Research from 11 nations around the globe
For the Summit, a bespoke primary research survey was conducted with people from 11 countries around the globe.

Research conducted online in local language between 1 and 24 August 2023

Countries selected to cover all the regions of the world as well as the countries which are facing now or faced war in the past.

These countries also collectively represent a diverse range of cultures, languages, and traditions, global perspectives, and encompass a range of socio-economic statuses.

People aged 13 year + included in research.

11,000 interviews conducted, 1000 in each country. A blended approach, giving equal weight to each nation (not weighted by population).

Research conducted by Alligator and analysis by BDRC, part of the BVA family.
What are our biggest challenges today?

We have many challenges across the globe, and mental health is recognised as a top five challenge for us collectively in the future.

Like other challenges in the world, people anticipate mental health is set to become more of a challenge in the longer term.

### Measurement of future challenges in the world (average score out of 10)

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Next 5 years</th>
<th>Next 20 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation/price rises</td>
<td>8.40</td>
<td>8.20</td>
</tr>
<tr>
<td>Climate change</td>
<td>7.57</td>
<td>7.99</td>
</tr>
<tr>
<td>Poverty</td>
<td>7.55</td>
<td>7.74</td>
</tr>
<tr>
<td>Mental health</td>
<td>7.46</td>
<td>7.73</td>
</tr>
<tr>
<td>Loss of job or reduced income</td>
<td>7.37</td>
<td>7.53</td>
</tr>
<tr>
<td>Physical health</td>
<td>7.26</td>
<td>7.60</td>
</tr>
<tr>
<td>War</td>
<td>7.03</td>
<td>7.27</td>
</tr>
<tr>
<td>Loneliness</td>
<td>6.62</td>
<td>7.10</td>
</tr>
<tr>
<td>Artificial intelligence</td>
<td>6.53</td>
<td>7.05</td>
</tr>
</tbody>
</table>
Younger people see mental health as a greater challenge than older people

The challenge of mental health over the next 5 years is higher up the new generation's agenda

<table>
<thead>
<tr>
<th>Rank of challenge</th>
<th>13 - 24</th>
<th>25 - 34</th>
<th>35 - 44</th>
<th>45 - 54</th>
<th>55 - 64</th>
<th>65 - 74</th>
<th>75 &gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
<td>Inflation/price rises</td>
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<tr>
<td>2</td>
<td>Mental health</td>
<td>Mental health</td>
<td>Poverty</td>
<td>Poverty</td>
<td>Poverty</td>
<td>Climate change</td>
<td>Climate change</td>
</tr>
<tr>
<td>3</td>
<td>Climate change</td>
<td>Poverty</td>
<td>Mental health</td>
<td>Climate change</td>
<td>Climate change</td>
<td>Physical health</td>
<td>Physical health</td>
</tr>
<tr>
<td>4</td>
<td>Poverty</td>
<td>Loss of job/reduced income</td>
<td>Loss of job/reduced income</td>
<td>Loss of job/reduced income</td>
<td>Loss of job/reduced income</td>
<td>Poverty</td>
<td>War</td>
</tr>
<tr>
<td>5</td>
<td>Loss of job/reduced income</td>
<td>Climate change</td>
<td>Climate change</td>
<td>Mental health</td>
<td>Physical health</td>
<td>War</td>
<td>Artificial intelligence</td>
</tr>
<tr>
<td>6</td>
<td>Physical health</td>
<td>Physical health</td>
<td>Physical health</td>
<td>Physical health</td>
<td>Mental health</td>
<td>Mental health</td>
<td>Mental health</td>
</tr>
<tr>
<td>7</td>
<td>War</td>
<td>War</td>
<td>War</td>
<td>War</td>
<td>War</td>
<td>Artificial intelligence</td>
<td>Poverty</td>
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<tr>
<td>8</td>
<td>Loneliness</td>
<td>Loneliness</td>
<td>Loneliness</td>
<td>Loneliness</td>
<td>Artificial intelligence</td>
<td>Loss of job/reduced income</td>
<td>Loneliness</td>
</tr>
<tr>
<td>9</td>
<td>Artificial intelligence</td>
<td>Artificial intelligence</td>
<td>Artificial intelligence</td>
<td>Loneliness</td>
<td>Loneliness</td>
<td>Loss of job/reduced income</td>
<td></td>
</tr>
</tbody>
</table>
So, what impacts our mental health?

Our mental health is impacted by both external and internal factors.

The worldwide economic challenges are putting most strain on us, as well as the fallout from the Covid-19 pandemic, war and politics.

There is a constant undercurrent of personal factors which impact our mental health: bereavement, relationship breakdown and our jobs.

- Financial worries: 41%
- Cost of living/ inflation: 35%
- Covid 19 Pandemic: 32%
- Bereavement: 24%
- Family relationship breakdown: 24%
- Workload/ working environment: 23%
- War: 19%
- Political decisions in own country: 19%
- Watching/ listening to news: 19%
- Injury or illness of friend/family: 13%
- Loss of job: 13%
- Spending time using social media: 11%
- Natural disaster: 9%
- Personal injury or accident: 7%
- Abuse: 6%
- Hereditary condition: 6%
- Political decisions in other countries: 6%
And we’re all different – some of us feel more impacted by these factors than others

<table>
<thead>
<tr>
<th>Factor</th>
<th>Argentina</th>
<th>Brazil</th>
<th>Croatia</th>
<th>Germany</th>
<th>Israel</th>
<th>Japan</th>
<th>Poland</th>
<th>Turkey</th>
<th>Ukraine</th>
<th>UK</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>War</td>
<td>3.3%</td>
<td>6.3%</td>
<td>11.0%</td>
<td>15.7%</td>
<td>16.8%</td>
<td>10.0%</td>
<td>19.5%</td>
<td>11.8%</td>
<td>88.5%</td>
<td>7.1%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Financial worries</td>
<td>40.4%</td>
<td>48.6%</td>
<td>42.3%</td>
<td>41.1%</td>
<td>36.1%</td>
<td>26.4%</td>
<td>31.6%</td>
<td>52.8%</td>
<td>43.1%</td>
<td>39.6%</td>
<td>39.3%</td>
</tr>
<tr>
<td>Cost of living/ inflation</td>
<td>40.9%</td>
<td>27.0%</td>
<td>42.3%</td>
<td>27.3%</td>
<td>21.8%</td>
<td>18.2%</td>
<td>32.1%</td>
<td>54.7%</td>
<td>32.5%</td>
<td>41.4%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Loss of job</td>
<td>13.7%</td>
<td>14.8%</td>
<td>9.9%</td>
<td>8.1%</td>
<td>8.5%</td>
<td>9.1%</td>
<td>10.6%</td>
<td>14.5%</td>
<td>16.5%</td>
<td>10.9%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Family relationship breakdown</td>
<td>27.5%</td>
<td>23.6%</td>
<td>18.8%</td>
<td>24.6%</td>
<td>29.4%</td>
<td>29.7%</td>
<td>21.0%</td>
<td>22.6%</td>
<td>9.7%</td>
<td>24.8%</td>
<td>31.8%</td>
</tr>
<tr>
<td>Bereavement</td>
<td>28.5%</td>
<td>23.0%</td>
<td>27.7%</td>
<td>24.4%</td>
<td>20.0%</td>
<td>11.7%</td>
<td>25.6%</td>
<td>18.5%</td>
<td>21.8%</td>
<td>24.9%</td>
<td>31.5%</td>
</tr>
<tr>
<td>Covid 19 Pandemic</td>
<td>35.3%</td>
<td>44.2%</td>
<td>30.6%</td>
<td>28.9%</td>
<td>30.0%</td>
<td>15.7%</td>
<td>27.7%</td>
<td>36.7%</td>
<td>35.0%</td>
<td>32.1%</td>
<td>28.2%</td>
</tr>
<tr>
<td>Watching/ listening to news</td>
<td>12.3%</td>
<td>19.0%</td>
<td>20.8%</td>
<td>14.2%</td>
<td>19.8%</td>
<td>13.8%</td>
<td>15.6%</td>
<td>26.0%</td>
<td>27.2%</td>
<td>16.9%</td>
<td>18.2%</td>
</tr>
<tr>
<td>Political decisions in own country</td>
<td>20.1%</td>
<td>16.3%</td>
<td>13.4%</td>
<td>13.9%</td>
<td>23.0%</td>
<td>5.7%</td>
<td>16.3%</td>
<td>36.0%</td>
<td>27.4%</td>
<td>12.2%</td>
<td>15.5%</td>
</tr>
<tr>
<td>Political decisions in other countries</td>
<td>3.3%</td>
<td>4.5%</td>
<td>4.1%</td>
<td>7.0%</td>
<td>5.7%</td>
<td>2.8%</td>
<td>5.2%</td>
<td>3.6%</td>
<td>14.3%</td>
<td>4.4%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Workload/ working environment</td>
<td>28.5%</td>
<td>20.0%</td>
<td>23.1%</td>
<td>24.8%</td>
<td>26.4%</td>
<td>29.5%</td>
<td>19.4%</td>
<td>21.2%</td>
<td>15.1%</td>
<td>27.2%</td>
<td>19.7%</td>
</tr>
</tbody>
</table>
Mental health diagnosis levels vary widely across the globe.

- 1 in 7 of us have a mental health illness diagnosis, but this level of diagnosis varies by country.
- 1 in 4 of us in Germany, UK and USA.
- 1 in 10 of us in South America, Croatia, Israel, Japan, Poland and Turkey.
- Approx. 1 in 50 of us in Ukraine.
...self help is prevalent: socialising, hobbies, media... with differences by nation

- Exercise: 39% (Argentina), 48% (Ukraine)
- Spending time with other people: 39% (Ukraine), 52% (Brazil)
- Spending time with nature: 36% (Ukraine), 47% (Croatia)
- Enjoying hobby or interest: 36% (Ukraine), 44% (Croatia)
- Travel and vacations: 30% (Israel), 39% (Ukraine)
- Spending time with animals: 28% (Poland), 32% (Brazil)
- Working: 22% (Brazil), 28% (Ukraine)
- Watching TV: 22% (Brazil), 32% (UK)
- Helping other people: 20% (USA), 25% (Ukraine)
- Spending time on social media: 17% (Ukraine), 26% (Ukraine)

Average across nations

Highest nation
Potentially the stigma around mental health prevents us from talking or taking action.

24% of us would feel uncomfortable speaking to a medical professional about our mental health.

Reasons why people might feel uncomfortable speaking to a medical professional about their mental health:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Lowest nation</th>
<th>Average across nations</th>
<th>Highest nation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Believe it would be embarrassing for someone</td>
<td>18% Japan</td>
<td>44%</td>
<td>61% Israel</td>
</tr>
<tr>
<td>It would affect their ability to get or stay in a job</td>
<td>33% Japan</td>
<td>39%</td>
<td>45% Croatia</td>
</tr>
<tr>
<td>It might affect their reputation at work</td>
<td>29% Japan</td>
<td>35%</td>
<td>39% Croatia</td>
</tr>
<tr>
<td>It would worry friends or family too much</td>
<td>20% Poland</td>
<td>36%</td>
<td>50% Japan</td>
</tr>
<tr>
<td>Believe it would affect their reputation in the community</td>
<td>16% Japan</td>
<td>30%</td>
<td>50% Turkey</td>
</tr>
<tr>
<td>It would be embarrassing for their friends or family</td>
<td>19% Ukraine &amp; UK</td>
<td>25%</td>
<td>30% Poland</td>
</tr>
</tbody>
</table>
Mental health is a top five global challenge

But we are optimistic about our own mental health, we expect it to improve more than get worse over the next three years

Economic conditions are one of the biggest factors impacting our mental health

1 in 7 of us have a mental health diagnosis, only 1 in 50 in Ukraine

The stigma of mental health can prevent us from talking or acting on our mental health
Panel 2: The impact of war on mental health
War not only affects those in conflict zones, repercussions are felt more widely

% of individuals who feel moderately or very affected by any world conflict

For the Russian-Ukraine war specifically, nearly 1 in 2 people feel affected by it on average

Over a third of people feel affected by conflicts of the past century
13 – 15-year-olds are most likely to feel affected by conflict

% of people very or moderately affected

13 – 15-year-olds are most likely to feel affected by conflict.
"Every time I hear about the war situation on the news, I become distrustful of people and feel sad.

– Japanese citizen

"I’m affected [by war] seeing innocent people losing their lives or being left with consequences for the rest of their lives.

– Brazilian citizen

"I feel very sorry for the Ukrainians and I am also afraid for the future of Poland.

– Polish citizen
War causes emotional burden

War has an emotional impact

86% agree those who have experienced war might experience mental ill health. This conviction is more pronounced (91%) among those who directly attribute their intense emotional experiences to the impact of war.

1 in 2 Ukrainians feel emotionally worse compared to three years ago.

57% of individuals unaffected by world conflicts have faced emotions that hinder their ability to cope with day-to-day activities.

This rises to 74% amongst those very affected by world conflicts (significantly more likely to feel scared, restless and unable to sleep).
But people and connections make a difference during times of war.

For those unaffected by world conflict, 33% rely on family for emotional support, this increases to 66% for those very affected by world conflicts.
But people are resilient and hopeful

% of people who agree war might not feel great sometimes but they'll get over it

We will get over this

People from nations where conflict has occurred are perhaps more ‘mental health resilient’ than people in nations untouched by recent conflict

% expecting their mental health to improve over the next 3 years

<table>
<thead>
<tr>
<th>Affected by World Conflict</th>
<th>Less Optimistic They Will Get Over It</th>
<th>More Optimistic They Will Get Over It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very</td>
<td>38%</td>
<td>66%</td>
</tr>
<tr>
<td>Moderately</td>
<td>35%</td>
<td>64%</td>
</tr>
<tr>
<td>Not</td>
<td>37%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Argentina, Brazil, Croatia, Germany, Israel, Japan, Poland, Turkey, Ukraine, UK, USA
The impact of war on mental health

- Living in a globally connected world, war affects everyone
- 13-15 years old feel the most affected by conflicts
- War alters perspectives on mental health
- Family support systems are important in times of conflict
- Humans are resilient in the face of hardship
Panel 3: How the new generation is changing the conversation on mental health
Despite this, 18-24 year-olds appear to be the most resilient and optimistic about the future, more than any other age group.

Young people aged 18-24 are currently reporting the lowest ratings for mental health.

Top 3 most common feelings amongst 18 – 24s are:

1. Stress 56%
2. Feeling down/sad 53%
3. Exhaustion 45%

Despite this, 18-24 year-olds appear to be the most resilient and optimistic about the future, more than any other age group.

58% have experienced improved mental health in last 3 years
70% expect mental health to improve in the next 3 years.
How can we best support young people’s mental health?

Self-care is currently having the most impact, specifically:

- Being with other people: 17%
- Exercising: 12%
- Taking part in a hobby: 10%
- Travelling / going on holiday: 10%

But 8% of young people are less likely to consider mental health professionals impactful (a slightly lower level than other age groups).
And this reticence by 13-24 year olds to engage with mental health services is further evidenced.

% agree they feel comfortable talking to a medical professional...

Young people tend to think, more than others, that talking about mental health is...

Embarrassing 44%
Would worry friends or family too much 38%
Would affect their ability to get or stay in a job 33%

How can we make it easier for younger people to access the services they potentially need?
Can we reduce the stigma around accessing mental health services for young people?
Is there a need to normalise mental health education and support?

Evidently, there is a shared desire for enhanced mental health education and resources.

While the need is consistent across age groups, more attention should perhaps be given to how young individuals want to and can access these resources.

Improvements in people’s attitudes towards mental health in your community:

- More mental health education: 60% (All), 55% (13-24 year-olds)
- More access to mental health services: 58% (All), 56% (13-24 year-olds)
- Openness about mental health struggles from ordinary people: 44% (All), 43% (13-24 year-olds)
- More conversations about mental health in social media/pop-culture: 37% (All), 41% (13-24 year-olds)
- Openness about mental health struggles from public figures: 33% (All), 35% (13-24 year-olds)
- Government initiatives/resources: 29% (All), 29% (13-24 year-olds)
Although the most prolific users of social media, young people are not blind to the harms of social media.

18-24 year-olds particularly acknowledge social media can affect people’s mental health negatively (79% vs average 65%)

13-24 year-olds on average spend more time on social media than other age groups
(3.6 hours vs. the average 3 hours)

13-24 year-olds are also the most reliant on social media
(69% vs. the average 52%)

There is a strong perception of the negative impact of social media on mental health
Yet, younger people also feel informed and connected by social media

13-24s, more than any other age group...

- see it as an essential way to keep up to date with the latest news and events 80%
- feel connected to a positive community 73%
- feel connected to a community that gives a sense of belonging 70%
- feel connected to an essential community at a time of crisis 65%

Social media is also seen as a tool of hope in times of war
Young people are changing the narrative on mental health

Adolescents are the most likely to perceive people with a mental health condition as...

- Strong
- Brave/courageous
- Inspiring

And are amongst the most tolerant of people with mental health issues within a society (% agree)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Live with Person</th>
<th>Work with Person</th>
<th>Live Nearby</th>
<th>Continue Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-24</td>
<td>73%</td>
<td>63%</td>
<td>60%</td>
<td>50%</td>
</tr>
<tr>
<td>25-34</td>
<td>77%</td>
<td>68%</td>
<td>62%</td>
<td>49%</td>
</tr>
<tr>
<td>35-44</td>
<td>74%</td>
<td>63%</td>
<td>58%</td>
<td>48%</td>
</tr>
<tr>
<td>45-54</td>
<td>73%</td>
<td>60%</td>
<td>57%</td>
<td>46%</td>
</tr>
<tr>
<td>55-64</td>
<td>75%</td>
<td>62%</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>65-74</td>
<td>71%</td>
<td>50%</td>
<td>50%</td>
<td>38%</td>
</tr>
<tr>
<td>75+</td>
<td>70%</td>
<td>54%</td>
<td>49%</td>
<td>38%</td>
</tr>
</tbody>
</table>

- Live with person
- Work with person
- Live nearby
- Continue relationship
How the new generation is changing the conversation on mental health

The new generation see mental health as a greater challenge in the next 5 years vs. other age groups

- Young people aged 18-24 self-report the lowest mental health ratings but are seemingly the most resilient and optimistic for the future

- Young people desire improved mental health education but feel more uncomfortable talking to a mental health professional than others

- Young people perceive those with mental health issues more positively than others

- Young people are more likely to be aware of both the positive and negative impacts of social media and yet are the most active and reliant users
The Third Summit of First Ladies and Gentlemen