2022 Global Wellbeing Report
lululemon commissioned an online survey managed by Edelman Data & Intelligence (DXI) which fielded in 10 markets between October 13, 2021 – November 15, 2021.

10,000 respondents in total: n=1,000 per market; general population, ages 18+

Not all percentages sum to 100% due to rounding.

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.
Defining Wellbeing

What wellbeing means to different people can vary. For some, it encompasses the holistic idea of mind, body, and soul. For others, it could center around other 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.

01 Physical wellbeing
Feeling like my body is in good enough physical health condition to perform the physical activities I want or need to do.

02 Mental wellbeing
Feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life.

03 Social wellbeing
Feeling connected to others and part of a supportive community.
Wellbeing has edged upward, driven by better coping strategies and an increased focus on mental health.
There are signs of strengthening wellbeing in many markets.

Globally, our wellbeing increased by one point year over year, from an index of 65 to 66.

South Korea demonstrates the most notable increase, while wellbeing declined in China & Australia.

<table>
<thead>
<tr>
<th>Country</th>
<th>Global Wellbeing Index</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>75</td>
<td>-4</td>
</tr>
<tr>
<td>France</td>
<td>68</td>
<td>+1</td>
</tr>
<tr>
<td>Singapore</td>
<td>68</td>
<td>+2</td>
</tr>
<tr>
<td>US</td>
<td>67</td>
<td>+2</td>
</tr>
<tr>
<td>Canada</td>
<td>66</td>
<td>+1</td>
</tr>
<tr>
<td>South Korea</td>
<td>65</td>
<td>+3</td>
</tr>
<tr>
<td>Germany</td>
<td>65</td>
<td>+2</td>
</tr>
<tr>
<td>Australia</td>
<td>62</td>
<td>-3</td>
</tr>
<tr>
<td>UK</td>
<td>62</td>
<td>0</td>
</tr>
<tr>
<td>Japan</td>
<td>61</td>
<td>+1</td>
</tr>
</tbody>
</table>
In the past year, we have begun utilizing a wider range of coping strategies and setting new goals for ourselves.

Over the past year, the average number of coping strategies each person used has increased from 4 to 5.

43% have been setting new goals for themselves over the past year, an increase of 20% from 2021.

[SOCS] When it comes to coping with the COVID-19 pandemic, what types of things have you been doing to help you cope?

[SOCS] Please think about any personal goals you have set for yourself over the past year. Which, if any, of the following reflect your situation?
Our increase in physical activity benefits our mental state.

Physical activity is one of the coping strategies that has grown the most during the pandemic, increasing by 30% over the past year.

- When I am physically active on a regular basis, I feel more confident in myself: 68%
- Exercise helps improve my mood: 68%
- Exercise has a positive impact on my mental health: 70%

[SW1] Please let us know whether you agree or disagree with the following statements. [5-pt scale 5 = Strongly agree; 1 = Strongly disagree]

[SOCS] When it comes to coping with the COVID-19 pandemic, what types of things have you been doing to help you cope?
Gains in overall wellbeing are driven by upticks in mental and social wellbeing.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>2021</th>
<th>2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Wellbeing Index</td>
<td>65</td>
<td>66</td>
<td>1</td>
</tr>
<tr>
<td>Physical</td>
<td>66</td>
<td>66</td>
<td>0</td>
</tr>
<tr>
<td>Mental</td>
<td>67</td>
<td>68</td>
<td>1</td>
</tr>
<tr>
<td>Social</td>
<td>63</td>
<td>64</td>
<td>1</td>
</tr>
</tbody>
</table>

Despite edging up since 2021, social wellbeing continues to be the lowest across dimensions.

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[1] Physical wellbeing: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. [2] Mental wellbeing: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life. [3] Social wellbeing: feeling connected to others and part of a supportive community.
Mental health dynamics have risen in importance, making up the majority of the most important drivers of overall wellbeing.

The increase in importance of mental health dynamics is balanced by declining importance in financial stability, which now falls outside the top drivers of wellbeing.

- **I consider myself to be in good physical health**
- **I feel confident in myself most of the time**
- **I am able to manage stress effectively**
- **I have enough energy to be able to accomplish the things I need to do every day**
- **I feel like I am in tune with my emotions**
- **I have a good work/school/home life balance**
- **I usually get enough sleep to feel well rested**

Together, these seven elements account for 52% of overall wellbeing.

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[SW1/GRI/COE] Please let us know whether you agree or disagree with the following statements. [5-pt scale: 5 = Strongly agree, 1 = Strongly disagree]
Optimism shows signs of recovery, currently at near pre-pandemic levels.

69% of those who have a strong wellbeing index feel optimistic about the future.

[vs. 35% among those with moderate to weak wellbeing]
Holistic wellbeing remains a challenge, particularly for Gen Z, with lack of support network being the top barrier.
Wellbeing is strongest among those who focus on all three dimensions of wellbeing.

- **INCREASED FOCUS ON ALL 3 DIMENSIONS OF WELLBEING**: 73
- **INCREASED FOCUS ON ANY DIMENSION OF WELLBEING**: 67
- **HAVE NOT INCREASED FOCUS ON WELLBEING**: 63

**Total Wellbeing Index**

- **Shift in focus on wellbeing in the past year**
  - WEAK
  - MODERATE
  - STRONG

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DI. Thank you for everything you’ve shared with us so far about your thoughts on the different elements of overall wellbeing. Thinking about these different elements, physical wellbeing, mental wellbeing, and social wellbeing, please tell us how focused you are on each of these three elements at this point in time when compared to one year ago.

DII. Now we’d like 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 feeling your absolute worst in this area and 9 means you’re feeling your absolute best in this area. (1) Physical wellbeing; feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. (2) Mental wellbeing; feeling self-awake, emotionally balanced and prepared, and like I am moving in the right direction towards living a fulfilling life. (3) Social wellbeing; feeling connected to others and part of a supportive community.
The proportion who feel well across all three dimensions has remained static, underscoring a continued need to improve holistic wellbeing.

29% indicate strong wellbeing across all three dimensions of overall wellbeing.

2021: 29%

Rated top 3 box (7-9) on a 9-point scale of wellbeing

[Q1/Q2/Q3] 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 feeling your absolute worst in this area and 9 means you’re feeling your absolute best in this area. [1] Physical wellbeing: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. [2] Mental wellbeing: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life. [3] Social wellbeing: feeling connected to others and part of a supportive community.
Holistic wellbeing presents a heightened challenge among Gen Z, impacted by weaker mental and social wellbeing.

Only 21% of Gen Z indicate strong wellbeing on all three dimensions of overall wellbeing.

[vs. 29% among the total population]

Holistic wellbeing is weakest among Gen Z and increases with age.
Gen Z have experienced disproportionate challenges over the past year.

68% of Gen Z feel that stress is a barrier to their wellbeing. [an increase from 65% in 2021, vs. a slight decline among the total population from 51% to 50%]

Gen Z are 1.5x more likely to say they are not able to manage stress effectively. [26% Gen Z vs. 17% among the total population]

53% of Gen Z have felt lonelier during the pandemic. [vs. 40% among the total population]
Lack of a support network is the #1 barrier to wellbeing for global citizens; cultivating a personalized support network can help.

% identify issue as holding them back from physical, mental, or social wellbeing

- **52%** Lack of support network
- **50%** Stress
- **48%** COVID-19
- **47%** Lack of money
- **44%** Lack of time/ personal responsibilities
- **36%** Health conditions
- **33%** Lack of knowledge

Those who **actively manage their support network** have a strong wellbeing index of **73.**

[vs. a wellbeing index of 62 among those who do not]

- Seek out interesting group events to attend in-person or virtually
- Regularly attend group events related to hobbies
- Actively try to expand social circle
- Put a lot of effort into staying connected with loved ones
- Prioritize feeling connected to others

NOTE: Results not comparable to 2021 study given modifications to survey question.
LGBTQ+, parents of young children, those with health conditions, Gen Z, and the Latino community are particularly affected by a lack of support network.
Wellbeing is strongest with one hour of social media a day and a mindful approach to curating that time.
While social media can help people feel connected, heavier users feel stronger negative impacts on their social wellbeing.

53% of global citizens believe that visiting social media sites or messaging apps helps them feel connected to friends/family.

- Makes me feel like I'm missing out on social connections
- Makes me compare myself to others

<table>
<thead>
<tr>
<th>Time spent on social media:</th>
<th>1 hour/day</th>
<th>2 hours/day</th>
<th>3 hours/day</th>
<th>More than 3 hours/day</th>
</tr>
</thead>
<tbody>
<tr>
<td>% feel social media</td>
<td>20%</td>
<td>29%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>has a negative impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>on social wellbeing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[CSME] In a typical day, how many hours do you spend doing each of the following activities? [Visiting social media sites or messaging apps]

[COI] Please let us know whether you agree or disagree with the following statements. [5-pt scale: 5 = Strongly agree; 1 = Strongly disagree] "Visiting social media sites or messaging apps helps me feel connected to my friends and/or family" [Strongly/somewhat agree]

[CO2] Some people may feel as if they do not feel close to others or are not part of a supportive community. We’d like to know which, if any, of the items below hold you back from social wellbeing.
The negative impacts of social media are felt more acutely by Gen Z, who use it more heavily.

[CSM6] In a typical day, how many hours do you spend doing each of the following activities? [Visiting social media sites or messaging apps]

[CO2] Some people may feel as if they do not feel close to others or are not part of a supportive community. We’d like to know which, if any, of the items below hold you back from social wellbeing.
Social media is not an all-or-nothing game; wellbeing is healthiest among those who use 1 hour of social media per day.

<table>
<thead>
<tr>
<th>Total Wellbeing Index</th>
<th>WEAK</th>
<th>MODERATE</th>
<th>STRONG</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Social Media Use</td>
<td>65</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Hour / Day</td>
<td>67</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Hours / Day</td>
<td>66</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3-4 Hours / Day</td>
<td>66</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More Than 4 Hours / Day</td>
<td>64</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[CSM6] In a typical day, how many hours do you spend doing each of the following activities? [Visiting social media sites or messaging apps]

[07/02/23] 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 feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area. 1] Physical wellbeing: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. 2] Mental wellbeing: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life. 3] Social wellbeing: feeling connected to others and part of a supportive community.
And it is important to balance out overall media consumption with uplifting stories, particularly for those with low wellbeing.

1 in 3 [33%] say mindful media consumption has helped them feel less lonely through the pandemic.

- Actively reducing how much media coverage you consume related to the COVID-19 pandemic
- Actively reducing how much media coverage you consume related to societal issues
- Impartial and accurate media coverage related to the COVID-19 pandemic

72% would like to see more stories about empowerment and wellbeing in the media.

- Stories about overcoming challenges, local heroes, tips on health / self-care / goal setting

Benefits from exposure to positive media content are amplified among those with low wellbeing, who experience 1.5x more positivity than those with higher wellbeing.

[CSM3]: Whether overall you have felt lonelier or less lonely, which, if any, of the following things can help you feel less lonely?

[CSM7]: Thinking about the various stories you see, hear, or read in the news and on social media, which, if any, of the following would you like to see more often?

* U.S. data only. Source: Edelman D9 commissioned media study through Realeyes (n=480 Americans)
Returning to the workplace drives higher wellbeing, but requires employers to implement lasting changes.
**Wellbeing is directly linked with a return to activities in real life.**

<table>
<thead>
<tr>
<th>Total Wellbeing Index</th>
<th>WEAK</th>
<th>MODERATE</th>
<th>STRONG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort level with return to activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WIDE RANGE OF ACTIVITIES</td>
<td>(incl. live outdoor/indoor events, out of country travel)</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>ESSENTIALS + SOCIAL ACTIVITIES</td>
<td>(incl. visiting friends/family, dining indoors, group celebrations)</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>“ESSENTIALS” ONLY</td>
<td>(incl. shopping, public transit, gym, in-person health appointments)</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>NOT COMFORTABLE WITH ANY ACTIVITIES</td>
<td></td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>

(CSM4) In many communities, COVID-19 restrictions are changing and certain activities are being resumed, however everyone’s comfort level with participating in activities is different. Whether the following activities have resumed in your region or not, please tell us if you feel comfortable participating in them now, and whether you feel comfortable participating in them in the future, beyond COVID-19.

[01/22/23] 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 feeling your absolute worst in this area and 9 means you’re feeling your absolute best in this area. 1 Physical wellbeing: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. 2 Mental wellbeing: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life. 3 Social wellbeing: feeling connected to others and part of a supportive community.
Wellbeing is higher among those returning to the workplace, indicating benefits of working together in-person.

<table>
<thead>
<tr>
<th>Total Wellbeing Index</th>
<th>Weak</th>
<th>Moderate</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already returned to the workplace</td>
<td>70</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Returning to the workplace full-time</td>
<td>70</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Returning to the workplace part-time</td>
<td>67</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not returning to the workplace</td>
<td>64</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Working from home during the pandemic increased employment stressors.

Almost 9 in 10 of those who pivoted to working from home experienced negative employment-based impacts during the COVID-19 pandemic (86%).

[vs. 68% among those with no change in work environment]
While returning to the workplace benefits wellbeing, employees are equally worried about loss of personal time and health and safety.

Loss of personal time presents an even greater concern for Gen Z than health risks.

Childcare is a pressing concern among 1 in 3 parents with children under age 13 (33%).

<table>
<thead>
<tr>
<th>Generation</th>
<th>Concerned About Risk of Exposure</th>
<th>Concerned About Less Personal Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>53%</td>
<td>69%</td>
</tr>
<tr>
<td>Millennial</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Gen X</td>
<td>54%</td>
<td>51%</td>
</tr>
<tr>
<td>Boomers</td>
<td>49%</td>
<td>34%</td>
</tr>
</tbody>
</table>

[WORKS] When thinking about returning to your previous work environment, which, if any, of the following are you concerned about?
Employees are not looking for temporary solutions but rather a ‘new norm’, expressing a need for employer support beyond the pandemic.

- My employer needs to provide more support in this area during COVID-19
- My employer needs to provide more support in this area beyond COVID-19

Almost half of employees are looking for more flexibility in working hours and location, followed closely by increased health support, particularly among Gen Z and parents.
Beyond the workplace, belonging to and giving back to one’s broader community offers a powerful holistic wellbeing lift.
Despite improvement over the past year, social wellbeing remains the lowest performing dimension of wellbeing.

Social wellbeing extends beyond loved ones to community.

Sense of belonging to a community is one of the top 3 drivers of social wellbeing.
Half of global citizens recognize the importance of community, higher among many visible minorities.

% agree that it is important for me to feel a sense of belonging to a community

- Total Global Population: 52%
- White: 50%
- East Asian: 52%
- Latino: 61%
- Black: 61%
- South Asian: 62%

Visible Minority Base: US, UK, Canada (n=3,000)

[COI] Please let us know whether you agree or disagree with the following statements [5-pt scale 5 = Strongly agree; 1 = Strongly disagree]: It is important for me to feel a sense of belonging to a community” [Strongly/somewhat agree]
Giving back to one’s community is important to half of global citizens and is seen as more important amongst East Asian, Latino, Black & South Asian communities.

[COI] Please let us know whether you agree or disagree with the following statements [5-pt scale: 5 = Strongly agree; 1 = Strongly disagree]: "It is important for me to give back to my community." [Strongly/somewhat agree]
Belonging to and giving back to one’s community drive stronger and more holistic wellbeing.

<table>
<thead>
<tr>
<th>Total Wellbeing Index</th>
<th>WEAK</th>
<th>MODERATE</th>
<th>STRONG</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENSE OF COMMUNITY IS IMPORTANT</td>
<td></td>
<td></td>
<td>71</td>
</tr>
<tr>
<td>SENSE OF COMMUNITY IS NOT IMPORTANT</td>
<td>57</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GIVING BACK TO COMMUNITY IS IMPORTANT</td>
<td></td>
<td></td>
<td>71</td>
</tr>
<tr>
<td>GIVING BACK TO COMMUNITY IS NOT IMPORTANT</td>
<td>58</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% indicate strong wellbeing on all three dimensions of overall wellbeing

- 39%
- 15%
- 39%
- 16%

GLOBAL AVERAGE: 29%

[CC1] Please let us know whether you agree or disagree with the following statements [5-pt scale: 5 = Strongly agree; 1 = Strongly disagree]: "It is important for me to feel a sense of belonging to a community"; "It is important for me to give back to my community".

[CO2/CO3] 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 feeling your absolute worst in this area and 9 means you’re feeling your absolute best in this area: [1] Physical well-being: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do; [2] Mental well-being: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life; [3] Social well-being: feeling connected to others and part of a supportive community.
Global Wellbeing Index: a summary of notable year-over-year shifts

1. Global wellbeing has edged upward, supported by mental and social wellbeing.
   - 2021: WEAK - 65, MODERATE - 66
   - 2022: WEAK - 65, MODERATE - 66

2. Holistic wellbeing remained steady, with continued room for improvement.
   - 2021: WEAK - 66, MODERATE - 66
   - 2022: WEAK - 67, MODERATE - 68

3. Mental wellbeing dynamics have increased in importance, bumping out financial contributors among the top drivers of wellbeing.
   - 2021: WEAK - 67, MODERATE - 68
   - 2022: WEAK - 63, MODERATE - 64

4. There have been increases over the past year in the use of coping strategies, goal setting, and optimism.

Top drivers of wellbeing:
- Physical: I consider myself to be in good physical health
- Mental: I feel confident in myself most of the time
- Social: I am able to manage stress effectively
- More strongly linked to overall wellbeing in 2022: I feel like I have enough energy to be able to accomplish the things I need to do every day, I feel like I am in tune with my emotions, I have a good work/school/home life balance, I usually get enough sleep to feel well rested

The increase in importance of mental health dynamics is balanced by declining importance in financial stability, which now falls outside the top drivers of wellbeing.

Over the past year, the average number of strategies each person used to cope with the pandemic has increased from 4 to 5.

The proportion of global citizens setting new goals for themselves increased from 37% to 43% over the past year.

Optimism shows signs of recovery:
- 54% 2022
- 40% 2021
- 59% pre-pandemic

29% of the population report feeling well across all three dimensions of overall wellbeing in 2021.

[Q1/Q2/Q3] 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 feeling your absolute worst in this area and 9 means you’re feeling your absolute best in this area. [Q1] Physical wellbeing: feeling like my body is in good enough physical condition to perform the physical activities I want or need to do. [Q2] Mental wellbeing: feeling self-aware, emotionally balanced and prepared, and like I am moving in the right direction of leading a fulfilling life. [Q3] Social wellbeing: feeling connected to others and part of a supportive community.
Market Highlights
Global Wellbeing Index Snapshot

Top drivers of wellbeing

These drivers account for at least half of overall wellbeing:

- I consider myself to be in good physical health (53%)
- I feel confident in myself most of the time (52%)
- I am able to manage stress effectively (48%)
- I feel like I have enough energy to be able to accomplish the things I need to do every day (47%)
- I feel like I am in tune with my emotions (44%)
- I have a good work/school/home life balance (40%)
- I usually get enough sleep to feel well rested (3%)

Top barriers to wellbeing

- Lack of support network (52%)
- Stress (50%)
- Lack of money (48%)
- Lack of time (47%)
- Health conditions (44%)
- Lack of knowledge (33%)
- Other (31%)

Return to the workplace

- Risk of exposure to COVID-19: 53%
- Less personal time: 52%
- Flexibility in work hours/location: 44%
- Physical/mental health support: 40%

Social media

- Average hours/day spent on social media: 3
- % feel social media has a negative impact on social wellbeing: 36%

Overall wellbeing by community involvement

- Agree: Sense of community is important (71)
- Disagree: Giving back to community is important (57)

Overall wellbeing by generation

- Gen Z: 63
- Millennial: 64
- Gen X: 69
- Boomer: 72
- Mature: 72

Overall wellbeing by generation vs. 2021

- Gen Z: +1
- Millennial: +1
- Gen X: -1
- Boomer: +1
- Mature: +1

29% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 29% in 2021).
Wellbeing Index Snapshot: US

Top drivers of wellbeing
These drivers account for at least half of overall wellbeing:
- I consider myself to be in good physical health
- I feel confident in myself most of the time
- I am able to manage stress effectively
- I usually get enough sleep to feel well rested
- I feel like I have enough energy to be able to accomplish the things I need to do every day
- I feel like I am in tune with my emotions
- I have a good work/school/home life balance

Return to the workplace
- Global average
  - 52%
  - 53%
  - 44%
  - 40%
- US
  - 55%
  - 50%
  - 38%
  - 38%

Top concerns in returning to the workplace:
- Less personal time
- Risk of exposure to COVID-19
- Flexibility in work hours / location
- Physical / mental health support

Top areas requiring employer support beyond COVID-19:
- Social media
  - Average hours / day spent on social media
  - % feel social media has a negative impact on social wellbeing
  - Global average
    - 3 hours
    - 2.5 hours
  - Gen Z
    - 39%
    - 24%
  - Total population
    - 36%
    - 21%

Overall wellbeing by community involvement
- Sense of community is important
  - Agree
  - Disagree
  - Global average
    - 71
    - 57
  - US
    - 72
    - 59
- Giving back to community is important
  - Agree
  - Disagree
  - Global average
    - 71
    - 58
  - US
    - 72
    - 60

Overall wellbeing by generation
- Gen Z
  - 2022: 61
  - vs. 2021: +5
- Millennial
  - 2022: 65
  - vs. 2021: -2
- Gen X
  - 2022: 65
  - vs. 2021: +2
- Boomer & Mature*
  - 2022: 72
  - vs. 2021: +3

Note: Mature generation base size is too small to report at a market level.

Wellbeing Index Snapshot: Canada

Overall wellbeing by generation

<table>
<thead>
<tr>
<th>Year</th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer &amp; Mature*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>60</td>
<td>65</td>
<td>64</td>
<td>70</td>
</tr>
<tr>
<td>vs. 2021</td>
<td>-3</td>
<td>+3</td>
<td>+2</td>
<td>+1</td>
</tr>
</tbody>
</table>

Top drivers of wellbeing

These drivers account for at least half of overall wellbeing:

- I am able to manage stress effectively
- I consider myself to be in good physical health
- I feel confident in myself most of the time
- I feel like I have enough energy to be able to accomplish the tasks I need to do each day
- I have a good work/school/home life balance
- I usually get enough sleep to feel well rested
- I feel comfortable in my home

Top barriers to wellbeing

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Canada</th>
<th>Global average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of support network</td>
<td>53%</td>
<td>31%</td>
</tr>
<tr>
<td>Lack of money</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Stress</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>COVID</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Health conditions</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Lack of time</td>
<td>42%</td>
<td>41%</td>
</tr>
<tr>
<td>Lack of knowledge</td>
<td>41%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Return to the workplace

<table>
<thead>
<tr>
<th>Concern</th>
<th>Global average</th>
<th>Canada</th>
<th>Total population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk of exposure to COVID-19</td>
<td>52%</td>
<td>52%</td>
<td>44%</td>
</tr>
<tr>
<td>Less personal time</td>
<td>40%</td>
<td>37%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Social media

<table>
<thead>
<tr>
<th>Social media usage</th>
<th>Global average</th>
<th>Gen Z</th>
<th>Total population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average hours/day spent on social media</td>
<td>3</td>
<td>3</td>
<td>36%</td>
</tr>
<tr>
<td>% feel social media has a negative impact on social wellbeing</td>
<td>14%</td>
<td>14%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Overall wellbeing by community involvement

<table>
<thead>
<tr>
<th>Overall wellbeing</th>
<th>Global average</th>
<th>Canada</th>
<th>Total population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>71</td>
<td>71</td>
<td>58</td>
</tr>
<tr>
<td>Disagree</td>
<td>57</td>
<td>58</td>
<td>71</td>
</tr>
</tbody>
</table>

Note: Mature generation base size is too small to report at a market level.
Wellbeing Index Snapshot: UK

Top drivers of wellbeing
These drivers account for at least half of overall wellbeing:
- Physical
- Mental
- Financial

23% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 23% in 2021).

Overall wellbeing by generation

<table>
<thead>
<tr>
<th></th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer &amp; Mature*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weak 2022</td>
<td>59</td>
<td>60</td>
<td>59</td>
<td>66</td>
</tr>
<tr>
<td>Moderate 2022</td>
<td>62</td>
<td>63</td>
<td>61</td>
<td></td>
</tr>
<tr>
<td>Strong 2022</td>
<td>65</td>
<td>64</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>Weak 2021</td>
<td>59</td>
<td>60</td>
<td>59</td>
<td>66</td>
</tr>
</tbody>
</table>

Top barriers to wellbeing

Return to the workplace

- Global average 52%
- 53%
- 44%
- 40%

Social media

- Global average 3%
- 1%
- 36%
- 21%

Overall wellbeing by community involvement

- 66 Agree
- 55 Disagree
- 66 Agree
- 56 Disagree

*Note: Mature generation base size is too small to report at a market level.
Wellbeing Index Snapshot: France

Top drivers of wellbeing
These drivers account for at least half of overall wellbeing:
- I consider myself to be in good physical health
- I feel confident in myself most of the time
- I feel like I have enough energy to be able to accomplish the things I need to do every day
- I am able to manage stress effectively
- I feel like I am in tune with my emotions
- I usually get enough sleep to feel well rested
- I am on track to meet my financial goals

Top barriers to wellbeing

Return to the workplace
- 54% Less personal time
- 48% Impact of commute
- 44% Flexibility in work hours / location
- 41% Physical / mental health support

Social media
- 3 Average hours / day spent on social media
- 1 ½ % feel social media has a negative impact on social wellbeing

Overall wellbeing by community involvement
- Agree
  - Sense of community is important
  - Giving back to community is important
- Disagree
  - Agree
  - Disagree

Overall wellbeing by generation

- Gen Z
  - Lack of money: 50%
  - Lack of support: 48%
  - COVID: 41%
  - Stress: 38%
  - Lack of time: 36%
  - Health conditions: 29%
  - Lack of knowledge: 25%

- Millennial
  - Lack of money: 48%
  - Lack of support: 44%
  - COVID: 41%
  - Stress: 38%
  - Lack of time: 36%
  - Health conditions: 29%
  - Lack of knowledge: 25%

- Gen X
  - Lack of money: 50%
  - Lack of support: 48%
  - COVID: 41%
  - Stress: 38%
  - Lack of time: 36%
  - Health conditions: 29%
  - Lack of knowledge: 25%

- Boomer & Mature
  - Lack of money: 50%
  - Lack of support: 48%
  - COVID: 41%
  - Stress: 38%
  - Lack of time: 36%
  - Health conditions: 29%
  - Lack of knowledge: 25%

33% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 29% in 2021).

Overall wellbeing by generation

- Gen Z: 65
- Millennial: 67
- Gen X: 65
- Boomer & Mature: 71

vs. 2021
- Gen Z: -1
- Millennial: -3
- Gen X: +1
- Boomer & Mature: +4

*Note: Mature generation base size is too small to report at a market level.
Wellbeing Index Snapshot: Germany

Top drivers of wellbeing
These drivers account for at least half of overall wellbeing:
- Physical: I consider myself to be in good physical health
- Mental: I feel like I have enough energy to be able to accomplish the things I need to do every day
- Financial: I am able to manage stress effectively
- Physical: I feel like I am in tune with my emotions
- Financial: I feel confident in myself most of the time
- Physical: I feel like I am in a good place when it comes to personal finances
- Financial: I understand my finances and feel confident managing them

Top barriers to wellbeing
- Lack of support
- Lack of time
- Stress
- COVID
- Lack of money
- Health conditions
- Lack of knowledge

Return to the workplace
- Global average: 52%
- Germany: 42%
- Physical: 53%
- Impact of commute: 48%
- Flexibility in work hours: 44%
- Mental health support: 40%

Top concerns in returning to the workplace
- Less personal time
- Impact of commute
- Flexibility in work hours / location
- Physical / mental health support

Top areas requiring employer support beyond COVID-19

Social media
- Global average: 3
- Germany: 1½
- Average hours / day spent on social media: 35%
- % feel social media has a negative impact on social wellbeing: 21%

Overall wellbeing by community involvement
- Global average: 71
- Germany: 70
- Agree: 70
- Disagree: 57
- Sense of community is important
- Agree: 61
- Disagree: 58
- Giving back to community is important

Overall wellbeing by generation
- Global average: 67
- Germany: 66
- Gen Z: 62
- Millennial: 63
- Gen X: 66
- Boomer & Mature: +3

26% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 24% in 2021).

*Note: Mature generation base size is too small to report at a market level.
Wellbeing Index Snapshot: Australia

24% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 28% in 2021).

### Overall wellbeing by generation

<table>
<thead>
<tr>
<th></th>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer &amp; Mature*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>62</td>
<td>60</td>
<td>59</td>
<td>66</td>
</tr>
<tr>
<td>vs. 2021</td>
<td>-1</td>
<td>-3</td>
<td>-6</td>
<td>-1</td>
</tr>
</tbody>
</table>

### Top drivers of wellbeing

These drivers account for at least half of overall wellbeing:

- I feel confident in myself most of the time
- I consider myself to be in good physical health
- I am able to manage stress effectively
- I feel like I have enough energy to be able to accomplish the things I need to do every day
- I feel like I am in tune with my emotions
- I have a good work/school/home life balance
- I usually get enough sleep to feel well rested

### Top barriers to wellbeing

- Lack of support network: Australia 54%, Global average 54%
- Stress: Australia 94%, Global average 94%
- Lack of money: Australia 81%, Global average 81%
- COVID: Australia 44%, Global average 44%
- Uneven health conditions: Australia 46%, Global average 46%
- Lack of time: Australia 48%, Global average 48%
- Lack of knowledge: Australia 32%, Global average 32%

### Return to the workplace

- Risk of exposure to COVID-19: 58%
- Less personal time: 52%
- Flexibility in work hours/location: 44%
- Physical/mental health support: 40%

### Social media

- Average hours/day spent on social media: Gen Z 3%, Total population 1%
- % feel social media has a negative impact on social wellbeing: Gen Z 44%, Total population 24%

### Overall wellbeing by community involvement

- Sense of community is important: Agree 68, Disagree 51
- Giving back to community is important: Agree 68, Disagree 53
Wellbeing Index Snapshot: China

Top drivers of wellbeing
These drivers account for at least half of overall wellbeing:

- I consider myself to be in good physical health
- I feel confident in myself most of the time
- I feel like I am in a good place when it comes to personal finances
- I feel like I have enough energy to be able to accomplish the things I need to do every day
- I feel like I am in tune with my emotions
- Growing up in my household, mental wellbeing was acknowledged
- I usually get enough sleep to feel well rested
- It is important for me to give back to my community

Top barriers to wellbeing

<table>
<thead>
<tr>
<th>Barriers to well-being</th>
<th>China</th>
<th>Global average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of time</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>Lack of support network</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Stress</td>
<td>56%</td>
<td>57%</td>
</tr>
<tr>
<td>Lack of money</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>COVID</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Mental health</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Physical health</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Social health</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Financial health</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Return to the workplace

- Global average: 53% - 52% - 40% - 44%
- Risk of exposure to COVID-19: 56% - 55% - 50% - 44%
- Less personal time: 56% - 55% - 50% - 44%
- Physical / mental health support: 56% - 55% - 50% - 44%
- Flexibility in work hours / location: 56% - 55% - 50% - 44%

Social media

- Average hours / day spent on social media:
  - Global average: 3 hours
  - Gen Z: 2 hours
  - Total population: 2 hours
  - Gen Z: 28%
  - Total population: 29%

Overall wellbeing by community involvement

<table>
<thead>
<tr>
<th>Community Involvement</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of community is important</td>
<td>78</td>
<td>57</td>
</tr>
<tr>
<td>Giving back to community is important</td>
<td>78</td>
<td>57</td>
</tr>
</tbody>
</table>

*Note: Mature generation base size is too small to report at a market level
Wellbeing Index Snapshot: Japan

**Top drivers of wellbeing**
These drivers account for at least half of overall wellbeing:

- I consider myself to be in good physical health
- I have a good work/school/home life balance
- I feel like I am in tune with my emotions
- I feel like I have enough energy to be able to accomplish the things I need to do every day
- Growing up in my household, mental wellbeing was acknowledged
- I am able to manage stress effectively
- I feel comfortable in my home
- I put a lot of effort into staying connected with people I care about

**Top barriers to wellbeing**

<table>
<thead>
<tr>
<th>Stress</th>
<th>Lack of support</th>
<th>Lack of money</th>
<th>COVID</th>
<th>Lack of time</th>
<th>Health conditions</th>
<th>Lack of knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>41%</td>
<td>44%</td>
<td>56%</td>
<td>33%</td>
<td>36%</td>
<td>32%</td>
</tr>
</tbody>
</table>

**Overall wellbeing by generation**

<table>
<thead>
<tr>
<th>Gen Z</th>
<th>Millennial</th>
<th>Gen X</th>
<th>Boomer &amp; Mature*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>58</td>
<td>58</td>
<td>56</td>
</tr>
<tr>
<td>vs. 2021</td>
<td>-1</td>
<td>+1</td>
<td>-</td>
</tr>
</tbody>
</table>

**Return to the workplace**

<table>
<thead>
<tr>
<th>Risk of exposure to COVID-19</th>
<th>Less personal time</th>
<th>Flexibility in work hours / location</th>
<th>Physical / mental health support</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>47%</td>
<td>33%</td>
<td>40%</td>
</tr>
</tbody>
</table>

**Social media**

<table>
<thead>
<tr>
<th>Average hours / day spent on social media</th>
<th>% feel social media has a negative impact on social wellbeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

**Overall wellbeing by community involvement**

<table>
<thead>
<tr>
<th>Sense of community is important</th>
<th>Giving back to community is important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>Agree</td>
</tr>
<tr>
<td>Disagree</td>
<td>Disagree</td>
</tr>
</tbody>
</table>

---

*Note: Mature generation base size is too small to report at a market level.

Wellbeing Index Snapshot: Singapore

- *Top drivers of wellbeing*:
  - Physical: I consider myself to be in good physical health
  - Mental: I feel confident in myself most of the time
  - Financial: I am able to manage stress effectively
  - Physical: I have a good work/school/home life balance
  - Mental: I usually get enough sleep to feel well rested
  - Financial: I am on track to meet my financial goals
  - Social: I understand my finances and feel confident managing them
  - Overall: Growing up in my household, mental wellbeing was acknowledged

- *Top barriers to wellbeing*:
  - COVID: 66%
  - Lack of time: 54%
  - Stress: 5%
  - Lack of support network: 47%
  - Lack of money: 43%
  - Lack of knowledge: 32%
  - Health conditions: 17%

- *Return to the workplace*:
  - Risk of exposure to COVID-19: 62%
  - Less personal time: 52%
  - Flexibility in work hours/location: 58%
  - Physical/mental health support: 48%

- *Social media*:
  - Average hours/day spent on social media: 3 Average hours/day spent on social media
  - % of population feels social media has a negative impact on social wellbeing: 3%

- *Overall wellbeing by community involvement*:
  - Agree: 70%
  - Disagree: 59%

31% indicate strong wellbeing across all three dimensions of overall wellbeing (vs. 29% in 2021).

Overall wellbeing by generation:
- Gen Z: 64
- Millennial: 67
- Gen X: 66
- Boomer & Mature*: 71
- vs. 2021: +2
- +2
- -
- +1

*Note: Mature generation base size is too small to report at a market level.

Wellbeing Index Snapshot: South Korea

Top drivers of wellbeing
These drivers account for around half of overall wellbeing:
- I consider myself to be in good physical health (66%)
- I feel like I have enough energy to be able to accomplish the things I need to do every day (60%)
- I am able to manage stress effectively (59%)
- I have a good work/school/home life balance (51%)
- I feel like I am in tune with my emotions (51%)
- Growing up in my household, mental wellbeing was acknowledged (50%)
- I feel confident in myself most of the time (49%)
- I am actively trying to expand my social circle (48%)

Top barriers to wellbeing

Overall wellbeing by generation

Return to the workplace

Social media

Overall wellbeing by community involvement

*Note: Mature generation base size is too small to report at a market level