

2021 Global Wellbeing Report



We
are
all
in.

A NOTE FROM OUR CEO

Thank you for your interest in lululemon's Global Wellbeing Report.

This is our first annual survey about wellbeing, which is intended to provide valuable insights across physical, mental, and social dimensions.

There is little doubt that the challenges of the last year have taken a toll on people's psyches and underscored the importance of our collective health and wellbeing. And while many of us often say "everything is fine," it's clear that we would all benefit from raising the bar for what it means to truly be well.

The path to feeling good mentally and physically is easier when you have access to the right tools, support, and resources. That's why lululemon is on a mission to disrupt inequity in wellbeing through movement, mindfulness, and connection. To make headway in our endeavor and gain a better understanding of where to focus our efforts, we explored the drivers and barriers to being well and used the findings to establish a worldwide benchmark.

We discovered that optimism for the future is lagging and the youngest members of society are struggling the most. In addition, the biggest barriers to wellbeing encompass many aspects of our daily lives – COVID-19, stress, and lack of time, money, and support. And while the report indicates a critical need for improvement, it also shows us an actionable path forward to foster greater wellbeing.

lululemon believes everyone has the right to be well. As we work to accelerate positive change that supports the wellbeing of our guests, employees, and the communities we serve, this report will play a crucial role in shaping our path forward, together.

Calvin McDonald
Chief Executive Officer

Methodology



lululemon commissioned an online survey managed by Edelman Data & Intelligence (DxI) which fielded in 10 countries between November 13 – December 1, 2020.

10,000 respondents in total:
n=1,000 per country; 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 in good enough physical health to perform the physical activities I want or need to do

02

Mental wellbeing

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

03

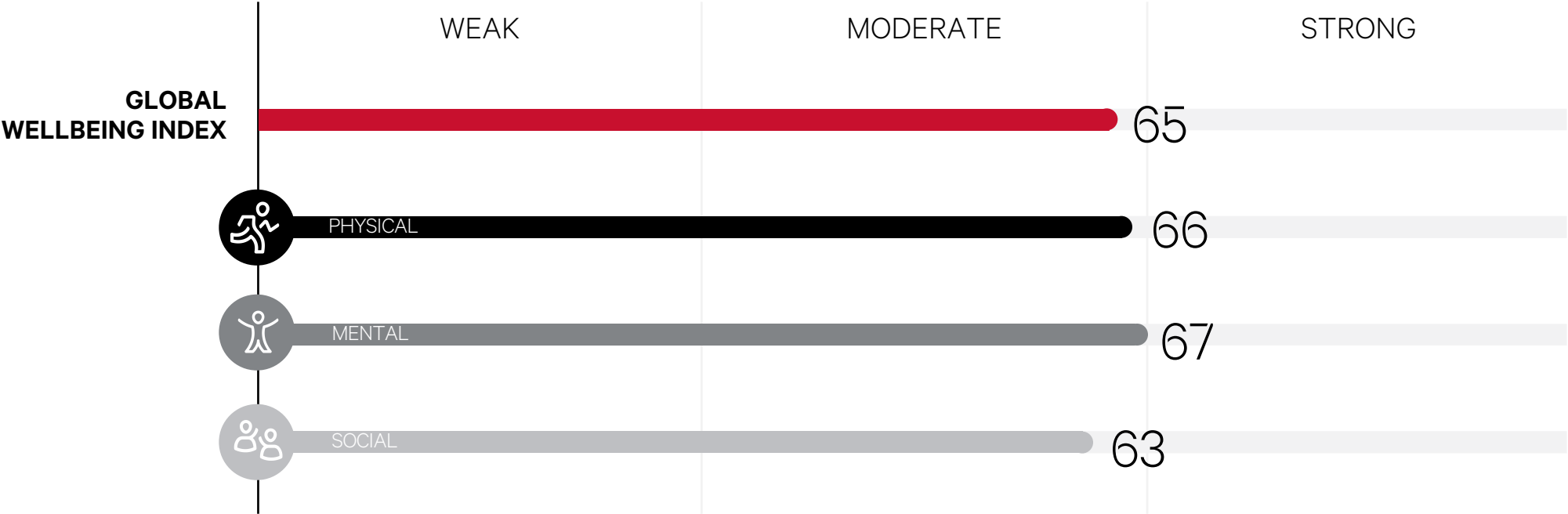
Social wellbeing

Feeling close to others and part of a supportive community

The state of global wellbeing exposes the paradox of people saying they feel “fine.”

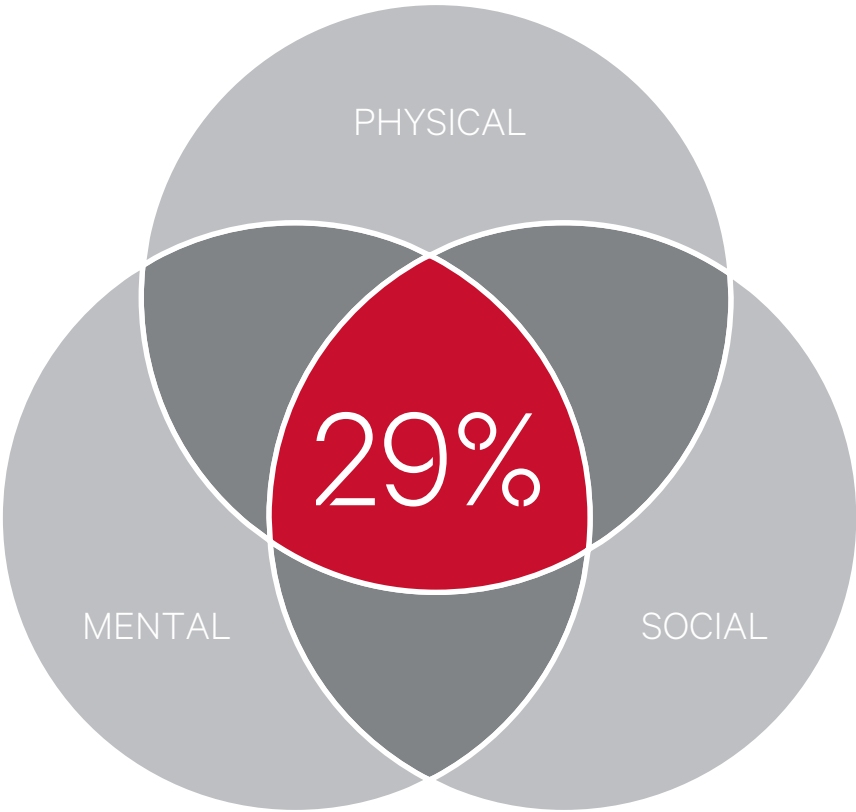


Global wellbeing is moderate.



But only 29% indicate strong wellbeing across all three dimensions.

% indicate strong wellbeing across all three dimensions of overall wellbeing



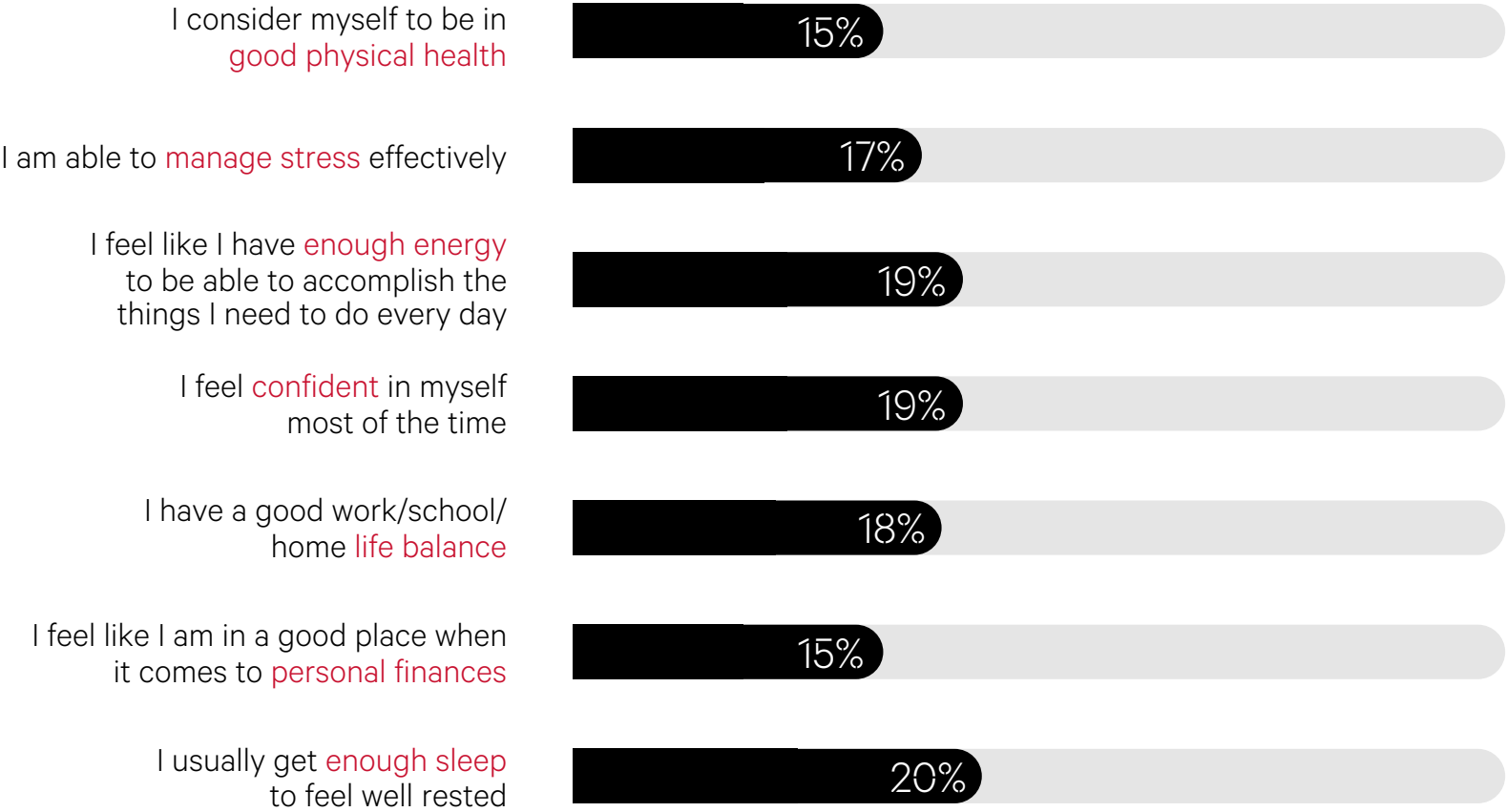
Rated top 3 box (7-9) on a 9-point scale of wellbeing

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 in good enough physical health to perform the physical activities I want or need to do. [2] Mental wellbeing: feeling self-aware, emotionally balanced, and like I am moving in the right direction of leading a fulfilling life. [3] Social wellbeing: feeling close to others and part of a supportive community.

The top drivers of overall wellbeing show an urgency to improve.

Top drivers of overall wellbeing

% strongly agree

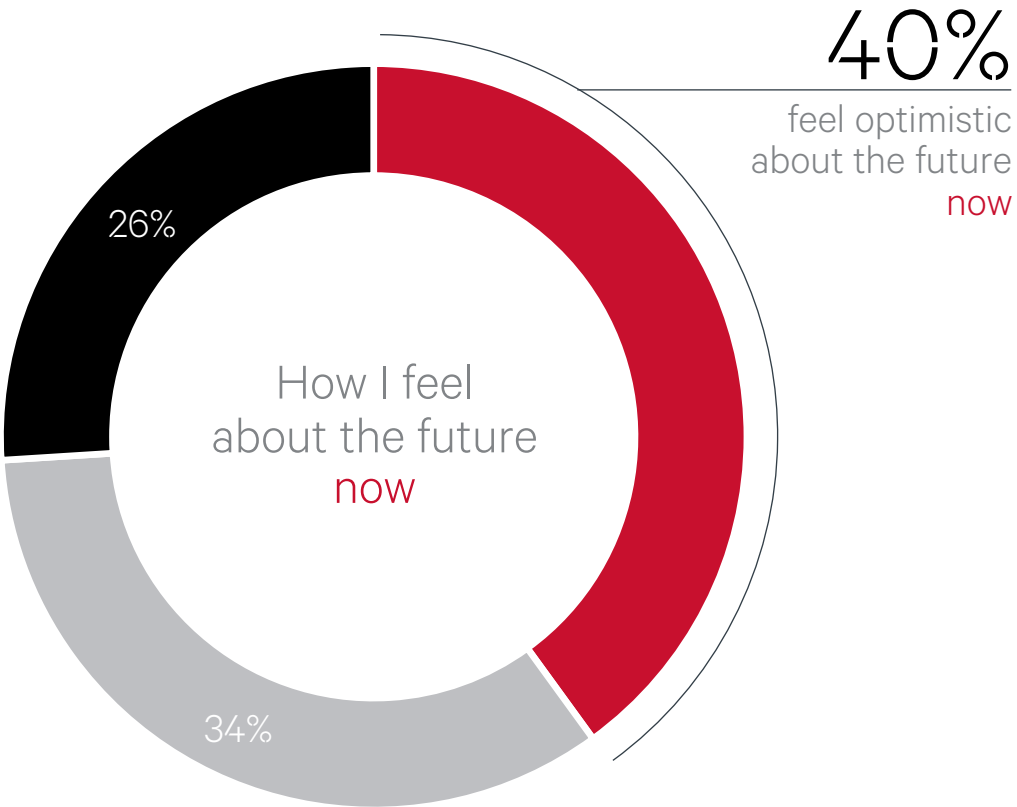
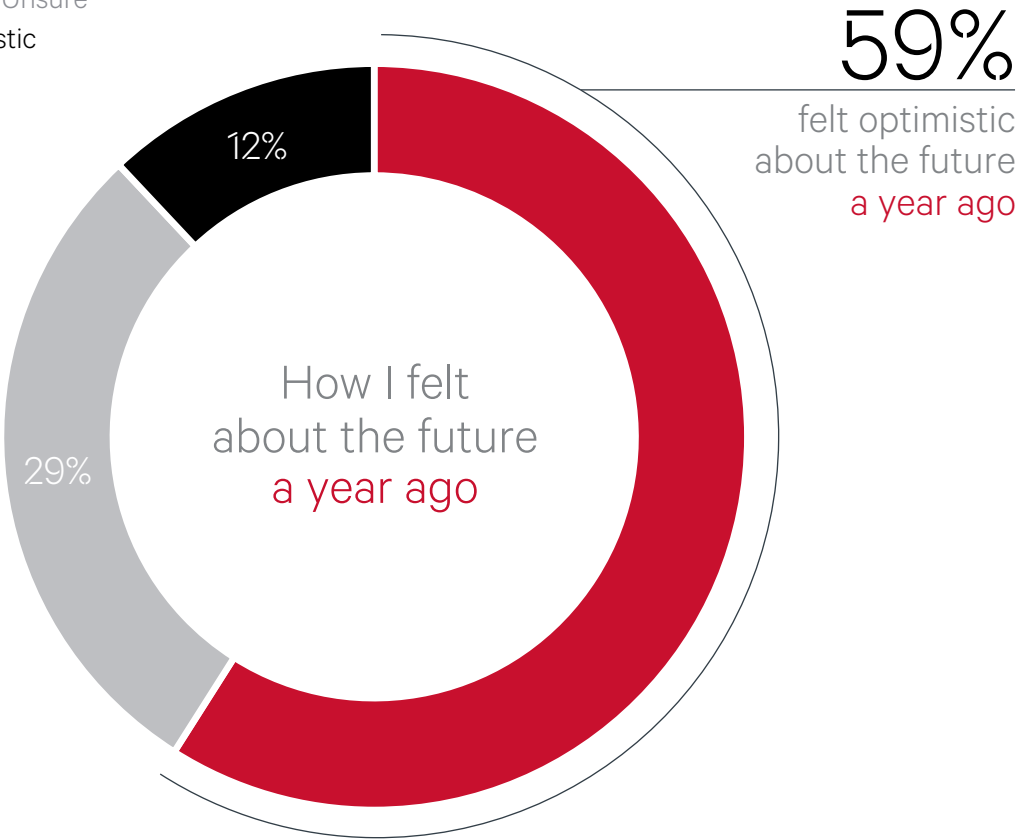


Optimism for the future
is on the decline.

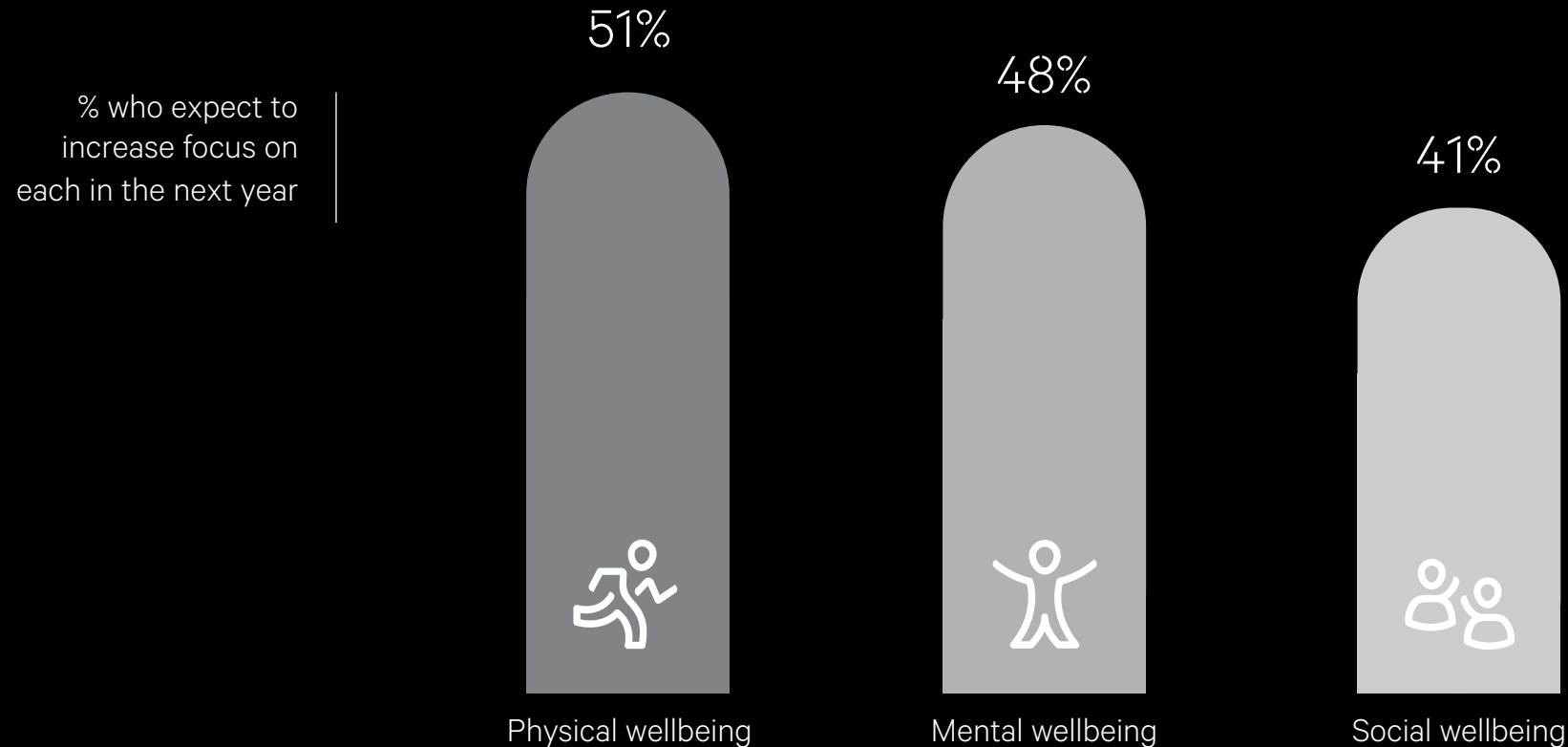


Optimism for the future has fallen 19 points.

- Optimistic
- Neutral/Unsure
- Pessimistic



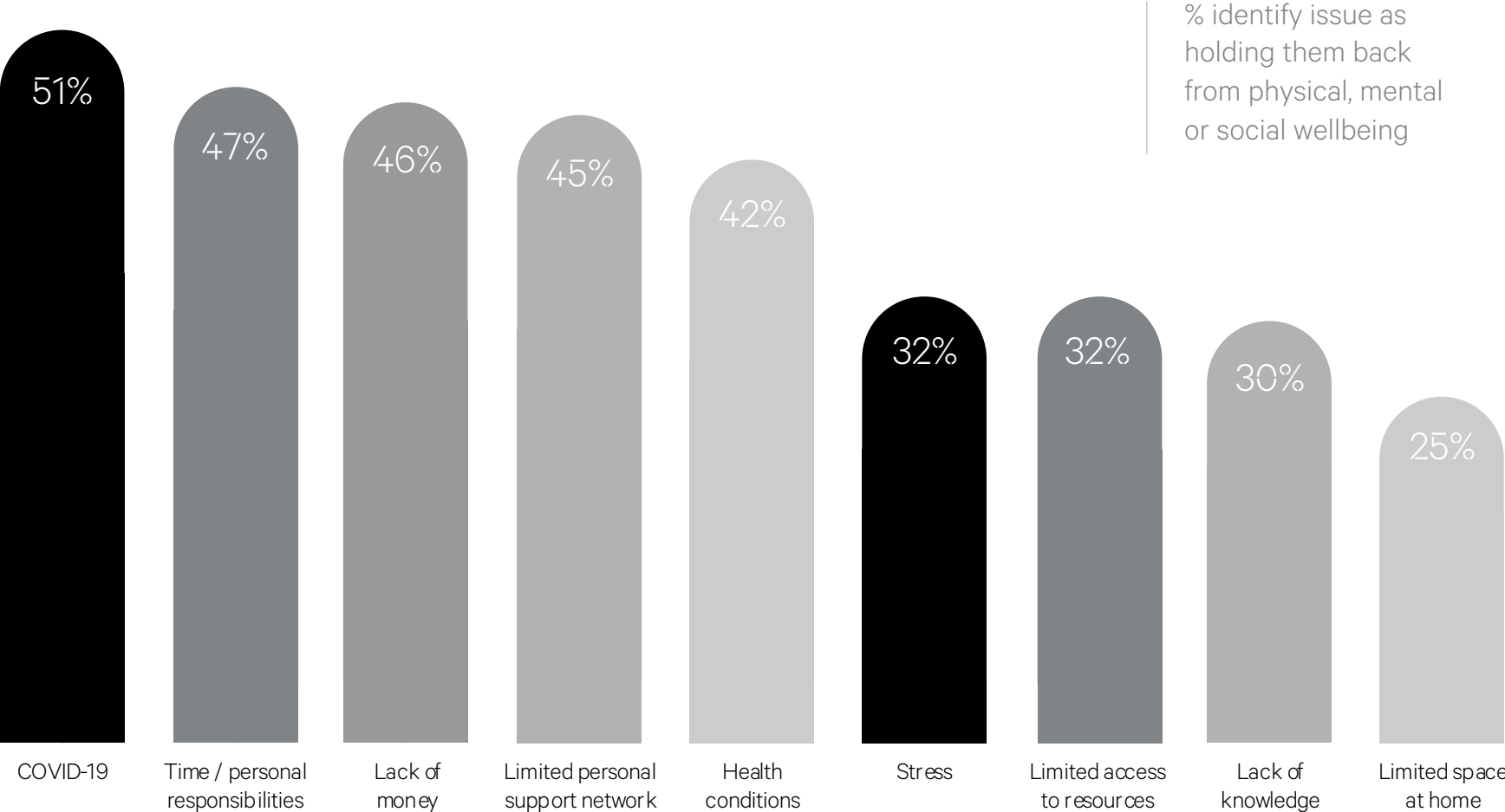
As optimism declines, there is an increased focus on wellbeing.



A range of challenges must be addressed in the pursuit of being well.

86%

face barriers that impact their physical, social, or mental wellbeing.

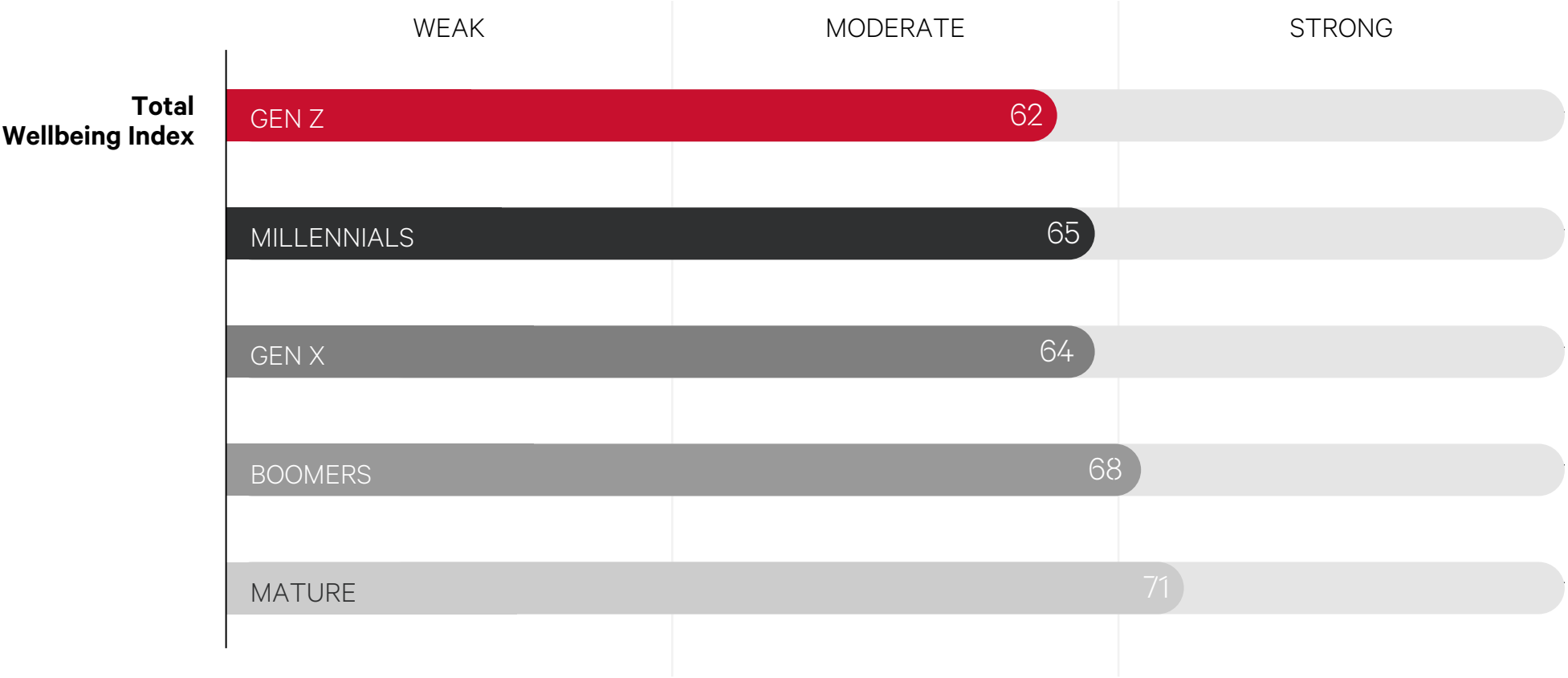


SW2. Some people may feel held back from achieving physical wellbeing. We'd like to know which, if any, of the items below hold you back from physical wellbeing. Please select all that apply.
GR2. Some people may feel held back from achieving mental wellbeing. We'd like to know which, if any, of the items below hold you back from mental wellbeing. Please select all that apply.
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. Please select all that apply.

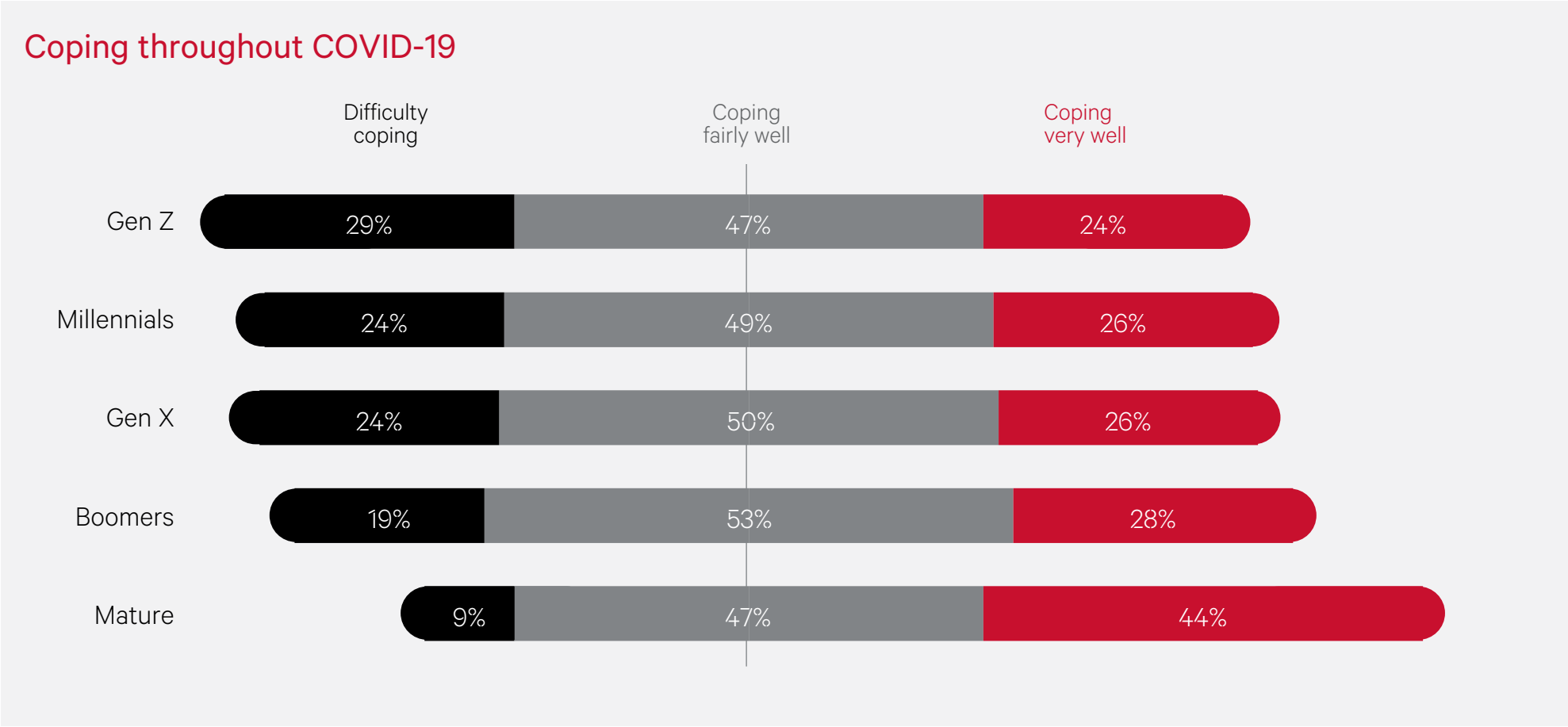
Gen Z has the lowest wellbeing among generations.



Gen Z wellbeing lags all other generations.



Gen Z has had the most difficulty coping with COVID-19.

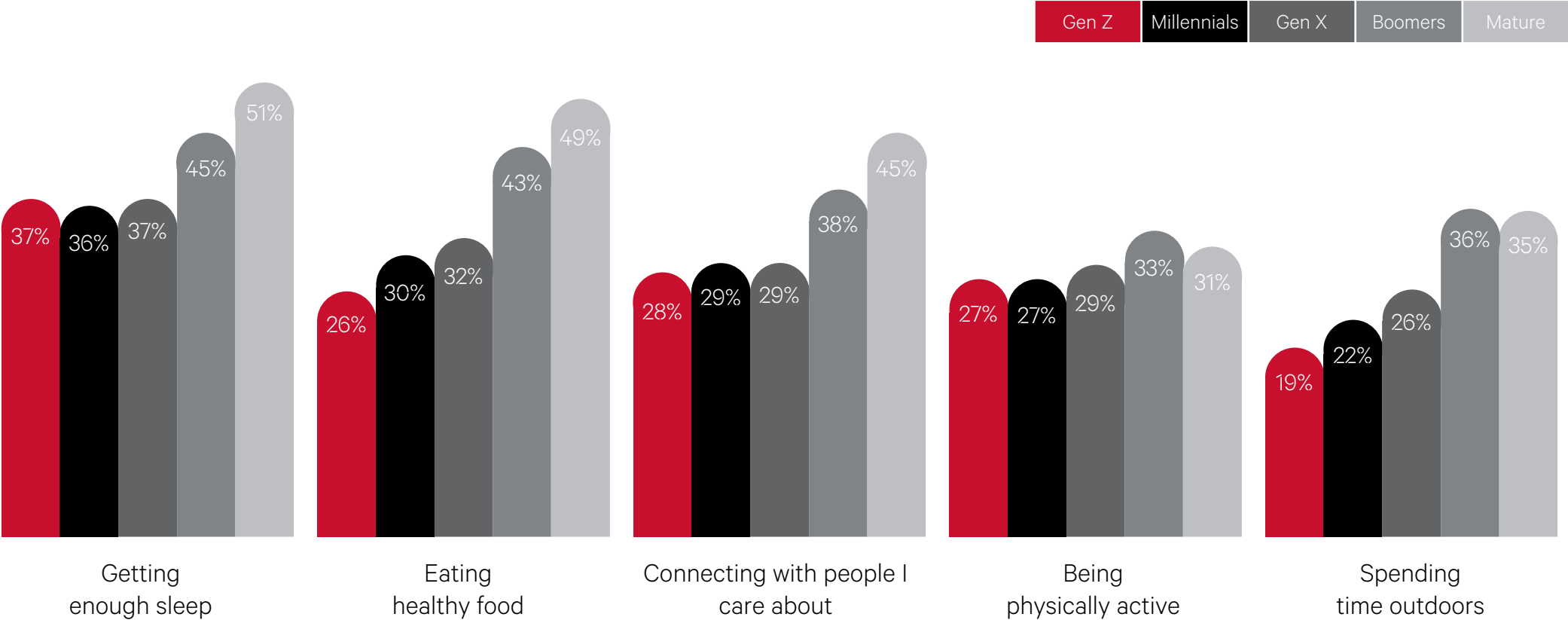


SOC3. Please think about any personal goals you had for yourself before COVID-19. How, if at all, have your goals been affected by the COVID-19 pandemic? Please select all that apply.
SOC4. Thinking about your overall wellbeing, how do you feel you have been coping throughout COVID-19?

Younger generations are less likely to have engaged in key coping activities (i.e., those most strongly associated with coping very well throughout COVID-19).

COVID-19 coping strategies

% engaged in each activity to help cope with the COVID-19 pandemic



SOC3. Please think about any personal goals you had for yourself before COVID-19. How, if at all, have your goals been affected by the COVID-19 pandemic? Please select all that apply.
SOC4. Thinking about your overall wellbeing, how do you feel you have been coping throughout COVID-19?

Gen Z is the generation most focused on, and impacted by, social issues.

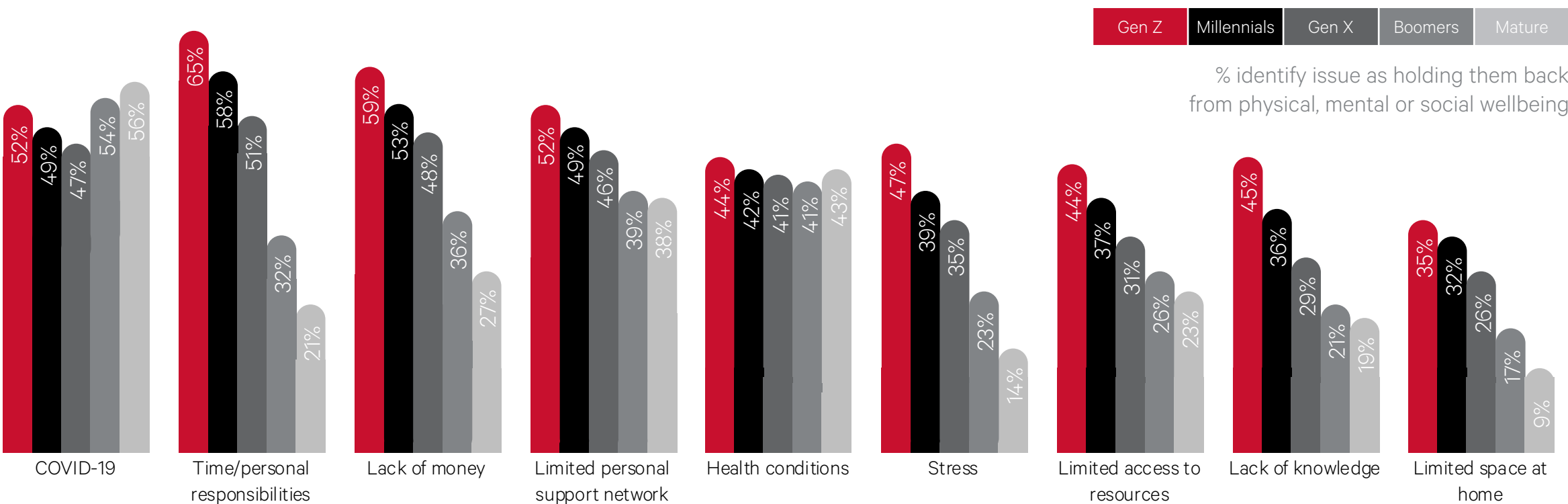
1 in 4

Gen Zs (23%) are deeply affected by issues like COVID-19, racial injustice, and/or other social issues, acting as a barrier to their mental wellbeing.

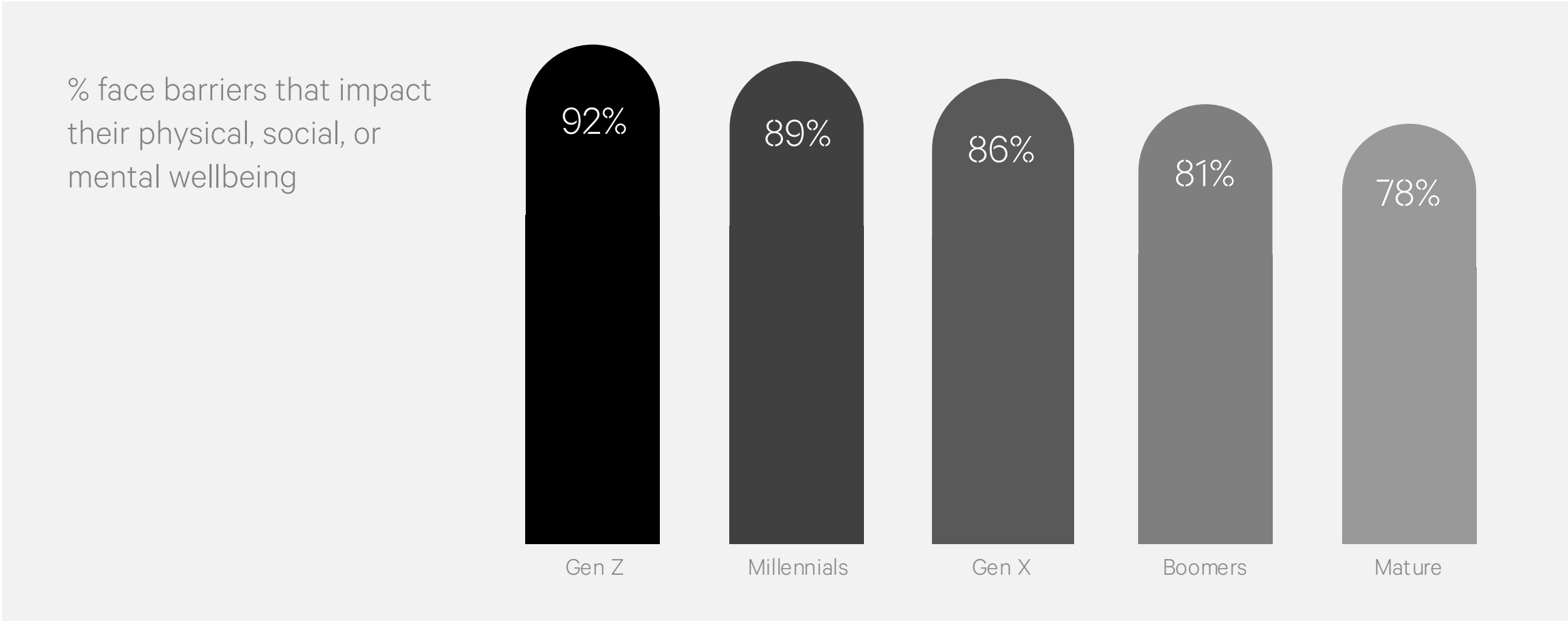
Key Issues

	GEN Z	MILLENNIALS	GEN X	BOOMERS	MATURE
01	COVID-19 pandemic	COVID-19 pandemic	COVID-19 pandemic	COVID-19 pandemic	COVID-19 pandemic
02	Climate Change	Climate Change	Climate Change	Climate Change	Climate Change
03	Women's Rights	Unemployment	Unemployment	Income Inequality	Political elections / platforms
04	Racial Injustice	Income Inequality	Income Inequality	Unemployment	Gun Violence
05	Black Lives Matter	Women's Rights	Income Gap	Political elections / platforms	Homelessness

Gen Z faces the most barriers to their overall wellbeing, including stress, and a lack of time, money, knowledge, and resources.

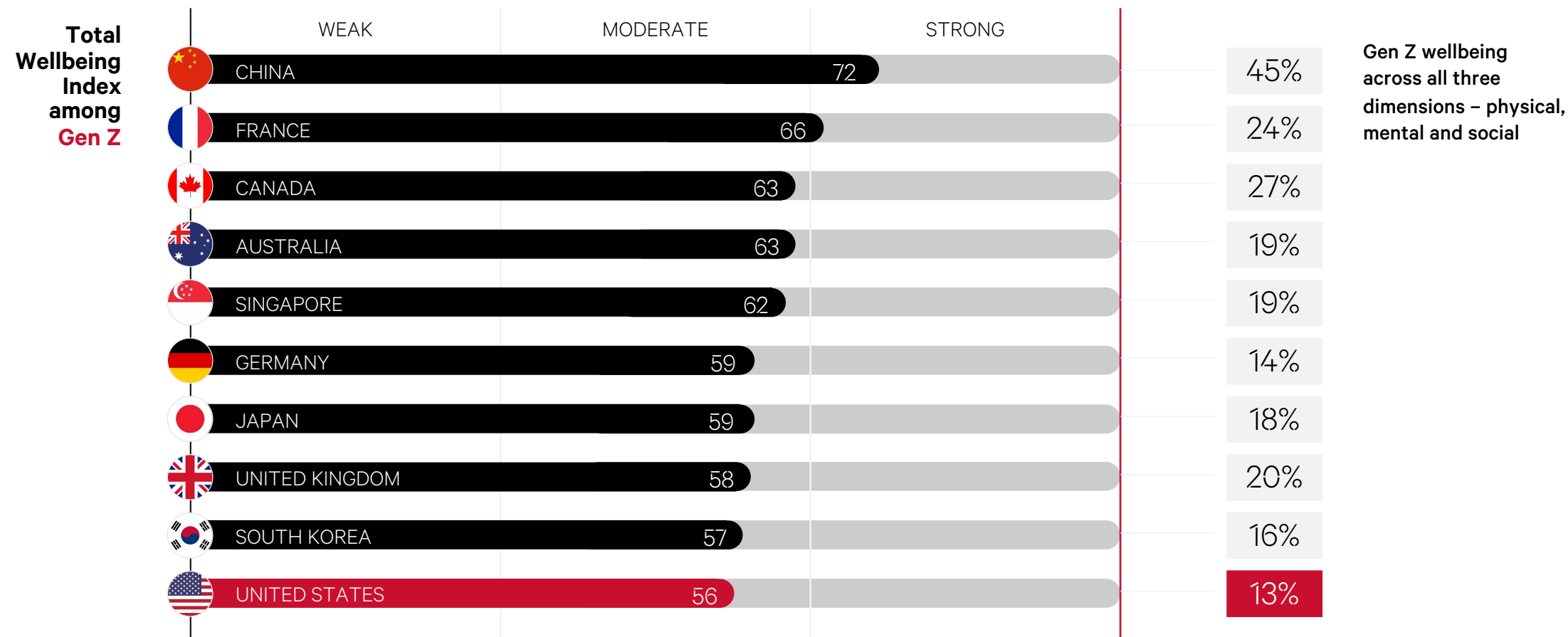


Gen Z faces the most barriers to their overall wellbeing, including stress, and a lack of time, money, knowledge, and resources.



SW2. Some people may feel held back from achieving physical wellbeing. We'd like to know which, if any, of the items below hold you back from physical wellbeing. Please select all that apply.
GR2. Some people may feel held back from achieving mental wellbeing. We'd like to know which, if any, of the items below hold you back from mental wellbeing. Please select all that apply.
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. Please select all that apply.

The generation impact is acute in the US, where Gen Z report the lowest Index score and wellbeing across the three dimensions.



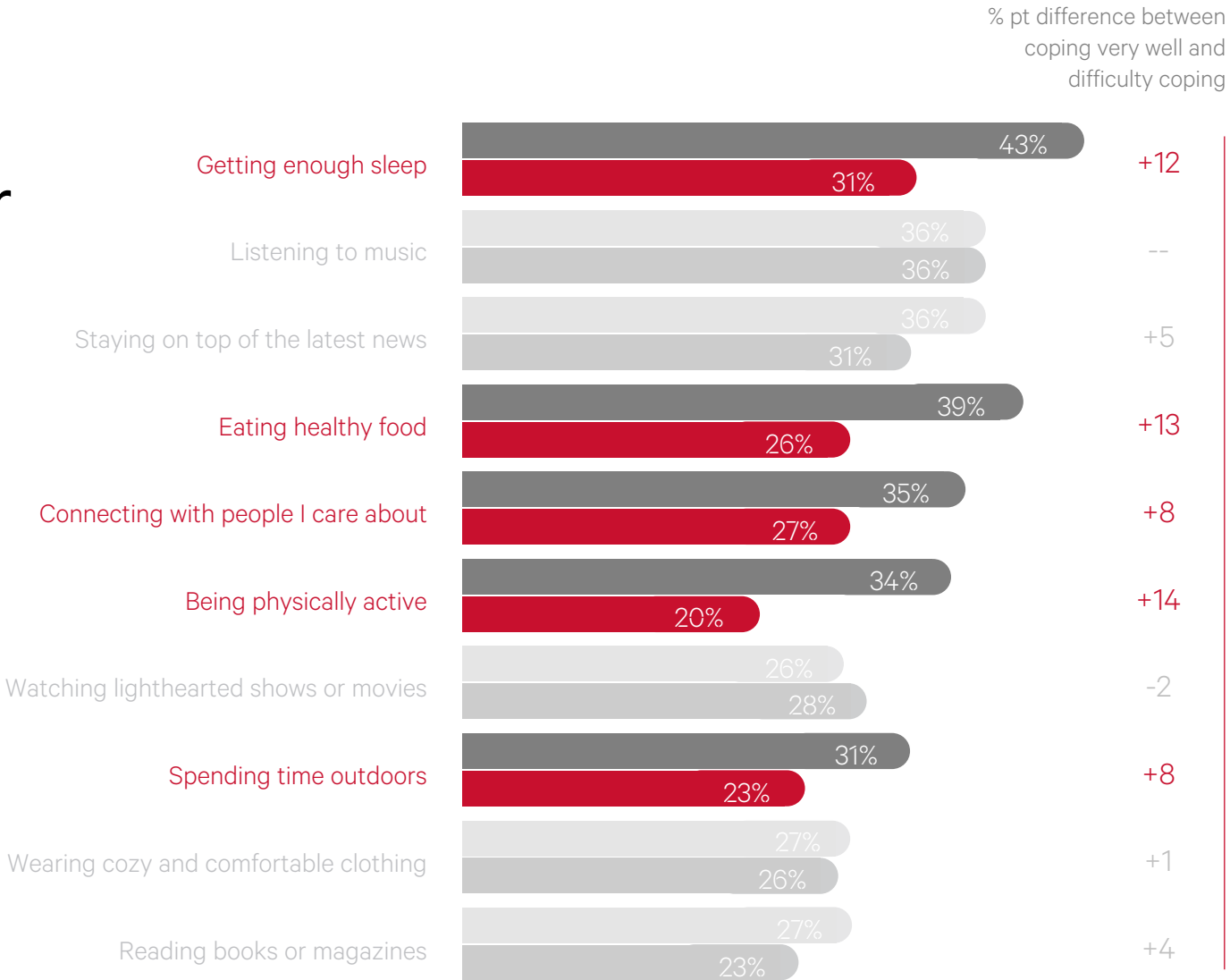
A holistic approach and proactive mindset catalyze stronger wellbeing and optimism.



Those coping very well through COVID-19 are more likely to support their wellbeing by focusing on the basics: sleep, healthy eating, connections, physical activity, and time outdoors.


% engaged in each activity to help cope with the COVID-19 pandemic


- Coping very well
- Difficulty coping




Focusing on key physical and mental elements drives wellbeing.

Top 5
drivers of
wellbeing

 physical

 mental

-  1 I consider myself to be in good physical health
-  2 I am able to manage stress effectively
-  3 I feel like I have enough energy to be able to accomplish the things I need to do every day
-  4 I feel confident in myself most of the time
-  5 I have a good work/school/home life balance

And drivers of physical, mental and social wellbeing are interconnected; making strides in one area benefits others.



PHYSICAL



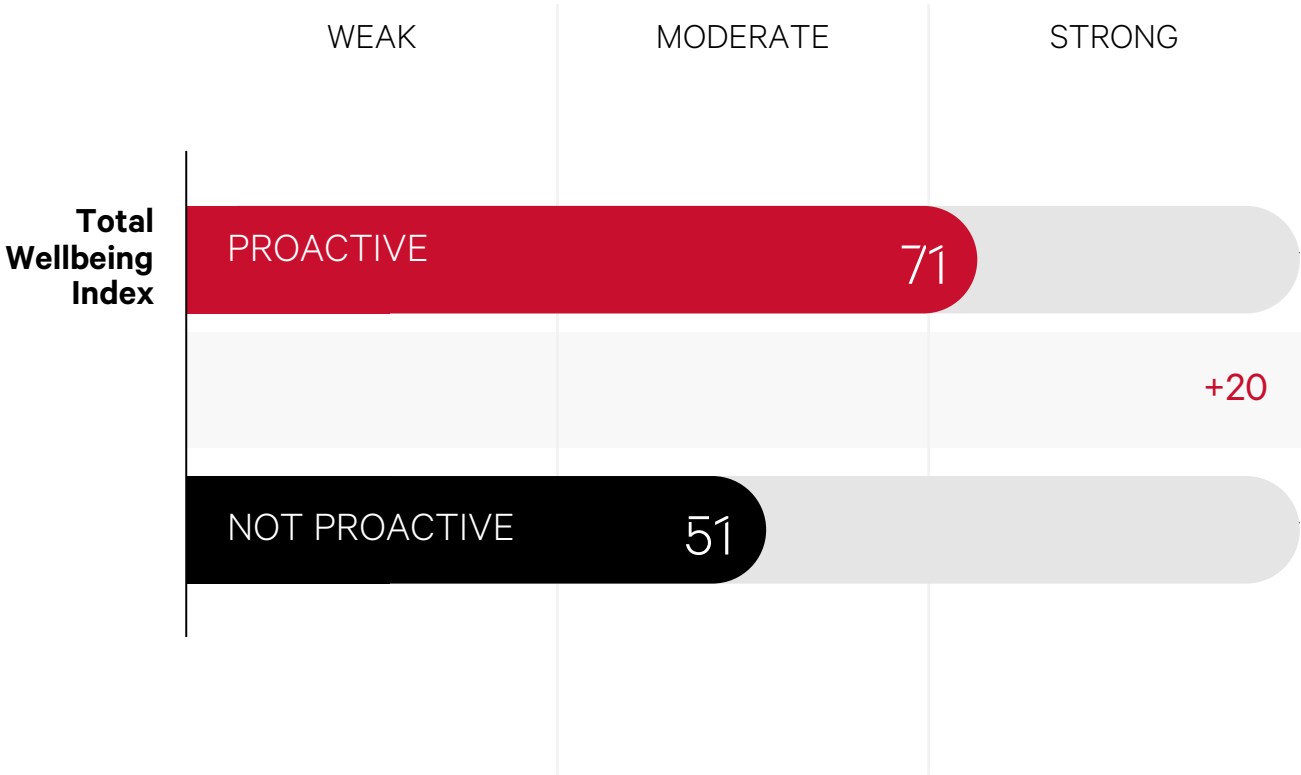
MENTAL



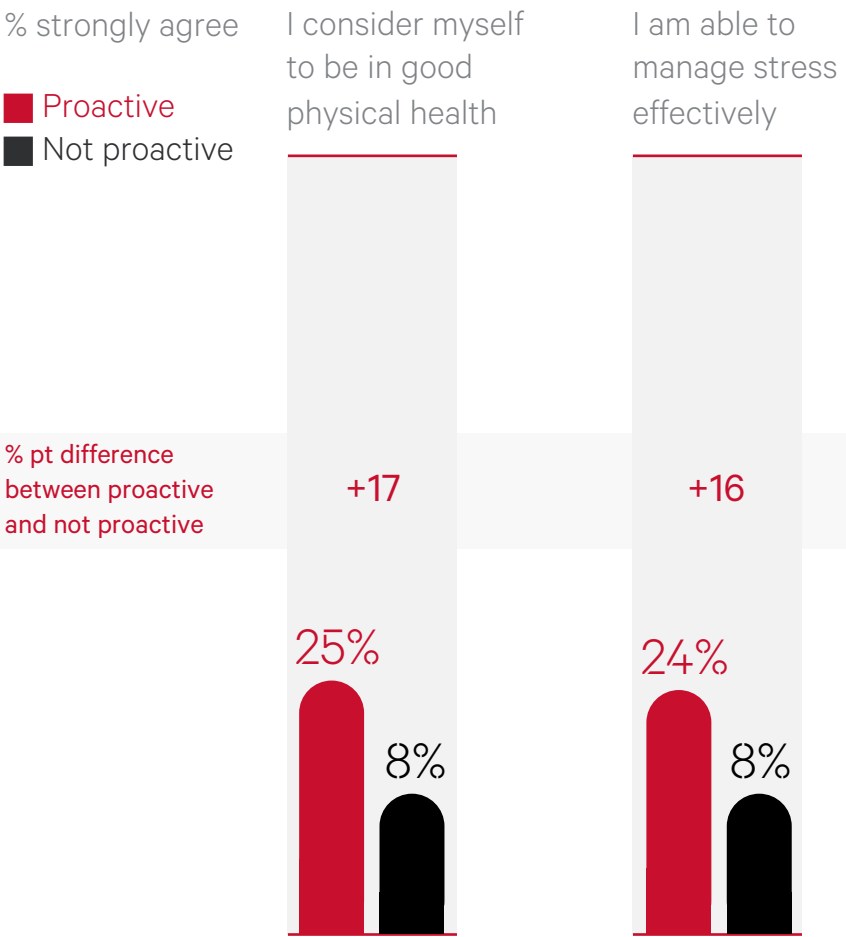
SOCIAL



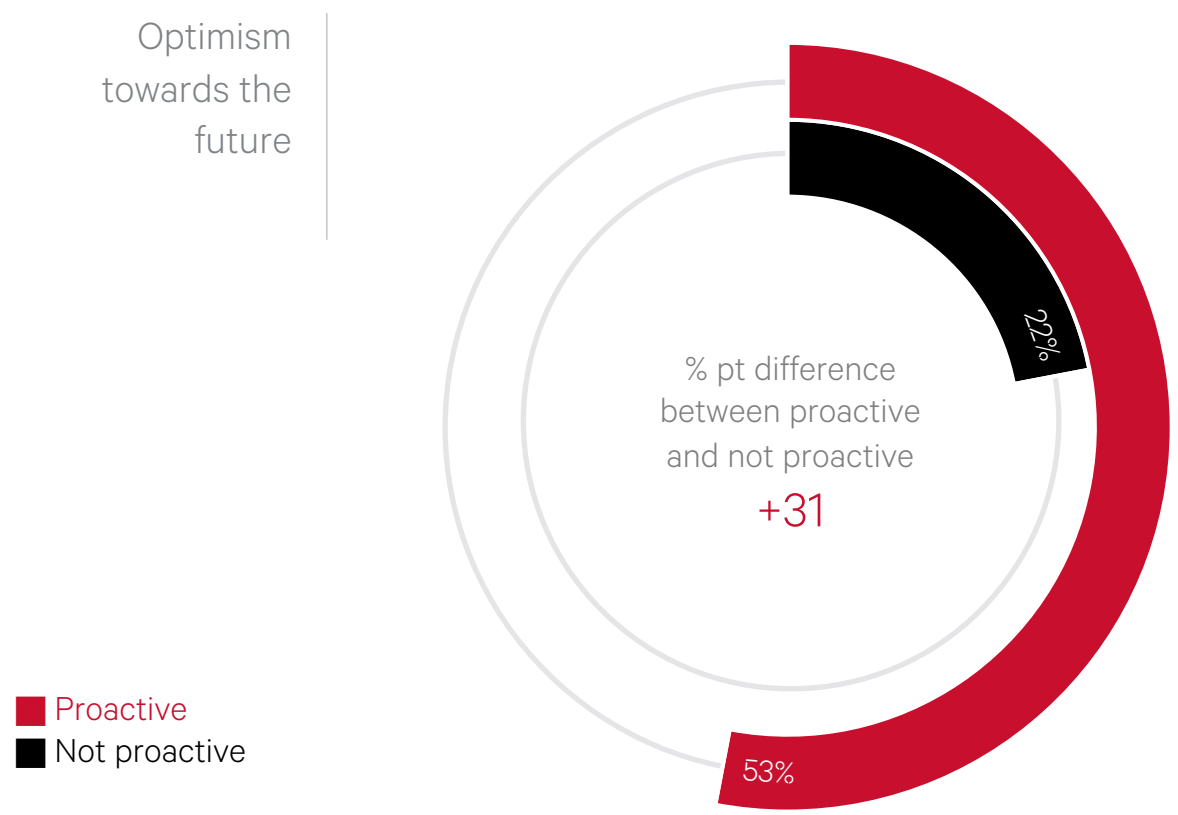
A proactive mindset is closely connected to wellbeing and its key drivers.



Those who are proactive are more likely to feel they're in good physical health and able to manage stress (the top 2 drivers of overall wellbeing).

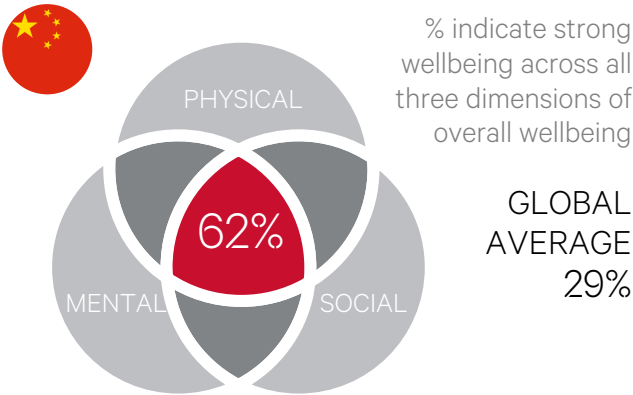
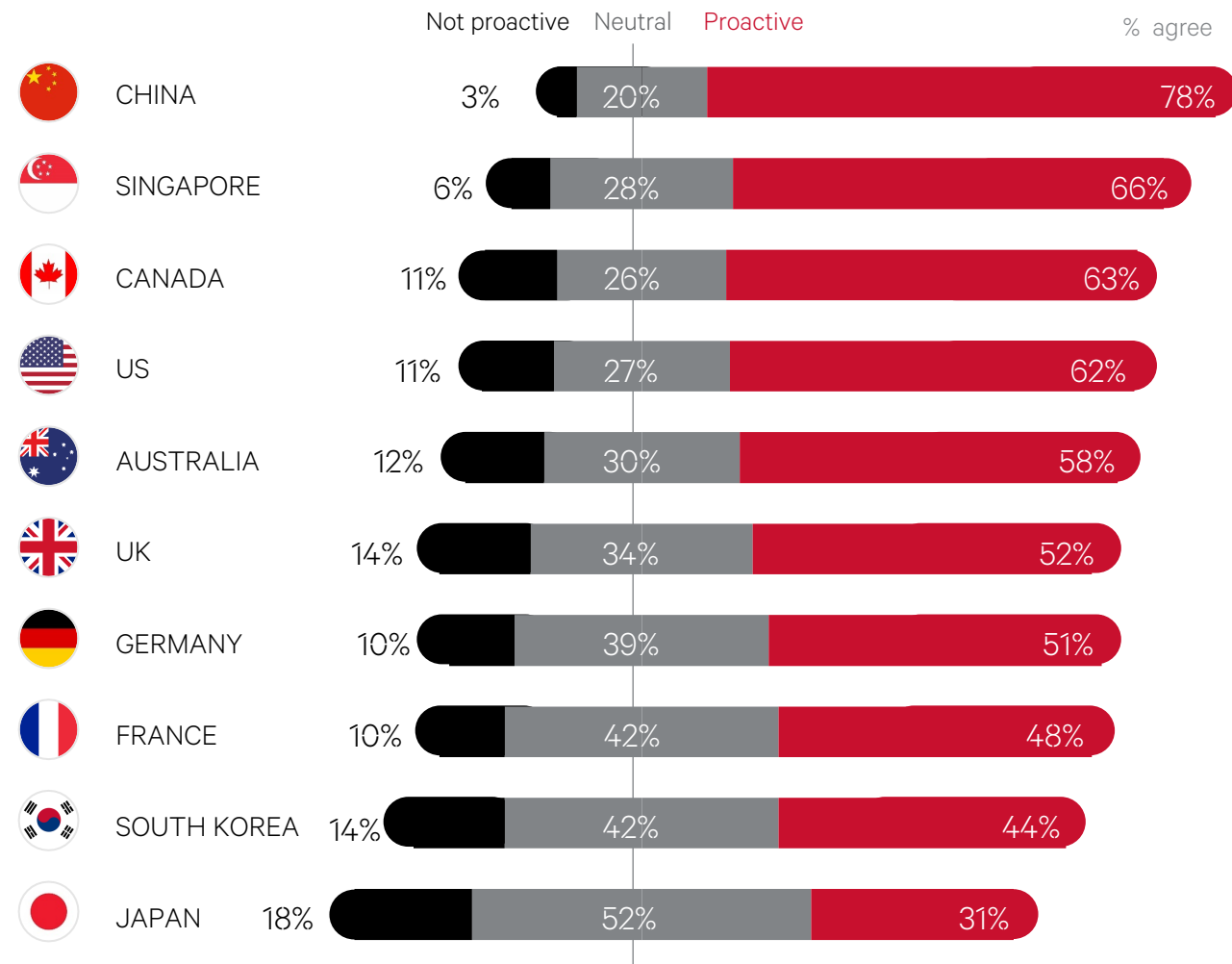


Proactivity is also connected to optimism for the future.



China bears out the benefits of being proactive, with the highest wellbeing index globally.

Proactivity,
by market:

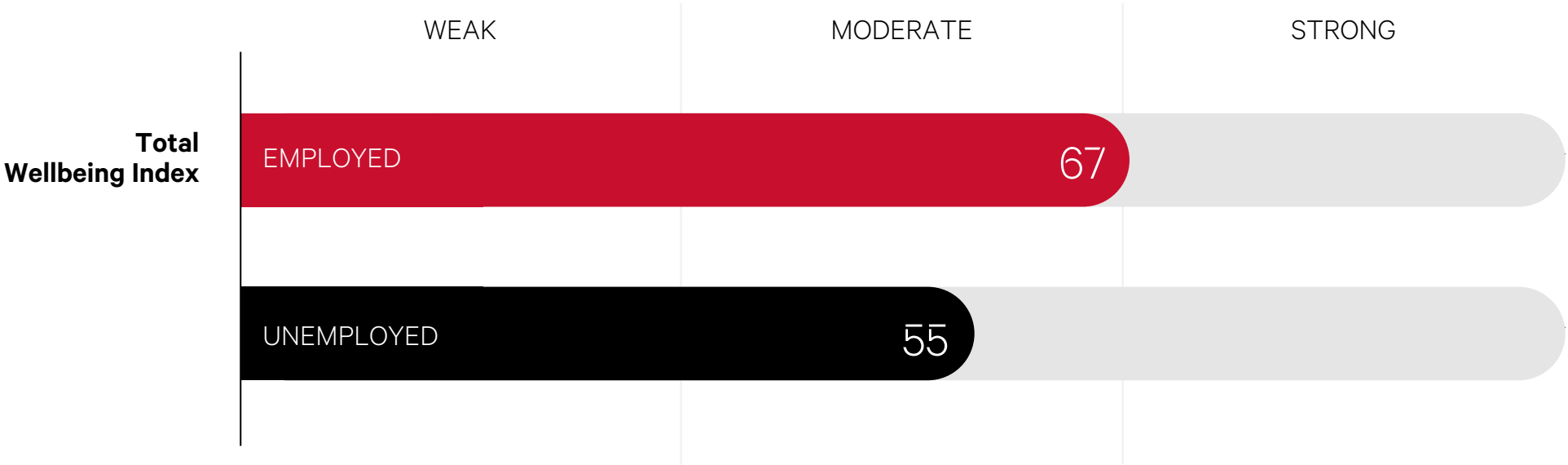


Q1/Q2/Q3. For each element below, please tell us how you feel you are doing on a scale of 1 to 9, where 1 means you're feeling your absolute worst in this area and 9 means you're feeling your absolute best in this area.
GR1. Please let us know whether you agree or disagree with the following statements: I am proactive about my mental wellbeing and personal development

Employers must do more
to support being well.

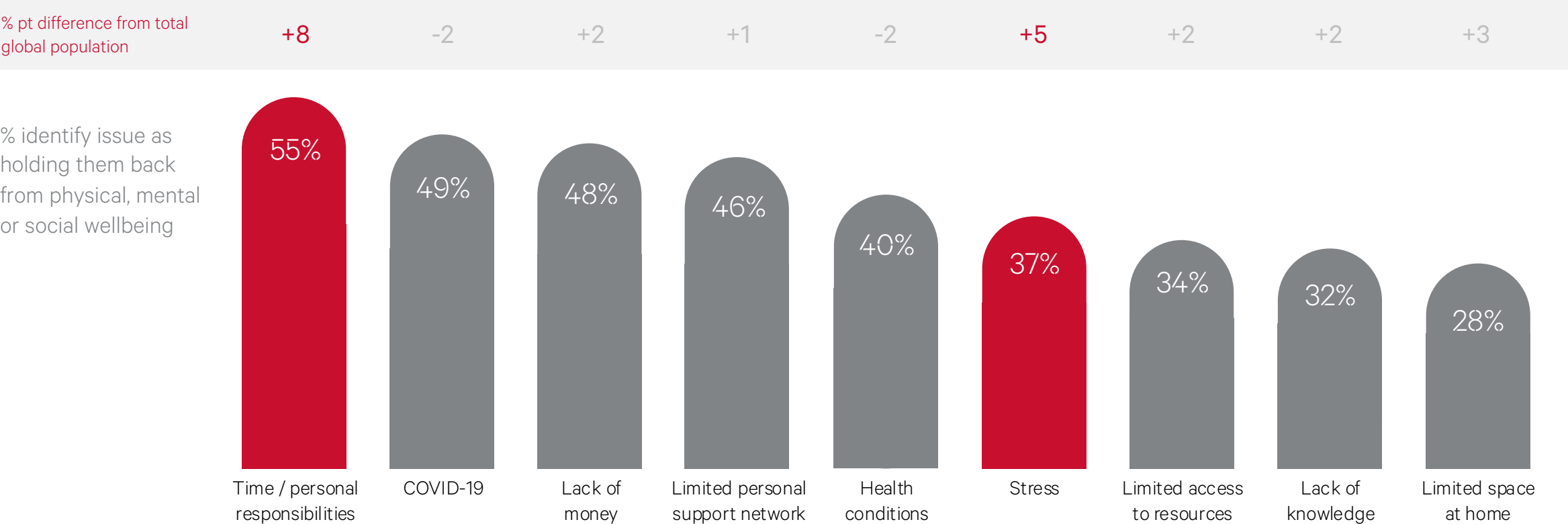


Those who are employed have higher wellbeing than the unemployed population.



Base: Retired (1849), Employed (5883), Students (458), Unemployed (739)

Time pressures present the largest barrier to wellbeing among the employed population. Stress is also amplified among those employed.



Base: Employed (5883)

There is opportunity for employers to offer more resources to support their staff’s wellbeing.

% strongly agree

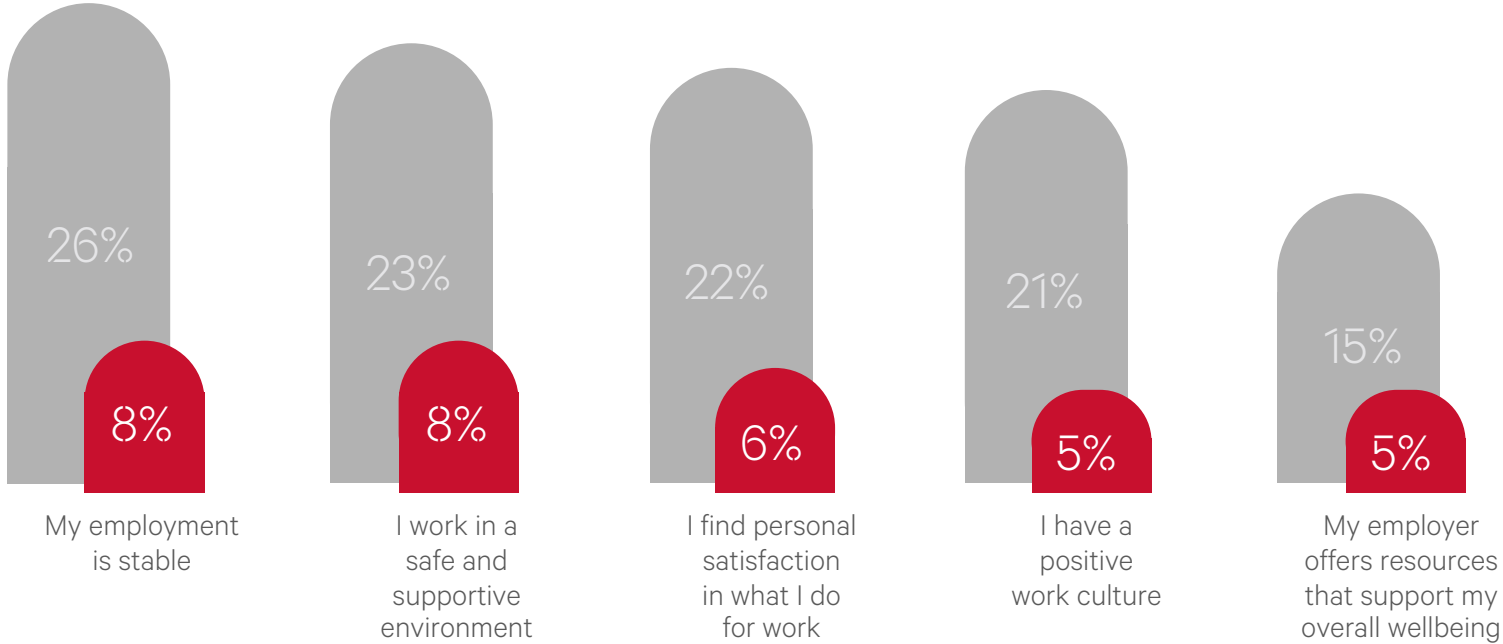


Base: Employed (5883)

The need for greater employer support is illustrated in Japan, where work/life balance is weakest.

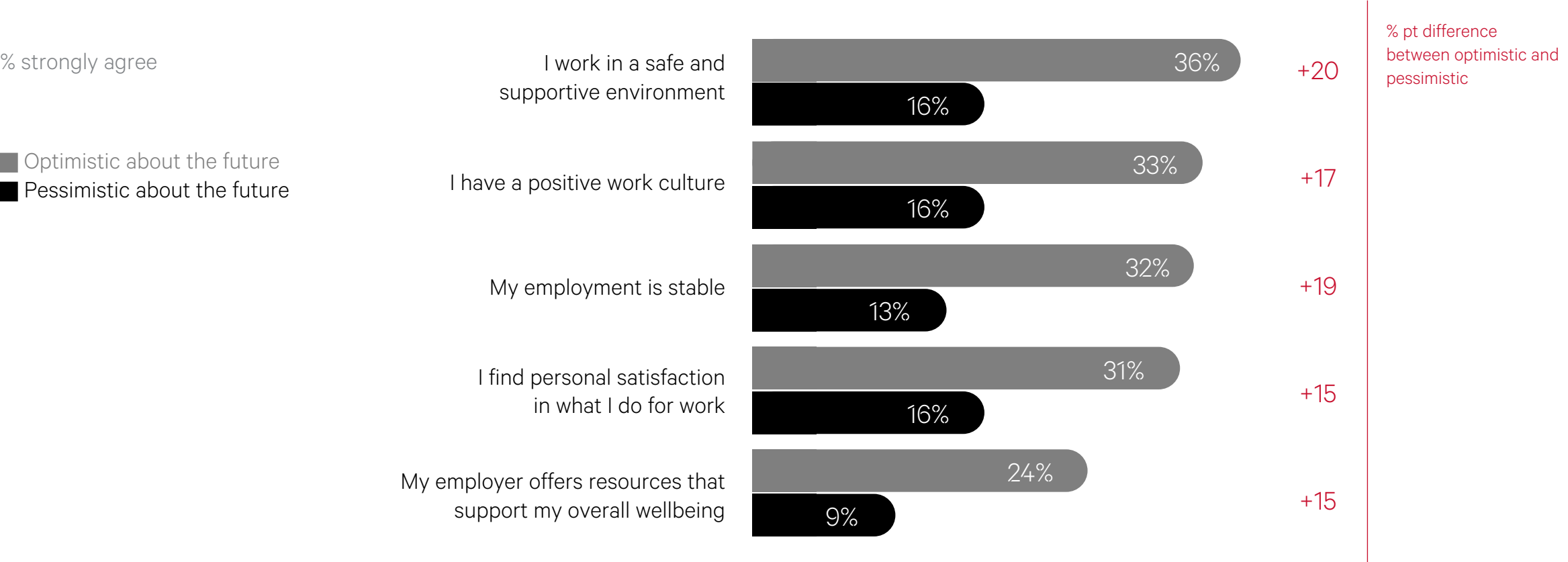
 **Spotlight on Japan:** Wellbeing Index of 60 is the weakest globally; only 21% indicate strong wellbeing across all three dimensions

 Global average  Japan % strongly agree



Base: Japan, Employed (426)

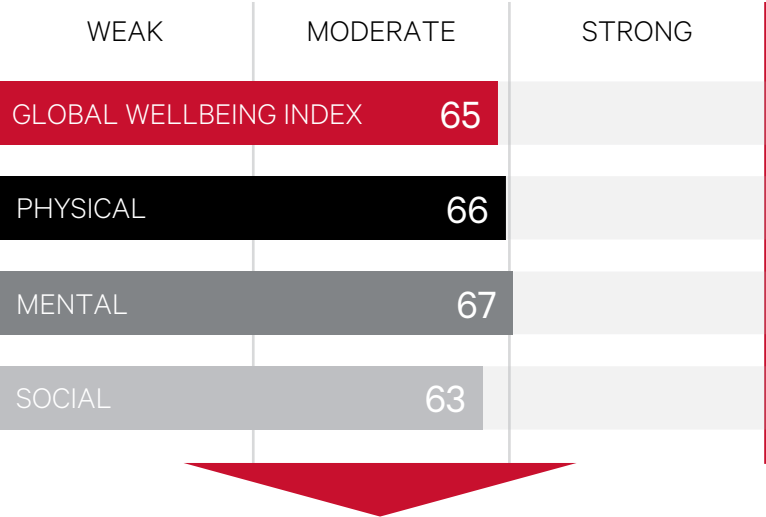
There is a close connection between a positive work environment and future optimism.



Base: Employed (5883)

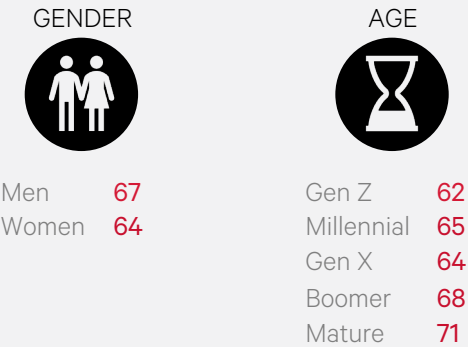
Country Highlights

Global Wellbeing Index Snapshot



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

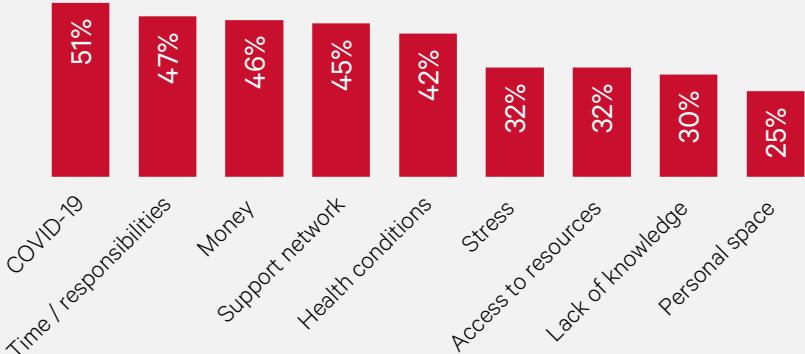
Overall Wellbeing: Key demographics



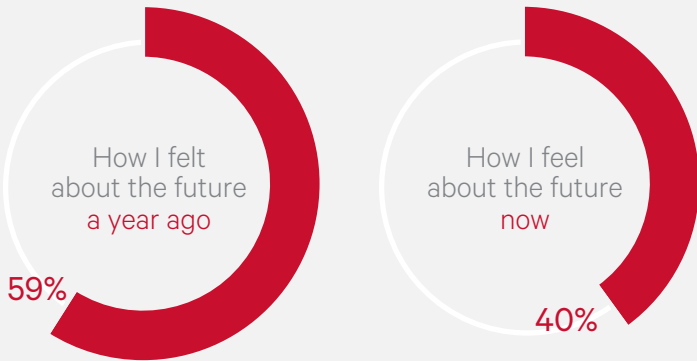
Performance against key drivers of wellbeing



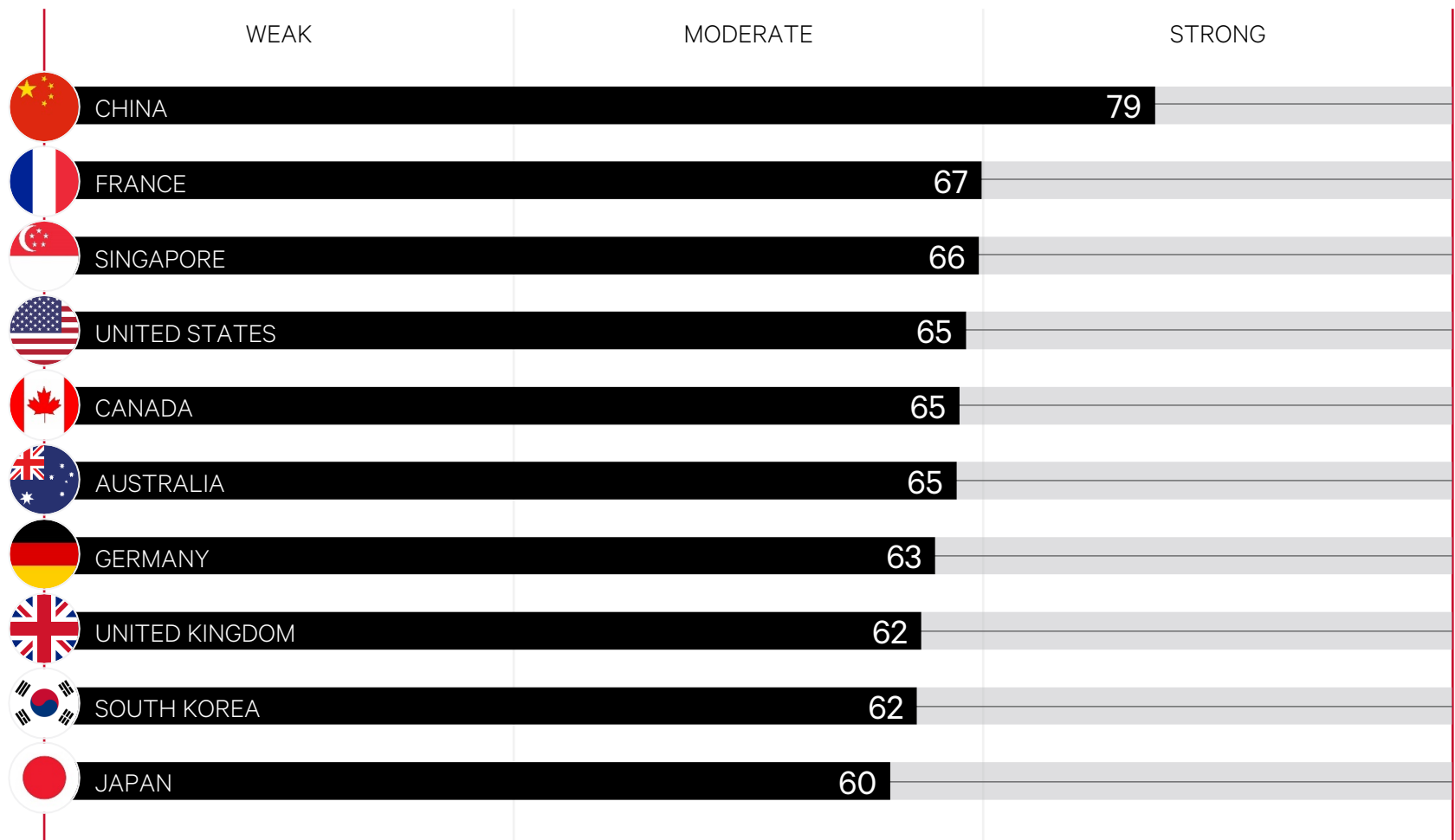
Barriers to wellbeing



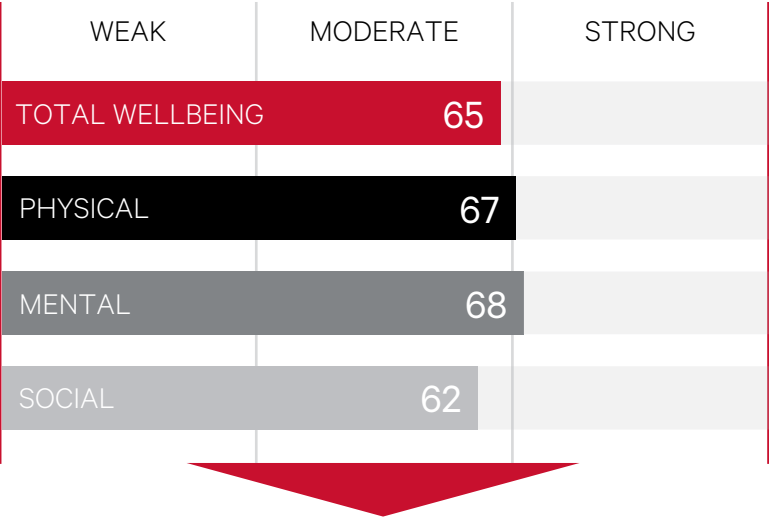
Optimism about the future



Total Wellbeing Index

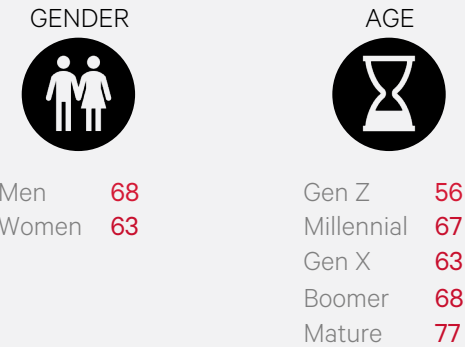


Wellbeing Index Snapshot: US



30% indicate strong wellbeing across all three dimensions of overall wellbeing

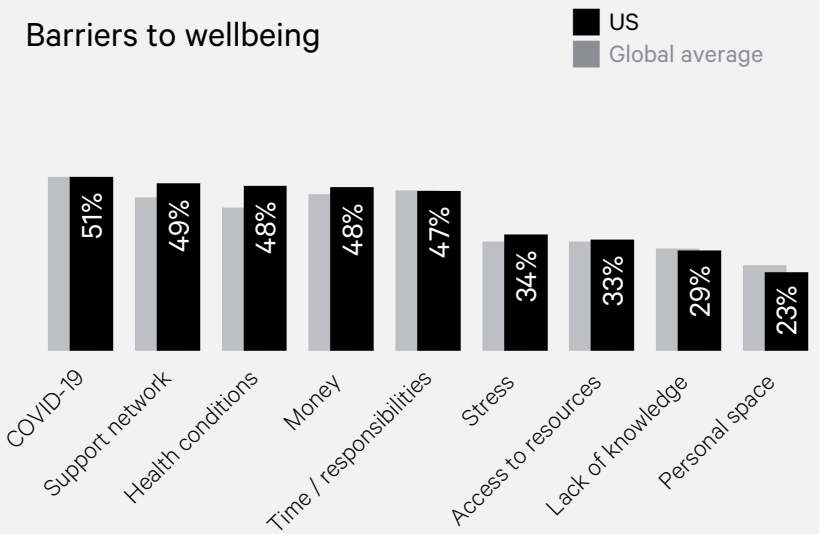
Overall Wellbeing: Key demographics



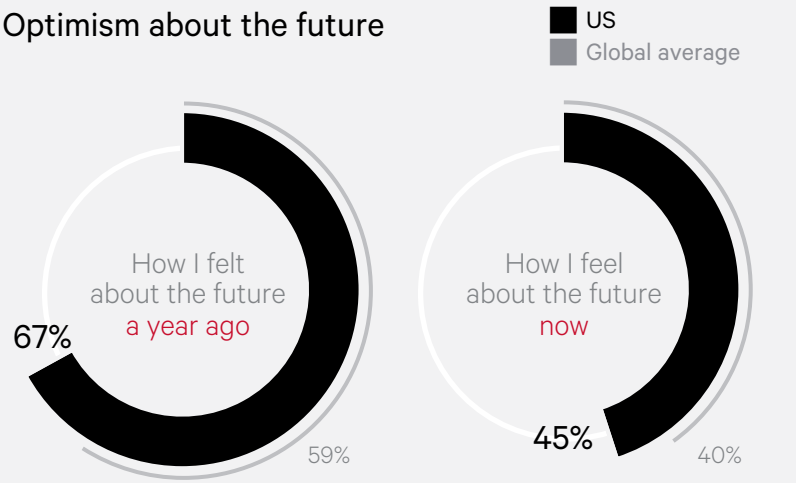
Performance against key drivers of wellbeing



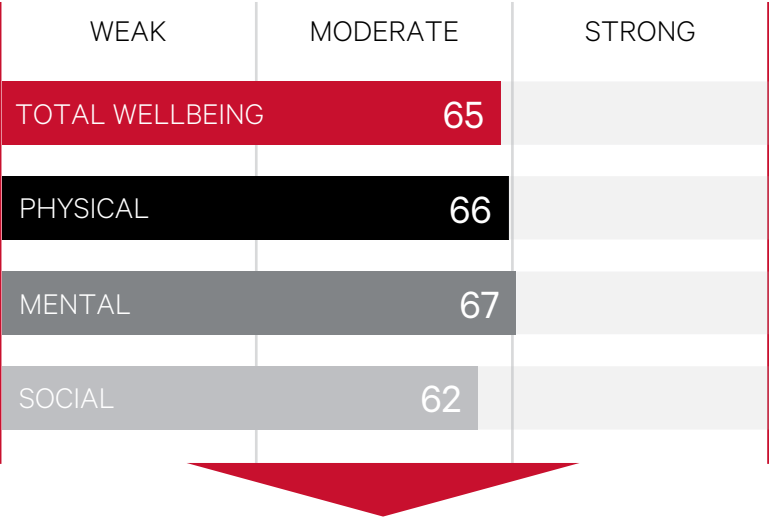
Barriers to wellbeing



Optimism about the future

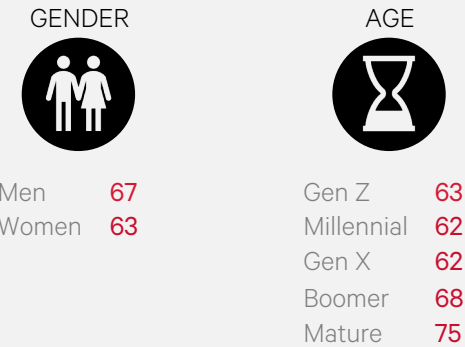


Wellbeing Index Snapshot: Canada



28% indicate strong wellbeing across all three dimensions of overall wellbeing

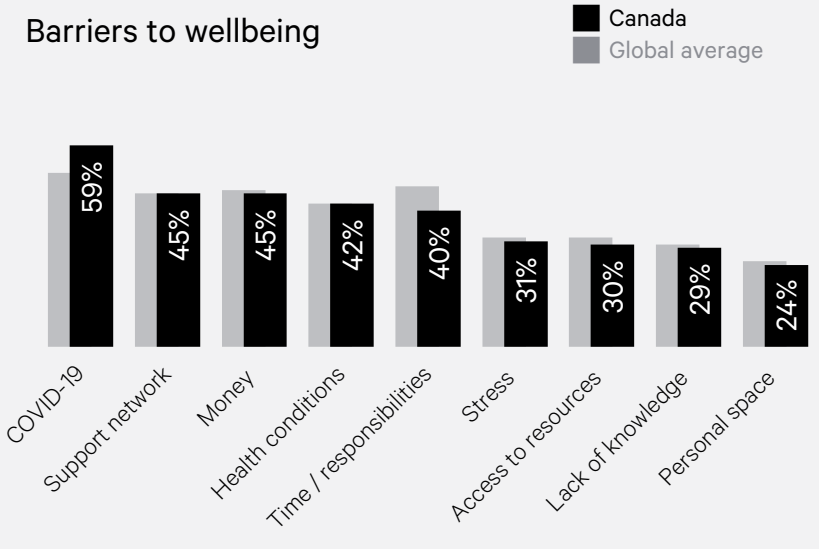
Overall Wellbeing: Key demographics



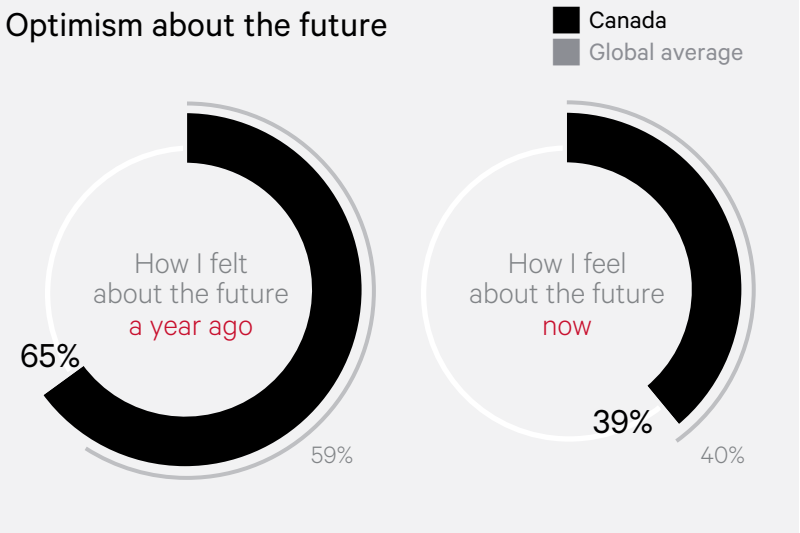
Performance against key drivers of wellbeing



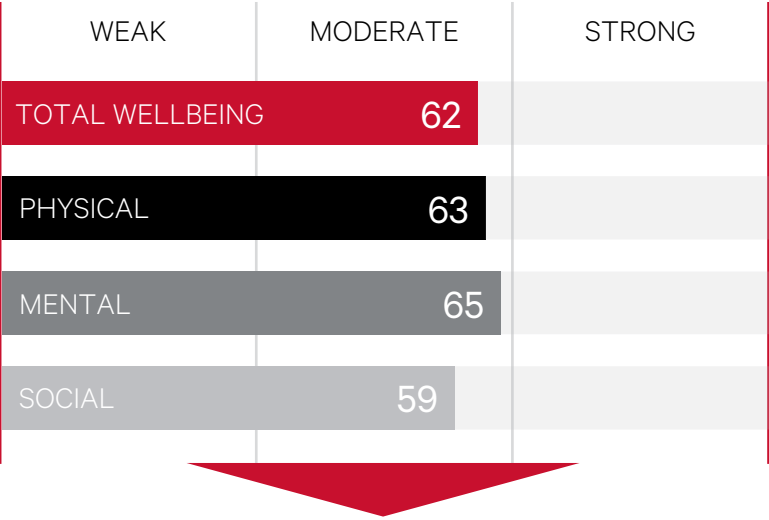
Barriers to wellbeing



Optimism about the future

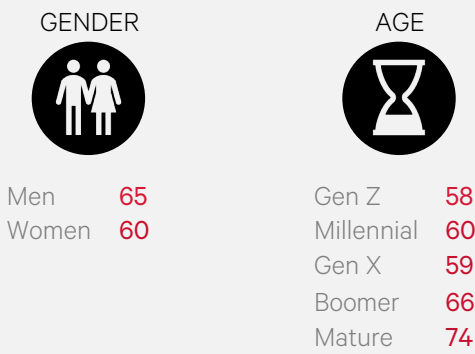


Wellbeing Index Snapshot: UK



23% indicate strong wellbeing across all three dimensions of overall wellbeing

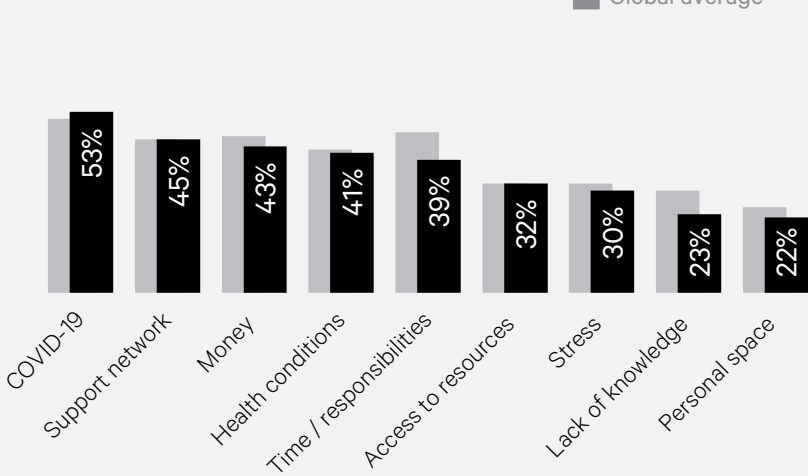
Overall Wellbeing: Key demographics



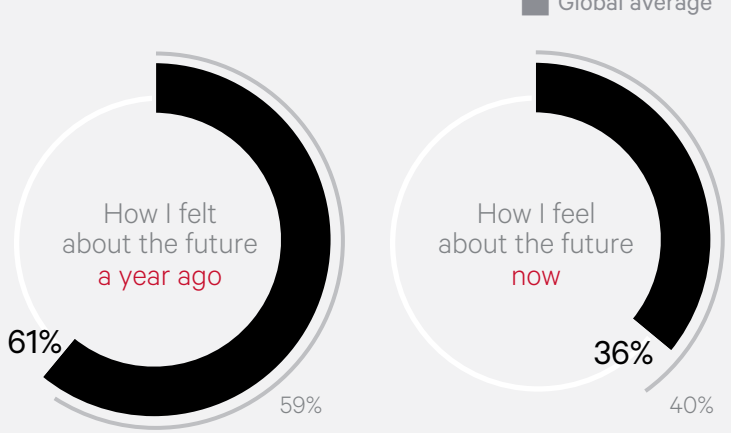
Performance against key drivers of wellbeing



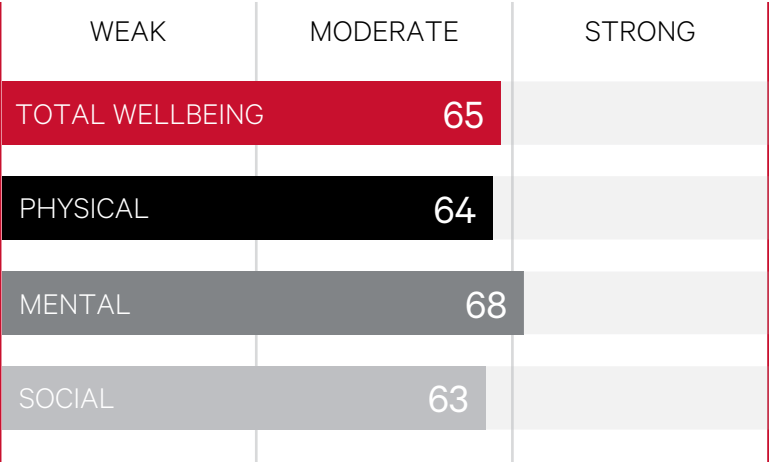
Barriers to wellbeing



Optimism about the future

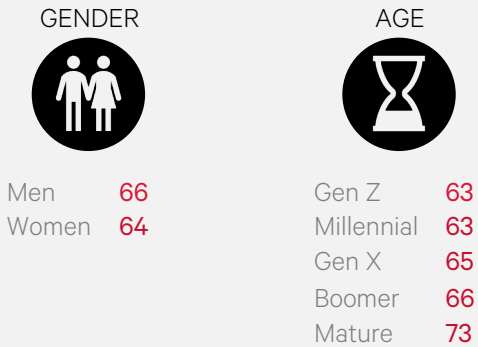


Wellbeing Index Snapshot: Australia

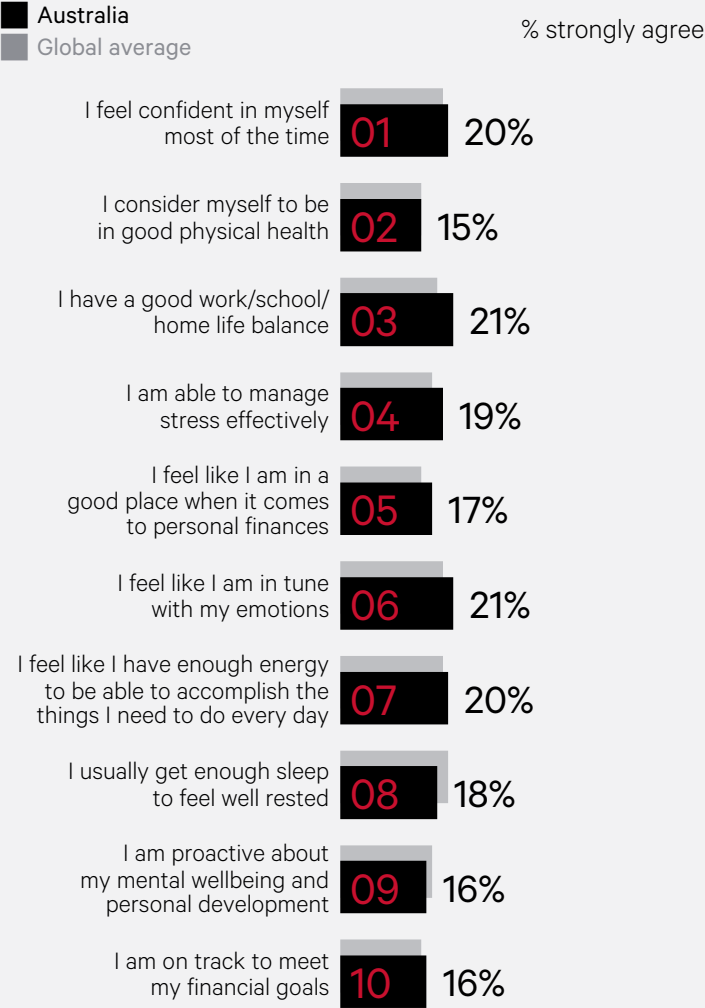


26% indicate strong wellbeing across all three dimensions of overall wellbeing

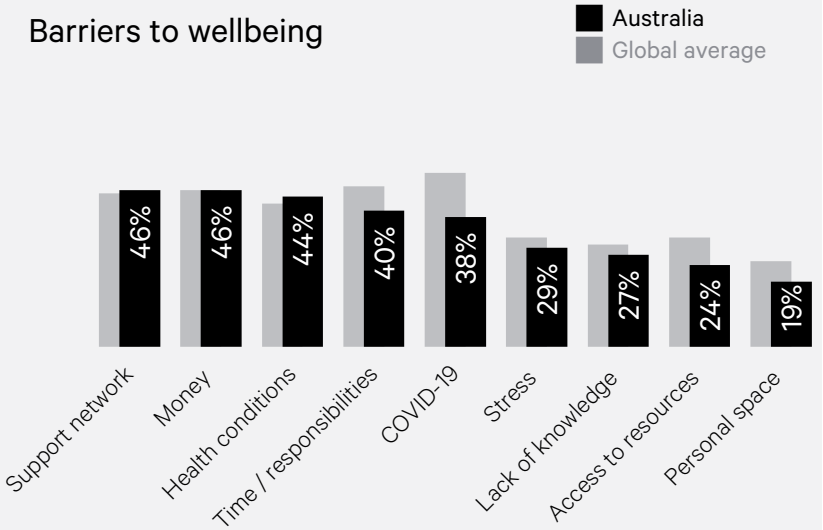
Overall Wellbeing: Key demographics



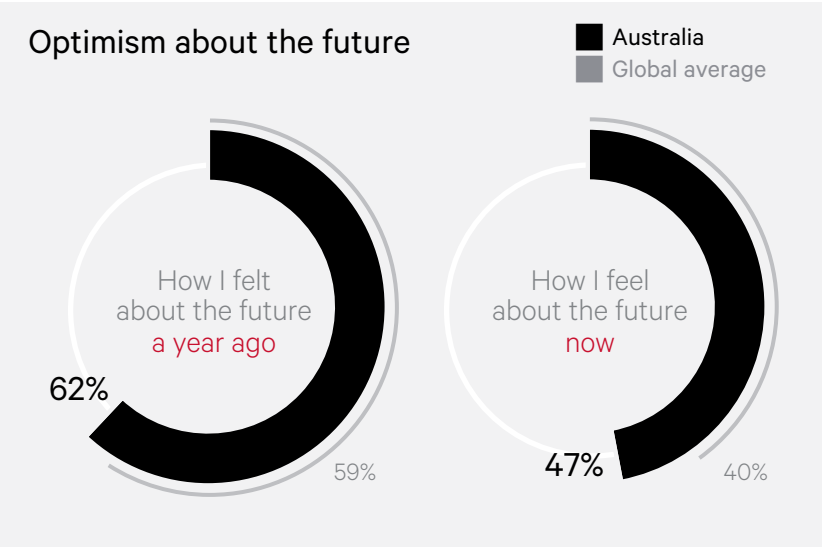
Performance against key drivers of wellbeing



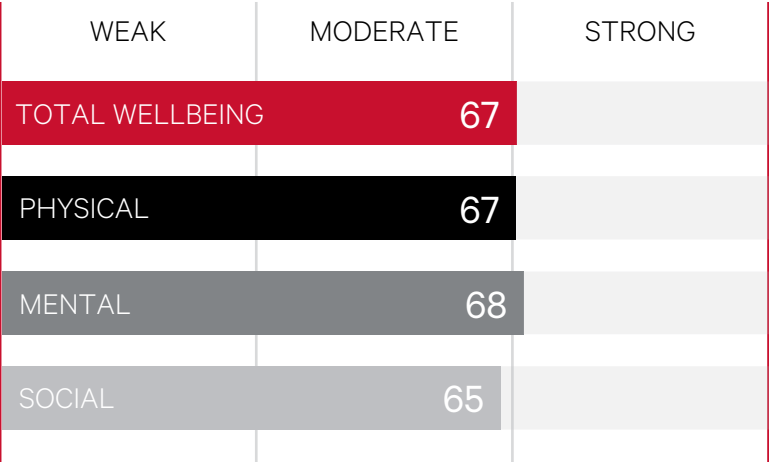
Barriers to wellbeing



Optimism about the future

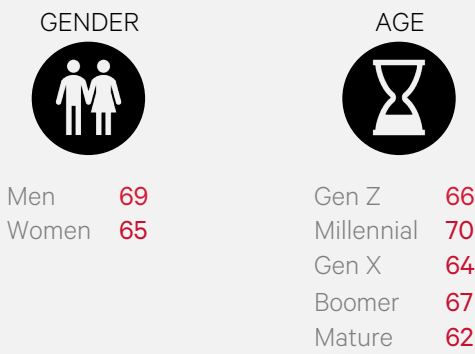


Wellbeing Index Snapshot: France



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

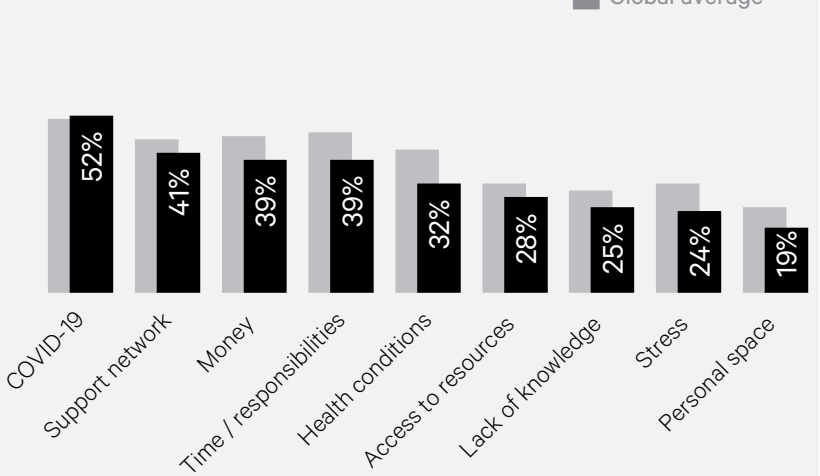
Overall Wellbeing: Key demographics



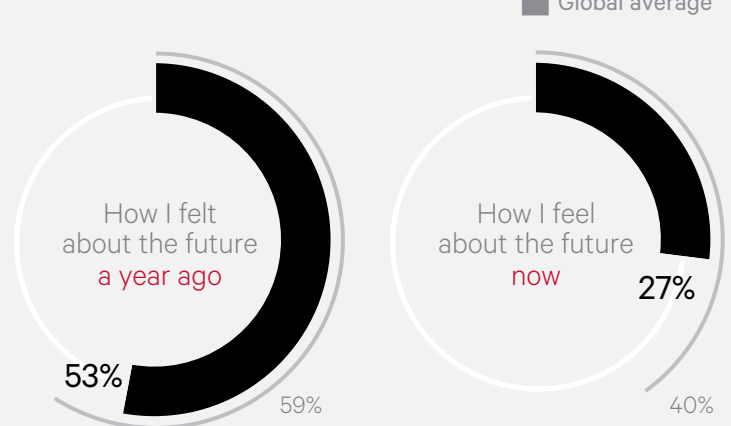
Performance against key drivers of wellbeing



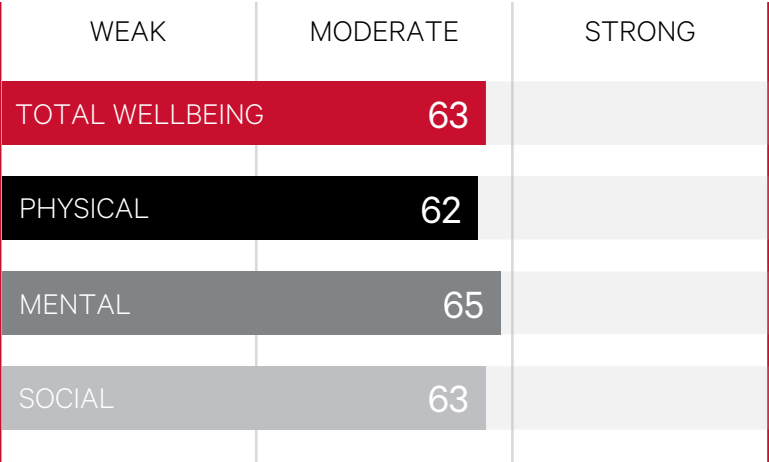
Barriers to wellbeing



Optimism about the future

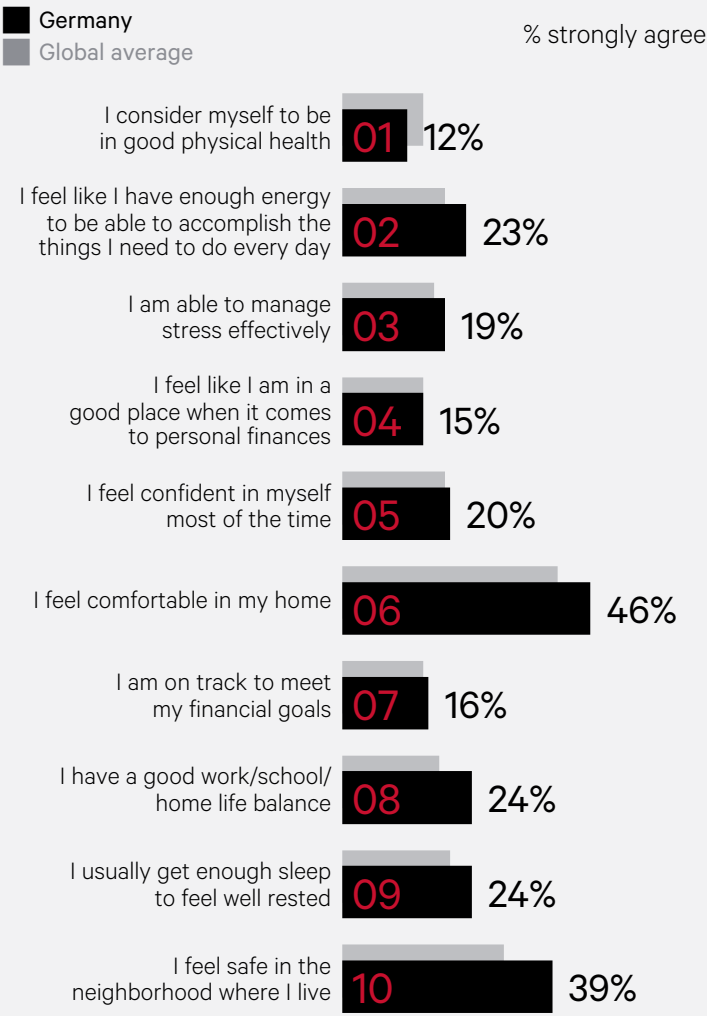


Wellbeing Index Snapshot: Germany

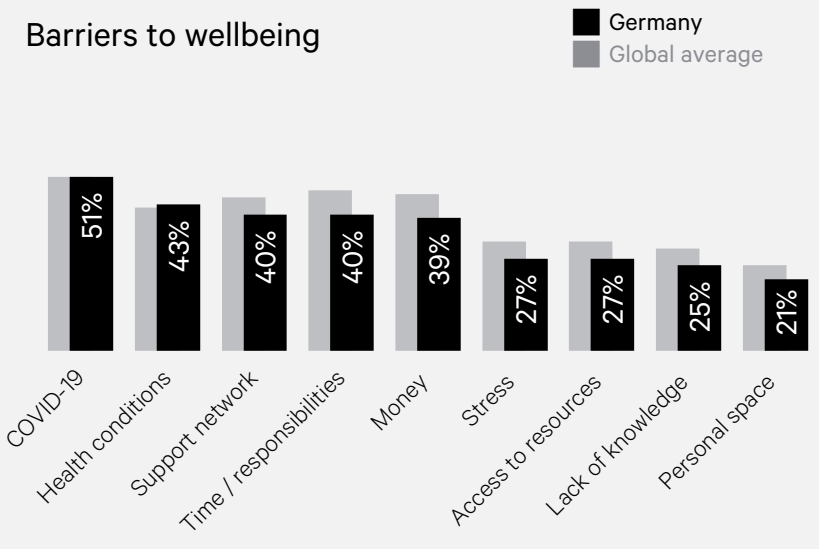


24% indicate strong wellbeing across all three dimensions of overall wellbeing

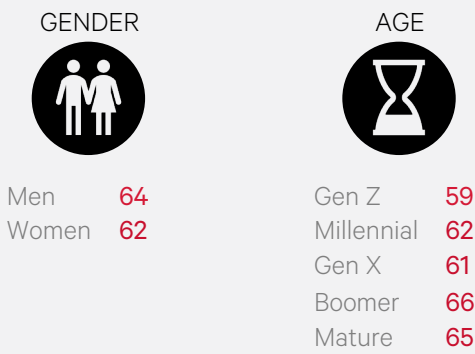
Performance against key drivers of wellbeing



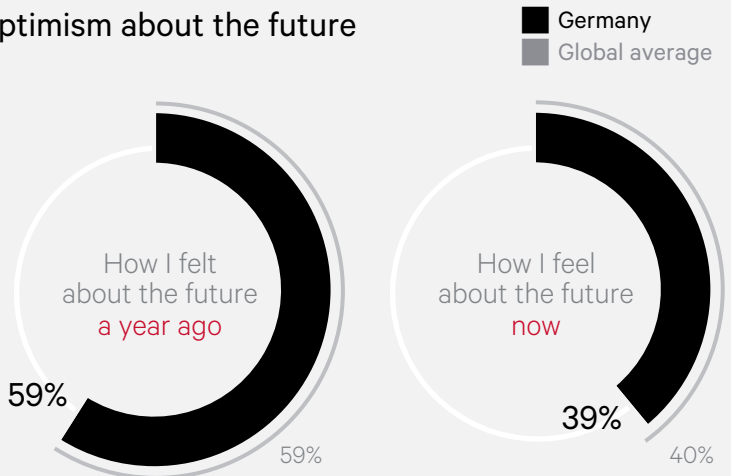
Barriers to wellbeing



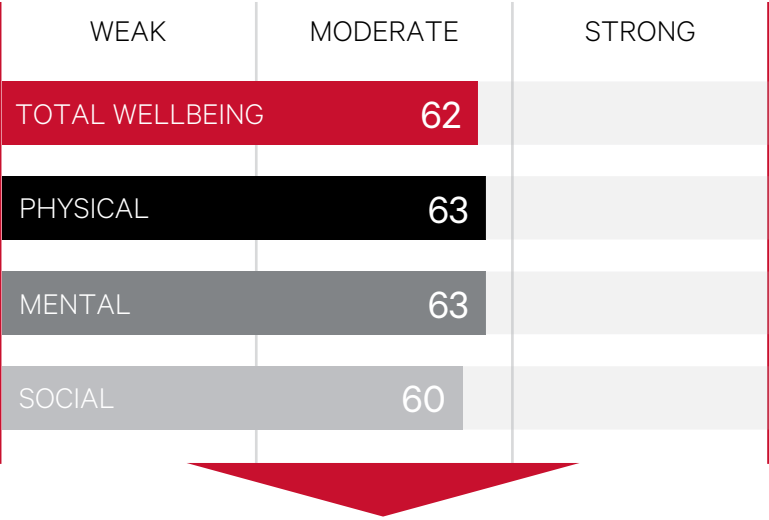
Overall Wellbeing: Key demographics



Optimism about the future

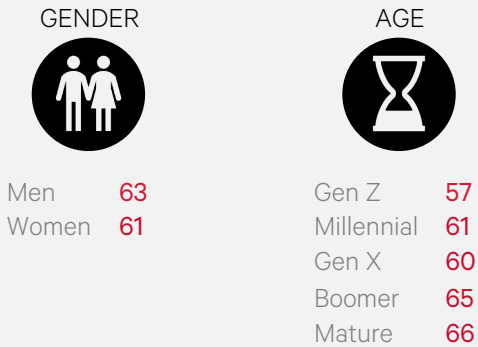


Wellbeing Index Snapshot: South Korea

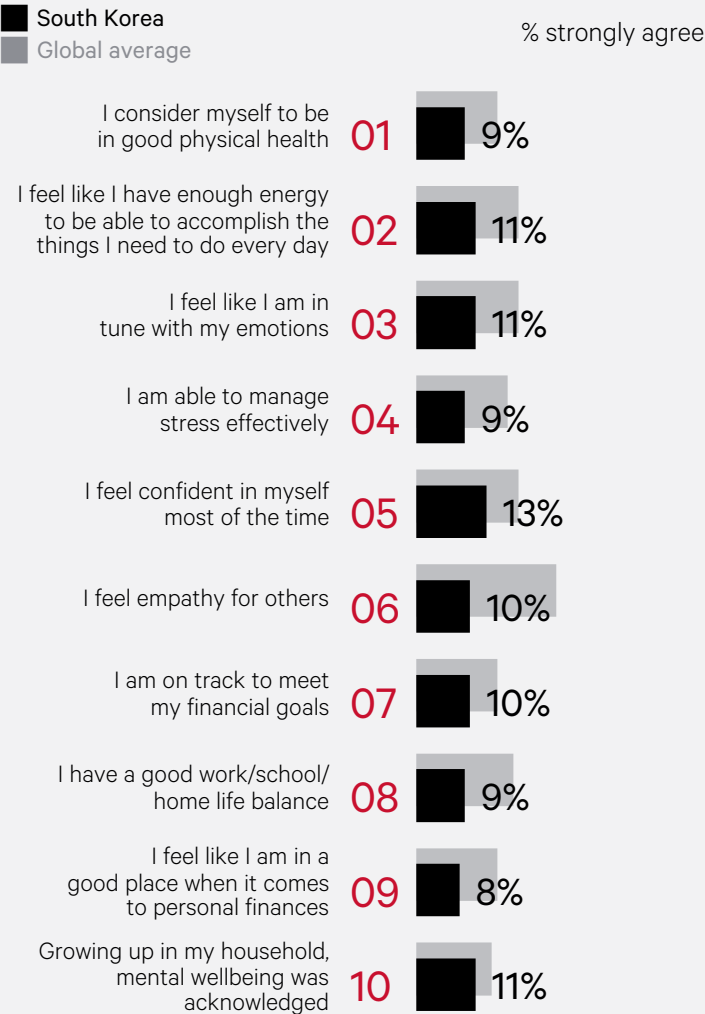


24% indicate strong wellbeing across all three dimensions of overall wellbeing

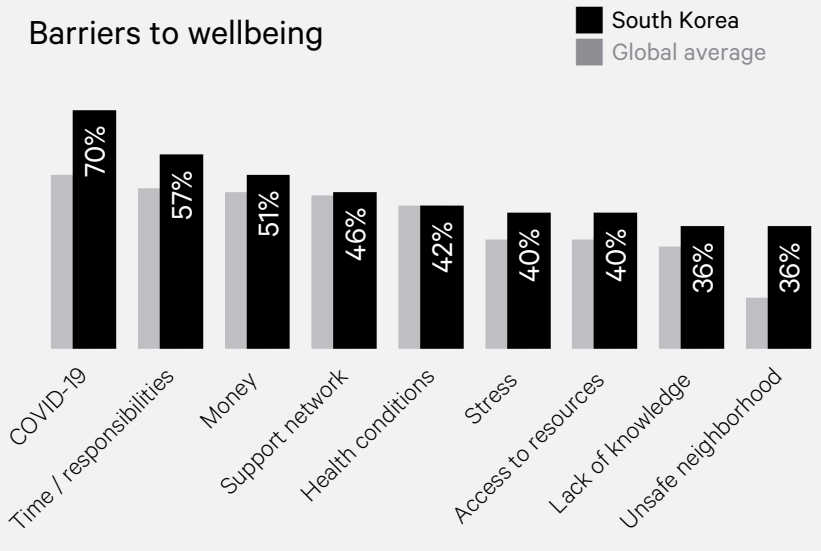
Overall Wellbeing: Key demographics



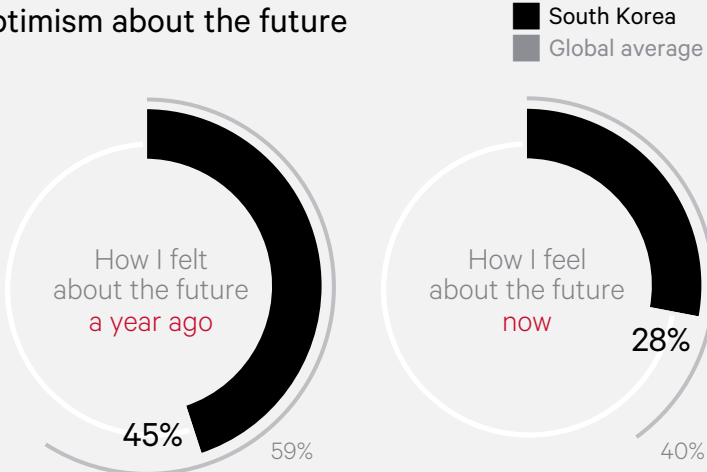
Performance against key drivers of wellbeing



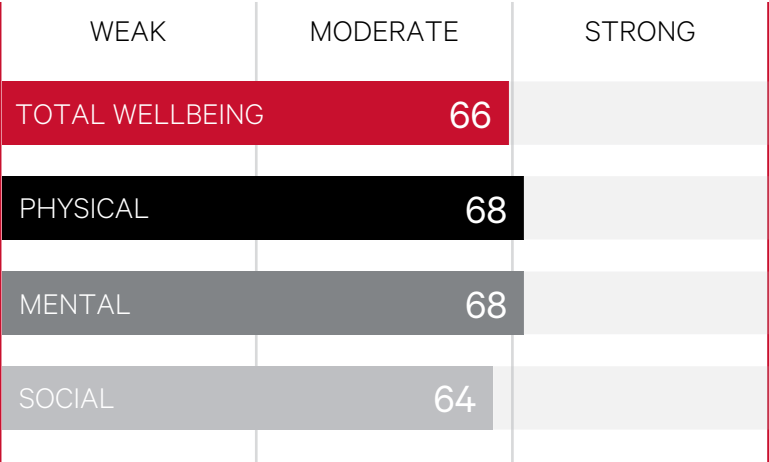
Barriers to wellbeing



Optimism about the future

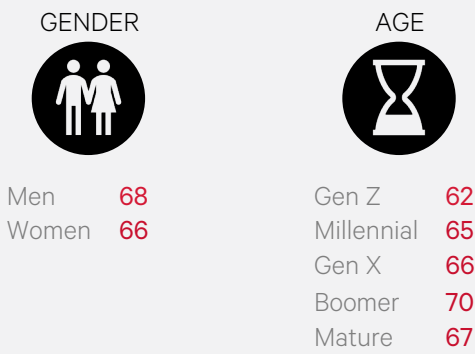


Wellbeing Index Snapshot: Singapore

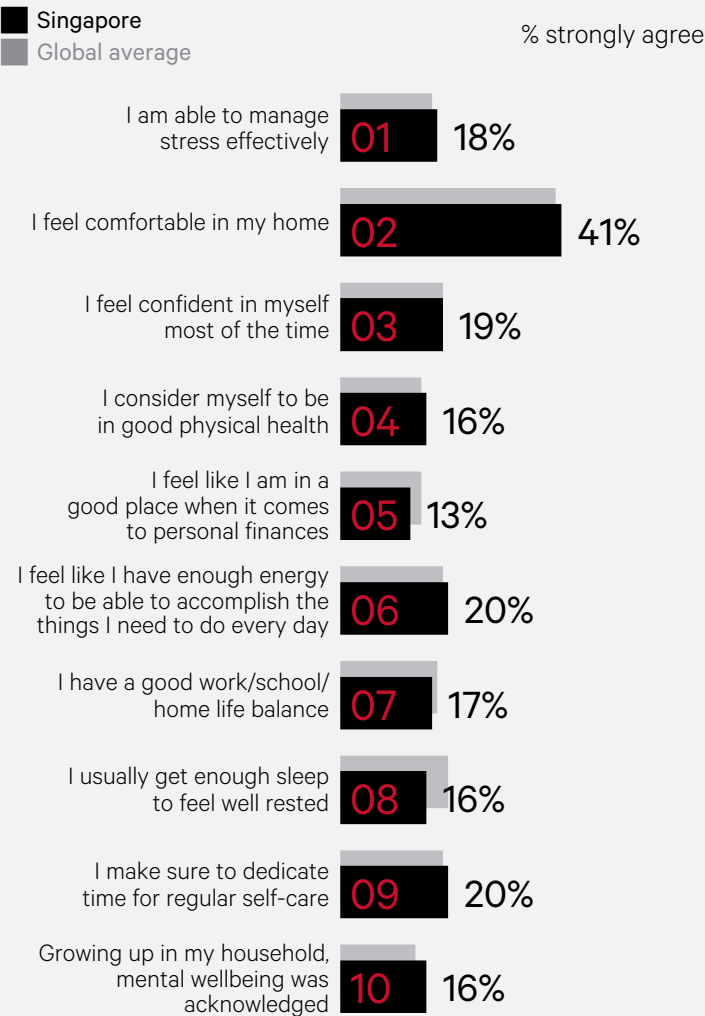


29% indicate strong wellbeing across all three dimensions of overall wellbeing

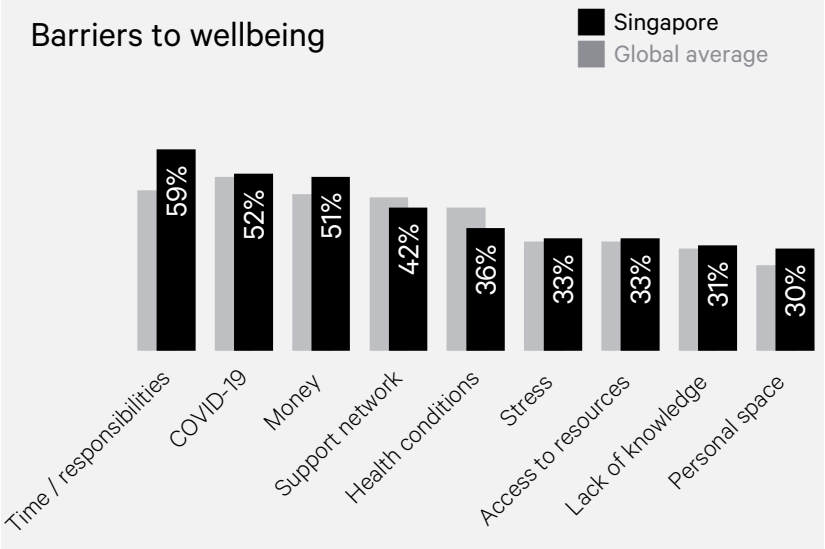
Overall Wellbeing: Key demographics



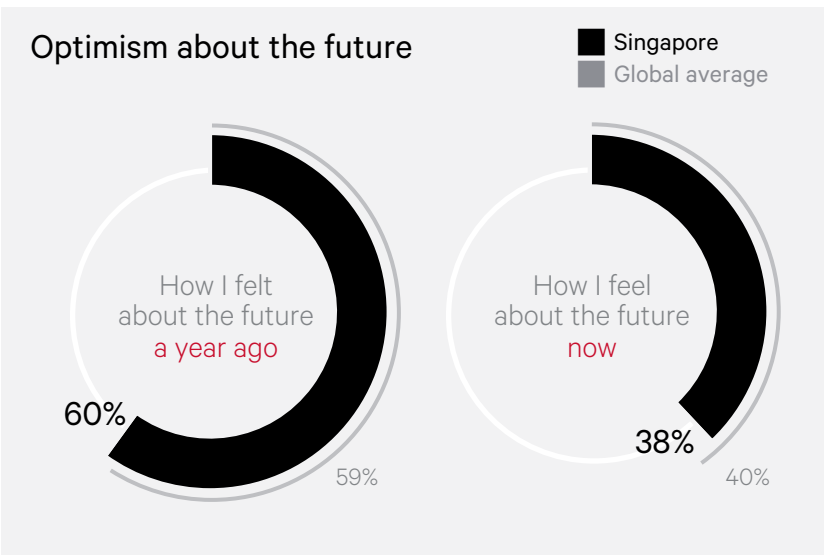
Performance against key drivers of wellbeing



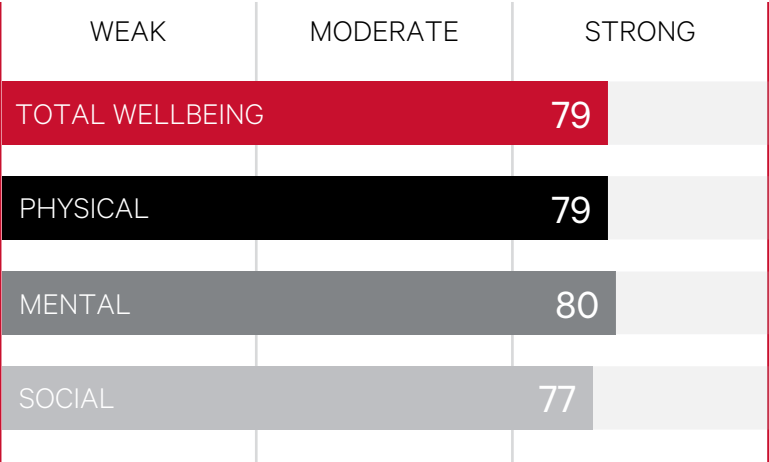
Barriers to wellbeing



Optimism about the future

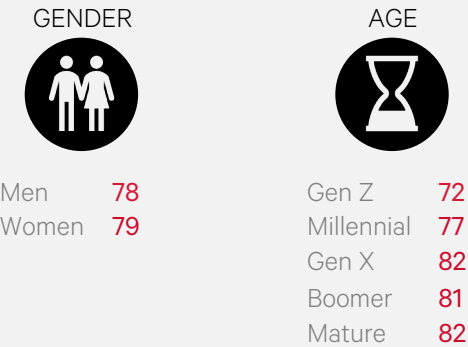


Wellbeing Index Snapshot: China

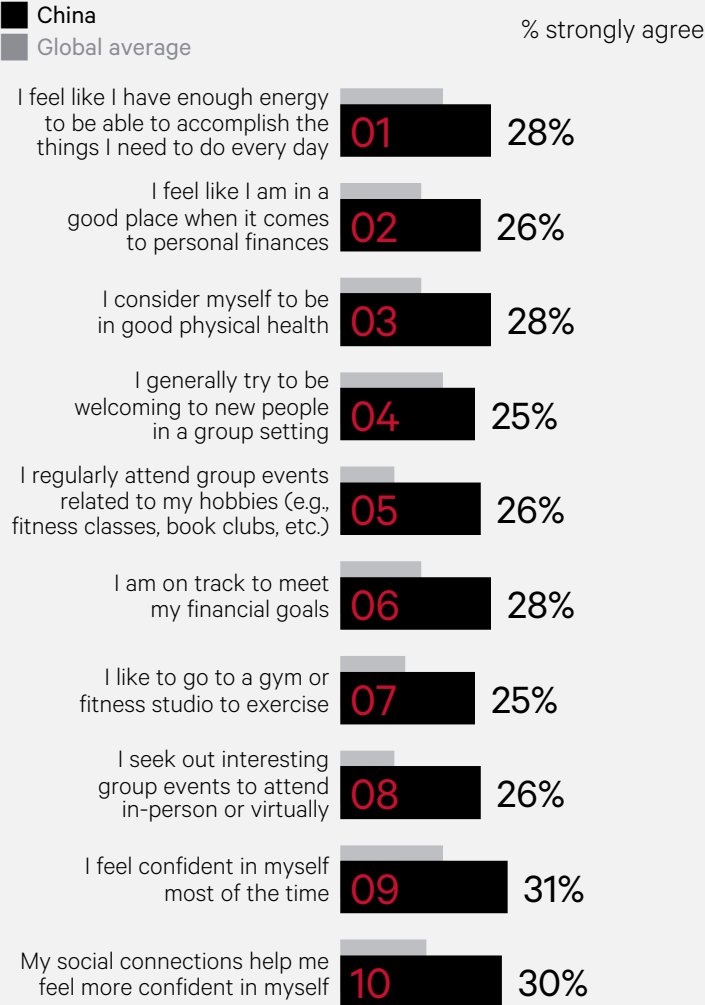


62% indicate strong wellbeing across all three dimensions of overall wellbeing

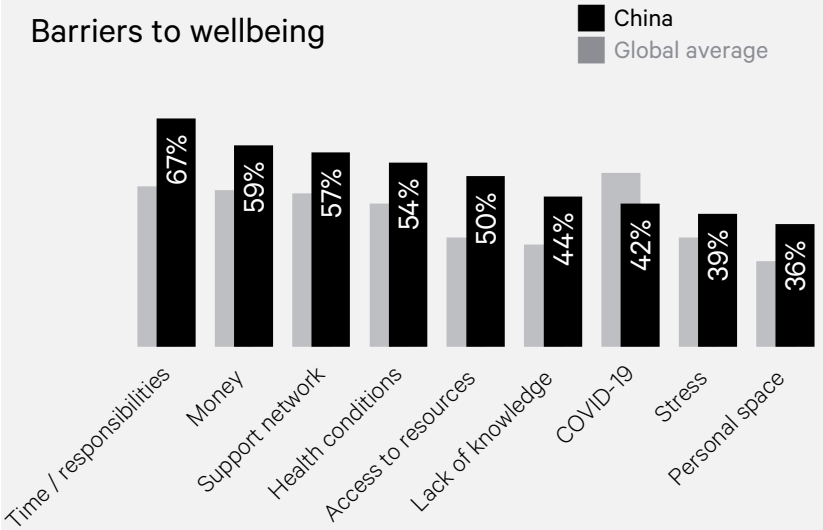
Overall Wellbeing: Key demographics



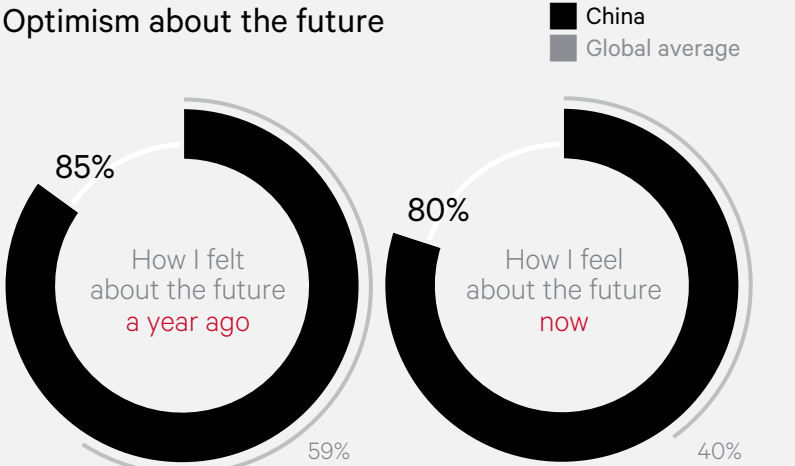
Performance against key drivers of wellbeing



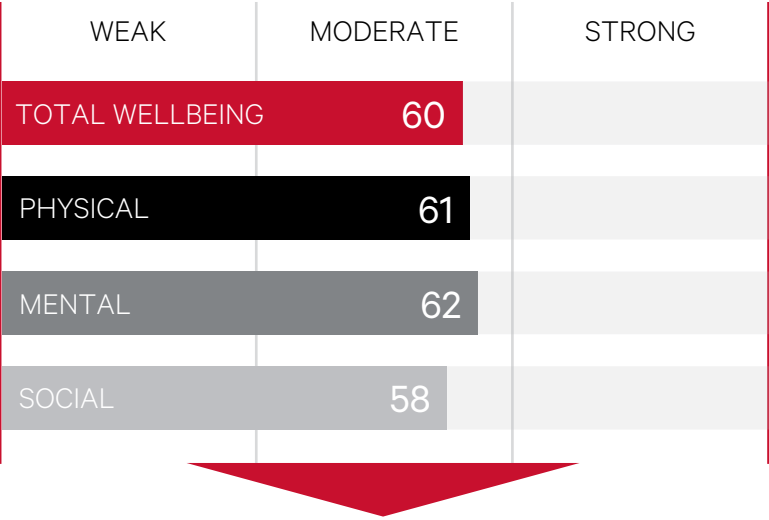
Barriers to wellbeing



Optimism about the future

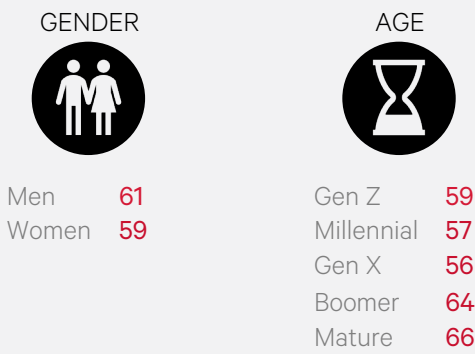


Wellbeing Index Snapshot: Japan



21% indicate strong wellbeing across all three dimensions of overall wellbeing

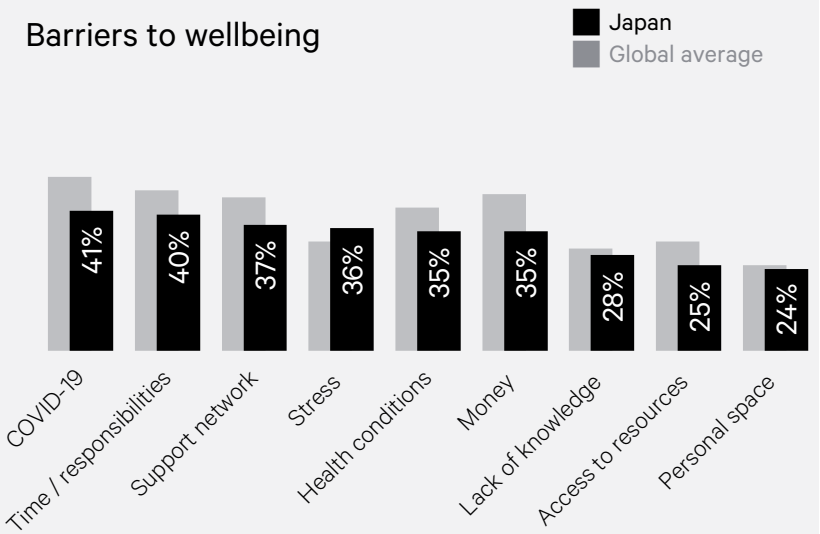
Overall Wellbeing: Key demographics



Performance against key drivers of wellbeing



Barriers to wellbeing



Optimism about the future

