



The Pressure to Be Well

lululemon Global
Wellbeing Report 2024

Methodology

lululemon commissioned an online survey managed by Edelman Data & Intelligence (DXI) to provide a glimpse into the worldwide state of wellbeing. The survey was fielded in 15 markets where lululemon operates between April 22, 2024 – May 30, 2024.

16,000 respondents in total

n=1,000 per all markets except China Mainland (n=2,000); general population, ages 18+



The 2021 Global Wellbeing Report was conducted across 10 markets [Hong Kong S.A.R., Spain, Thailand, New Zealand, and Malaysia have since been added to the survey].

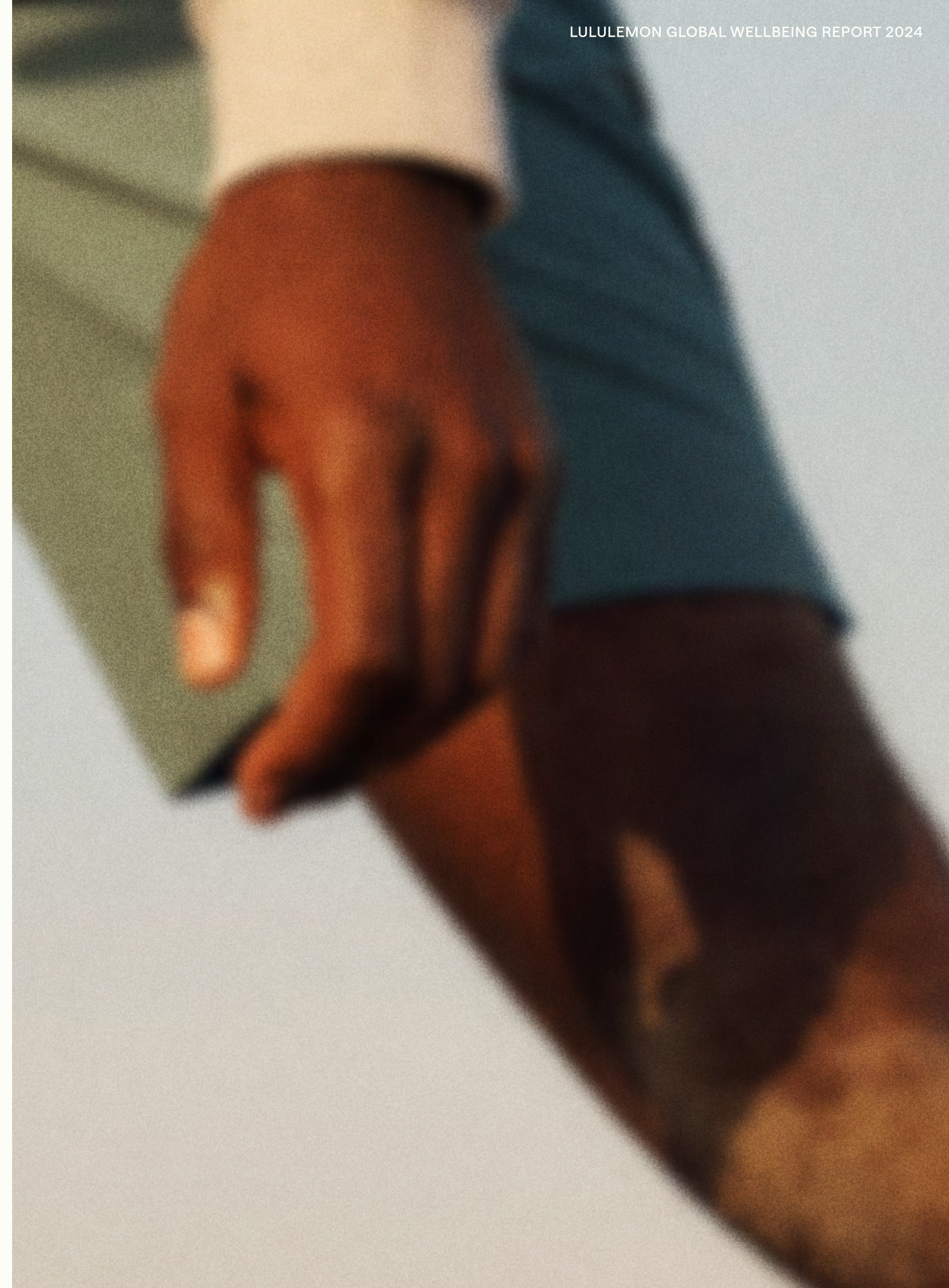
Not all percentages sum to 100% due to rounding, and total global percentages have a margin of error of <1%.

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.

Defining wellbeing

For the purposes of this research, “wellbeing” is defined by three core elements: physical, mental, and social. The balance of these three elements makes up the core of being well and feeling your best.

| | |
|----------|---|
| Physical | Feeling empowered and able to give one’s body what it needs for health and quality of life. |
| Mental | Feeling emotionally prepared, and able to handle what the future holds. |
| Social | Feeling connected to others, a part of something larger than oneself, and contributing to a supportive community. |



The Pressure to Be Well

Escaping a Cycle That Holds Us Back

Last year, people increasingly prioritized their wellbeing— yet the state of wellbeing didn't improve.

This year, the report finds that the constant pressure to improve our wellbeing is actually making us less well.

The good news? Our research highlights three strategies that can reduce this pressure and help us to get unstuck.

While the importance of wellbeing is stronger than ever, so is the **pressure to keep up.**

Wellbeing is
burning us out.

1 in 2

(45%) are experiencing wellbeing burnout.

2 in 3

(63%) experiencing wellbeing burnout feel powerless when it comes to improving their wellbeing.

Nearly

2 in 3

(61%) are feeling pressure from others and society to support their wellbeing in specific ways.

For the purposes of this research, “burnout” is defined as a state of physical, mental, or social exhaustion caused by excessive and prolonged stress. It might occur when individuals feel overwhelmed, emotionally drained, and unable to meet constant demands, and also involves a sense of reduced accomplishment and purpose.

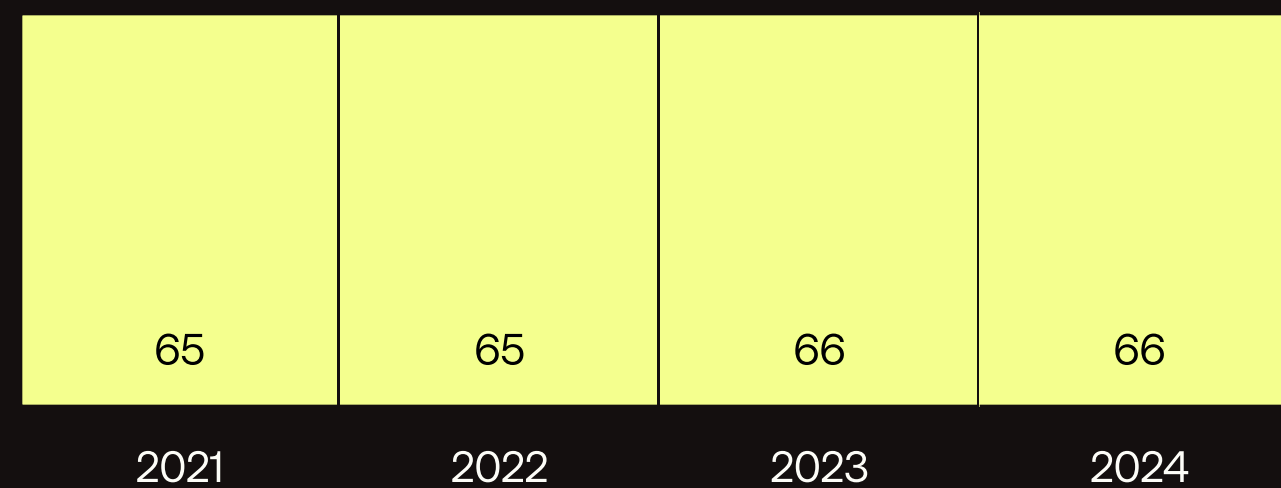
The more pressure we feel to be well,

Global wellbeing scores have not improved in the last 4 years, remaining at scores of 65-66.

People who feel more wellbeing pressure are **55%** more likely to feel wellbeing burnout.

People who feel wellbeing burnout are **43%** more likely to experience wellbeing pressure.

Global wellbeing scores



the less well we feel.

We're stuck in a perpetual wellbeing cycle fueled by **three key pressure points:**



Unrealistic societal expectations

61%

of people experience overwhelming societal **expectations to appear well.**

Conflicting information

53%

say there is a lot of **conflicting information** about the **best ways to improve** their wellbeing.

Feeling that we're going at it alone

89%

of those with wellbeing burnout say **loneliness is a contributing factor.**

Globally, markets that struggle more with these pressure points are feeling the most wellbeing burnout—and even more stuck.

The top global “wellbeing burnout zones*”:

- 01 Australia
- 02 New Zealand
- 03 Canada
- 04 Malaysia
- 05 United States

Pressure point increase among those in “wellbeing burnout zones”:

+25%

experiencing overwhelming societal expectations.

+23%

facing conflicting information.

+35%

feel disconnected from their community.

*Defining burnout: For the purposes of this research, “burnout” is defined as a state of physical, mental, or social exhaustion caused by excessive and prolonged stress. It might occur when individuals feel overwhelmed, emotionally drained, and unable to meet constant demands, and also involves a sense of reduced accomplishment and purpose. The “wellbeing burnout zones” are the markets within our survey that experience the highest levels of burnout when thinking about their physical, mental, or social wellbeing.

The “wellbeing burnout zones” are the markets within our survey that experience the highest levels of burnout when thinking about their physical, mental, or social wellbeing.

When we release the pressure to be well and focus on our own journey, we can break the cycle and feel less stuck.

In learning from individuals surveyed with higher wellbeing scores, there are several ways to do this.



Actions you can take

01

Quiet the noise so you can hear yourself

Reality is grounding.

Those who take social media breaks report 9% higher wellbeing.

Boundaries are freeing.

Those setting boundaries in their work and personal lives report 13% higher wellbeing.

Mindfulness is powerful.

Those who practice meditation report 12% higher wellbeing.

02

Do what feels good to you

Wellbeing doesn't need to be intense.

Those who practice "slow living" by taking the time to do things at their own pace report 15% higher wellbeing.

Wellbeing can be bite-sized.

Those moving their body a little bit throughout the day report 16% higher wellbeing.

Wellbeing can be fun.

Those who use physical activity as an opportunity to socialize with others report 23% higher wellbeing.

03

Invite others on your journey

Human connection offers an advantage.

Those who are more connected to their community report 16% higher wellbeing.

Community powers purpose.

Those more connected to their community are 28% more likely to feel a sense of purpose.

Moving with others fuels wellbeing.

People who participate in team sports report 14% higher wellbeing.

When community and movement come together, we have the opportunity to increase our holistic wellbeing.

People who take group fitness classes report

15%

higher wellbeing

People who join group workouts to meet like-minded people report

17%

higher wellbeing

People who feel a sense of belonging when they work out with other people report

21%

higher wellbeing

A word from lululemon Mental Wellbeing Global Advisory Board Members.



“Often, the pressure to improve our wellbeing causes us to overthink and fixate on what’s lacking in our lives. I recommend setting gradual, achievable goals, turning the pursuit of wellbeing into a source of joy and anticipation rather than stress.”

Dr. Doraiswamy, Professor at Duke University



“There’s no one-size-fits-all approach to wellbeing, it’s deeply personal. For me, prioritizing daily intentional mindfulness to center myself, whether through meditation or moving my body keeps me grounded.”

Yvette Kong, Mind HK



“Connecting with peers is essential for maintaining mental wellbeing. Whether it’s through building community in the workplace, in local neighborhoods, or in shared spaces, these relationships truly matter. Strong connections support mental health, and when they flourish, they help create a solid foundation for overall wellbeing.”

Dan Gillison, CEO of NAMI



“Every small step counts. Whether it’s a few minutes of deep breathing, a walk in nature, journaling, or simply taking a break from screens, the key is to choose something that nurtures your mind, body, and spirit, and to make it a non-negotiable part of your routine.”

Dr. Alfiee, Founder of The AAKOMA Project



“Life is full of ups and downs, and it’s easy to get swept up in the whirlwind. It’s important to take time for yourself, spend time with people who make you feel good, tackle those important conversations, and move more.”

Paul Villanti, Movember

Global Wellbeing Report 2024

While the importance of wellbeing is stronger than ever, so is the pressure to keep up.

Worldwide, more people are trying to improve their wellbeing.

But nearly 2 in 3 (61%) people feel pressure from others and society to support their wellbeing in specific ways.

9 in 10

(89%) are taking more action than they were a year ago to improve their wellbeing in any dimension.

Q5a. Now thinking specifically 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> Q6a. Now thinking specifically 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 > Q7a. Now thinking specifically 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 Size: 2024 Global Total (n=15,938)*

Q5b/c. Please consider all the [activities you do]/[general actions you take] to have strong physical wellbeing. Compared to a year ago, have you been doing the following [activities]/[actions] more or less often, if at all? <Showing Do This More> / Q6b/c: Please consider all the [activities you do]/[general actions you take] in relation to your mental wellbeing. Compared to a year ago, have you been doing the following [activities / actions]/[actions] more or less often, if at all? < Showing Do This More> / Q7c/d: Please consider all the [activities you do]/[general actions you take] in relation to your social wellbeing. Compared to a year ago, have you been doing the following activities / actions more or less often, if at all? < Showing Do This More> / Base Size: 2024 Global Total (n=15,938)*

*Note that data has been weighed to allow for equal representation across all markets

This pressure is most keenly felt by **younger generations.**



76% Gen Z, 71% Millennials feel pressure from others/society in the ways they are expected to support their wellbeing, compared to 60% Gen X, 41% Boomer+.

| Wellbeing | Gen Z | Millenials | Gen X | Boomer+ |
|-----------|-------|------------|-------|---------|
| Physical | 55% | 51% | 40% | 27% |
| Mental | 53% | 50% | 38% | 24% |
| Social | 51% | 46% | 36% | 22% |

Q5a. Now thinking specifically 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>
 Q6a. Now thinking specifically 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>
 Q7a. Now thinking specifically 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 Size: 2024 Global Gen Z (n=2,438), Millennial (n=4,600), Gen X (n=4,591), Boomer+ (n=4,308)

Mental wellbeing takes the brunt of the pressure.

This is exacerbated by the **social pressure to appear well.**

52%

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

45%

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

44%

say the pressure to conform to societal norms negatively impacts their mental wellbeing.

2 in 5

(40%) feel pressure in the ways they are expected to support their mental wellbeing.

+17 points among those who often experience loneliness.

Nearly half of men are still struggling with societal pressures, with men in Asia feeling this the most.

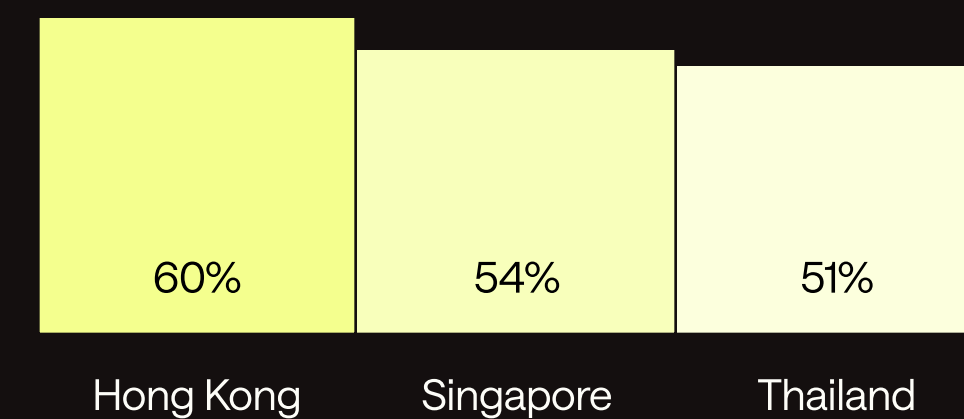
As a result of these pressures, men have not seen improvements in their overall wellbeing.

70 in 2023, 70 in 2024

42%

of men say the pressure to conform to societal norms negatively impacts their mental wellbeing.

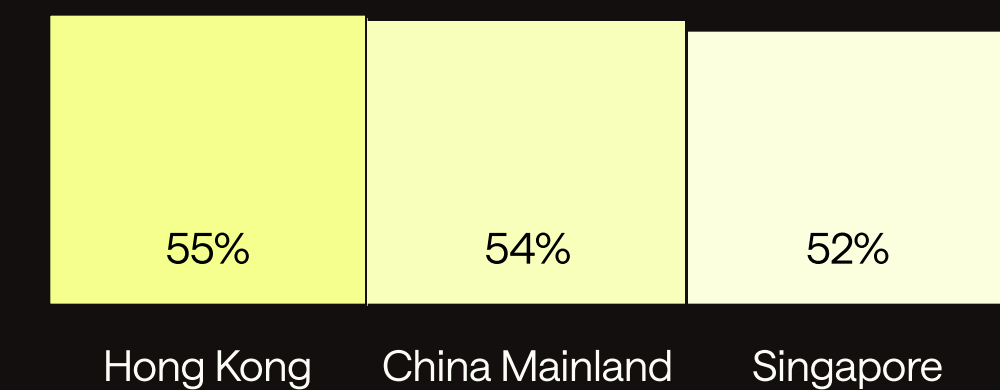
+6 points from 2023



43%

say societal expectations for men in their country make it difficult for them to express their emotions.

+4 points from 2023



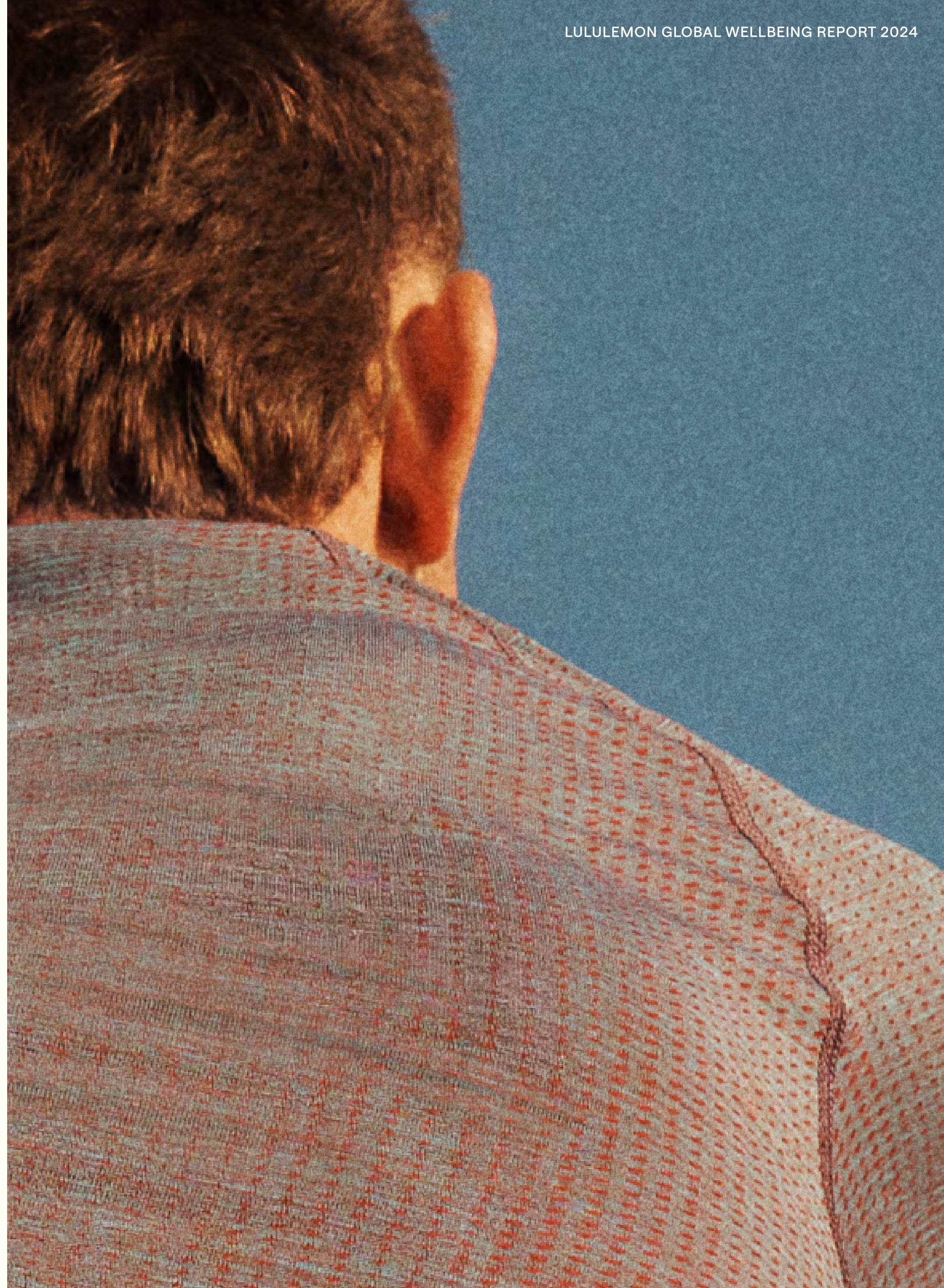
This comes at a time
when we're already feeling
excessive pressure.

56%

say global and local news
make them worried for their
personal wellbeing.

42%

say thinking about climate
change heightens their
feelings of anxiety.



Wellbeing is burning us out.

1 in 2

(45%) are experiencing wellbeing burnout.*

8 in 10

of those experiencing wellbeing burnout also regularly experience negative emotions (stress, exhaustion, loneliness, etc.).

2 in 3

(63%) of those with wellbeing burnout say their burnout makes them feel powerless to improve their own wellbeing.

* Wellbeing burnout is defined as experiencing burnout in either one's physical, mental, or social wellbeing.

Q3: How often do you feel each of the following emotions? Please select one option per row. <Showing Top 3 Box Often/All the time> / Base Size: 2024 Global Total who are experiencing wellbeing burnout (n=5,397) / Q11: In which of the following areas of life, if any, are you currently experiencing burnout? <Showing Percent Selected> / Base Size: Those who are experiencing burnout: 2024 Global Total (n=12,008)

Q13: How much do you agree or disagree with the following statements? <Showing Top 2 Box Agreement> / Base Size: 2024 Global who are experiencing wellbeing burnout (n=5,397)

Globally, wellbeing has not improved in the last four years and remains stagnant.

Global wellbeing index scores

| | 2024 | 2023 | 2022 | 2021 |
|-------------|------|------|------|------|
| Total score | 66 | 66 | 65 | 65 |
| Physical | 66 | 64 | 64 | 66 |
| Mental | 69 | 68 | 67 | 67 |
| Social | 64 | 64 | 63 | 63 |

Note that these Index Score shifts are not statistically significant at the 95% confidence level and should not be considered a large growth or decline.

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. Now thinking specifically about your physical wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Wellbeing Scores> / Base Size: 2021 Global Total (n=9,000), 2022 Global Total (n=9,000), 2023 Global Total (n=9,000), 2024 Global Total (n=15,938)*

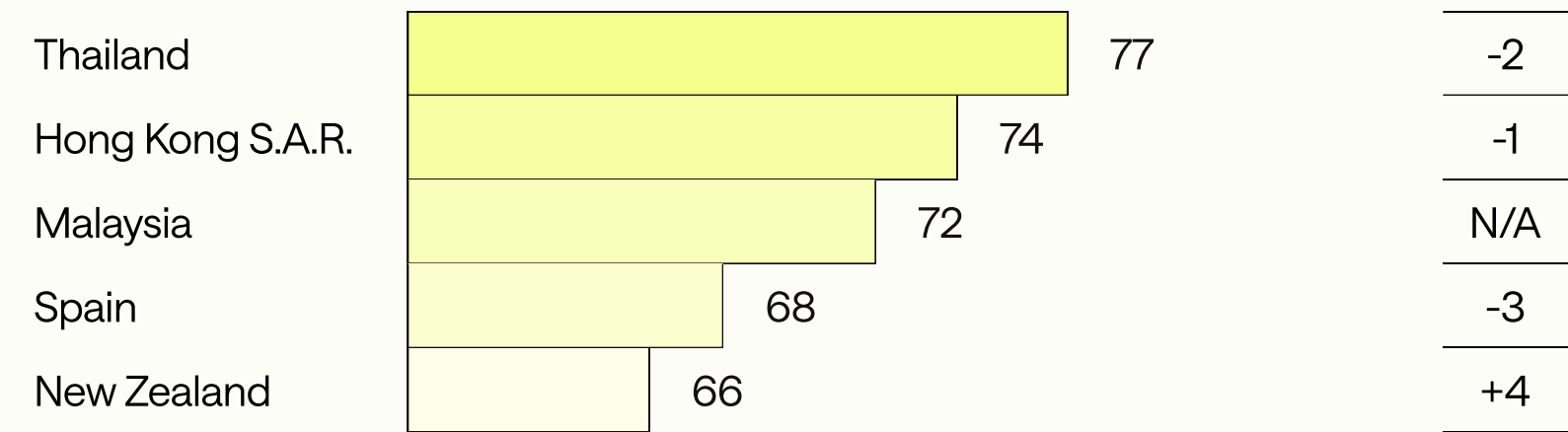
*Note that data has been weighed to allow for equal representation across all markets

** Global wellbeing scores includes scores across the markets surveyed consistently across all years in which lululemon operates



Even at a market level, wellbeing has shifted minimally in the last four years.

Markets added since first wellbeing report:



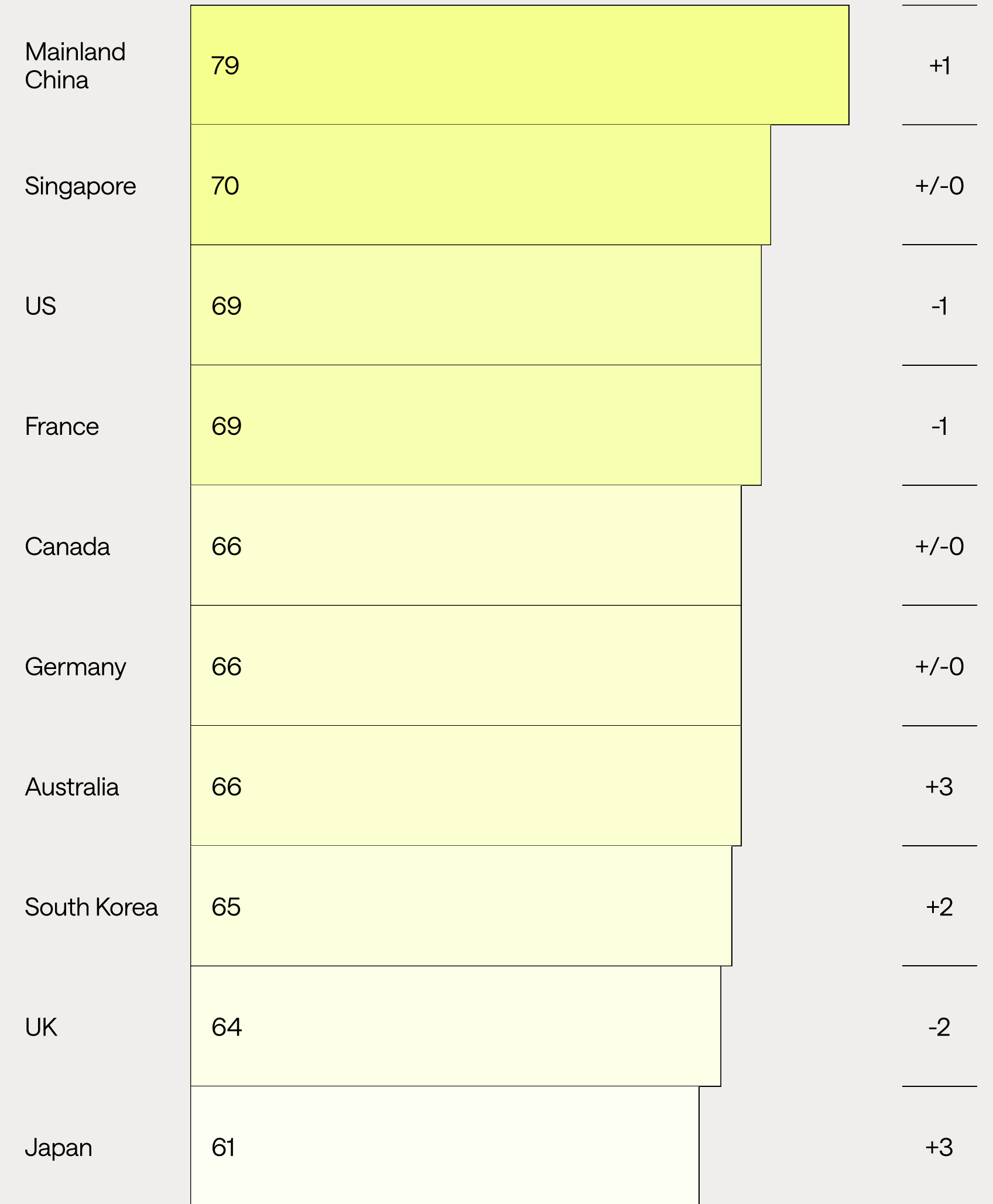
Note that these Index Score shifts are not statistically significant at the 95% confidence level and should not be considered a large growth or decline.

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. Now thinking specifically about your physical wellbeing, please indicate how much you agree or disagree with the following statements using the scale below. <Showing Overall Wellbeing Score> / Base Size: 2023 Global Total (n=14,000), 2024 Global Total (n=n=15,938)*

*Note that data has been weighed to allow for equal representation across all markets

Wellbeing Index Scores

2023



We are stuck in a perpetual cycle where the more pressure we feel to be well, the less well we feel.

Wellbeing pressure

People feeling wellbeing pressure are **+55% more likely** to also experience wellbeing burnout.

Increased wellbeing pressure is leading to increased burnout, continuing the cycle.

Wellbeing pursuit

People feeling wellbeing burnout are **+43% more likely** to also experience wellbeing pressure.

Q11. In which of the following areas of life, if any, are you currently experiencing burnout? .<Showing Percent who feel burnout in their physical, mental, or social wellbeing> / Base Size: Among those feeling burnout: 2024 Global Those who feel pressure in any area of wellbeing (n=8,086), Those who do not feel wellbeing pressure (n=3,923) Q5a. Now thinking specifically 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> Q6a. Now thinking specifically 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 > Q7a. Now thinking specifically 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 Size: 2024 Global Those experiencing wellbeing burnout (n=5,397), Those not experiencing wellbeing burnout (n=10,541).

Marginalized communities experience greater wellbeing pressures, leading to increased burnout.

| | Pressure from others and society to support their wellbeing in specific ways | Experiencing wellbeing burnout |
|---------------------------------|--|--|
| Global | 61% | 45% |
| LGBTQIA2S+ | 63% | 51% |
| People living with disabilities | 66% | 59% |
| BIPOC | 61% | 53% |
| | 74% UK, 73% CA, 61% UK, 59% UK, 59% NZ | 57% AU, 54% NZ, 53% CA, 51% US, 44% UK |

Q5a. Now thinking specifically 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>
 Q6a. Now thinking specifically 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 >
 Q7a. Now thinking specifically 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 Size: 2024 Global Total (n=15,938)*, LGBTQIA2S+ (n=2,517), People living with disabilities (n=5,531), BIPOC includes the following markets: US BIPOC (n=335), UK BIPOC (n=141), Canada BIPOC (n=266), Australia BIPOC (n=172), New Zealand BIPOC (n=734). LGBTQIA2S+ excludes respondents from Singapore and Malaysia, where respondents were not asked to identify.

*Note that data has been weighed to allow for equal representation across all markets

This cycle is fueled by three key pressure points:



Unrealistic societal expectations

61%

of people experience overwhelming societal expectation to appear well.

Conflicting information

53%

say there is a lot of conflicting information about the best ways to improve their wellbeing.

Feeling that we're going at it alone

89%

of those with wellbeing burnout say loneliness is a contributing factor.

Markets struggling more with these pressure points are feeling the most wellbeing burnout—and feeling even more stuck.

Levels of wellbeing burnout are not universal.

The top global “wellbeing burnout zones”:

- 01 Australia
- 02 New Zealand
- 03 Canada
- 04 Malaysia
- 05 United States

Pressure point increase among those in “wellbeing burnout zones”:

+25%

are more likely to experience **overwhelming societal expectations**.

+23%

facing **conflicting information** about how to improve wellbeing.

+35%

feel **disconnected** from their community.

*Defining burnout: For the purposes of this research, “burnout” is defined as a state of physical, mental, or social exhaustion caused by excessive and prolonged stress. It might occur when individuals feel overwhelmed, emotionally drained, and unable to meet constant demands, and also involves a sense of reduced accomplishment and purpose. The “wellbeing burnout zones” are the markets within our survey that experience the highest levels of burnout when thinking about their physical, mental, or social wellbeing.

The markets experiencing the least wellbeing burnout are China Mainland, France, South Korea, Hong Kong, and Japan

Q4. Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agreement> / Q5a. Now thinking specifically 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> / Q6a. Now thinking specifically 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> / Q7a. Now thinking specifically 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> / Q18. Now, using the scale below, please indicate who you feel has played an active role in helping you improving your overall wellbeing. <Showing Percent Selected Has not helped me improve my overall wellbeing> / Base Size: 2024 Global Total (n=15,938)*; burnout zones experiencing burnout (n=2,081), *Note that data has been weighed to allow for equal representation across all markets. **Note the Wellbeing burnout zone comparisons are being made to Global Total

Our opportunity

When we release the pressure to be well and focus on our own journey, we can break the cycle and feel less stuck.

Priorities in breaking the cycle and feeling less stuck:

01

Quiet the noise so you can hear yourself.

02

Do what feels good to you.

03

Invite others on your journey.

Priority 1: Quiet the noise so you can hear yourself

Reality is grounding.

Wellbeing increases by...



9%

when people take social media breaks.

Boundaries are freeing.

Wellbeing increases by...



13%

when people set boundaries in their work/personal life.

26%

when people feel they can still be happy even if their wellbeing needs improvement.

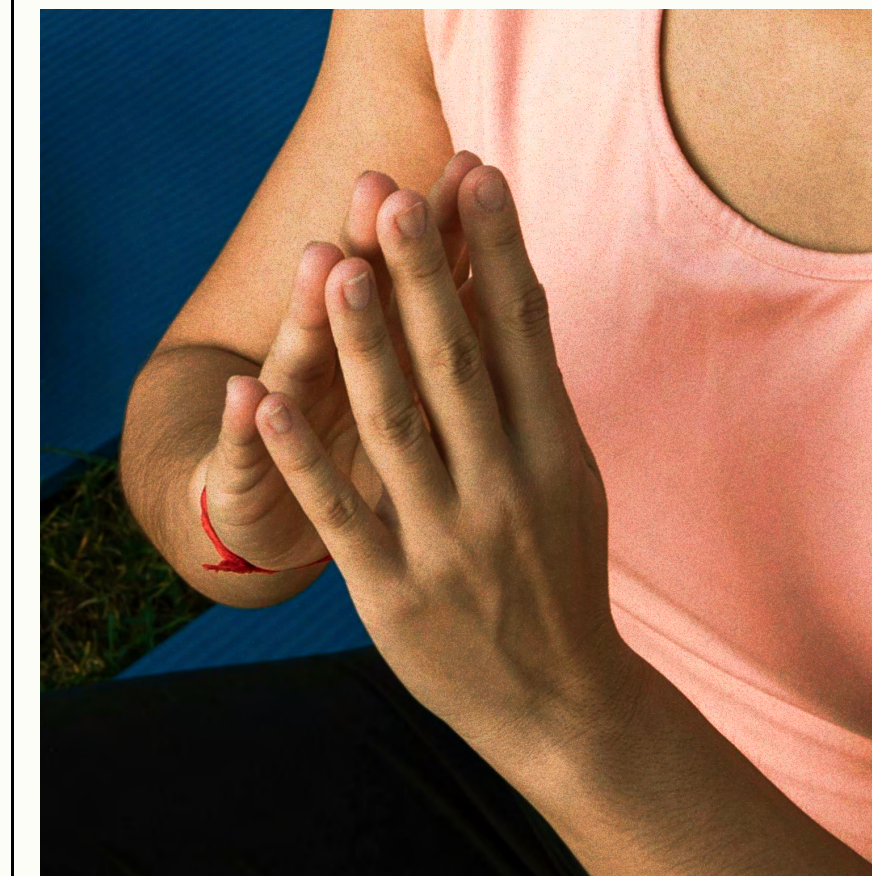
Lower among Gen Z (19% increase, vs. 26% other generations)

16%

when people practice self-love and acceptance.

Mindfulness is powerful.

Wellbeing increases by...



+12%

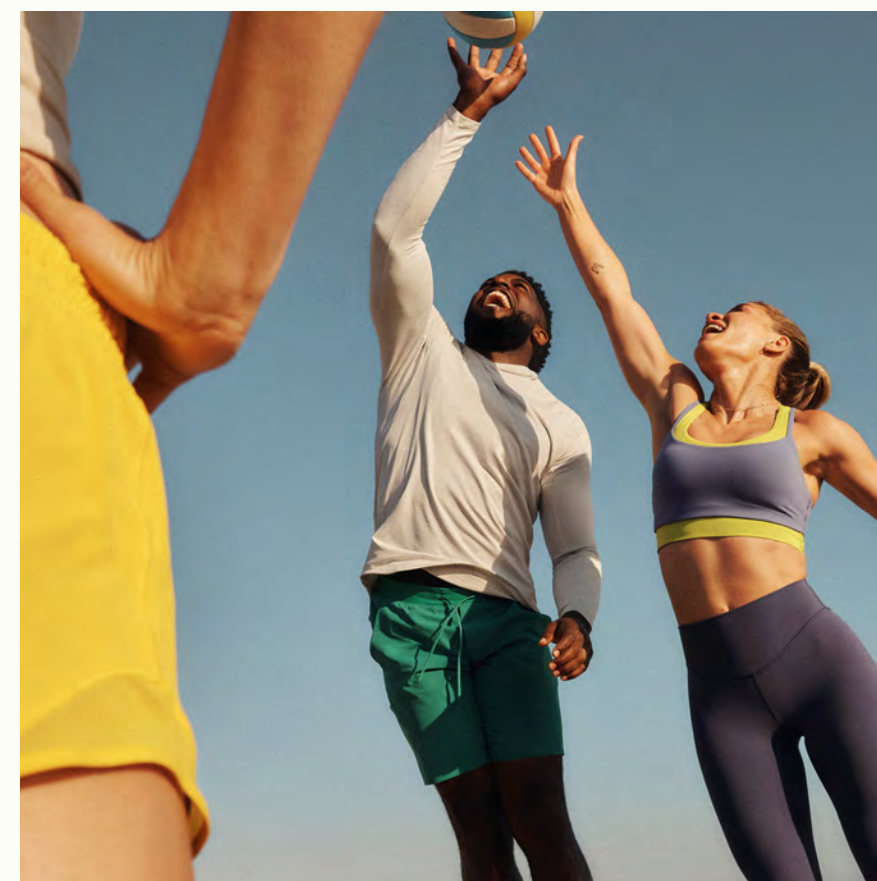
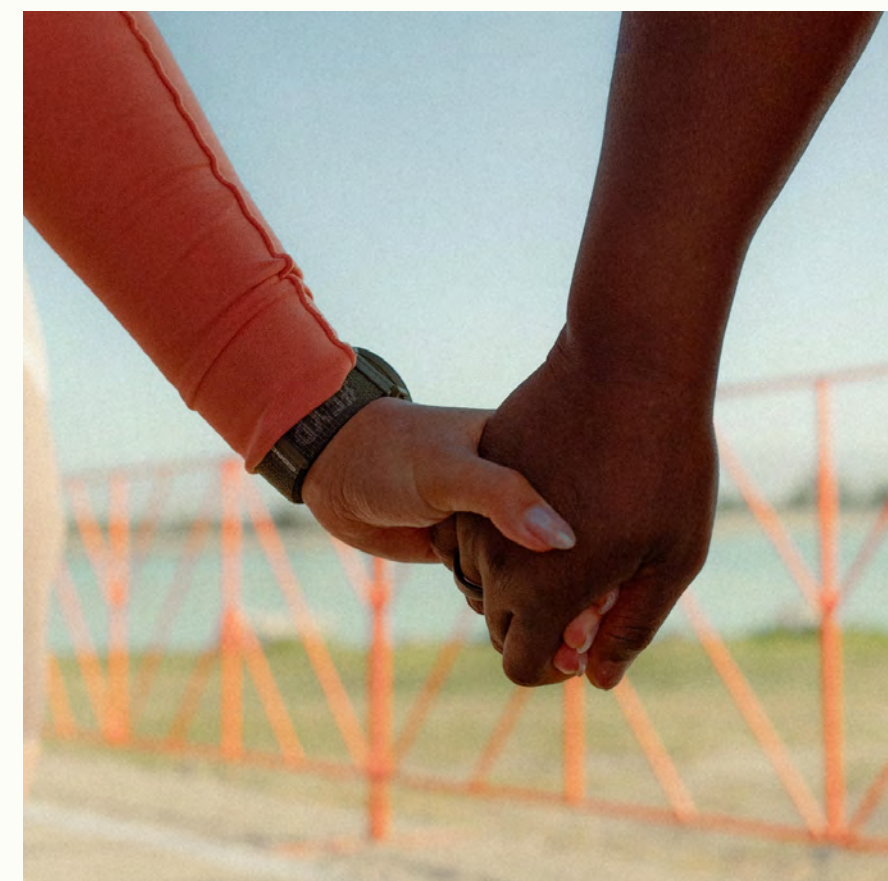
when people practice meditation

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 Overall Wellbeing Score> / Base Size: 2024 Global Practicing mindfulness n=10,738, Practicing mindfulness less or not at all (n=5,200) Practicing self-love and acceptance (n=12,004), Practicing self-love and acceptance less or not at all (n=3,996), Taking social media breaks (n=9,487), Taking less or no social media breaks (n=6,513), Setting boundaries in work or personal life (13,320), Setting less or no boundaries in work or personal life (n=2,680), Those who can still be happy even if their wellbeing needs improvement (10,852), Those who cannot be happy if their wellbeing needs improvement (1,508), Gen Z (n=1,909)*, Other generations (n=10,452)*. *Note: Bases exclude anyone who chose not to answer the question.

Priority 2: Do what feels good to you

Wellbeing doesn't need to be intense.

Wellbeing increases by...



15%

when people practice "slow living" by taking the time to do things at their own pace.

20%

when people do little things throughout the day for small boosts to their wellbeing.

22%

when people find purpose in life through the little things (e.g. smaller goals).

18%

when people spend time in nature or the outdoors with others.

13%

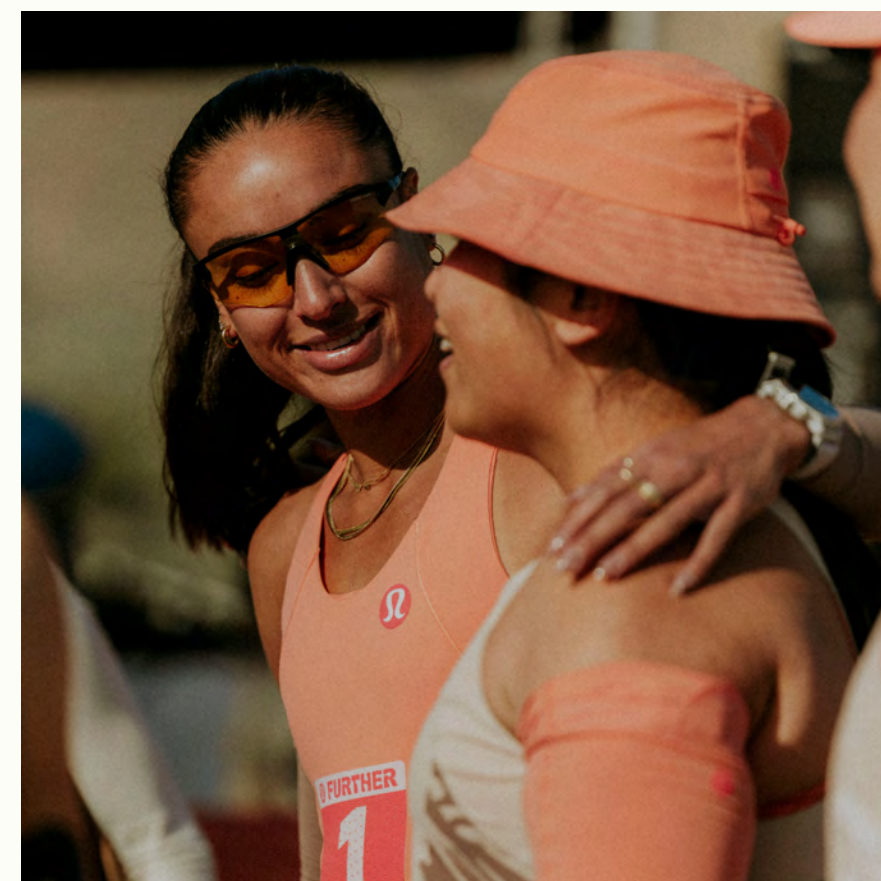
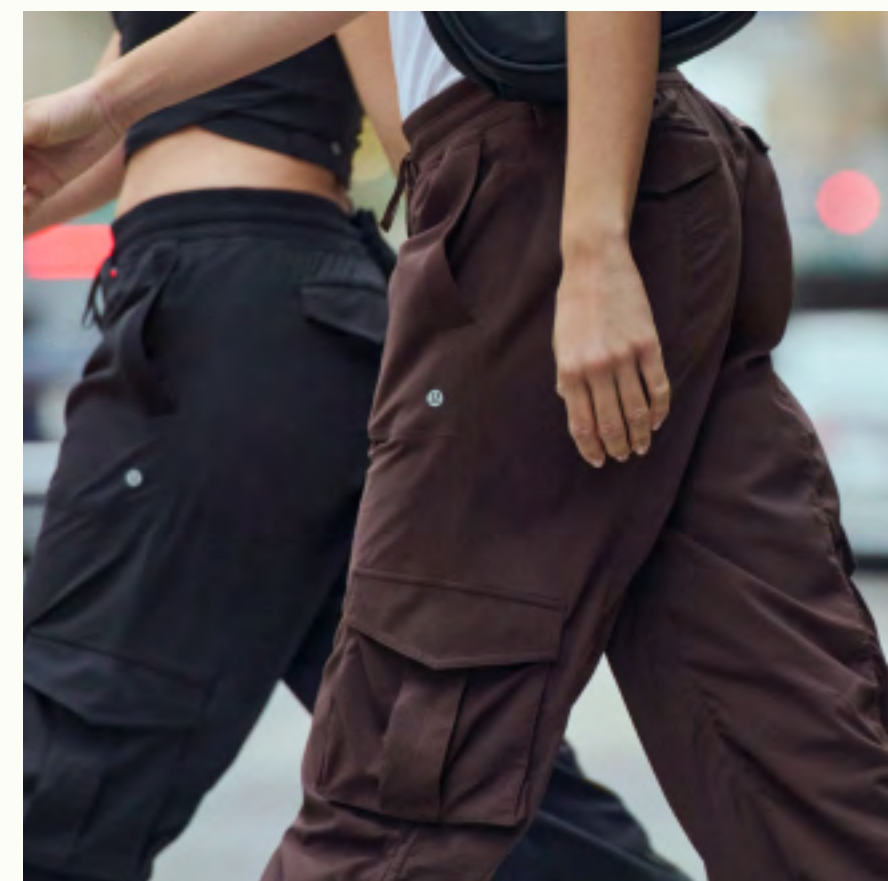
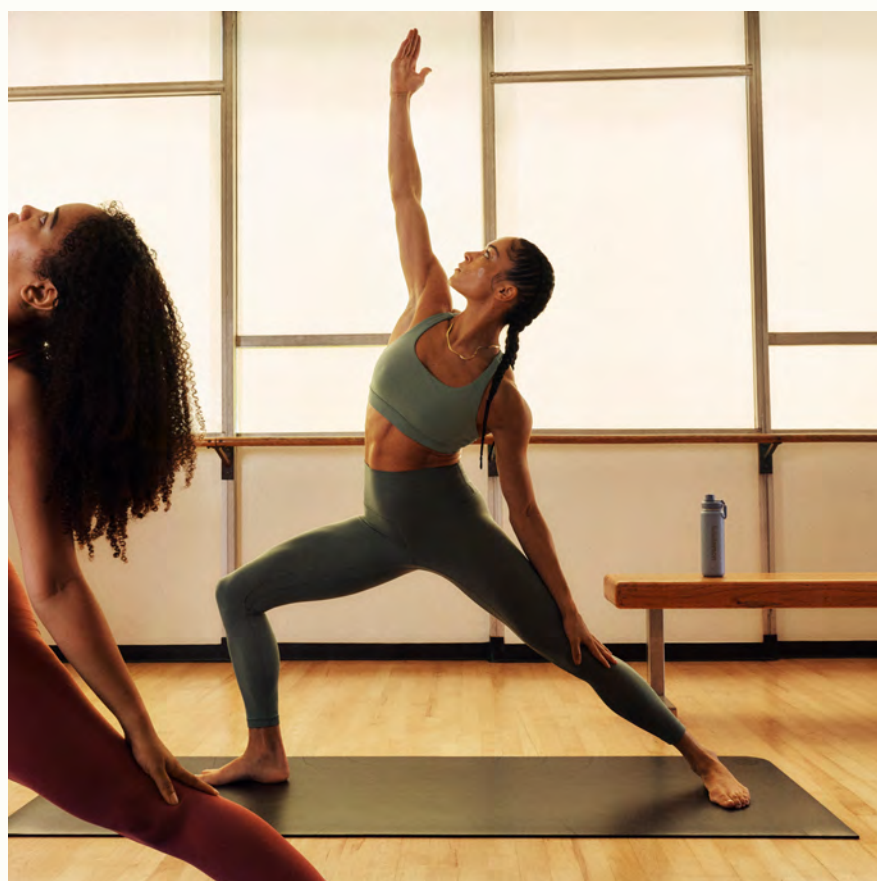
when people combine low-intensity exercise with comfortable home activities.

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 Overall Wellbeing Score> / Base Size: 2024 Global Practice slow living (n=10,263), Does not practice slow living (n=1,843), Do little things throughout the day for small wellbeing boosts (n=11,226), Does not do little things throughout the day for small wellbeing boosts (n=1,528), Find purpose in life through the little things (n=11,262), Does not find purpose in life through the little things (n=1,342), Spends time in nature/outdoors with others (n=11,175), Does not spend time in nature/outdoors with others (n=4,762), Combines low-intensity exercise with comfortable activities at home (10,928), Does not combine low-intensity exercise with comfortable activities at home (5,009).

Priority 2: Do what feels good to you

Wellbeing can be bite-sized and fun.

Wellbeing increases by...



16%

when people move their body a little bit throughout the day.

13%

when people go for short walks (under 15 minutes).

23%

when people use physical activity as an opportunity to socialize with others.

57%

feel they only need to stretch for 30 minutes or less each day to feel a positive impact on their wellbeing.

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 Overall Wellbeing Score> / Base Size: 2024 Global Moving their body a little bit throughout the day (n=12,603), Moving their body a little bit throughout the day less or not at all (n=3,335), Going for short walks (n=11,957), Going for short walks less or not at all (n=3,980), Using physical activity as a n opportunity to socialize (n=8,173), Not using physical activity as an opportunity to socialize (n=3,497). / Q5d. How much time do you feel you need to spend on each of these activities each day to feel a positive impact on your wellbeing, if at all? Your best guess is fine. <Showing Less than 30 minutes NET> / Base Size: 2024 Global Total (n=15,938)*. *Note that data has been weighed to allow for equal representation across all markets

Priority 2: Do what feels good to you

Men with higher wellbeing are leaning into lower-intensity forms of movement.

This year, men with high wellbeing are doing more of **these physical activities:**

| Activities | With high wellbeing | With low wellbeing |
|--|---------------------|--------------------|
| Walking | 43% | 29% |
| Going for short walks (under 15 minutes) | 38% | 26% |
| Taking small breaks throughout the day to stretch or move their body | 32% | 20% |

Compared to 2023, they are

46%

more likely to try yoga or Pilates

Priority 3: Invite others on your journey

Human connection offers an advantage.

Those who feel connected to their community feel...

16%

higher overall wellbeing.

14%

lower wellbeing burnout, especially among women (20%).

However, **only 53%** of people currently **feel connected to their community.**

Those who talk about loneliness with friends and family report an

11%

higher overall wellbeing.

*Those who feel connected to their community includes anyone who feels their community has played an active role in helping them improve their overall wellbeing.

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 Overall Wellbeing Score> / Base Size: 2024 Global Those who often talk about loneliness with their friends and family (n=5,104), Do not often talk about loneliness with their friends and family (n=5,994), Connected to community (n=8,451), Not connected to community (n=4,130). / Q11. In which of the following areas of life, if any, are you currently experiencing burnout? Please select all that apply. <Showing Percent who feel burnout in their physical, mental, or social wellbeing> / Base Size: Among those experiencing burnout: 2024 Global Connected to community (n=6,354), Not connected to community (3,234), Women (n=6,515)*, Men (n=5,291)*. *Note: Bases exclude anyone who chose not to answer the question.

Priority 3: Invite others on your journey

Community powers purpose.



Those who are connected to their community are...

28%

more likely to feel a sense of purpose.

85%

more likely to feel their sense of purpose is driven by making a positive impact on their community.

34%

less likely to experience burnout in their sense of purpose.

Especially among women, who experience 37% less purpose burnout (vs. 29% among men).

Q4. Thinking broadly about your wellbeing, please indicate how much you agree or disagree with the following statements. <Showing Top 2 Box Agree> / Q14. 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: 2024 Global Connected to community (n=8,451), Not connected to community (n=4,130). / Q11. In which of the following areas of life, if any, are you currently experiencing burnout? <Showing Percent Selected Experiencing burnout in their sense of purpose> / Base Size: Among those experiencing burnout: 2024 Global Connected to community (6,354), Not connected to community (n=3,234), Women (n=5,291)*, Men (n=6,515)*. *Note: Bases exclude anyone who chose not to answer the question.

Priority 3: Invite others on your journey

Community requires intentionality.

Wellbeing increases by...



18%

when people show up for their loved ones.



9%

when people end relationships that negatively affect their wellbeing.



8%

when people regularly check in with health care professionals.



22%

when people vocalize their needs with their family, friendships, and relationships

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 Overall Wellbeing Scores> / Base Size: 2024 Global Showing up for loved ones (n=13,274), Showing up less or not at all for loved ones (2,664), Ending relationships that negatively affect their wellbeing (n=10,533), Ending relationships less often or not at all that negatively affect their wellbeing (n=5,405), Having regular check-ins with healthcare professionals (n=9,739), Having less or no regular check-ins with healthcare professionals (n=6,198), Vocalizing needs with friends, family, or romantic relationships (n=13,050), Vocalizing needs less or not at all with friends, family, and romantic relationships (n=2,887).

Here's a deeper look
at the impact community
can have.

Gen Z are more likely than other generations to prioritize connection in their pursuit of meaningful community.

60%

of Gen Z feel lonely

vs. 42% other generations

| % who agree they are... | Talking about loneliness with their friends and family: | Ending relationships that negatively affect their wellbeing: |
|-------------------------|---|--|
| Gen Z | 40% | 71% |
| Other generations | 30% | 65% |

Men are more likely to prioritize **human connection**, and as a result feel more connected to their community, especially in Asia.



Men in Asia are more likely to lean on their loved ones and communities to **improve their wellbeing**:

75%

are participating in real or virtual communities (vs. 70% of women).

96% China Mainland
88% Thailand
83% Hong Kong

46%

are working out with other people (vs. 42% of women).

85% China Mainland
64% Hong Kong
62% Thailand

56%

of men globally feel connected to their community (vs. 50% of women), highest in Asia.

75% Thailand
70% China Mainland
69% Malaysia

Q5b. Please consider all the activities you do to have strong physical wellbeing. Compared to a year ago, have you been doing the following activities more or less often, if at all? <Showing Doing same or more> / Q7c. Please consider all the activities you do in relation to your social wellbeing. Compared to a year ago, have you been doing the following activities / actions more or less often, if at all? <Showing Doing same or more> / Q18. Now, using the scale below, please indicate who you feel has played an active role in helping you improving your overall wellbeing. <Showing Top 2 Box Has helped at all> / Base Size: 2024 Global Men (n=7,994), Women (n=6,878), China Mainland Men (n=976), Thailand Men (n=476), Hong Kong S.A.R. Men (n=483), Malaysia Men (n=541).

Historically marginalized groups are finding unique ways to foster a sense of community.

Marginalized groups are **more likely to feel lonely.**

49%

BIPOC Respondents

(vs. 44% White respondents)

52%

LGBTQIA2S+ Respondents

(vs. 43% non-LGBTQIA2S+ respondents)

56%

People Living with Disabilities

(vs. 39% People Living Without Disabilities)

As a result, they work to find community through different avenues.

BIPOC Respondents

LGBTQIA2S+ Respondents

People Living with Disabilities

Participate in local community

Set boundaries

Promote vulnerability

46%

Attend group events related to their hobbies (e.g., sport clubs, book clubs, running clubs, movie clubs, dance clubs, etc.)

(vs. 39% White respondents)

61%

Say no to social events in an effort to slow down the pace of their life

(vs. 58% non-LGBTQIA2S+ respondents)

67%

Feel it is important that, as a society, we become more open to talking about loneliness

(vs. 63% people living without disabilities)

41%

Join an in-person gym, health club, or fitness studio

(vs. 31% White respondents)

46%

Set clear boundaries by limiting time spent with loved ones to protect wellbeing

(vs. 41% non-LGBTQIA2S+ respondents)

35%

Talk about loneliness with their friends and family

(vs. 30% people living without disabilities)

When community and movement come together, we have the opportunity to increase our holistic wellbeing.

Moving with others is a game changer.

Wellbeing increases by...



14%

when people participate in team sports.

21%

when people feel a sense of belonging when working out with other people.

18%

when people spend time in nature/outdoors with others.

15%

when people take group fitness classes.

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 Overall Wellbeing Scores> / Base Size: 2024 Global Participate in team sports (n=6,537), Participate in team sports less or not at all (n=9,401), Feel a sense of belonging when working out with others (n=7,932), Does not feel a sense of belonging when working out with others (n=3,011), Spending time in nature / outdoors with others (n=11,175), Spending less or no time in nature / outdoors with others (n=4,762), Take group fitness classes (n=4, 724), Take less or no group fitness classes (n=11,213). / Q5d. How much time do you feel you need to spend on each of these activities each day to feel a positive impact on your wellbeing, if at all? Your best guess is fine. <Showing Less than 30 minutes NET> / Base Size: 2024 Global Total (n=15,938)*. *Note that data has been weighed to allow for equal representation across all markets.

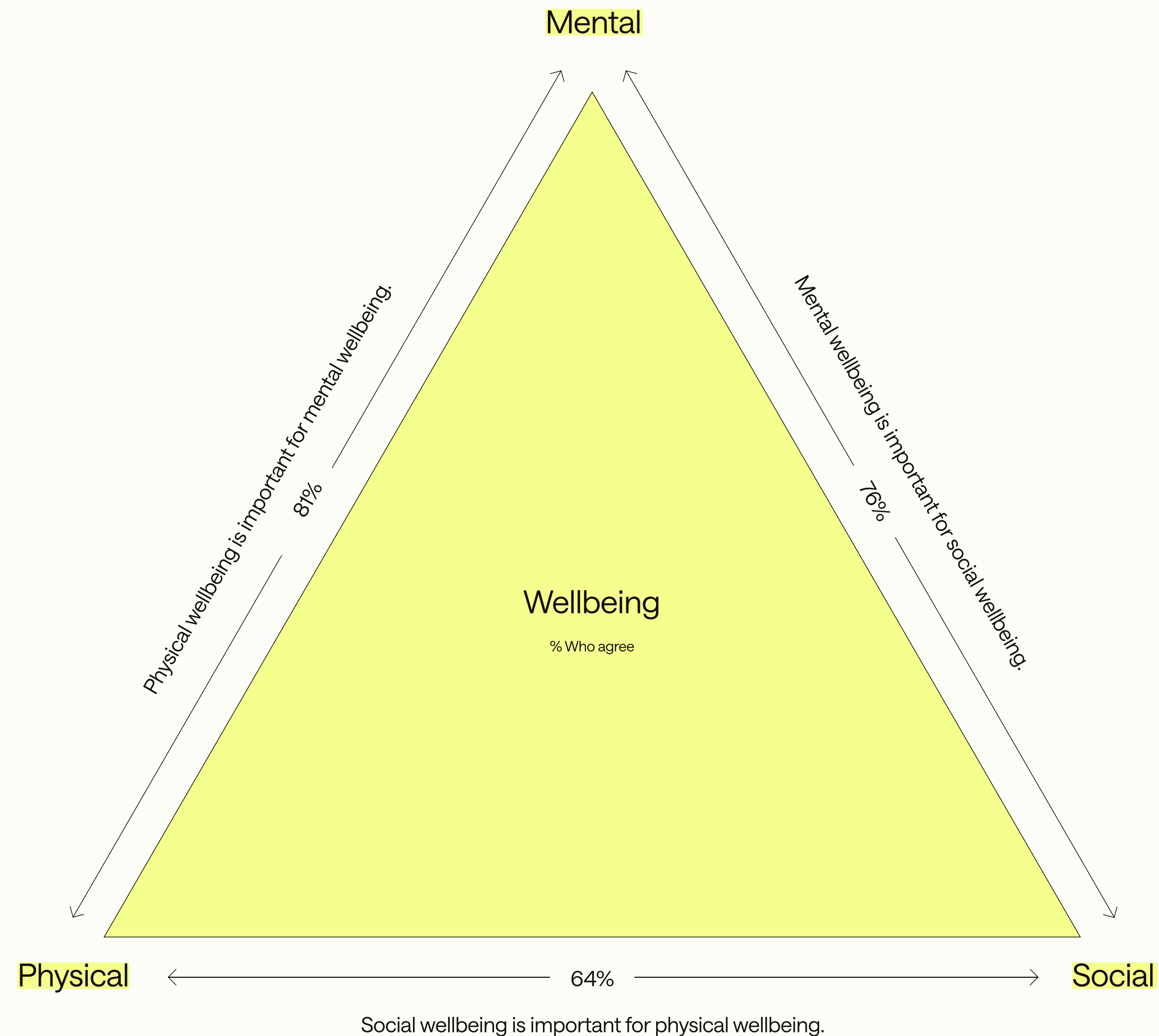
Taking action doesn't mean doing it all—lifting one dimension of wellbeing uplifts other dimensions.

Those who feel that being **physically active** is how they get their “me time” report higher mental wellbeing.

+19% mental wellbeing

People who work out in groups report higher wellbeing in all dimensions.

+17% physical wellbeing
 +12% mental wellbeing
 +17% social wellbeing



Q5a. Now thinking specifically 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> / Q6a. Now thinking specifically 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> / Q7a. Now thinking specifically 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 Size: 2024 Global Total (n=15,938)*, Agree that being physically active is how they get their “me time” (n=10,084), Disagree that being physically active is how they get their “me time” (n=2,039), Working out in groups the same or more than last year (n=5,570), Working out in groups less or not at all than last year (n=10,367). *Note that data has been weighed to allow for equal representation across all markets.

Appendix

| Data Point | Scores | | Difference |
|--|--|---|-------------|
| Slide 23: Increased wellbeing pressure is leading to increased burnout, continuing the cycle. | | | |
| Impact of wellbeing pressure on wellbeing burnout | 51% experiencing wellbeing pressure also experience wellbeing burnout. | 33% not experiencing wellbeing pressure experience wellbeing burnout. | +55% |
| Impact of wellbeing burnout on wellbeing pressure | 76% experiencing wellbeing burnout also experience wellbeing pressure. | 53% not experiencing wellbeing burnout experience wellbeing pressure. | +43% |
| Slide 27: Levels of wellbeing burnout are not universal. | | | |
| Impact of living in the wellbeing burnout zone experiencing overwhelming societal expectation to appear well | 76% among those living in the burnout zone | 61% total | +25% |
| Impact of living in the wellbeing burnout zone on feeling there is a lot of conflicting information about the best ways to improve their wellbeing | 65% among those living in the burnout zone | 53% total | +23% |
| Impact of living in the wellbeing burnout zone on not feeling a connection to their community | 35% among those living in the burnout zone | 26% total | +35% |
| Impact of living in the wellbeing burnout zone on not feeling a connection to their community | 40% among women living in the burnout zone | 30% among men living in the burnout zone | +33% |
| Slide 30: Quiet the noise so you can hear yourself. | | | |
| Impact of taking social media breaks on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 65 wellbeing among those who are doing this less than last year or not at all | +9% |
| Impact of setting boundaries in work/personal life on wellbeing | 70 wellbeing among those who are doing this the same amount or more than last year | 62 wellbeing among those who are doing this less than last year or not at all | +13% |
| Impact of still being happy even if wellbeing needs improvement on wellbeing | 72 wellbeing among those who agree | 57 wellbeing among those who disagree | +26% |
| Impact of still being happy even if wellbeing needs improvement on wellbeing on Gen Z | 68 wellbeing among those who agree | 57 wellbeing among those who disagree | +19% |

| Data Point | Scores | | Difference |
|--|--|---|-------------|
| Slide 30: Quiet the noise so you can hear yourself. | | | |
| Impact of practicing self-love and acceptance on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 61 wellbeing among those who are doing this less than last year or not at all | +16% |
| Impact of meditation on wellbeing | 73 wellbeing among those who are doing this the same amount or more than last year | 65 wellbeing among those who are doing this less than last year or not at all | +12% |
| Slide 31: Wellbeing doesn't need to be intense. | | | |
| Impact of practicing "slow living" by taking the time to do things at your own pace on wellbeing | 71 wellbeing among those who agree | 62 wellbeing among those who disagree | +15% |
| Impact of doing little things throughout the day for small boosts to wellbeing | 71 wellbeing among those who agree | 59 wellbeing among those who disagree | +20% |
| Impact of finding purpose in life through the little things | 71 wellbeing among those who agree | 58 wellbeing among those who disagree | +22% |
| Impact of spending time in nature or the outdoors with others on wellbeing | 72 wellbeing among those who are doing this the same amount or more than last year | 61 wellbeing among those who are doing this less than last year or not at all | +18% |
| Impact of combining low-intensity exercises with comfortable home activities | 71 wellbeing among those who are doing this the same amount or more than last year | 63 wellbeing among those who are doing this less than last year or not at all | +13% |
| Slide 32: Wellbeing can be bite-sized and fun. | | | |
| Impact of moving your body a little bit throughout the day on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 61 wellbeing among those who are doing this less than last year or not at all | +16% |
| Impact of going for short walks of under 15 minutes on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 63 wellbeing among those who are doing this less than last year or not at all | +13% |
| Impact of using physical activity as an opportunity to socialize with others on wellbeing | 74 wellbeing among those who agree | 60 wellbeing among those who disagree | +23% |

| Data Point | Scores | | Difference |
|--|--|--|-------------|
| Slide 34: Human connection offers an edge. | | | |
| Impact of feeling connected to your community on wellbeing | 73 wellbeing among those who feel connected to their community | 63 wellbeing among those who do not feel connected to their community | +16% |
| Impact of feeling connected to your community on wellbeing burnout | 44% of those who feel connected to their community experience wellbeing burnout | 51% of those who do not feel connected to their community experience wellbeing burnout | +14% |
| Impact of talking often about loneliness with friends and family on wellbeing | 73 wellbeing among those who are doing this the same amount or more than last year | 66 wellbeing among those who are doing this less than last year or not at all | +11% |
| Slide 35: Community powers purpose. | | | |
| Impact of feeling connected to your community on feeling a sense of purpose | 73% of those who feel connected to their community feel a sense of purpose | 57% of those who do not feel connected to their community feel a sense of purpose | +28% |
| Impact of feeling connected to your community on feeling your sense of purpose is driven by making a positive impact on your community | 61% agree among those who feel connected to their community | 33% agree among those who do not feel connected to their community | +85% |
| Impact of feeling connected to your community on feeling burnout in your sense of purpose | 19% of those who feel connected to their community experience purpose burnout | 29% of those who do not feel connected to their community experience purpose burnout | -34% |
| Slide 36: But community requires intentionality. | | | |
| Impact of showing up for your loved ones on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 60 wellbeing among those who are doing this less than last year or not at all | +18% |
| Impact of ending relationships that negatively impact your wellbeing on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 65 wellbeing among those who are doing this less than last year or not at all | +9% |

| Data Point | Scores | | Difference |
|---|---|--|------------|
| Slide 36: But community requires intentionality. | | | |
| Impact of regularly checking in with health care professional on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 66 wellbeing among those who are doing this less than last year or not at all | +8% |
| Impact of vocalizing your needs with family, friendships, or relationships on wellbeing | 71 wellbeing among those who are doing this the same amount or more than last year | 58 wellbeing among those who are doing this less than last year or not at all | +22% |
| Slide 42: Moving with others is a game changer. | | | |
| Impact of participating in team sports on wellbeing | 72 wellbeing among those who agree | 63 wellbeing among those who disagree | +14% |
| Impact of feeling a sense of belonging when working out with other people on wellbeing | 74 wellbeing among those who agree | 61 wellbeing among those who disagree | +21% |
| Impact of spending time in the nature or the outdoors with others on wellbeing | 72 wellbeing among those who are doing this the same amount or more than last year | 61 wellbeing among those who are doing this less than last year or not at all | +18% |
| Impact of attending group fitness classes on wellbeing | 76 wellbeing among those who are doing this the same amount or more than last year | 66 wellbeing among those who are doing this less than last year or not at all | +15% |
| Slide 43: Taking action doesn't mean doing it all – lifting one dimension of wellbeing uplifts other dimensions. | | | |
| Impact of feeling that being physically active is how they get their “me time” on mental wellbeing | 74 mental wellbeing for those who are doing this the same amount or more than last year | 62 mental wellbeing for those who are doing this less than last year or not at all | +19% |
| Impact of working out in groups on wellbeing | 76 physical wellbeing for those who are doing this the same amount or more than last year | 65 physical wellbeing for those who are doing this less than last year or not at all | +17% |
| Impact of working out in groups on wellbeing | 76 mental wellbeing for those who are doing this the same amount or more than last year | 68 mental wellbeing for those who are doing this less than last year or not at all | +12% |
| Impact of working out in groups on wellbeing | 74 social wellbeing for those who are doing this the same amount or more than last year | 63 social wellbeing for those who are doing this less than last year or not at all | +17% |

