or social wellbeing. Which of the following are signs, for you, of your low physical, mental, or social wellbeing? Please select all that apply. / Q4: In the text box below, please indicate how many days of [IF EMPLOYED (S12/I-2): work] [IF STUDENT (S12/S): school] you have missed or called in sick during the past 12 months because of low physical, mental, or social wellbeing. / Q7: Now, thinking specifically about what you do and how you feel when you experience low wellbeing, please indicate how much do you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Base Sizes: Global Total (n=14,000), Student (n=585), Students with low wellbeing (n=136), Students with high wellbeing (n=157), Employed (n=8,852)



Workplace impact from low wellbeing is significant across markets.

Work days missed, on average, by people in the past 12 months because of low wellbeing:

5 days
globally



By market

Germany	9	UK	5
Hong Kong S.A.R.	8	Australia	5
Thailand	7	Canada	4
France	6	New Zealand	4
Singapore	6	South Korea	3
China Mainland	5	Spain	3
US	5	Japan	3



Q4: In the text box below, please indicate how many days of [IF EMPLOYED (S12/1-2): work] you have missed or called in sick during the past 12 months because of low physical, mental, or social wellbeing. / Base Sizes: Global Total (n=14,000), Student (n=585), Employed (n=8,852), n=1,000 for each of the following markets (China Mainland, Singapore, US, France, Canada, Germany, UK, Australia, South Korea, Japan, Thailand, Hong Kong S.A.R., Spain, New Zealand).



People not
only demand
change from
themselves,

but also
from the
institutions
they interact
with most.

Detailed
Finding / 03



Societal contributions— across government, media, and business—are crucial to effect sustainable and systemic change and combat global concerns and access inequality.



53%

prefer to support **brands and businesses** that work hard to improve societal wellbeing.



74%

feel **institutions** are not doing enough to facilitate societal wellbeing.



Including

Government	54%
Media	50%
Business	47%
NGOs	36%



70%

of people agree **employers** have a responsibility to improve employee wellbeing.

1 in 3

turn to **their community** for physical wellbeing initiatives.

39% feel being with community motivates them in their workouts.

34% are interested in joining group workouts to meet like-minded people.

Q18. Thinking broadly about your physical wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Top 2 Box Agreement> / Q24: Please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Q25: Now, please think broadly about your work experience and how your employer contributes to your overall wellbeing. Using the scale below, indicate how much you agree or disagree with the following statements. / Base Sizes: 2023 Global Total (n=14,000), Employed (n=8,852)

Institutional expectation is strong across markets, especially in Spain.



74%

feel that institutions (government, media, business, or NGOs) are not doing enough to facilitate societal wellbeing.

