

# MENTAL HEALTH: The Silent Pandemic and the Impossible Quest for Happiness

Prosumer Report  
—  
HAVAS GROUP

2023



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On May 5, 2023, the World Health Organization (WHO) **declared an end** to the COVID-19 global health emergency, signaling the official conclusion of three years of lockdowns, social deprivation, restrictions, and mandates. And yet, the world remains in the grip of another, arguably every bit as destructive pandemic: a global rise in so-called diseases of despair, including anxiety, depression, and social alienation. This pandemic of mental health disorders claims victims across social strata, generations, education levels, and lifestyles. And, despite the efforts of health authorities, pharmaceutical companies, governments, advocates, and increasingly, employers, it appears to be gaining strength. The latest figures from WHO **indicate** that 1 in 8 people worldwide lives with a mental health disorder.

In the first quarter of 2023, Havas Group fielded a survey among some 13,000 women and men in 30 markets worldwide to explore this silent pandemic, which until fairly recently was discussed in hushed tones, if at all. Our aim: to better understand how society regards mental health and what role brands can and should play in contributing to solutions. We discovered a distinct societal shift in which personal well-being has become a focal point of concern and action, along with compelling evidence that the youngest members of society are especially susceptible to mental health challenges.



# From One Pandemic to Another

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These past several years have seen a rise in both mental health disorders and public awareness of them. Earlier this year, U.S. Surgeon General Vivek Murthy **characterized** the increase in mental health needs among youth as “the defining crisis of our time.”

The issue was worsening even prior to COVID-19. In 2019, experts at a Pan American Health Organization event **cited** mental health problems—from anxiety and depression to dementia and alcohol abuse—as the single largest cause of disabilities in the world. However, the pace and scale of the crisis were intensified by the global health emergency. Our survey reveals that half of Prosumers (51%) feel more anxious and stressed than before *coronavirus* moved into common parlance. Even higher rates of agreement were returned in Brazil (65%) and the United States (58%). Perhaps more concerning is the clear generational divide. While barely more than a quarter of baby boomers admit feeling more anxious and stressed today, 53% of Gen Zs do so.



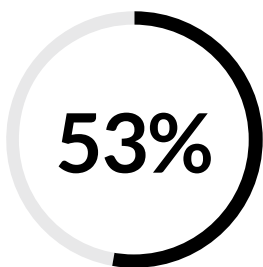


**I feel more anxious and stressed than I used to before COVID-19** (% agreeing strongly/somewhat)

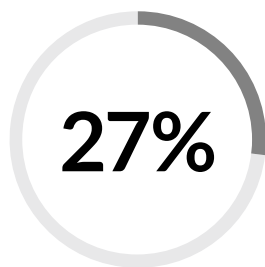
**51%** PROSUMERS



**44%** MAINSTREAM



Gen Z



Boomers

The prevalence of mental health issues has reached the stage at which nearly 9 in 10 Prosumers consider it “one of the most concerning issues of our times.” That speaks volumes in an era when global society is grappling with all manner of existential threats, from political polarization and violent extremism to the cataclysmic potential of climate change.

**Mental health is one of the most concerning issues of our times** (% agreeing strongly/somewhat)

**89%** PROSUMERS



**79%** MAINSTREAM



# **In the Face of This Pandemic, Two Realities Have Emerged**

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As society struggles to come to grips with the modern-day mental health crisis, two shifts have materialized: First, personal well-being has become a social duty. Second, happiness is now a medical norm.



## WELLNESS IS A RIGHT AND OBLIGATION

More than 8 in 10 Prosumers globally—rising to 9 in 10 in France—believe that addressing mental health issues is crucial for one’s well-being. And an individual’s wellness is no longer a private, guarded topic. It’s openly discussed—and actively pursued. The past decade has seen a sharp rise in content promising to put us each on a path to wellness, ranging from [courses on the pursuit of happiness](#) at elite institutions of higher learning to television programming such as [Rainn Wilson and the Geography of Bliss](#)—a series dedicated to unlocking the “secrets of well-being” around the world.

**Addressing mental health issues is crucial for our personal well-being**  
 (% agreeing strongly/somewhat)



**73% MAINSTREAM**

Critically, well-being isn’t just a personal affair. How individuals feel affects the entire community, and so we see that 8 in 10 Prosumers believe that addressing mental health issues is crucial for society overall.

**Addressing mental health issues is crucial for the overall well-being of society**  
 (% agreeing strongly/somewhat)



**67% MAINSTREAM**





## WELL-BEING AS A CORNERSTONE OF HEALTH

Written in 1948, the preamble to the constitution of the World Health Organization **declares**, “Health is a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity.” This more holistic concept of health has steadily gained ground in the decades since. In our 2023 study, 94% of Prosumers and 85% of mainstream consumers agreed that their mental health is as important as their physical health. Consequently, our negative emotions have essentially become medical symptoms. People don’t just regard diagnosed sleeping or eating disorders as signs of mental health issues now, but also highly common feelings such as anxiety and stress. Being unhappy, sad, or even angry for an extended period has become “abnormal”—an issue to “fix.”

**For me, mental health is as important as physical health** (% agreeing strongly/somewhat)

**94%** PROSUMERS



**85%** MAINSTREAM

## HAPPINESS IS A NEW MEDICAL NORM

Happiness is now an expectation. If we are unhappy, there is a problem to be solved. In 1776, when the founding fathers of the soon-to-be-united states of America declared a right to “life, liberty, and the pursuit of happiness,” it was a fairly novel concept. Two and a half centuries later, we see it becoming widely accepted that governments have a **responsibility** to ensure their citizens’ mental health and well-being.



**In your opinion, what are the signs of mental health issues?**

**Anxiety**



**Stress**



**Eating disorder**



**Permanent state of sadness**



**Constant feeling of helplessness and frustration**



**Melancholy**



**Sleeping disorder**



**Permanent state of anger**



■ PROSUMERS  
■ MAINSTREAM

This report focuses on four aspects of the mental health pandemic: the state of “unwell-being,” the toll on youth, potential cures, and the role of brands.





Which of the following has the greatest impact on your mental health? (Choose one.)

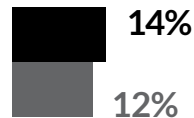
Your personal/family situation



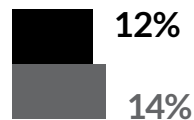
The economic crisis (inflation and recession)



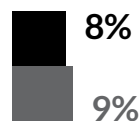
The COVID-19 crisis



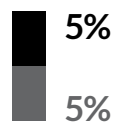
Your work situation



The war in Ukraine and political tensions in the world



Climate change issues



■ PROSUMERS ■ MAINSTREAM

# The State of “Unwell-Being”

There is plenty of cause for anxiety in 2023—not least, climate change fears, the global energy crisis, and the ongoing war in Ukraine—but the issues with the greatest impact on respondents’ mental health are far closer to home: their personal relationships and finances. We may be worried on some level about rising sea levels, but our more immediate concerns regard family frictions and whether we have enough money to cover our bills at the end of the month.



## WE ARE UNWELL BECAUSE OUR SOCIETY IS SICK

*“It is not a sign of good mental health to be well-adjusted to a sick society.”*

—PHILOSOPHER JIDDU KRISHNAMURTI

Apart from individual struggles, the current mental health pandemic can be linked to several facets of modern life. Among them: hyperconsumerism, the rise of social media and digital addiction, a lack of interpersonal interaction, and our disconnectedness from the natural world. We live in a time of increasing isolation and artificiality, with the vast majority of our waking hours spent indoors hunched over computer keyboards (depending on profession) and our smartphones. With the rise in **remote work** and **single-person households**, it’s easier than ever to go for days or even weeks without meaningful, in-person interaction with another human being. Research conducted in 113 countries and territories between 2000 and 2019 found that loneliness has become a **problem** worldwide.

**In your opinion, what are the reasons we are suffering more from mental health issues?** (Showing Prosumers.)

**Consumerism—everything in society is now about money**



**60%**

**The lack of interaction with loved ones**



**60%**

**Social media and digital addiction**



**56%**

**Our disconnection from nature**



**50%**



# The Kids Aren't Alright

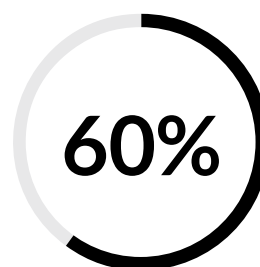
The disruptions of the pandemic, mounting economic pressures, and the perils of climate change are not evenly distributed. It is the younger generations who saw their educations and childhood rites of passage **derailed** by the COVID-19 lockdowns and who face an economic and environmental future far more dire than what their parents and grandparents experienced. Is it any surprise then that youth are feeling outsized effects on their mental health?

A consensus appears to have emerged that today's youth are "mentally weaker" than previous generations—a sentiment with which two-thirds of Prosumers

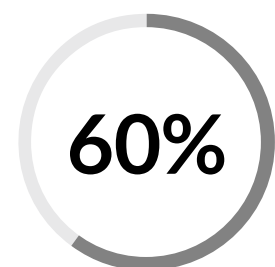
agree. Prosumer agreement is even higher in certain markets, including Brazil (77%) and India (70%). This may seem like an aspersion cast by disapproving elders, but we see equal percentages of Gen Zs and boomers (60%) agreeing with the statement.

**I think the younger generation is mentally weaker than previous generations**

(% agreeing strongly/somewhat)



Gen Z



Boomers



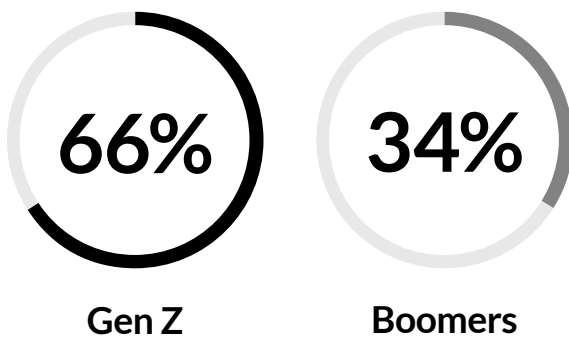


## FAKE IT TILL YOU MAKE IT

We also found that, despite people now speaking more freely about issues pertaining to mental health, two-thirds of Gen Zs feel social pressure to pretend to feel good even when they don't. In comparison, only around a third of boomers feel that pressure.

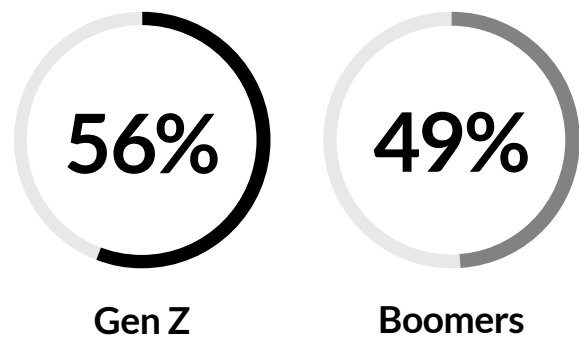
**I feel a social pressure to say I feel good even when it's not true**

(% agreeing strongly/somewhat)

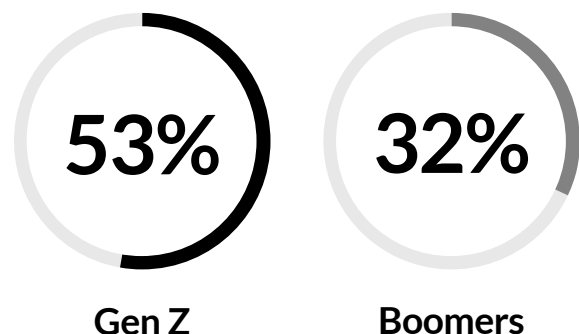


The burden young people face is exacerbated by a fear of being—or being seen as—overdramatic or overly introspective. A majority of Gen Zs—versus around a third of boomers—agree that people tend to “listen” too much to their feelings.

**I think these days, people overdramatize every small negative feeling in their life and call them mental health issues** (% agreeing strongly/somewhat)



**We tend to listen too much to our feelings** (% agreeing strongly/somewhat)





## I AM A ROCK

Mental health practitioners advise that when a person feels anxious or depressed, they should talk about it. And yet, our study reveals that barely half of Gen Zs (50%) talk to their friends to feel better, and even fewer (38%) reach out to family members. The regrettable reality is that most young people (57% of Gen Zs) find it difficult to talk about their issues with mental health. And nearly half (46%), compared with just 17% of boomers, feel no one understands their struggles. In Asia, the “[lying flat](#)” movement (China) and the [Hikikomori](#) trend (Japan) are seeing some young people withdraw almost completely from society, seeking to avoid social pressures by opting out to the extent they can.

### When you feel anxious or depressed, what do you do to feel better?

#### Talk with friends



#### Talk with my family

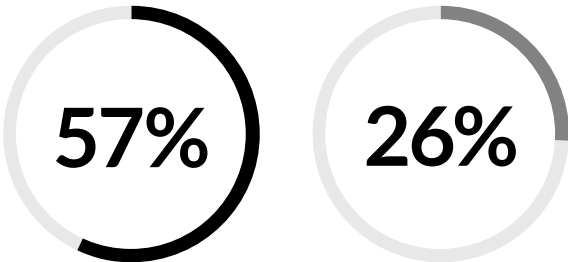


■ GEN Z ■ BOOMERS



### I find it hard to talk about my mental health issues with my friends, relatives, or partner

(% agreeing strongly/somewhat)

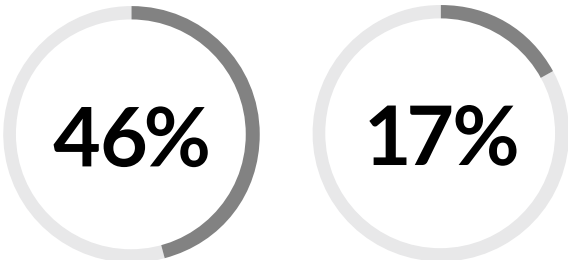


Gen Z

Boomers

### I feel no one understands my mental health issues

(% agreeing strongly/somewhat)



Gen Z

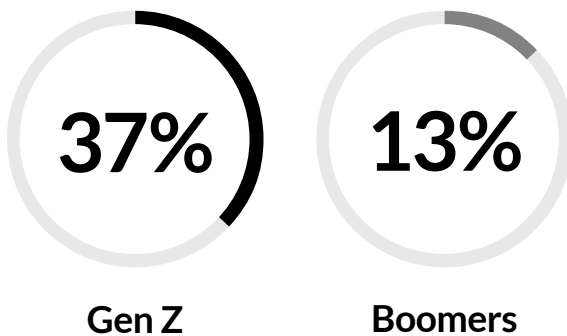
Boomers

## SOCIAL MEDIA: CURE AND CURSE

Today's youth have never known a time when they couldn't connect with the world via smartphone and social media—and that has had a psychological impact. A [three-year study](#) in the U.S. by leading experts in psychiatry and public health found, for instance, that adolescents who spent more than three hours a day on social media doubled their risk of experiencing poor mental health outcomes, including depression and anxiety. It's a complex relationship: While nearly 4 in 10 Gen Z respondents (37%) spend time on social media platforms in an attempt to soothe their anxiety or depression, an even higher proportion (43%) say spending time on their smartphones worsens their symptoms. There is a clear age correlation here, with just 13% of boomers saying the same.

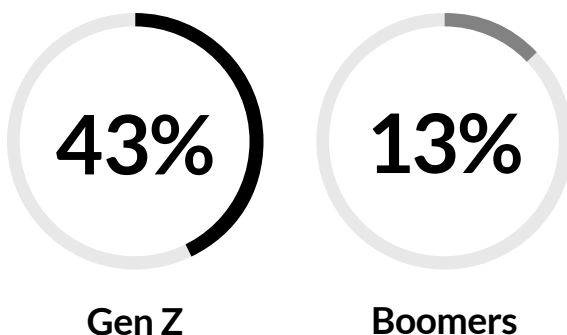
### When you feel anxious or depressed, what do you do to feel better?

Go on social media on my smartphone



### The more time I spend on my phone, the more anxious and/or depressed I get

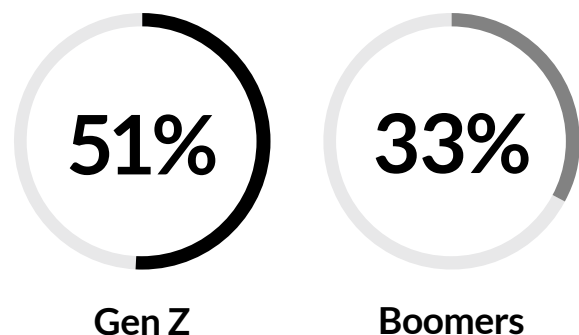
(% agreeing strongly/somewhat)



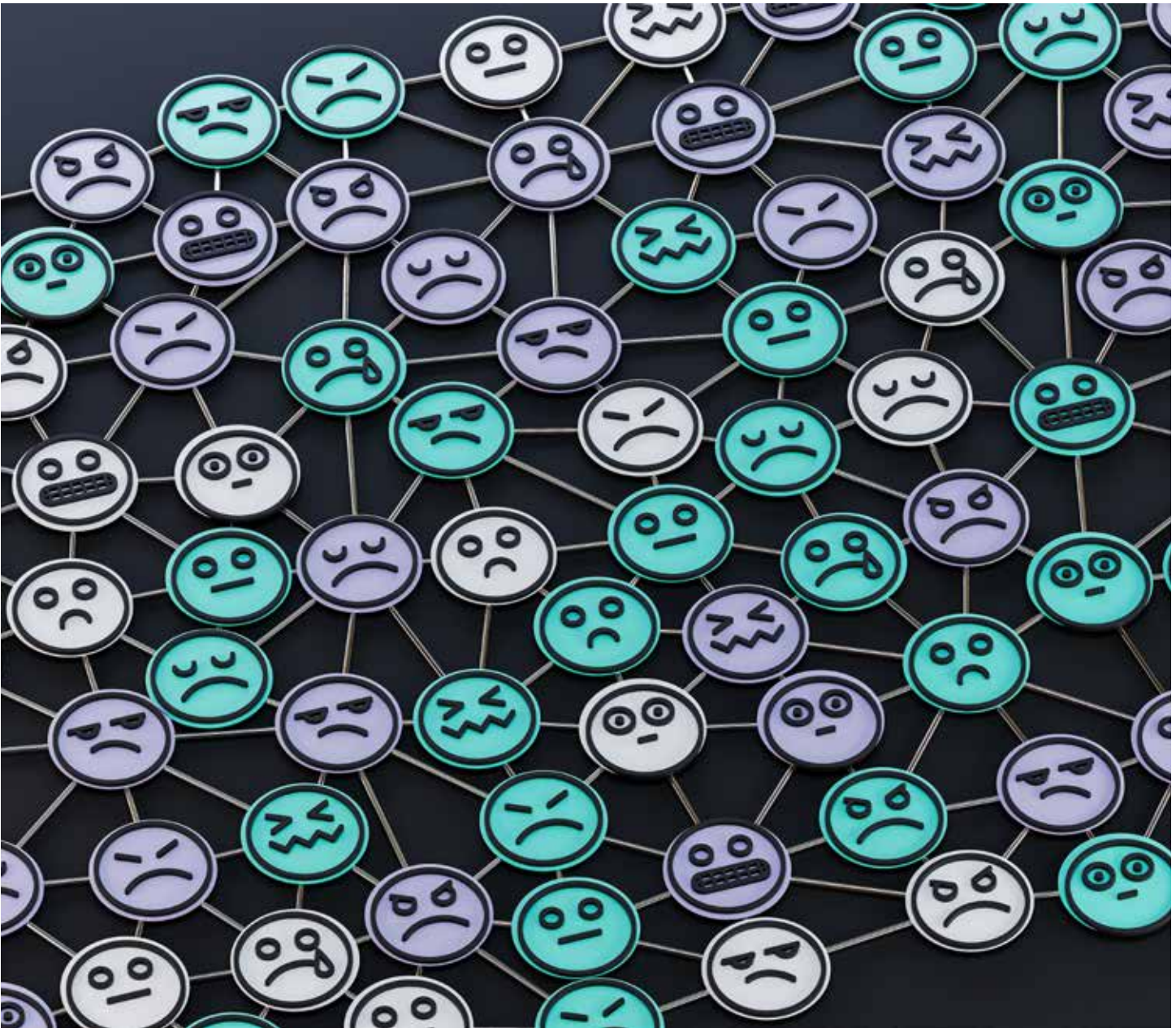
Recent years have brought a [push](#) to hold tech companies liable for the impacts of their platforms, and half of Gen Zs (as well as a third of boomers) believe social networks should be held accountable for their users' mental health.

### Social networks should be held responsible for the mental health of their users

(% agreeing strongly/somewhat)







# What's the Solution?

Our study reveals two potential pathways to progress: medical intervention or a change in modern lifestyles.

## A "CURE" FOR EVERY EMOTION

Most respondents would like to see treatments for a broad range of mental health issues—from eating and sleeping disorders to depression and stress—covered by medical insurance, which suggests a widespread belief that there are pharmacological cures for most of the mental health issues that ail us.

## Among the following signs of mental health issues, which ones do you think should be covered by medical insurance?

### Anxiety



### Stress



### Permanent state of anger



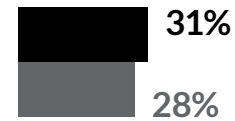
### Sleeping disorder



### Permanent state of sadness



### Melancholy



### Eating disorder



### Constant feeling of helplessness and frustration



■ PROSUMERS  
■ MAINSTREAM

Rather than viewing anxiety as an ordinary facet of life, for example, two-thirds of Prosumers regard it as an illness that needs to be cured with drugs. Not surprisingly, then, we see that the [market](#) for the treatment of global anxiety disorders and depression reached \$8.5 billion in 2019—and is expected to soar to more than \$13 billion by 2027.

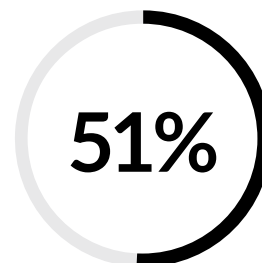


### Anxiety is a real illness that needs to be cured with drugs (% agreeing strongly/somewhat)

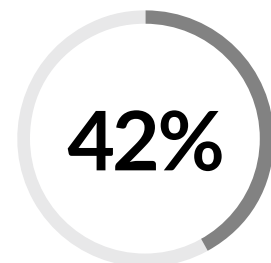
60% PROSUMERS



49% MAINSTREAM



Gen Z



Boomers



## IT TAKES A VILLAGE

There is also broad support for a “village” approach to mental healthcare, with a majority of Prosumers globally thinking that help should come not just from medical professionals but also from governments, employers, friends, and family. This speaks to support for a more holistic approach than simply popping a pill (or five).

### Who should provide support when it comes to mental health issues?

#### Medical professionals: psychiatrists and doctors



#### The state and social security systems



#### Other professionals such as psychologists or life coaches



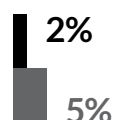
#### Friends and relatives



#### Employers



#### None of these



■ PROSUMERS  
■ MAINSTREAM

And yet, despite this broad support for medical solutions, many people hold “Big Pharma” responsible for the increasing number of people who have become addicted to treatment medications. We see, for instance, that half of Prosumers blame pharma companies for the widespread addiction to antidepressants. It’s a complicated situation with no easy answers regarding how to ensure that effective treatments are available to those who need them without putting patients at undue risk.

### Big pharma companies are responsible for the increasing number of depressed people who are addicted to antidepressants

(% agreeing strongly/somewhat)

**50%** PROSUMERS



**48%** MAINSTREAM





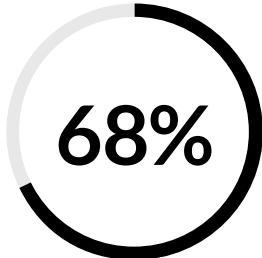
### A CHANGE OF LIFESTYLE

As pharmacological solutions increasingly are seen as part of the problem, a large majority of Prosumers (71%) are convinced that efforts to address mental health should start not with prescription medications but with human willpower. With so many young people now on psychiatric drugs for everything from depression to ADHD, it's worth noting that 68% of Gen Zs agree with this sentiment compared with just 52% of boomers.

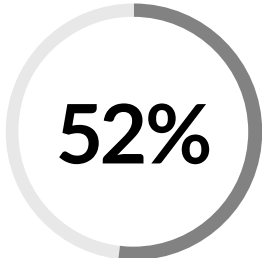
Addressing mental health issues starts with willpower, not drugs (% agreeing strongly/somewhat)



**62% MAINSTREAM**



Gen Z



Boomers

Nearly 9 in 10 Prosumers think maintaining a healthy lifestyle—including regular exercise—is the best way to avert mental health disorders. Agreement is even higher in several markets, including China (97%) and India (96%). Half of Prosumers claim to engage in sports or other forms of exercise as a coping mechanism when they feel anxious or depressed. Even higher percentages treat their mental health issues by spending time in nature. This doubtless is contributing to the recent spikes in **forest bathing**, **birding**, and other outdoor activities.

**Having a healthy lifestyle (eating well, doing sports / exercising, taking care of one’s body) is the best way to avoid mental health issues**

(% agreeing strongly/somewhat)

**87%** PROSUMERS



**75%** MAINSTREAM

**When you feel anxious or depressed, what do you do to feel better?**

**Go out into nature**



**Engage in sports/exercise**



■ PROSUMERS ■ MAINSTREAM



Going to the gym and spending time in the great outdoors have **proven mental health benefits**, but our study found that most people think curtailing this pandemic requires structural change. Nearly 3 in 4 Prosumers (71%) believe good mental health requires a slower pace of life.

**To have good mental health, we need to adopt a slower pace of life** (% agreeing strongly/somewhat)

**71%** PROSUMERS



**64%** MAINSTREAM





# Mental Health and Brands

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Consumer-facing brands have a dual role in addressing this silent pandemic: as manufacturers, retailers, or service providers and as employers. The past decade has seen a proliferation of **corporate wellness offerings**, and that intensified during the first two years of COVID-19. Employers increasingly recognize that workers' mental well-being is a critical driver of **engagement and productivity**. Many employers also appreciate that their wellness offerings—including flexible schedules—can give them an edge in attracting and retaining top talent.

As shown above, 37% of Prosumers want to see their employers offer mental health support, suggesting that such offerings not only have legitimacy but are increasingly an expected part of benefits packages. In several countries—Australia, Brazil, Canada, Colombia, Côte D'Ivoire, and South Africa—agreement on this statement exceeded 50%.



## ALL BRANDS HAVE CREDIBILITY IN THIS SPACE...

It makes sense that most people believe pharmaceutical brands have the credibility to talk to consumers about mental health issues (though New Zealand and the U.S. remain the only countries where drugmakers can market their prescription medications directly to consumers). “Permission” to engage on this topic extends much farther, however, with sizeable proportions of Prosumers also stating that brands in industries ranging from beauty and wellness to alcohol and fashion have a right to engage in this space. This comes back to the “village” approach to well-being. Brands play an outsized role in people’s lives, and—just as we saw with [consumer messaging](#) at the start of COVID-19—they’re expected to find ways to help in all sorts of crises.

## In your opinion, which types of brands can talk about mental health issues?

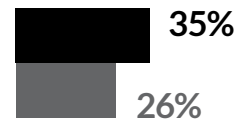
### Pharma companies



### Food brands



### Hospitality brands



### Beauty and wellness brands



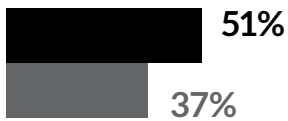
### Alcohol brands



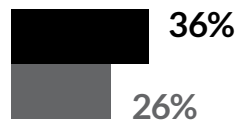
■ PROSUMERS

■ MAINSTREAM

### Sports brands



### Fashion brands



In 2019, Burger King partnered with Mental Health America on a campaign that played off their “have it your way” slogan. The [#FeelYourWay](#) initiative stressed that it’s OK not to feel happy all the time. For one month, restaurants in select cities featured meals for various moods: a Blue Meal, Yaaas Meal, Pissed Meal, Salty Meal, and a DGAF Meal. The implied slam on rival McDonald’s “Happy Meals” did not go unnoticed.



In 2022, Heineken released a tongue-in-cheek campaign to promote life-work balance. When customers used a specially created Bluetooth-connected bottle opener (“[The Closer](#)”) to crack open a beer, it automatically put their laptop computer to sleep.



Nike is among the employers that have gotten serious about employee well-being. In 2021, the company instituted an annual “[Well-Being Week](#),” when global offices are closed to allow workers to “relax and recharge.” Having everyone off work simultaneously makes it more likely that people’s time off won’t be affected by emails, calls, and other work-related interruptions.



**...BUT BEAUTY AND WELLNESS BRANDS ARE AHEAD OF THE CURVE**

Scientific research has **confirmed** a clear link between physical and mental health. Among other connections, feeling physically fit can lift a person’s mood and increase their sense of confidence and well-being. Beyond that, our study shows that the act of self-care—and specifically, indulging in beauty and skincare treatments—can lift people’s spirits. Interestingly, significant segments of our sample also are convinced

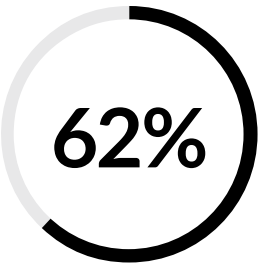
that people who consider themselves attractive are less apt to suffer from declines in mental health. The question, of course, is whether physical beauty protects against mental health issues or whether being in a “good place” mentally contributes to one’s sense of attractiveness. In either case, the door is open to wellness-centered content from beauty brands.

**Taking care of myself with beauty and skincare brands helps me feel better mentally**

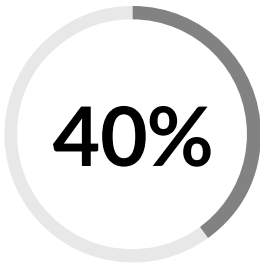
(% agreeing strongly/somewhat)



**54%** MAINSTREAM



Gen Z



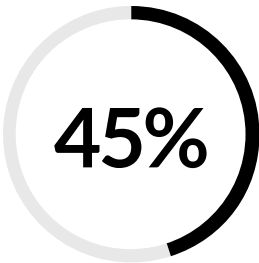
Boomers

**People who find themselves attractive have fewer mental health issues**

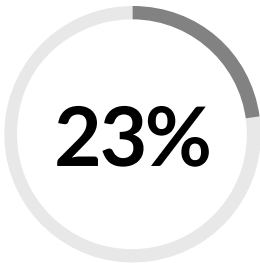
(% agreeing strongly/somewhat)



**38%** MAINSTREAM



Gen Z



Boomers

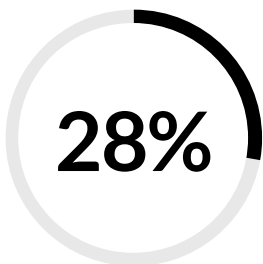


**Younger generations should be educated about mental health by: Brands (sponsored content)**

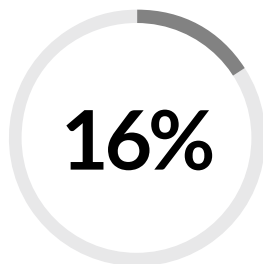
**36%** PROSUMERS



**25%** MAINSTREAM



**Gen Z**



**Boomers**

Maybelline New York is one of the brands operating in this space. In 2020, it pledged \$10 million to mental health organizations as part of its **Brave Together** campaign, a long-term program to support sufferers of anxiety and depression worldwide. Working alongside mental health experts, the brand created tools to

destigmatize the topic and help sufferers identify their issues and locate appropriate care. One sponsored initiative is Maybelline Brave Talk, a program offering 90-minute training sessions to college students looking to support their peers during mental health crises.

## **A FINE LINE BETWEEN ADVOCACY AND EXPLOITATION**

Efforts to support mental health and well-being must be authentic and sensitive to accusations of brandwashing. Around half of Prosumers consider it inappropriate for brands to use the topic of mental health to increase sales. This attitude is especially prevalent in France, where 63% of Prosumers agreed with the statement. As with any issue-oriented focus—be it LGBTQ+ rights, sustainability, or something else—initiatives must be intimately tied to brand values and actions.

**It is inappropriate for a brand to use the topic of mental health to sell products**

(% agreeing strongly/somewhat)

**47%** PROSUMERS



**52%** MAINSTREAM





# IN A NUTSHELL

COVID-19 has altered our relationship with health, making mental health both a social duty and a medical norm.

**1.** Mental health issues are a symptom of a broader disease infecting modern society. Everyday economic pressures, social alienation (including loneliness), and a disconnect from nature are all major sources of our collective distress.

**2.** Youth are especially impacted by this issue and find themselves trapped in a destructive cycle in which social media serves as both remedy and culprit.

**3.** Two methods are emerging to address this societal challenge: medicalization (aiming to find a pharmacological treatment for every emotional issue) and meaningful lifestyle change.

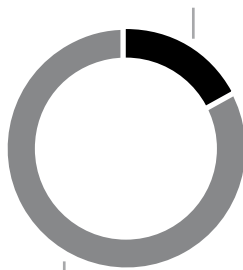
**4.** Brands now possess greater legitimacy to address mental health issues and should use the opportunity to educate, raise awareness, and contribute to solutions.

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## About the Study

In the first quarter of 2023, Havas partnered with Market Probe International to survey 12,929 people ages 18+ in 30 markets: Africa bundle (Ivory Coast, Kenya, Nigeria), Argentina, Australia, Austria, Brazil, Canada, Chile, China, Colombia, Czech Republic, Denmark, Finland, France, Germany, Greece, India, Ireland, Italy, Japan, Mexico, the Philippines, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Ukraine, the United Arab Emirates, the United Kingdom, and the United States.

The survey sample was made up of **17% leading-edge Prosumers**



and **83% mainstream consumers.**

## Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

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## Find out more about Prosumer Reports



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