



MENTAL / BEHAVIORAL HEALTH & WELLNESS

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Why?

CivicScience is a proud 2024 Gold recipient of Mental Health America's Bell Seal for Workplace Mental Health.

- The Bell Seal for Workplace Mental Health is an unparalleled workplace mental health certification recognizing employers striving to improve employee mental health and create a psychologically safe workplace for all.

At CivicScience, we believe everything affects everything...that includes mental health and emotional well-being.

- Mental health is about more than the mere presence or absence of a diagnosed mental health condition. It is a universal human experience deeply tied to demographic, psychographic, social, environmental, and cultural factors. As such, a person's emotional well-being plays a pivotal role in shaping not only their thoughts and feelings but also their desires and behaviors. There's simply no getting a complete sense of the modern American consumer without paying close attention to mental health and emotional well-being.
- Yet mental health is also a crucially important topic in its own right, apart from any implications for consumer behavior. That, fortunately, is one of the enduring lessons of the COVID-19 pandemic. So, for a research company like CivicScience, where it's a guiding principle that "everything affects everything," an effort to understand better American health and well-being is simply the right thing to do.



Executive Summary

Emotional Well-Being in US Adults

Over half of adults in the US currently live in a household in which there is a **mental health condition**. The importance of mental health extends far beyond those with official diagnoses, however. Everyone struggles with their emotional health from time to time, and such struggles **can have major impacts on how consumers think, behave, and spend**.

- CivicScience's Emotional Well-Being Index (WBI) supports existing research in showing that **emotional health is dependent on a variety of demographic, social, cultural, and environmental factors**. In fact, well-being is especially high among adults over 65, living in a high-income household, and financially secure.
- **Emotional well-being** is tied to a **wide variety of healthy and enriching behaviors**. Americans who **exhibit very high emotional well-being** are **far more likely** than average, for instance, to show signs of healthy social connections. They are also more likely to spend time in nature, exercise frequently, get sufficient sleep each night, "unplug" from digital devices, and prioritize spending on experiences (rather than material items).
- Americans with **very low emotional well-being**, on the other hand, are **less likely** than average adults to say they feel healthy. This group of consumers is also less likely to engage in a range of healthy behaviors (such as eating healthy or exercising) and more likely to cope with stress via distraction, eating, and shopping.

The Connection Between Well-being & Personality

- Emotional well-being is tied to a unique personality profile. Adults with **high emotional well-being** exhibit higher-than-average levels of **conscientiousness, extroversion, and agreeableness**, whereas **adults with low emotional well-being** exhibit higher-than-average **neuroticism / emotional instability**.

Public Attitudes Toward Mental Health

- Over the past few decades, there's been a considerable decline in the social stigma surrounding mental health issues. **Eighty seven percent of Americans today express at least some concern about mental health in the US**. Moreover, **83% believe that it's generally a good thing to discuss mental health openly**, and nearly two-thirds of Americans believe that physical and mental health are equally important.
- None of this is to suggest, however, that all Americans feel equally safe discussing their mental health challenges. In fact, **about 1 in 10 Americans say they have no one to talk to about their mental health**. This number increases to **1 in 3 among Americans with very low emotional well-being**.

Mental Health Treatments

- For many Americans, the past few years have been particularly challenging. Over the past year alone, use of **mental health treatments rose by 6pp**, with much of this increase attributable to Gen Z adults.
- Yet while use of mental health resources is on the rise, barriers to treatment persist. **The most common barrier to mental health treatment is cost**, with nearly a third of Americans reporting they delayed or opted not to get treatment recently because they "can't afford it".
- Persistent stigma is another barrier. **Twenty one percent of US Adults say they "don't feel comfortable"** with mental health treatment. In addition, **only 44% of Americans with a mental health condition** in the household feel **comfortable talking to a healthcare provider** about their mental health.

The Road Ahead

- Since the pandemic, issues related to mental health have been thrust into the spotlight. This is unlikely to change anytime soon, especially considering how intricately related emotional well-being is to all aspects of consumer behavior. Our forecasts show that **under "business-as-usual" conditions, the emotional well-being of the average American should remain mostly steady throughout the remainder of the year, with a slight increase expected around holiday season**.

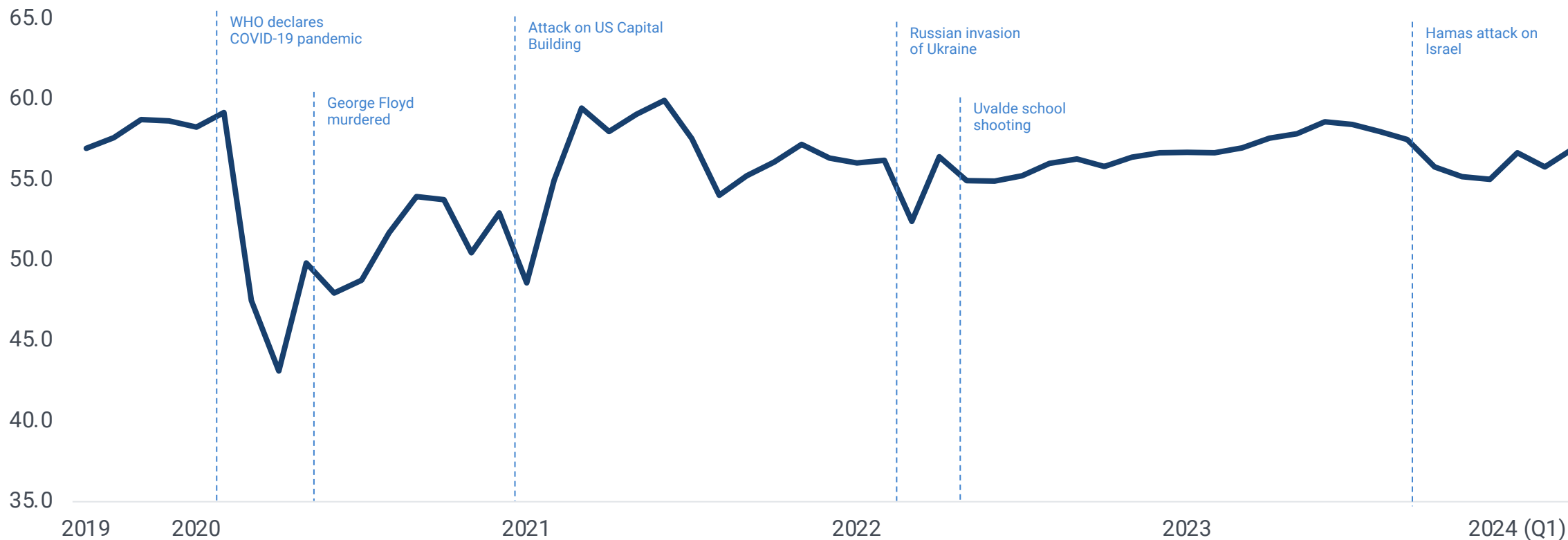


MENTAL HEALTH

CivicScience’s Emotional Well-Being Index provides a measure of the emotional health of consumers.

The WBI is shown to correlate with significant events associated with global unrest, with drops in emotional well-being following significant political, social, and cultural events.

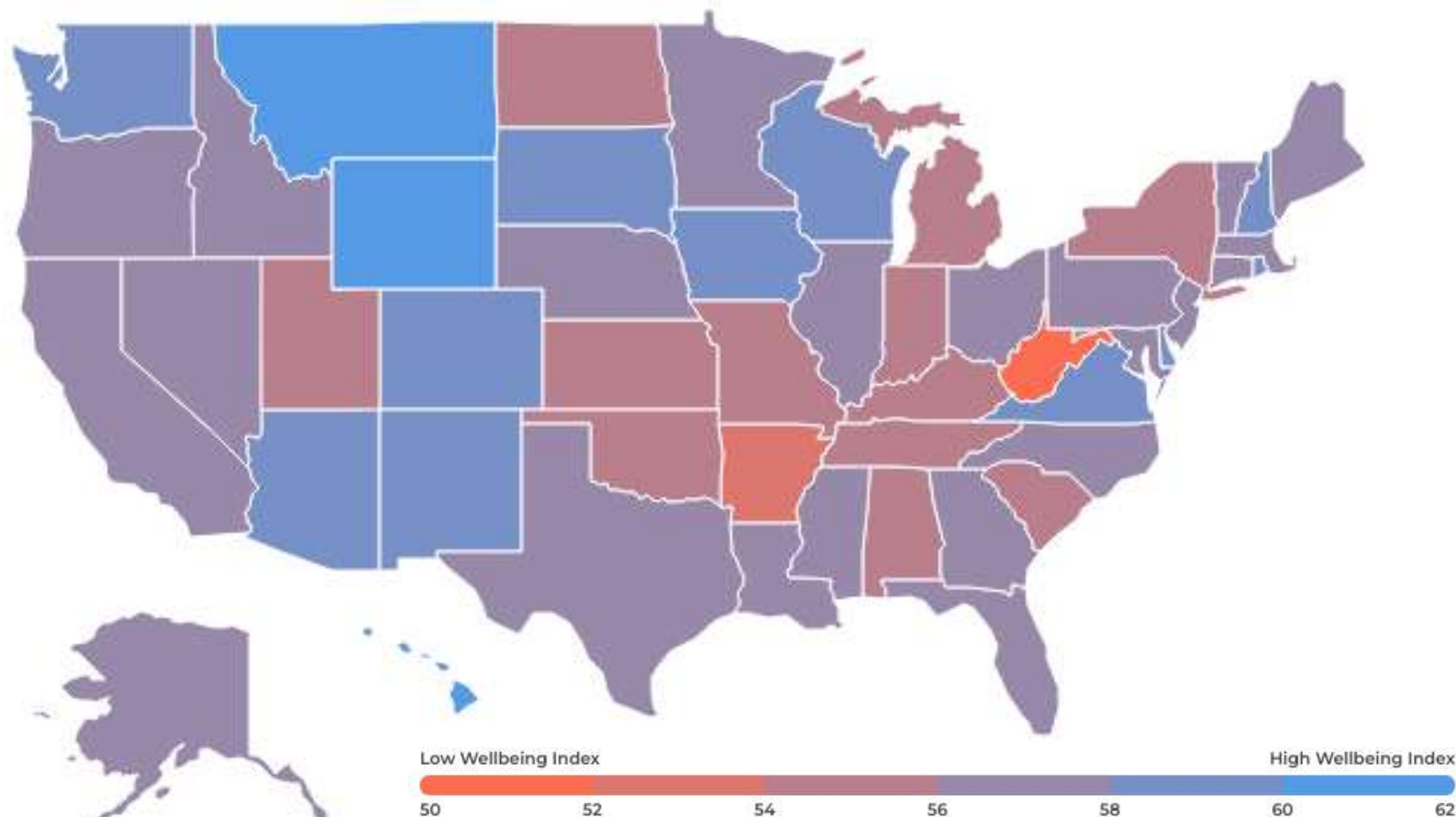
CivicScience’s Emotional Well-Being Index



CivicScience’s Emotional Well-Being Index is an estimate of the percentage of Americans who, in the past week, report feeling positive emotions (e.g., happiness and excitement) in the absence of overwhelming negative emotions (e.g., stress, sadness, fear, and worry).

Demographic, sociocultural, and environmental factors have a notable impact on well-being. Montana residents report the highest levels of well-being in the nation, and West Virginia residents report the lowest.

CivicScience’s Emotional Well-Being Index by State



Top 5 States with Highest Emotional Well-Being

Montana	60.8
Wyoming	60.1
Hawaii	59.9
Arizona	59.5
New Hampshire	59.1

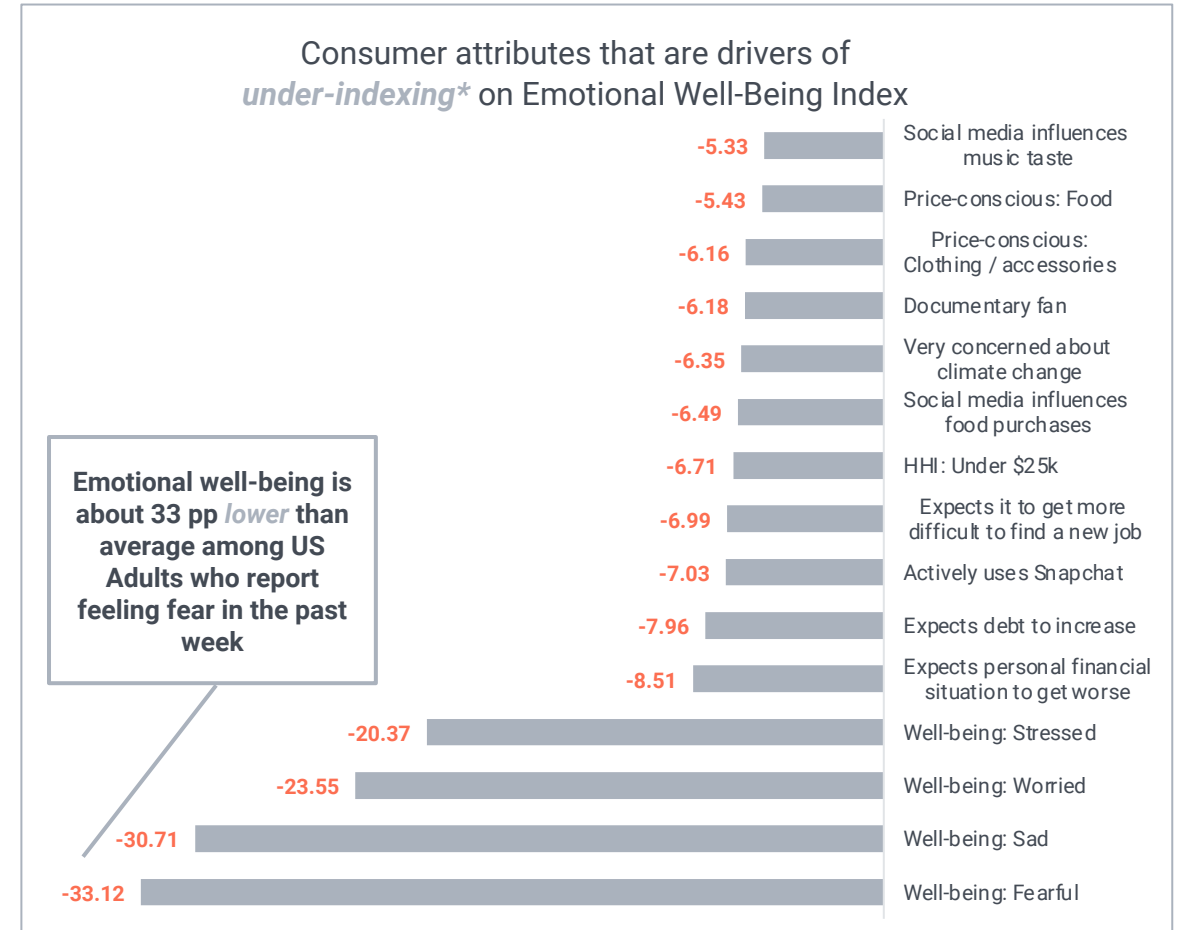
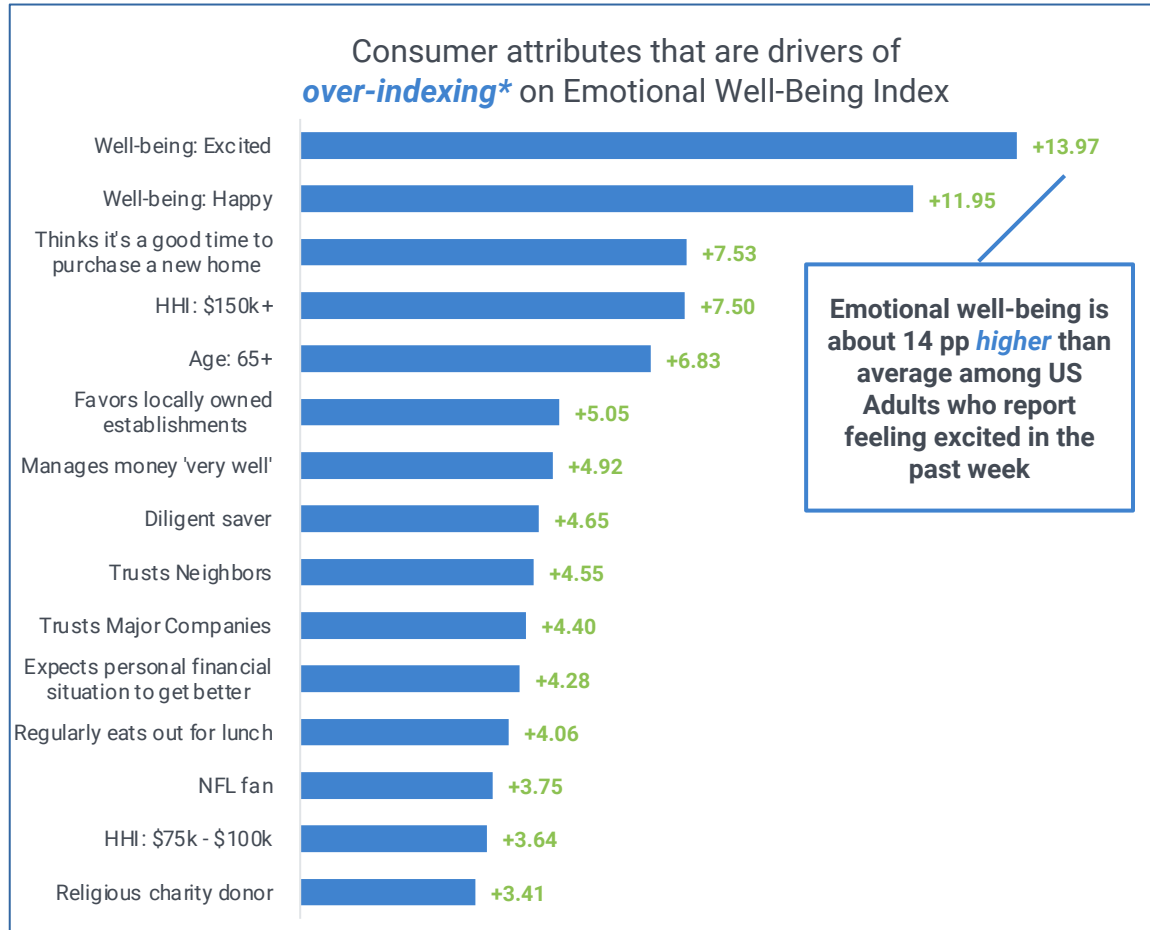
Top 5 States with Lowest Emotional Well-Being

West Virginia	52.3
Arkansas	53.3
North Dakota	53.9
Kentucky	54.1
Kansas	54.3

Some consumer attributes are also predictive of emotional well-being. Having an optimistic economic outlook, living in a high-income household, and being over 65 are all associated with higher-than-average scores on the WBI.

Feelings of excitement is the highest driver of over-indexing and feelings of fear are the highest driver or under-indexing.

Psychographic Drivers of Emotional Well-Being



* Indexing relative to US Adults

8% of US Adults report strong negative emotions, with the absence of positive emotions (Very Low EWB), and 17% report strong positive emotions, with the absence of negative emotions (Very High EWB).

Segment Definitions

Very Low Emotional Well-Being (EWB)

- “How strongly have you felt _____ over the past week or so?”
 - Happy > Not Very Much / Not at All
 - Excited > Not Very Much / Not at All
 - Fear > Very / Somewhat Strongly
 - Worried > Very / Somewhat Strongly
 - Stressed > Very / Somewhat Strongly
 - Sad > Very / Somewhat Strongly

Very High Emotional Well-Being (EWB)

- “How strongly have you felt _____ over the past week or so?”
 - Happy > Very / Somewhat Strongly
 - Excited > Very / Somewhat Strongly
 - Fear > Not Very Much / Not at All
 - Worried > Not Very Much / Not at All
 - Stressed > Not Very Much / Not at All
 - Sad > Not Very Much / Not at All

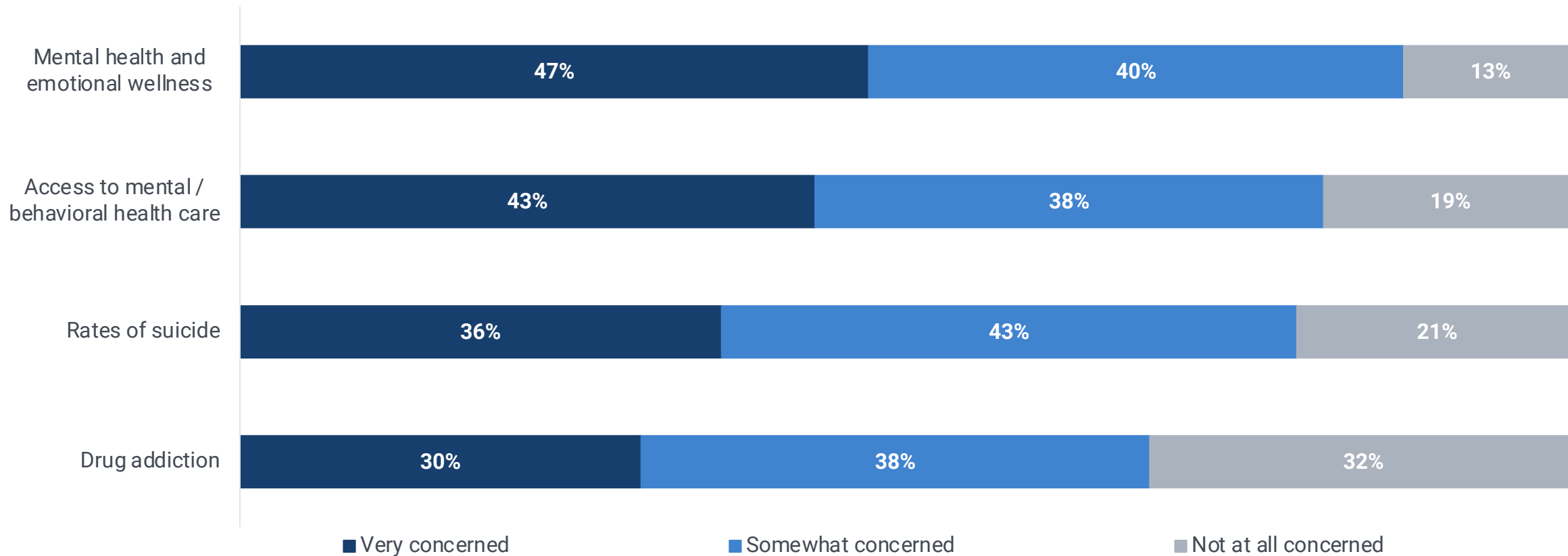
US Adults with **very low emotional well-being** are disproportionately: Millennials, lower household income and education, white, and LGBTQ+

US Adults with **very high emotional well-being** are disproportionately: Baby Boomers, higher household income and education, and not LGBTQ+

	Very Low EWB	Very High EWB
Gender		
Male	44%	47%
Female	56%	53%
Age		
Gen Z (18 - 24)	8%	8%
Millennial (25-44)	38%	27%
Gen X (45 - 54)	23%	17%
Baby Boomer (55+)	31%	49%
Household Income		
Under \$25,000	32%	14%
\$25,001-\$50,000	29%	19%
\$50,001-\$100,000	25%	32%
More than \$100,000	15%	35%
Education		
High School / GED or less	32%	22%
Some college, no degree	29%	24%
Bachelor's or Associate's Degree	31%	36%
Graduate or professional degree	8%	19%
Political Affiliation		
Democrat	29%	29%
Independent / Other	36%	31%
Republican	35%	39%
Race / Ethnicity		
White	84%	75%
Non-White	16%	25%
LGBTQ+ Affiliation		
Identify as LGBTQ+	12%	7%
Don't identify as LGBTQ+	88%	93%

Most Americans express at least some concern regarding mental health and related factors in the US, particularly the mental health of Americans and access to care.

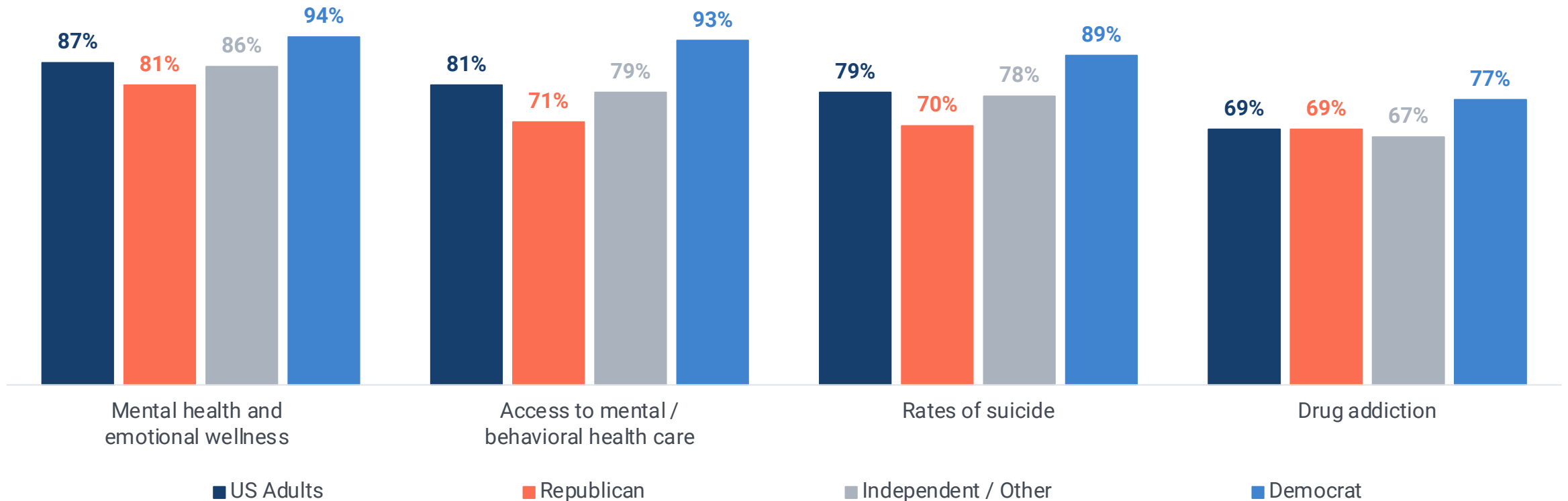
How concerned are you about _____ in the US?



With the 2024 election on the horizon, social issues in the US are a hot topic. Although there are slight differences between partisan groups, Americans of all political stripes agree that mental health is a primary concern.

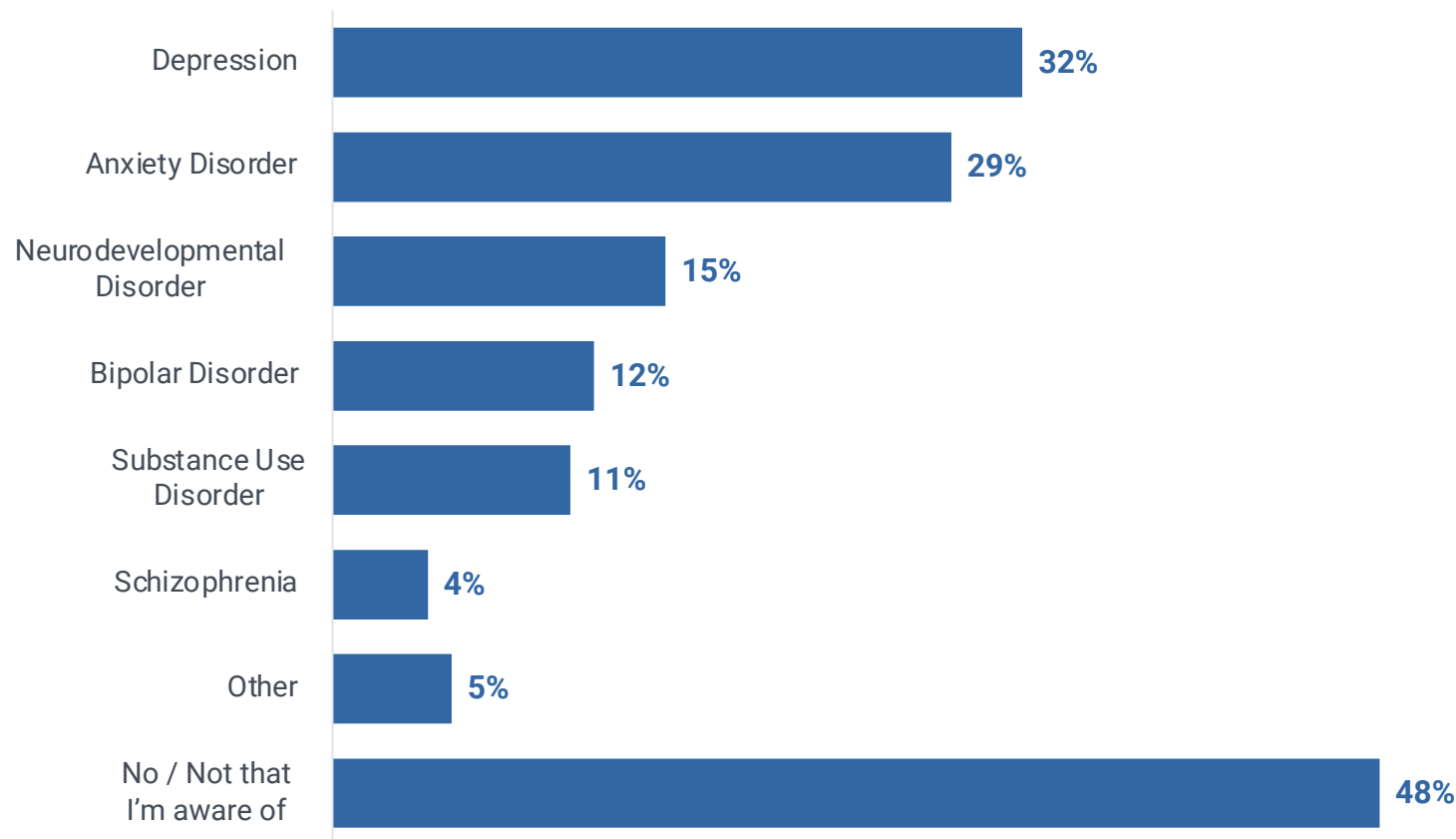
How concerned are you about _____ in the US? *compared with* Generally speaking, do you usually think of yourself as a Republican, a Democrat, or an Independent / Other?

Displaying Very/Somewhat Concerned



Over half of households in the US are managing one or more mental health conditions, with the depression the most common.

Are you or anyone in your household managing any of the following mental health conditions? Select all that apply.



Households managing depression, anxiety, and substance use conditions report notably lower well-being relative to the average US adult.

Regardless of diagnosis, every household managing mental health conditions over-indexed on feelings of fear (see page 7). Households reporting no mental health concerns under-indexed on all negative emotions.

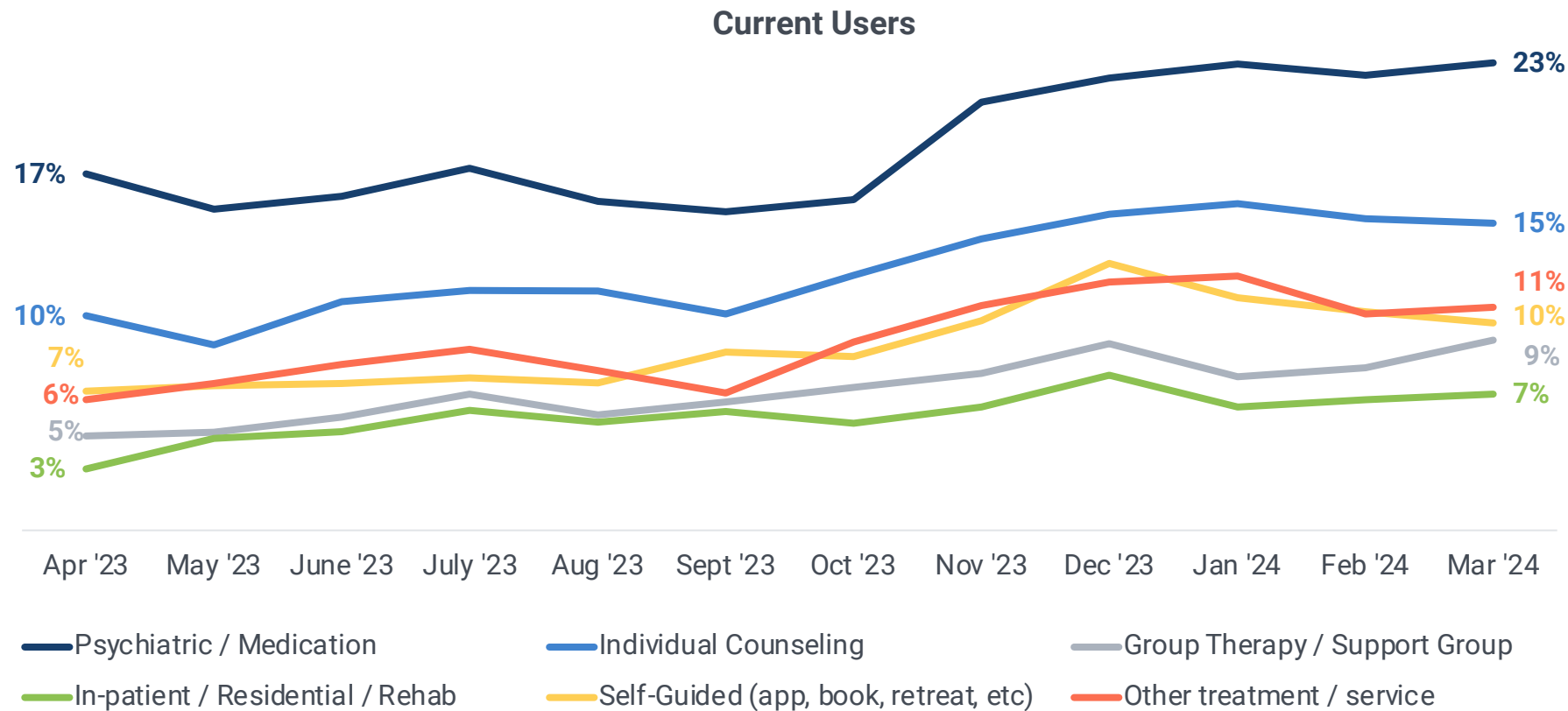
CivicScience’s Emotional Well-Being Index Components by Mental Health Condition

	US Adults	Depression	Anxiety Disorder	Neuro-developmental Disorder	Bipolar Disorder	Substance Use Disorder	Schizophrenia	Other	No / Not that I'm aware of
Wellbeing Index	56.7	43.3	44.8	47.4	47.0	44.1	46.1	49.2	66.3
Happy	66.1	56.2	59.5	62.5	62.4	58.0	61.3	63.4	70.1
Excited	49.1	42.9	46.4	48.8	51.1	47.8	51.9	48.7	49.5
Sad	38.9	57.5	54.8	51.5	54.5	59.3	58.0	52.9	24.4
Stressed	57.2	72.6	73.3	69.0	68.5	71.2	67.5	63.2	42.9
Worried	50.9	67.5	66.8	64.2	63.9	65.5	61.8	59.4	37.2
Fearful	28.4	42.0	41.9	42.2	44.7	45.2	49.3	41.2	17.3

Highlighting indicates over (blue) / under (grey) index compared to US Adults

Use of all mental health treatments have increased in the past year with medication and individual counseling remaining the most prevalent.

Have you or anyone in your household ever received any of the following mental health treatments / services?

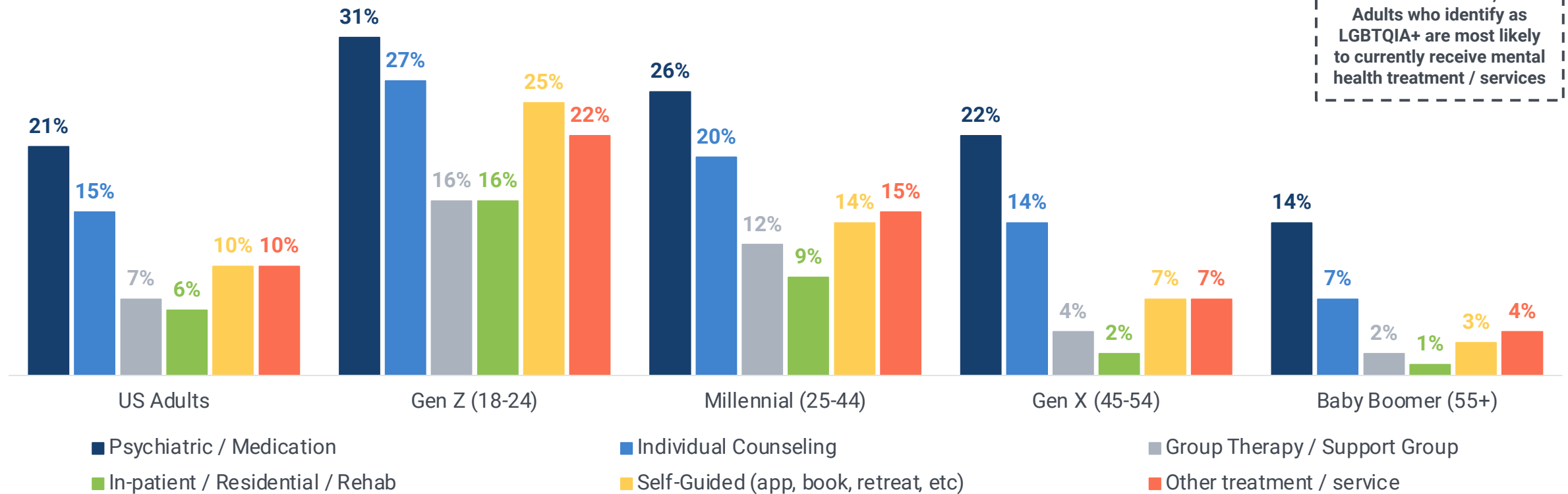


Change in Mental Health Treatment Usage in Past 12 Months

Psychiatric / Medication	+6pp
Individual Counseling	+5pp
Group Therapy / Support Group	+4pp
In-patient / Residential / Rehab	+4pp
Self-Guided (app, book, retreat, etc)	+3pp
Other treatment / service	+5pp

Psychiatric / medication is the most common form of mental health treatment across all age groups. Gen Z is more likely than other generations to utilize all types of mental health treatment.

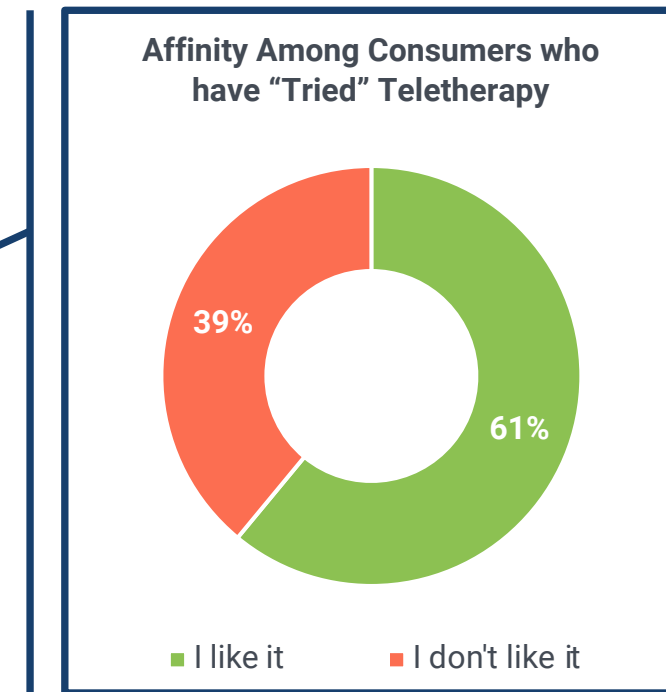
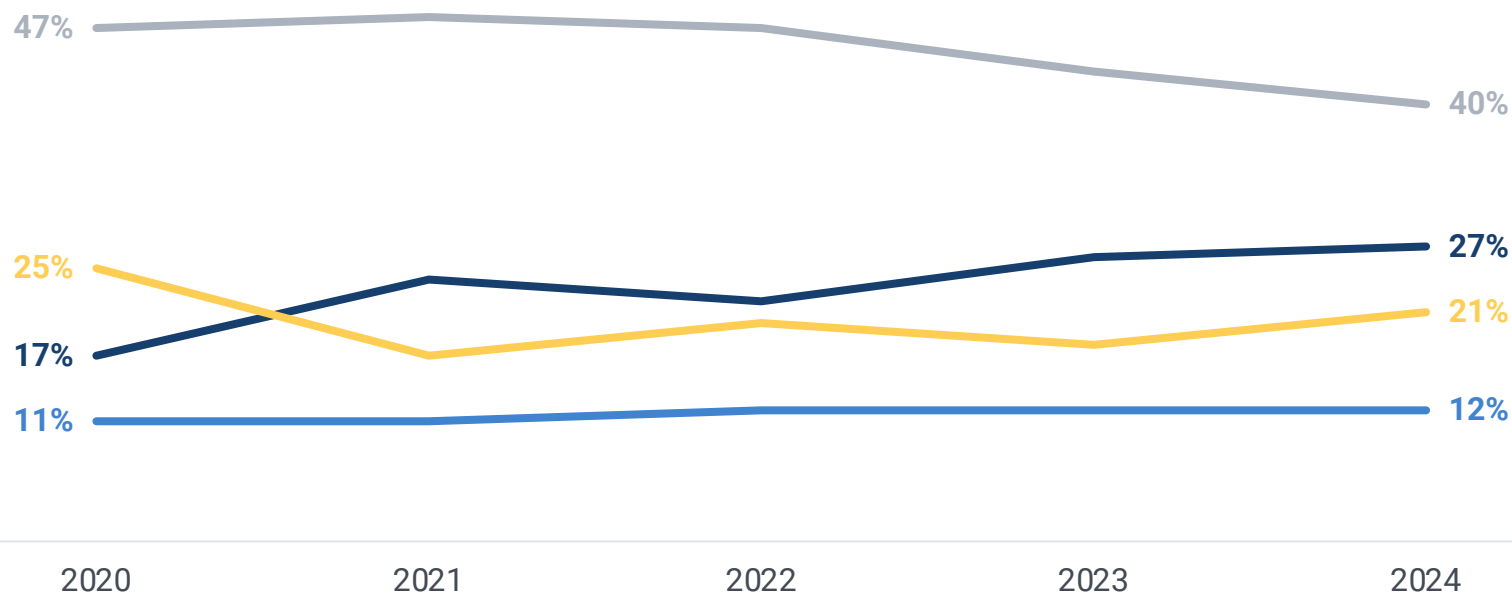
Have you or anyone in your household ever received any of the following mental health treatments / services? *compared with* To what broad age group do you belong?



ADDITIONAL INSIGHTS:
 Aside from Gen Z, US Adults who identify as LGBTQIA+ are most likely to currently receive mental health treatment / services

The use of teletherapy has increased by 10pp in the past five years, and most users like the experience.

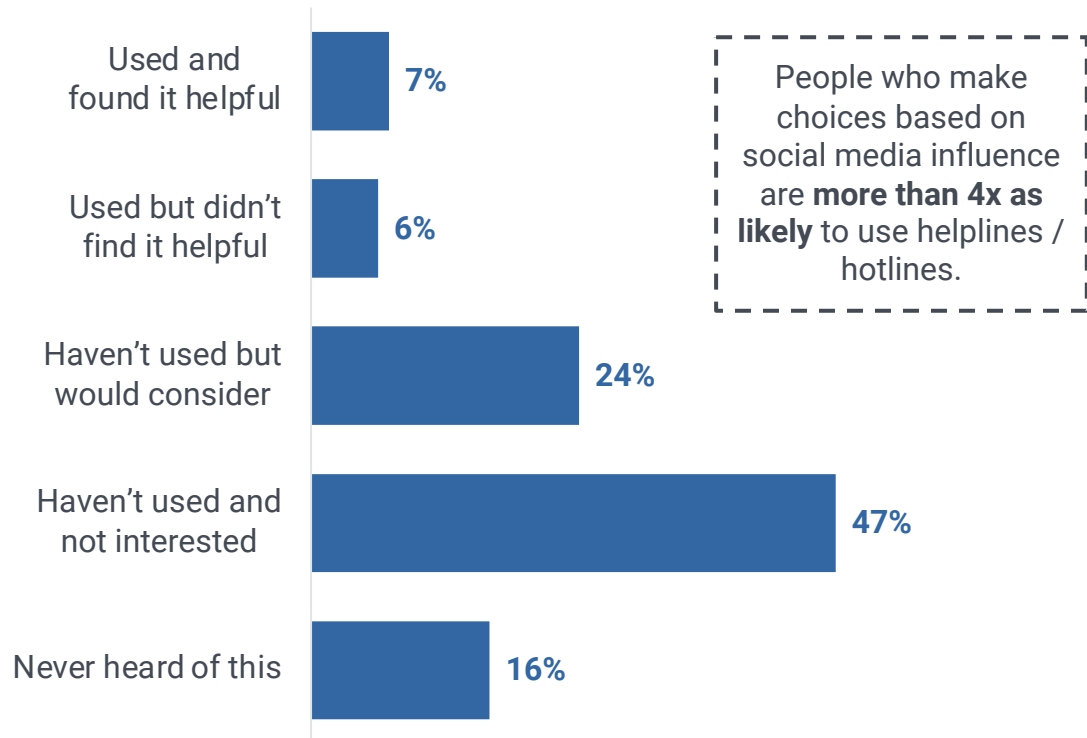
Which one of the following best describes your experience with teletherapy, where you can receive therapy or counseling virtually / remotely (such as via a videocall on your smartphone)?



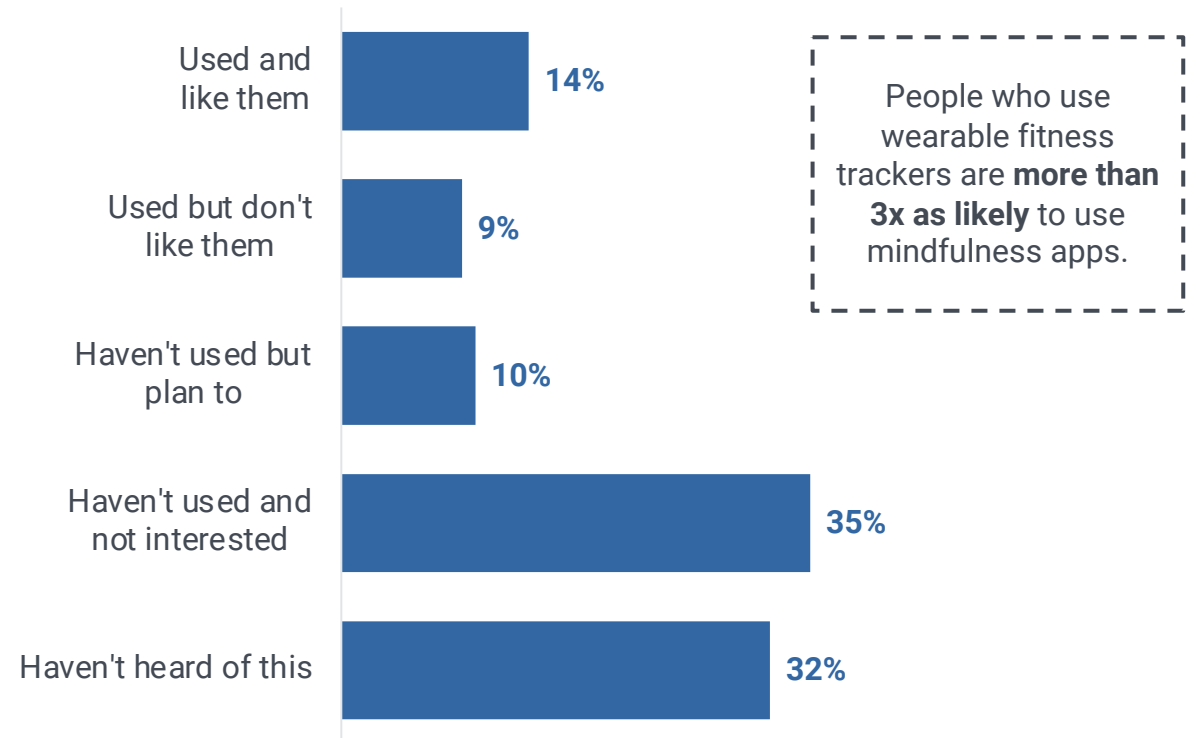
- I've tried this
- I haven't tried this, but I plan to
- I haven't tried this and I'm not interested
- I haven't heard of this

Aside from traditional mental health treatments, most Americans are also aware of other support resources, such as mental health helplines/hotlines (84%) and mindfulness/meditation apps (68%).

Which of the following best describes your experience with mental health helplines / hotlines (e.g. 988, Crisis Text Line, Gamblers Anonymous) in the past year?



Which of the following best describes your experience with mindfulness meditation apps (such as Headspace and Calm)?



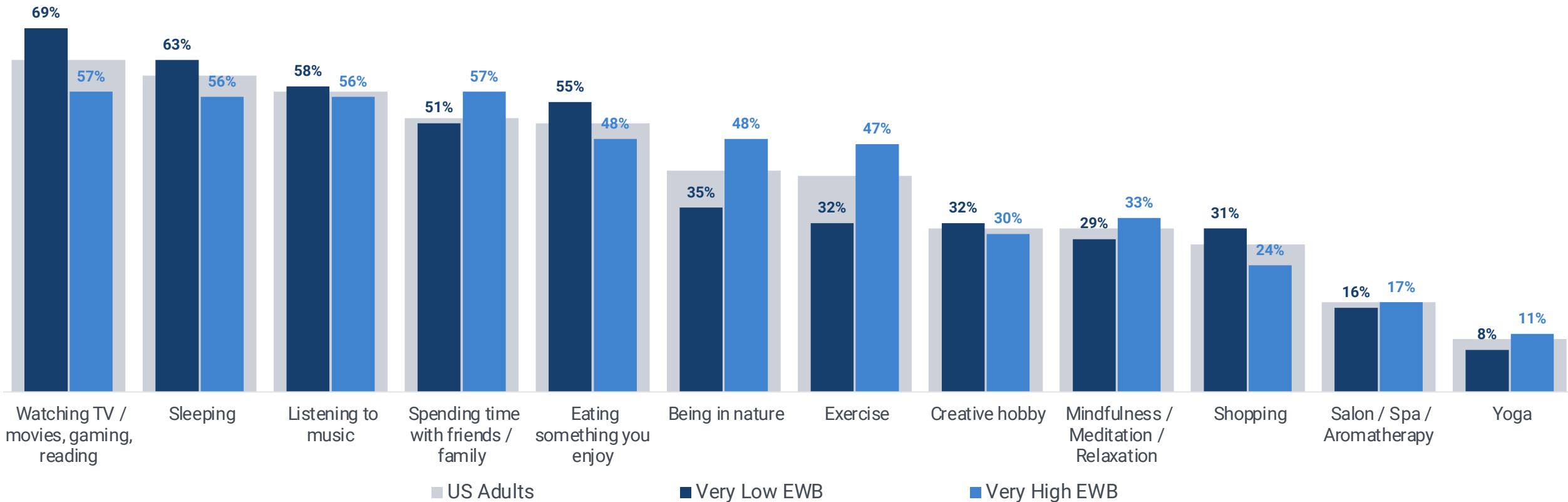
2,152 responses weighted by US Adults from April 15, 2024 to April 26, 2024

4,686 responses weighted by US Adults from April 15, 2024 to April 26, 2024

Distraction (TV, gaming, music) and sleep are the most common self-care methods among US Adults.

US Adults with very high well-being, meanwhile, are more likely than average to seek self-care by spending time with friends and family, spending time in nature, and exercising.

Which of the following do you use for self-care? Select all that apply.

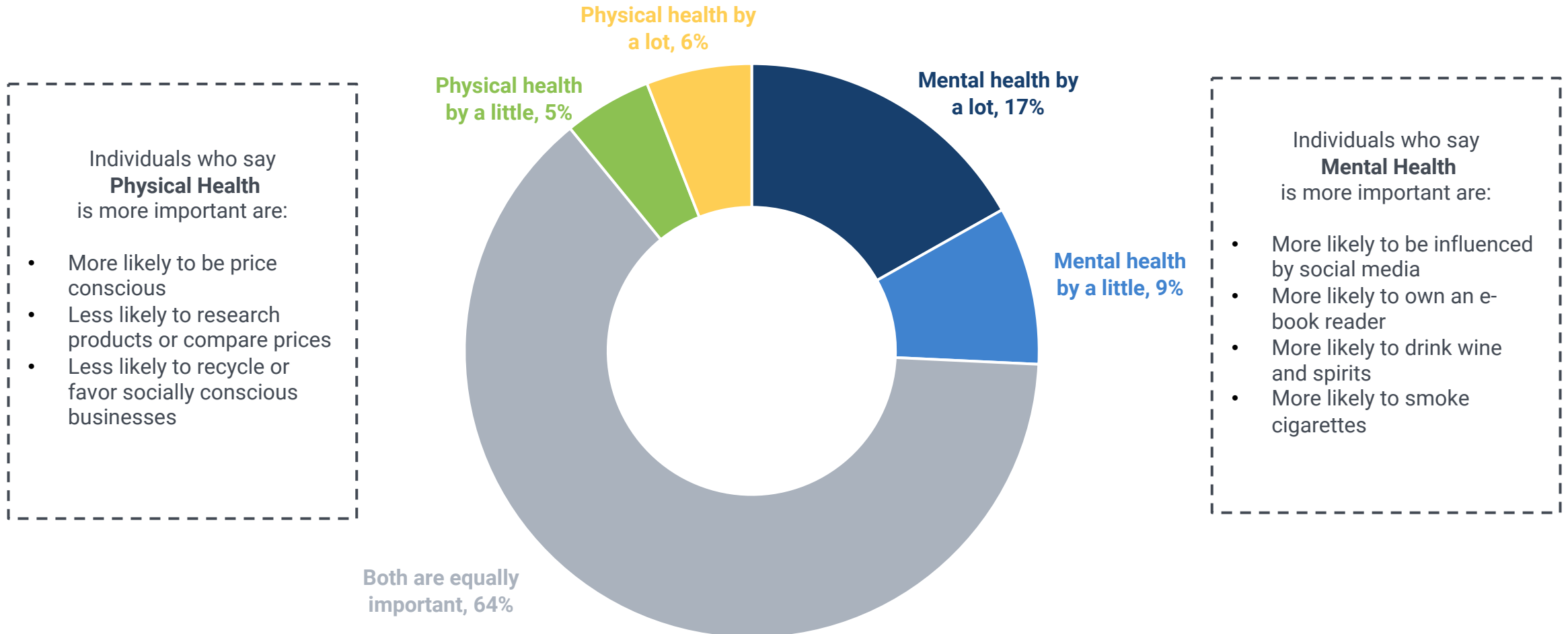




PHYSICAL HEALTH

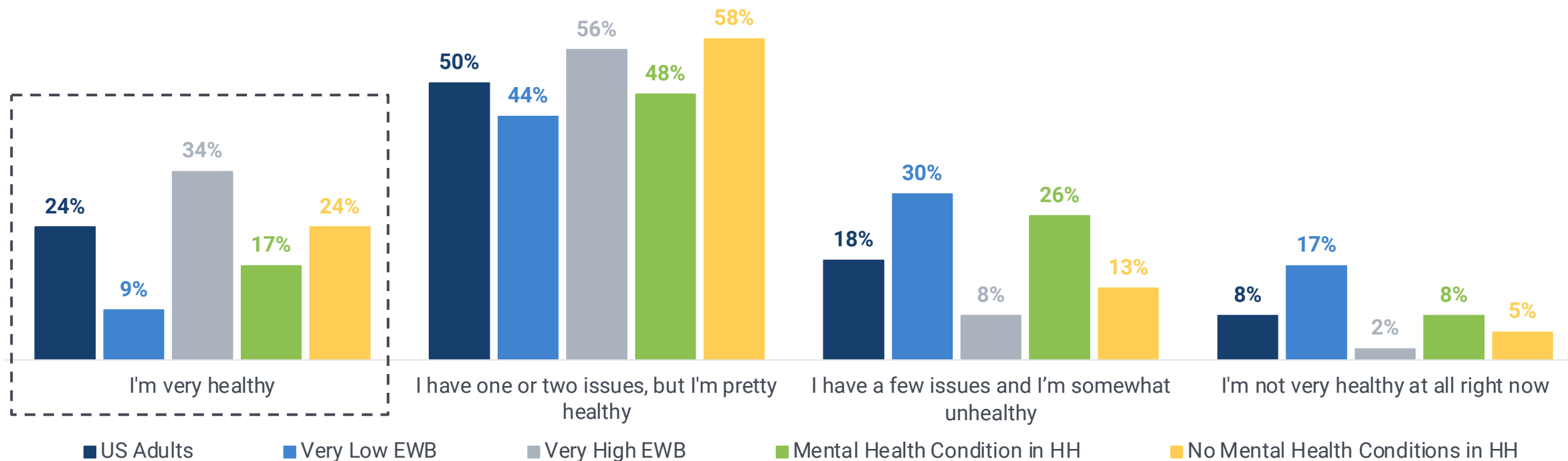
Most US Adults (64%) acknowledge that physical and mental health is equally important. Among those who prioritize one over the other, however, mental health wins out.

Which of the following do you, personally, think is more important: mental health or physical health?



High emotional well-being is strongly indicative of good physical health, even beyond the presence or absence of mental health conditions.

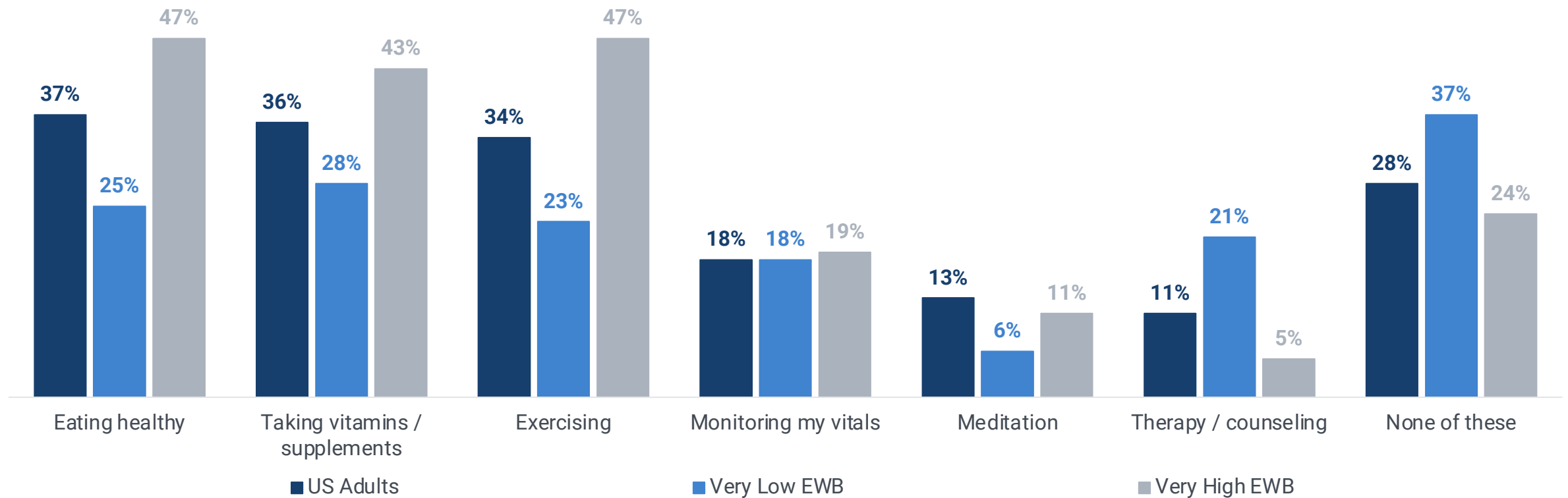
How would you rate your current overall health?



High emotional well-being is associated with various healthy habits, including healthy eating, the use of vitamins and supplements, and exercise.

Individuals with low emotional well-being are less likely than average to engage in most healthy habits.

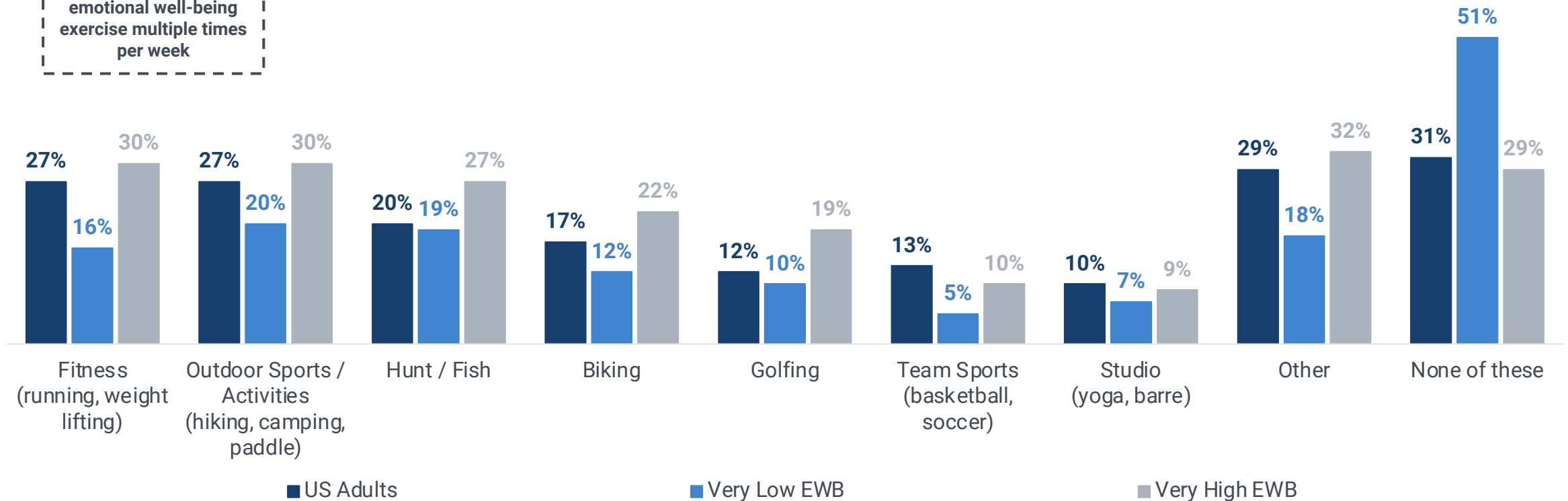
In the last year or so, which of the following have you been doing more than usual? (Please select all that apply.)



In line with other research, participation in frequent general fitness and outdoor activities is also associated with higher-than-average levels of emotional well-being.

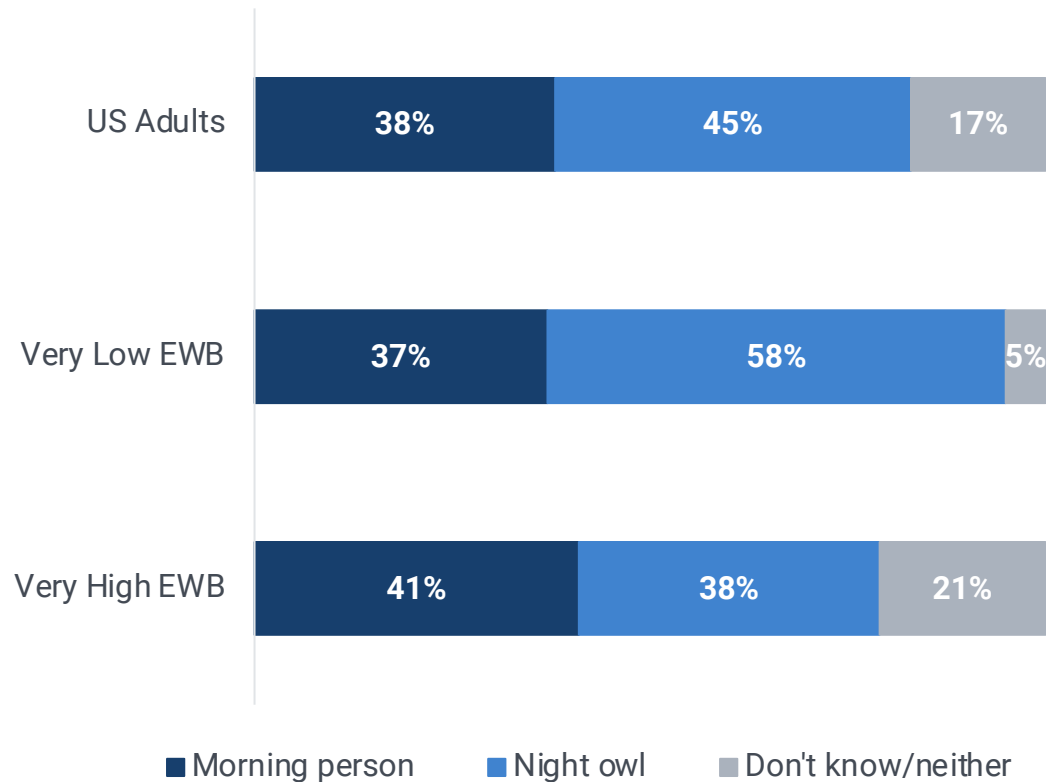
Which of the following activities do you participate in? (Please select all that apply.)

ADDITIONAL INSIGHTS:
52% of adults with high emotional well-being exercise multiple times per week

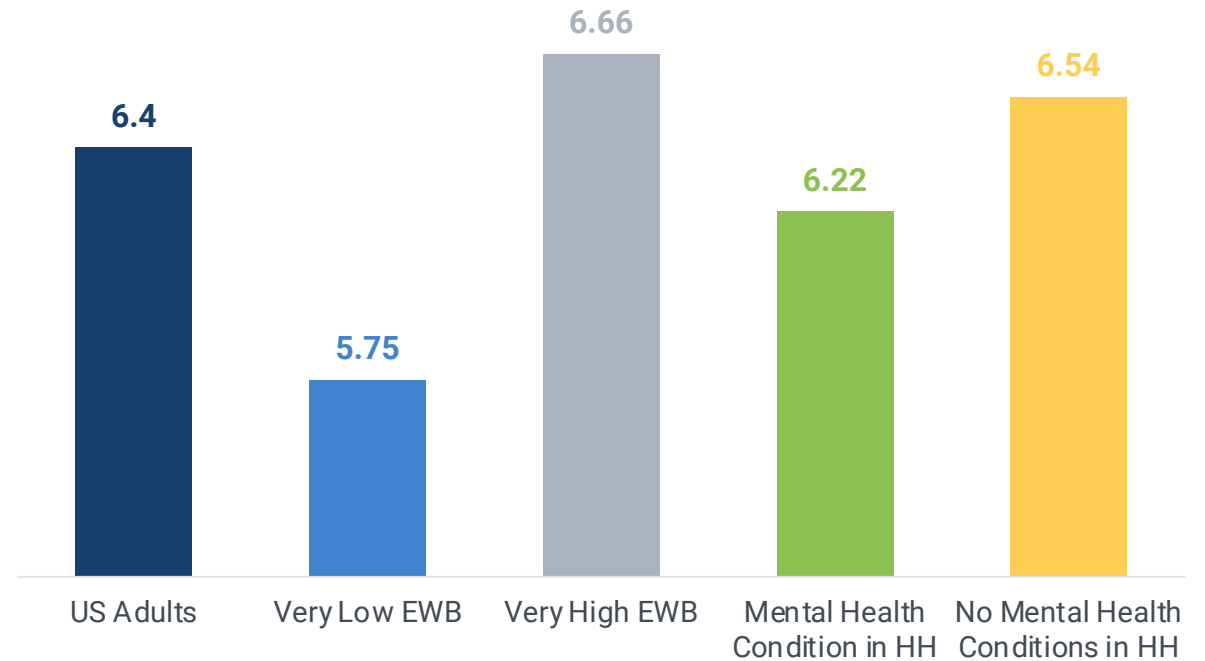


Sleep is an increasingly studied factor related to well-being. Adults who have very low emotional well-being are more likely than average adults to describe themselves as a “night owl” and to say they generally get less than 6 hours of sleep per night.

Are you more of a night owl or morning person?

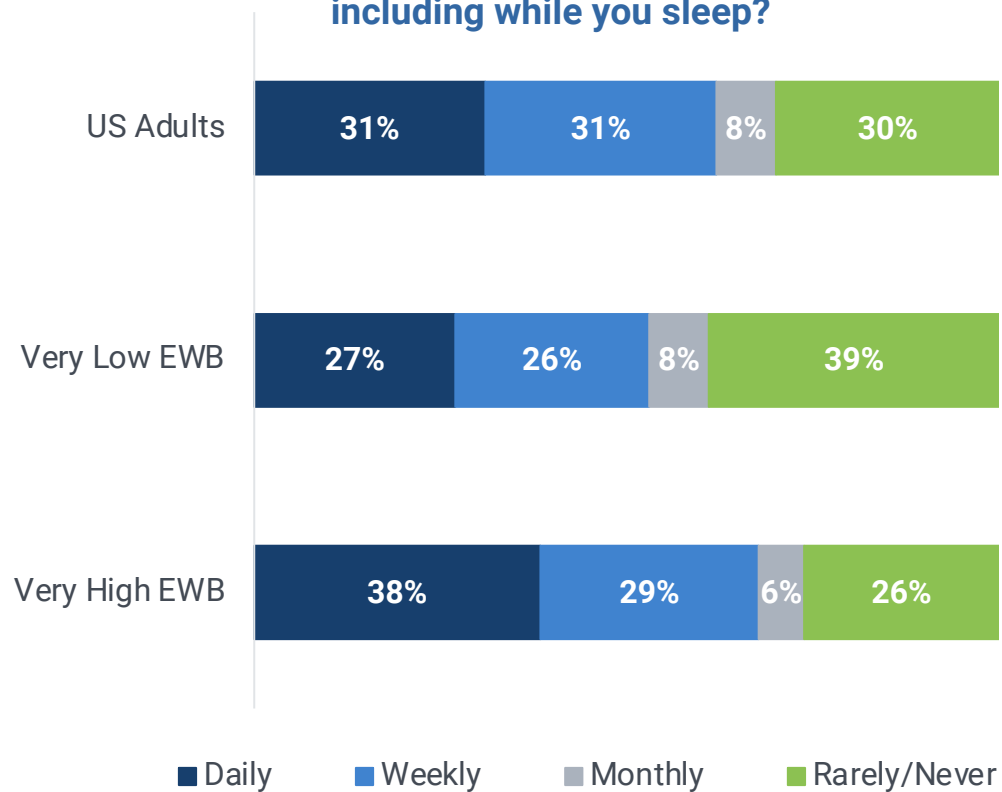


On average, how many hours of sleep do you get each night? (Displaying Average Hours)

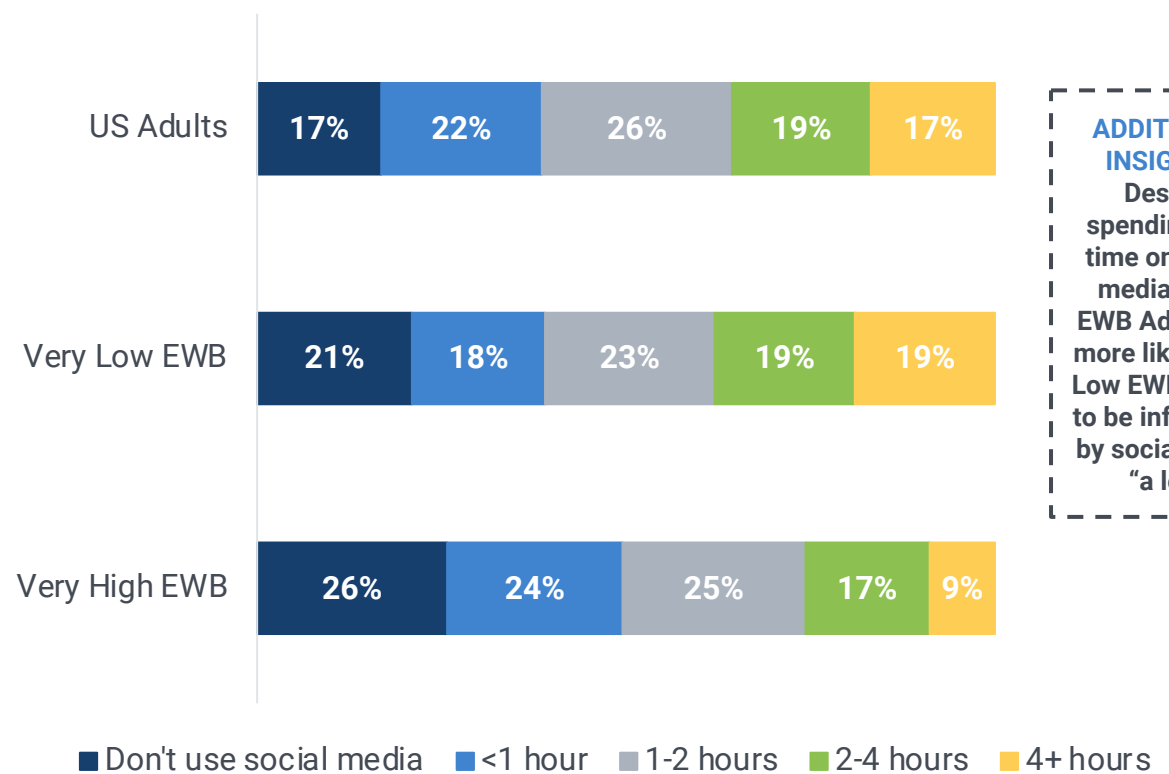


Individuals with high emotional well-being are more willing to “unplug” from tech devices daily and limit time on social media.

How often do you deliberately “un-plug” for at least 2 hours from your personal tech devices, not including while you sleep?



On an average day, how much time do you spend in total on social media sites and apps?



ADDITIONAL INSIGHTS:
Despite spending less time on social media, High EWB Adults are more likely than Low EWB Adults to be influenced by social media “a lot”.

407+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

418+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024



SOCIAL WELL-BEING

Personality traits, such as the “Big Five,” are commonly related to emotion, with high neuroticism being associated with negative emotions and high extroversion and agreeableness related to positive emotions.

Individuals with high emotional well-being report the highest conscientiousness, agreeableness, and extroversion, while those with low emotional well-being report the highest neuroticism.

The “Big Five” Personality Traits are associated with being...

Openness to Experience

- Imaginative, innovative, creative, curious

Conscientiousness

- Hard-working, dependable, well-organized, planners

Extroversion

- Sociable, talkative, active, affectionate, optimistic

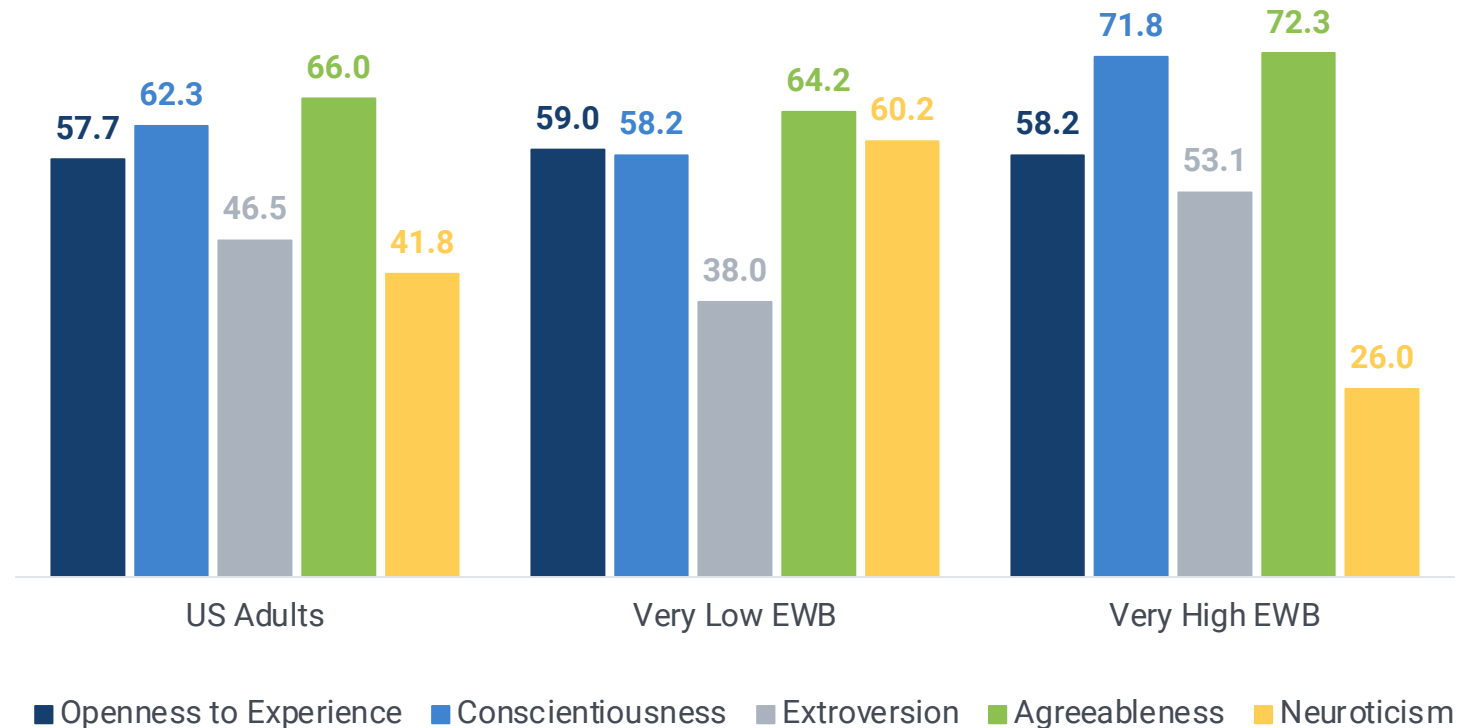
Agreeableness

- Collaborative, friendly, good-natured, generous

Neuroticism

- Worried, temperamental, self-conscious, emotional

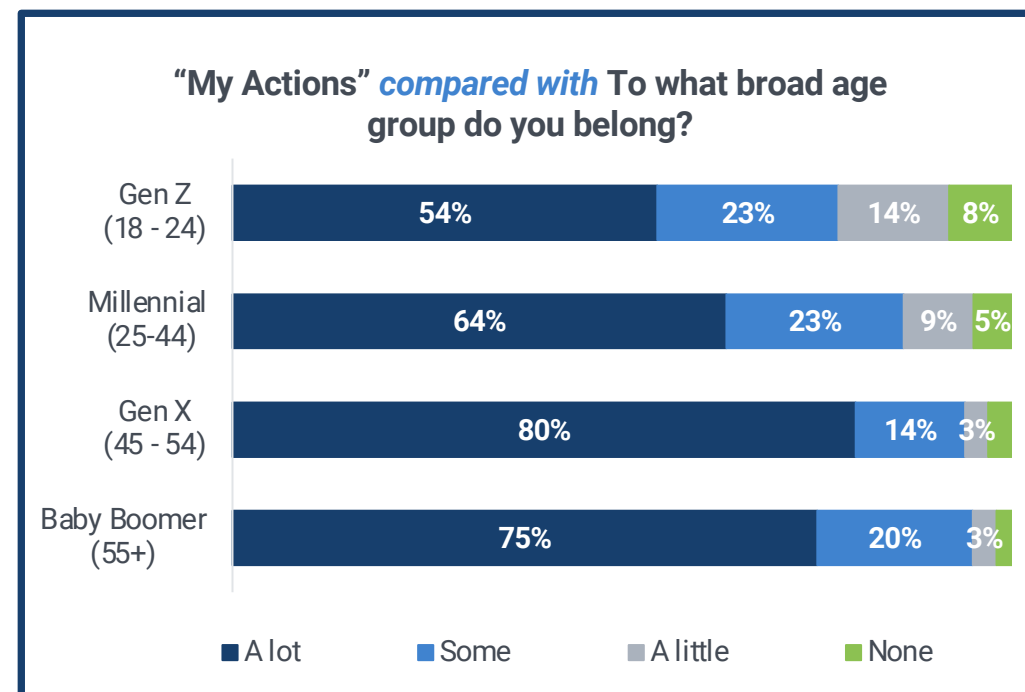
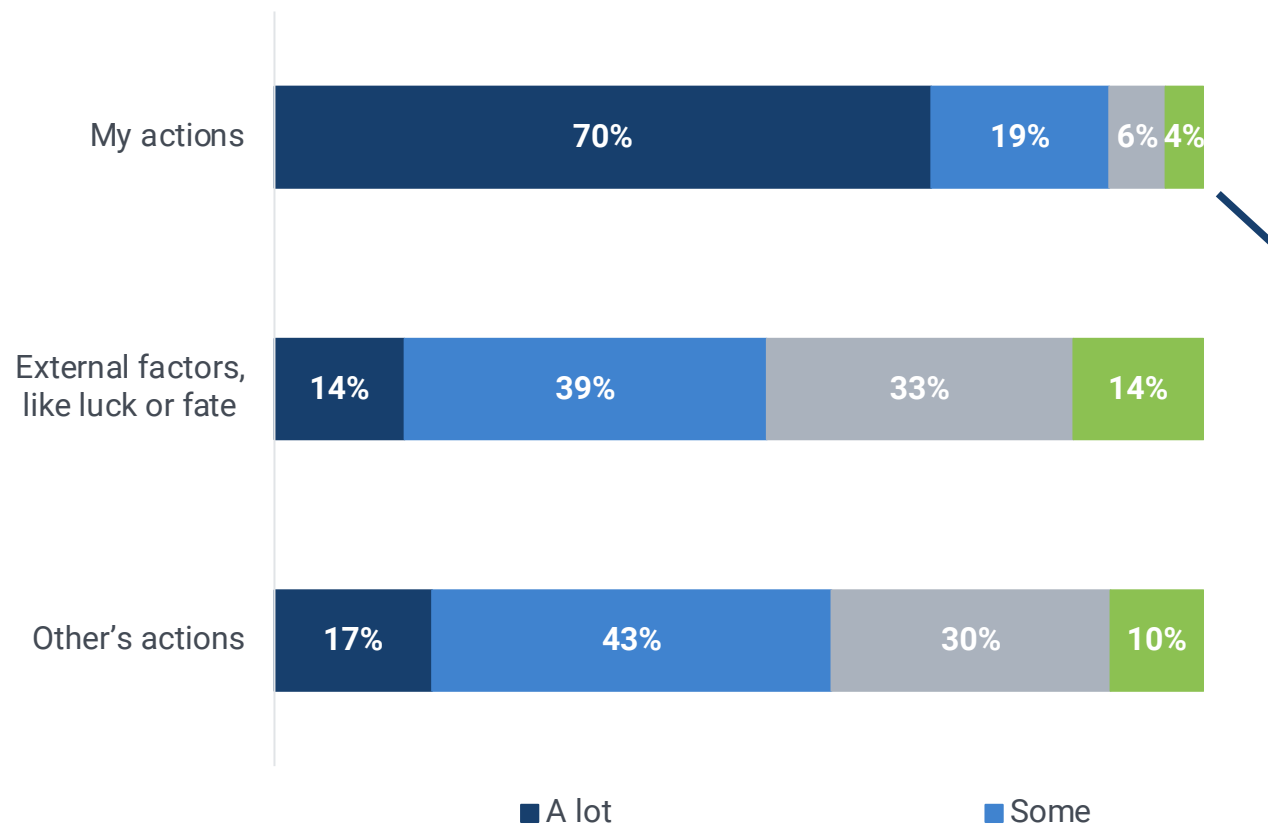
“Big Five” Personality Traits



Most US Adults possess an *internal* locus of control, meaning they believe their actions (rather than outside forces, such as luck) primarily determine the outcomes in their lives.

Younger generations, however, are more likely than older generations to exhibit a low internal locus of control.

To what extent do you believe the outcomes in your life are determined by the following factors?

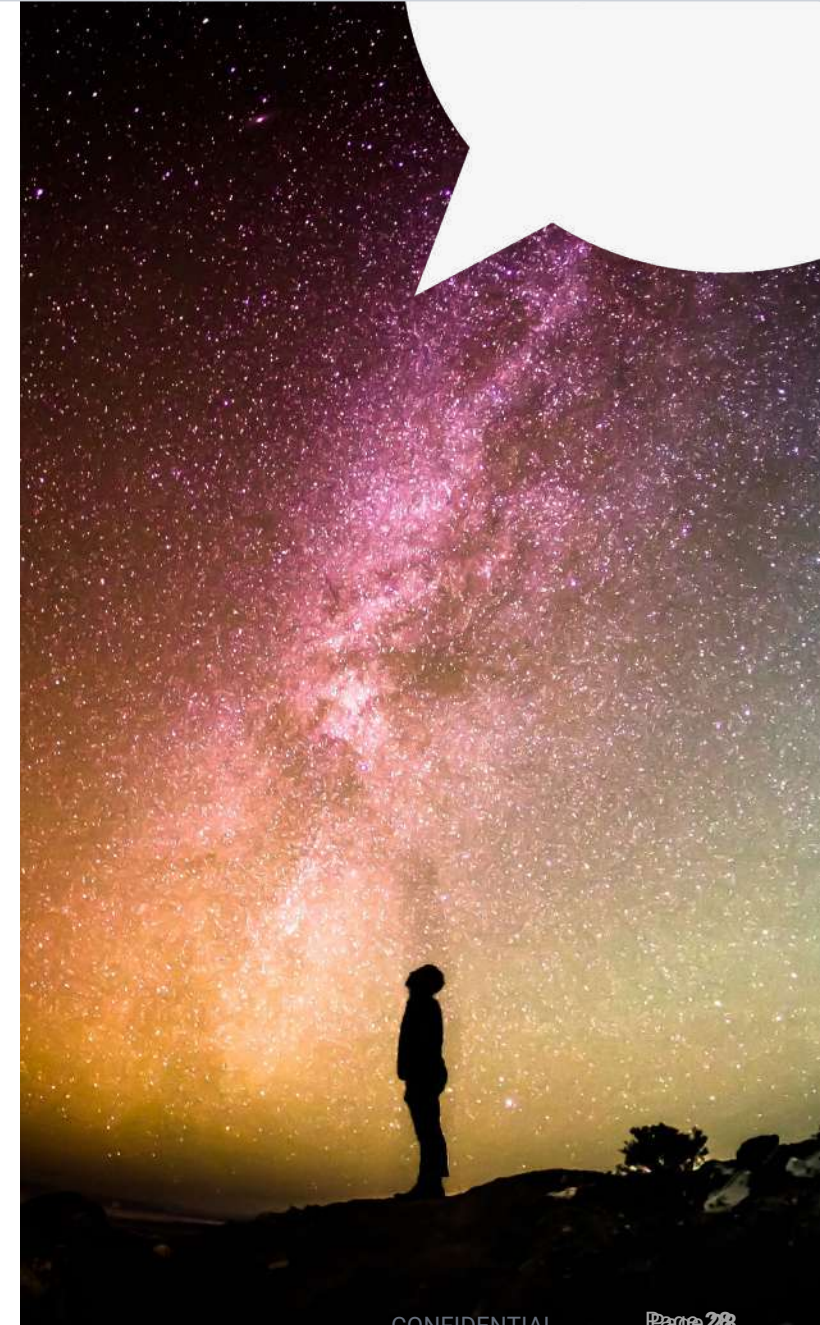
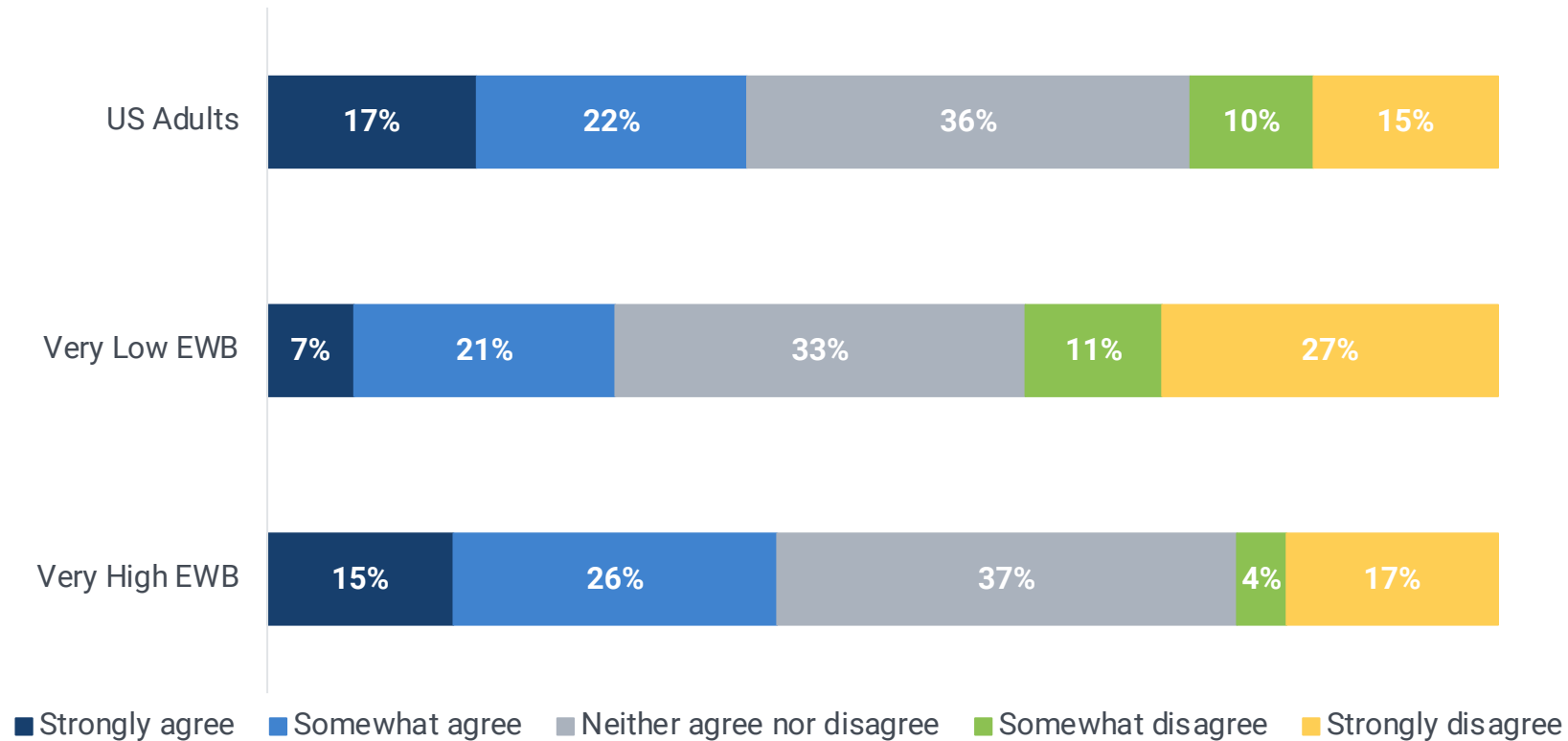


2,153 responses weighted by US Adults from April 15, 2024 to April 26, 2024

1,301 responses weighted by US Adults from April 15, 2024 to April 26, 2024

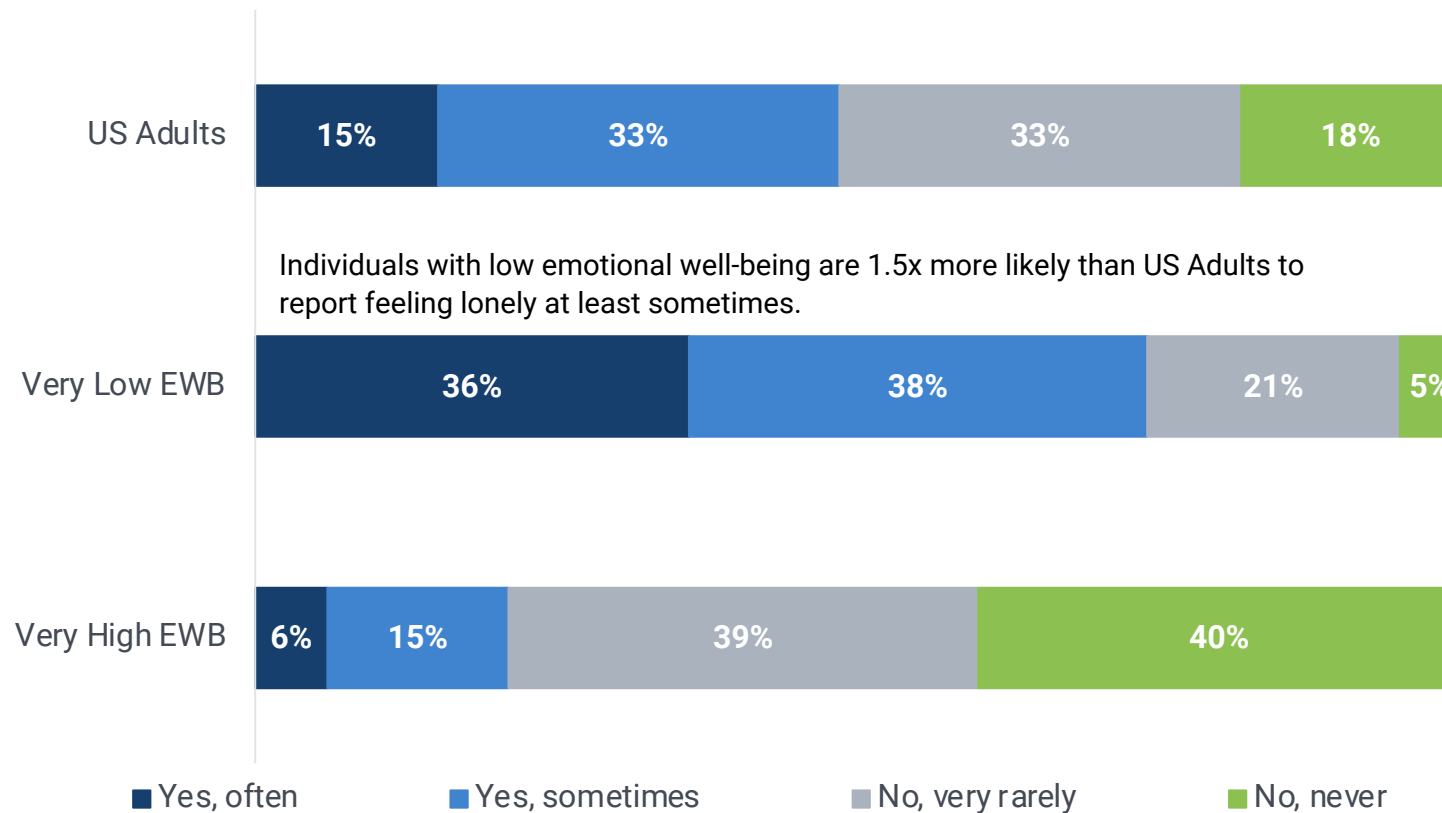
Individuals with low emotional well-being are half as likely to “strongly agree” that they feel a sense of belonging.

How much do you agree (or disagree) with the following statement? "I feel a sense of belonging to a human or world community, one that extends beyond where I live and includes more than just the people I know."



Feelings of loneliness, which have risen considerably since the pandemic, bring with them a variety of adverse outcomes, including increased risk of illness.

Generally speaking, do you feel lonely?



US Adults who report feeling lonely "often" are:

- More likely to report **increased desire to leave the home.**
- More than twice as likely to **want/own a virtual reality** product
- More than twice as likely to regularly **dine at upscale** restaurants
- More than twice as likely to regularly **volunteer weekly+**
- More likely to use **Snapchat**, watch **TV documentaries**, and go to the **movies monthly+.**
- More likely to eat **off the value menu** at fast food restaurants
- More likely to **live in a city** and **drink alcohol**

Feelings of loneliness can be compounded by distrust of others. US Adults with very low well-being are particularly distrustful of neighbors and strangers.

On the other hand, individuals with very high emotional well-being over-index on interpersonal trust and trust in neighbors.

CivicScience’s Interpersonal and Institutional Trust Components

	US Adults	Very Low EWB	Very High EWB
Interpersonal Trust Index	44.5	31.5	50.0
Reported Trust Among:			
Family	81.0	71.3	86.1
Friends	78.9	73.2	82.2
Neighbors	56.0	43.3	63.2
Acquaintances	50.2	40.6	53.6
Strangers	24.0	16.4	25.1

	US Adults	Very Low EWB	Very High EWB
Institutional Trust Index	51.3	39.6	53.9
Reported Trust Among:			
Hospitals	67.1	56.2	67.9
Police	64.7	57.4	71.7
Banks	60.6	50.3	64.0
Major Companies	42.7	34.0	45.7
Media	35.7	27.1	33.2
Politicians	22.2	13.1	21.6

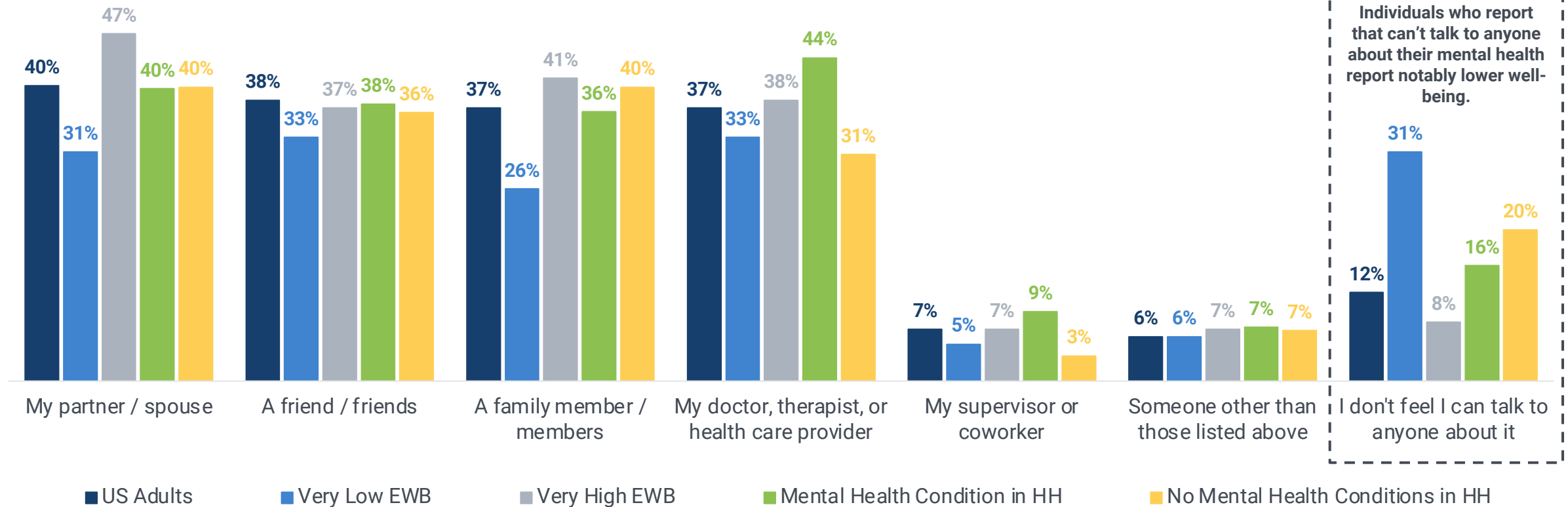
The Interpersonal Trust Index is based on a combination of questions about the extent to which respondents say they trust various groups of people
417+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

The Institutional Trust Index is based on a combination of questions about the extent to which respondents say they trust various institutions.
408+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

Nearly one-third of adults with very low emotional well-being say they don't feel they can talk to anyone about their mental health.

Only 44% of individuals with a mental health condition in the household feel able to talk to a healthcare provider about their mental health, and 16% feel that they can't speak to anyone.

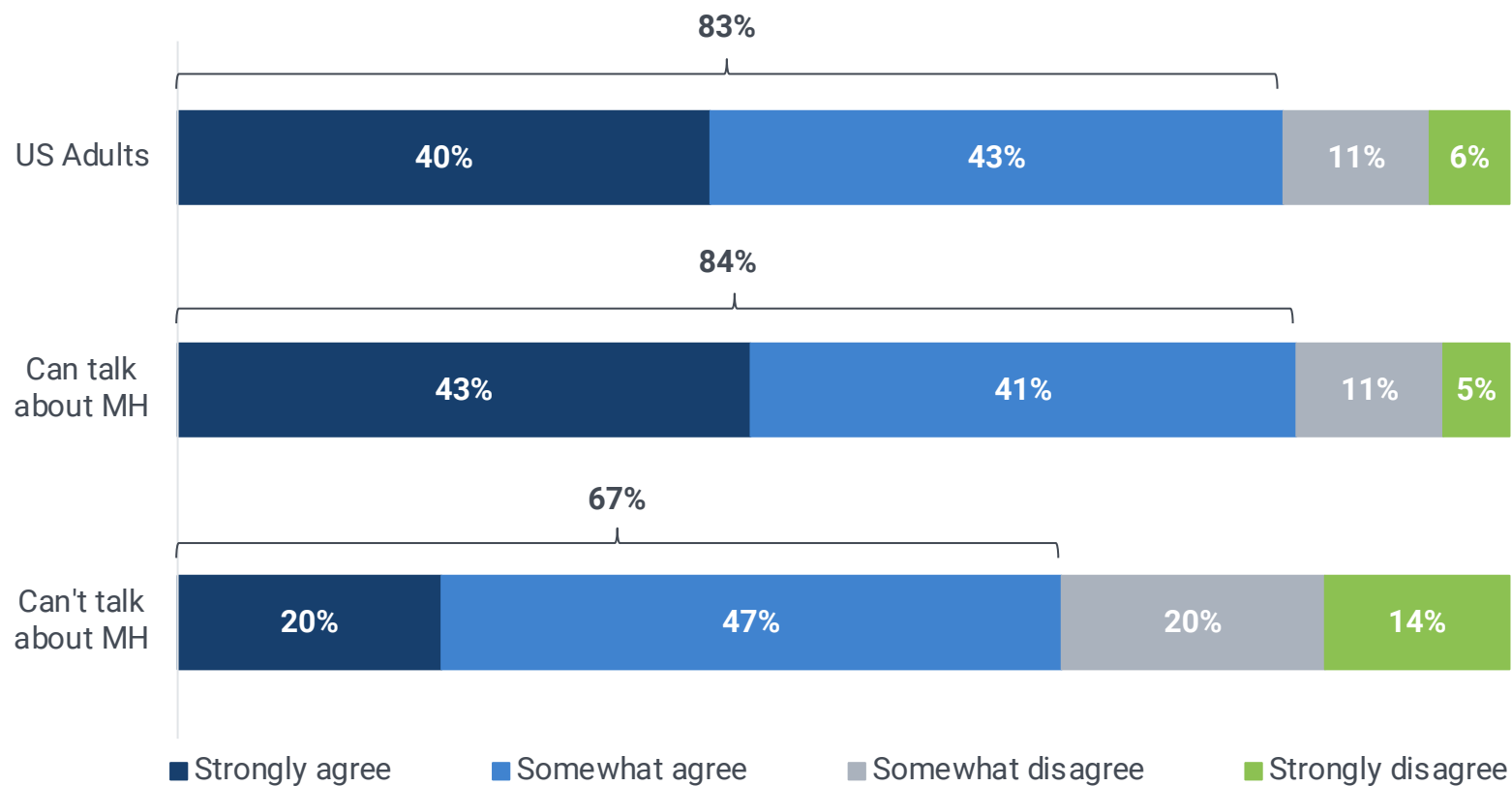
In your life, who do you feel you can talk to about your mental health?



ADDITIONAL INSIGHTS:
Individuals who report that can't talk to anyone about their mental health report notably lower well-being.

Despite perceived stigma, most US Adults support open discussion about mental health, including two-thirds of those who feel they can't talk about it.

How strongly do you agree or disagree with the following statement: "It's a good thing when people openly discuss their mental health."

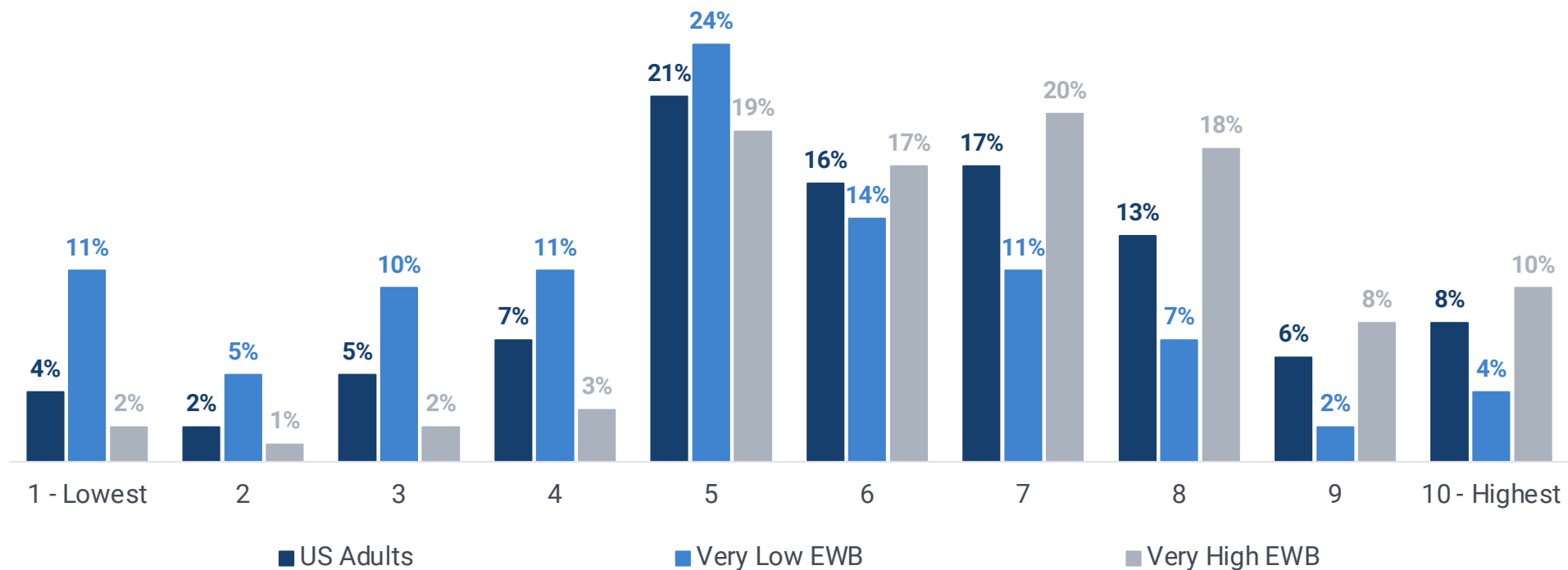




ECONOMIC WELL-BEING

Emotional well-being is associated with perceived socio-economic status (SES), and adults with low emotional well-being generally perceive themselves as having lower-than-average SES.

Which number best represents where you think you stand compared to others in your community? 10 represents those with the highest standing (i.e., the most money, most education, best jobs) and 1 represents those with the lowest standing (i.e., the least money, least education, and worst / no jobs).

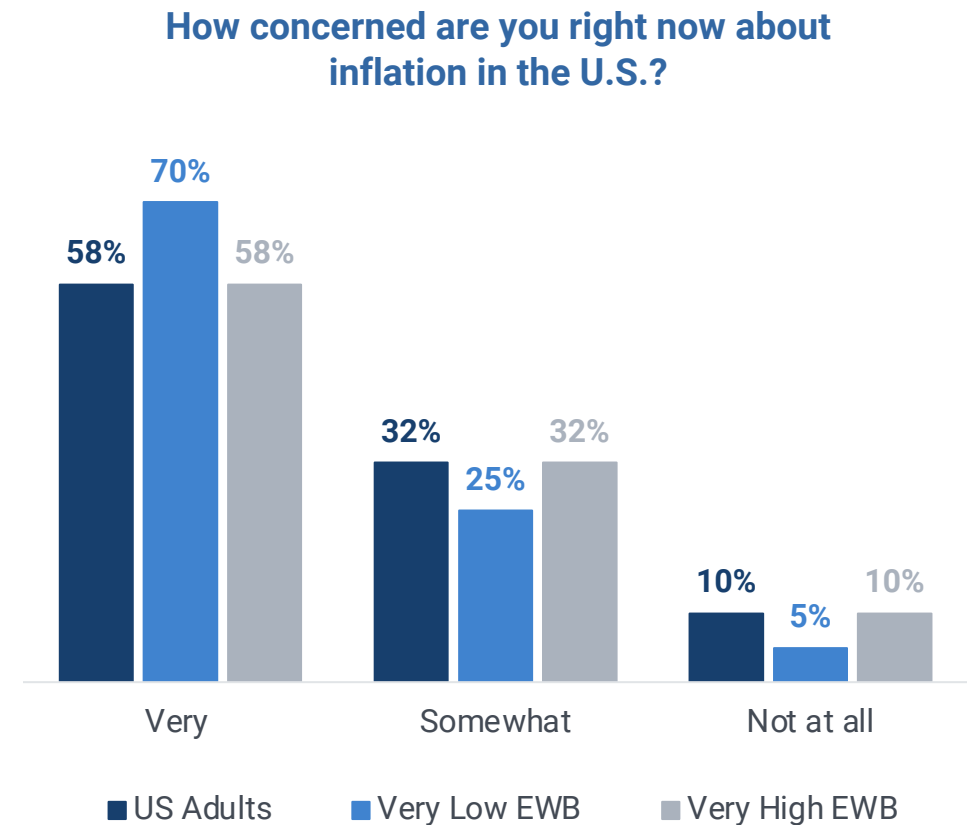


Average Perceived SES	
US Adults	6.15
Very Low EWB	4.93
Very High EWB	6.71

Americans with low emotional well-being also report lower-than-average financial health, particularly regarding their savings and investing outlooks.

Consistent with their lower levels of financial health, adults with low emotional well-being are especially concerned about inflation.

	US Adults	Very Low EWB	Very High EWB
Consumer Financial Health Index	64.6	54.6	68.9
Financial Outlook:			
Credit Score	69.4	62.0	72.0
Savings	65.4	53.8	70.4
Income	64.2	53.8	66.6
Debt	62.2	55.6	67.9
Investing	61.7	47.8	67.9



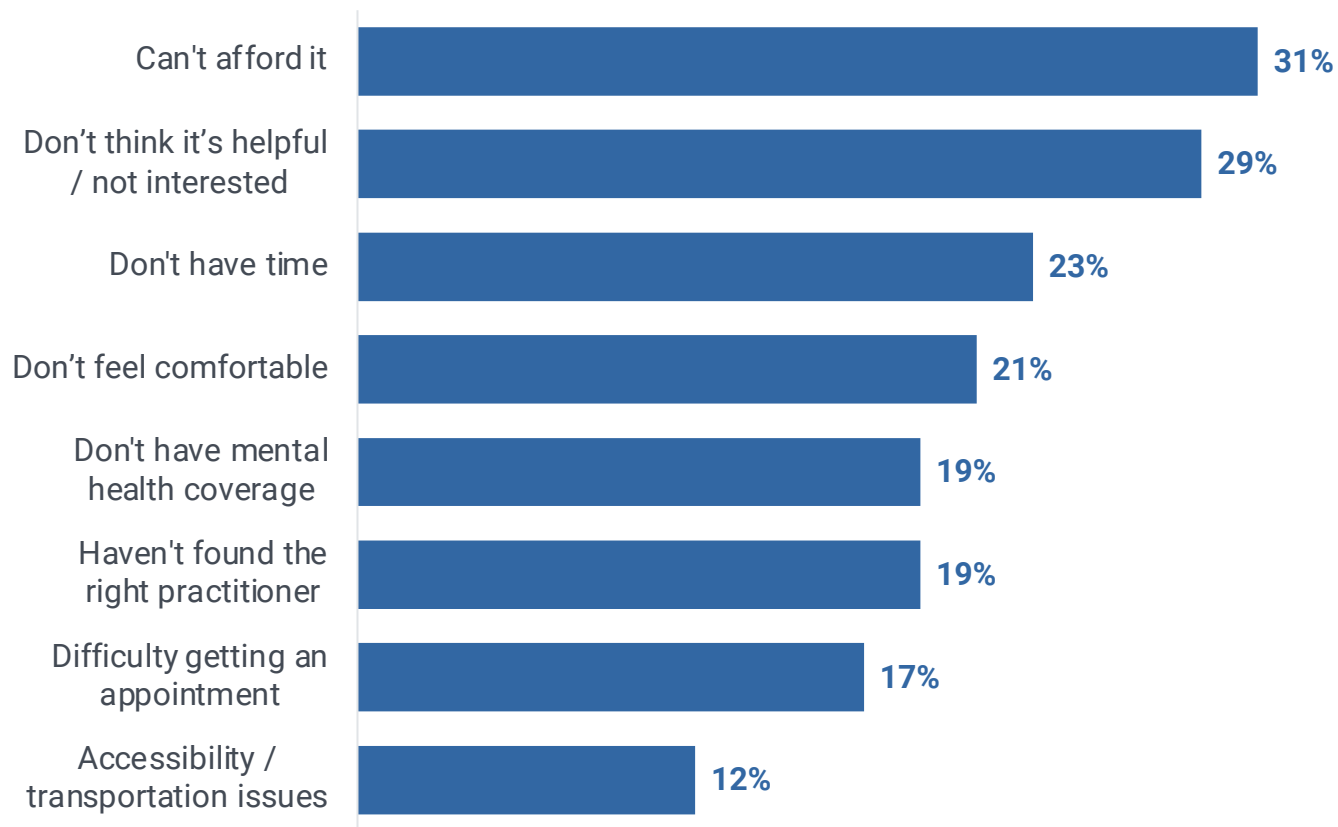
CivicScience’s Consumer Financial Health Index measures how Americans feel about their own financial wellness and is a good indicator of spending habits and daily financial decision-making.

769+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

489+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

Financial concerns can be particularly challenging for those managing mental health, as cost is the most common barrier to mental health treatment for US Adults.

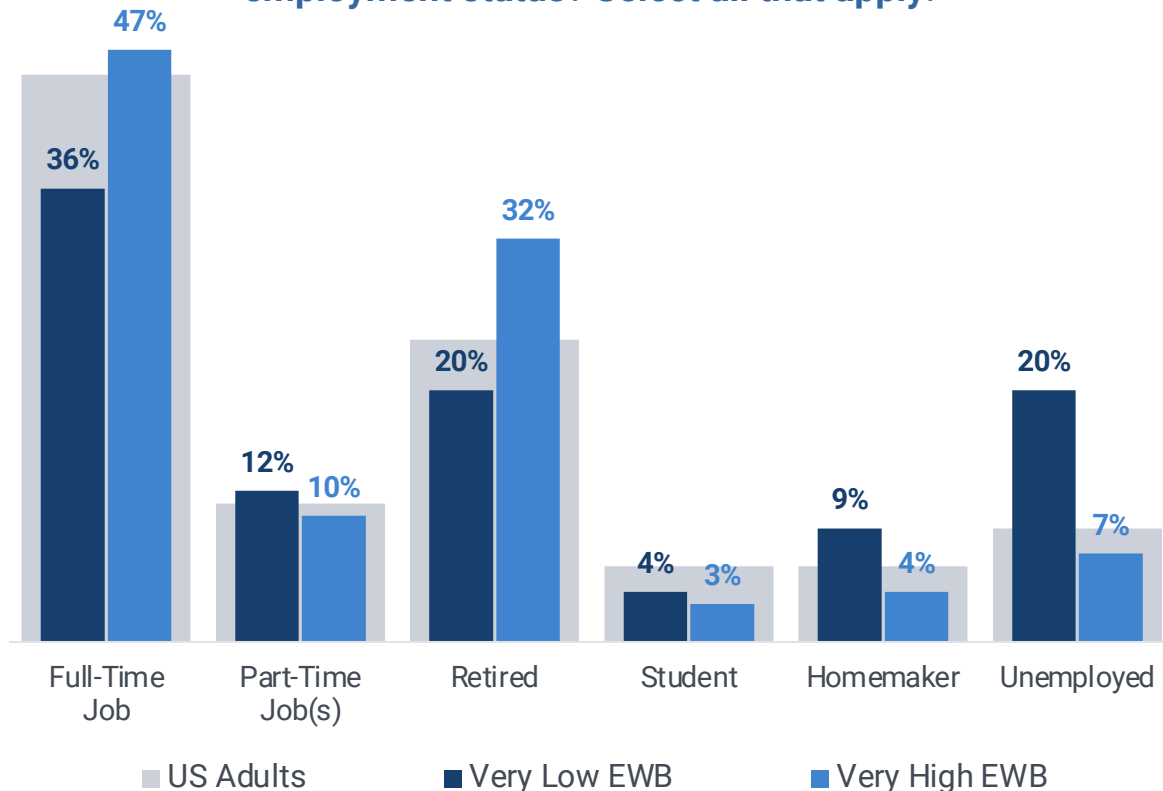
Why did you either delay or not get mental health care over the past year? Select all that apply.



Employment situation and satisfaction are also strongly associated with emotional well-being. Those with low emotional well-being are over twice as likely, compared with average adults, to be either unemployed or very unhappy at their current job.

On the other hand, those with high emotional well-being are more likely than the average American to be employed full-time and be “very happy” at their current job.

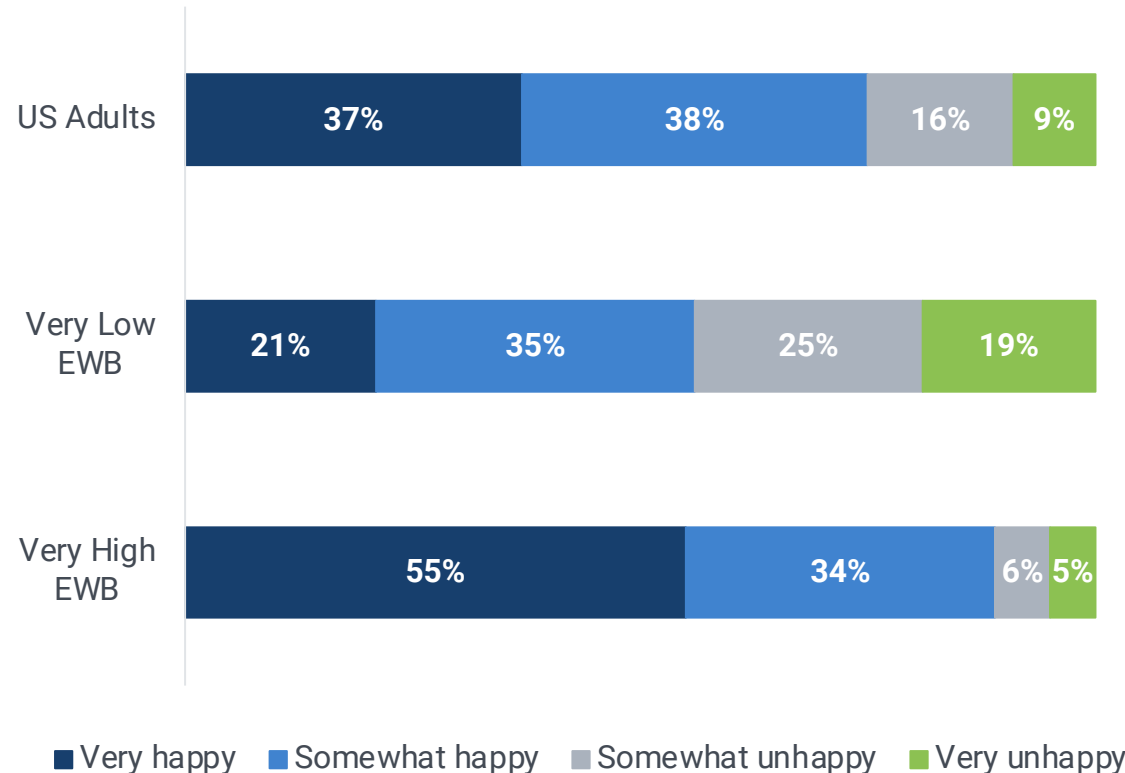
What best describes your current employment status? Select all that apply.



1,208+ responses autoweighted by US Adults from January 1, 2024 to May 7, 2024

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How happy are you in your current job?



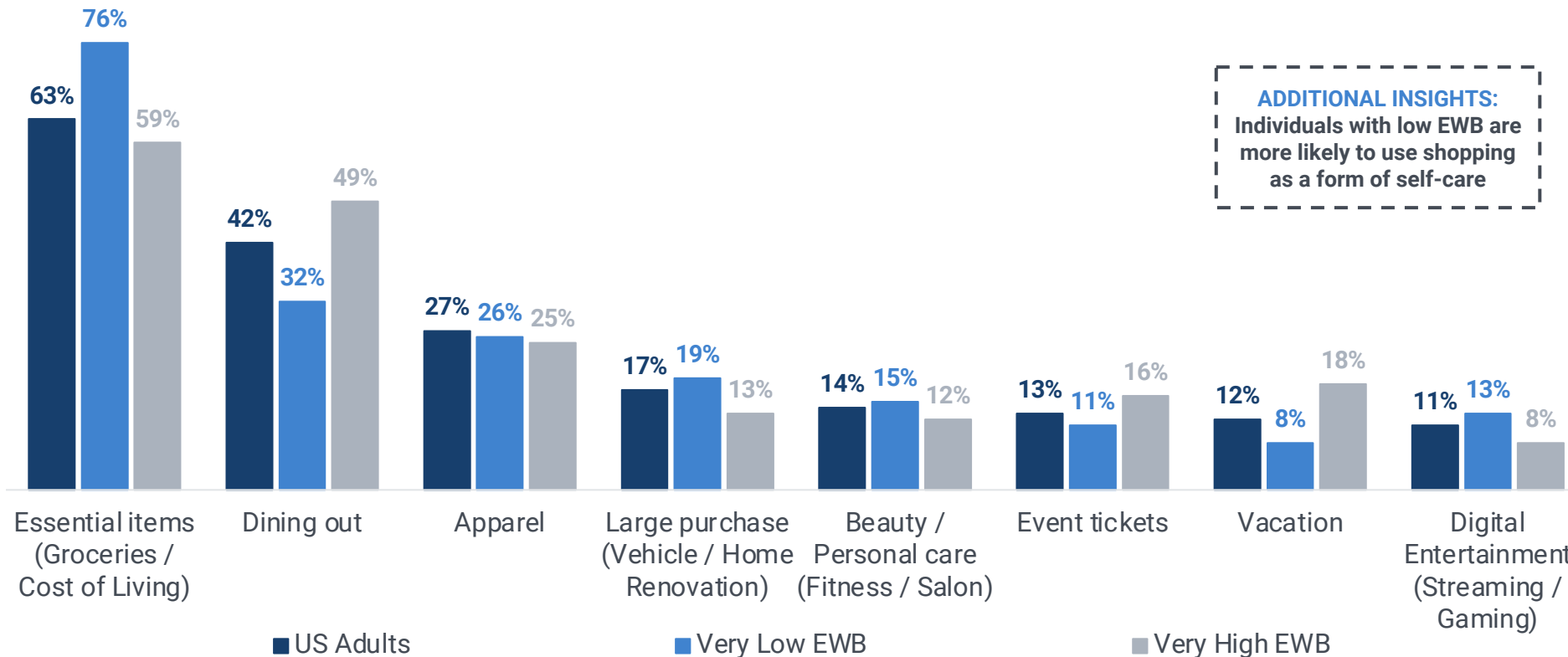
218+ responses among employed autoweighted by US Adults from January 1, 2024 to May 7, 2024

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Adults with high emotional well-being are more likely than average adults to spend extra cash on experiences, such as dining out, events, and vacations.

Low emotional well-being, meanwhile, is associated with spending on essential items and lower-than-average levels of impulse control.

Assume you were given \$100. Which TWO of the following would you be the MOST likely to spend it on?



ADDITIONAL INSIGHTS:
Individuals with low EWB are more likely to use shopping as a form of self-care

Impulse Control Index

US Adults	76.5
Very Low EWB	70.04
Very High EWB	88.67

407+ responses autoweighted by US Adults from January 1, 2024 to May 7, 2024

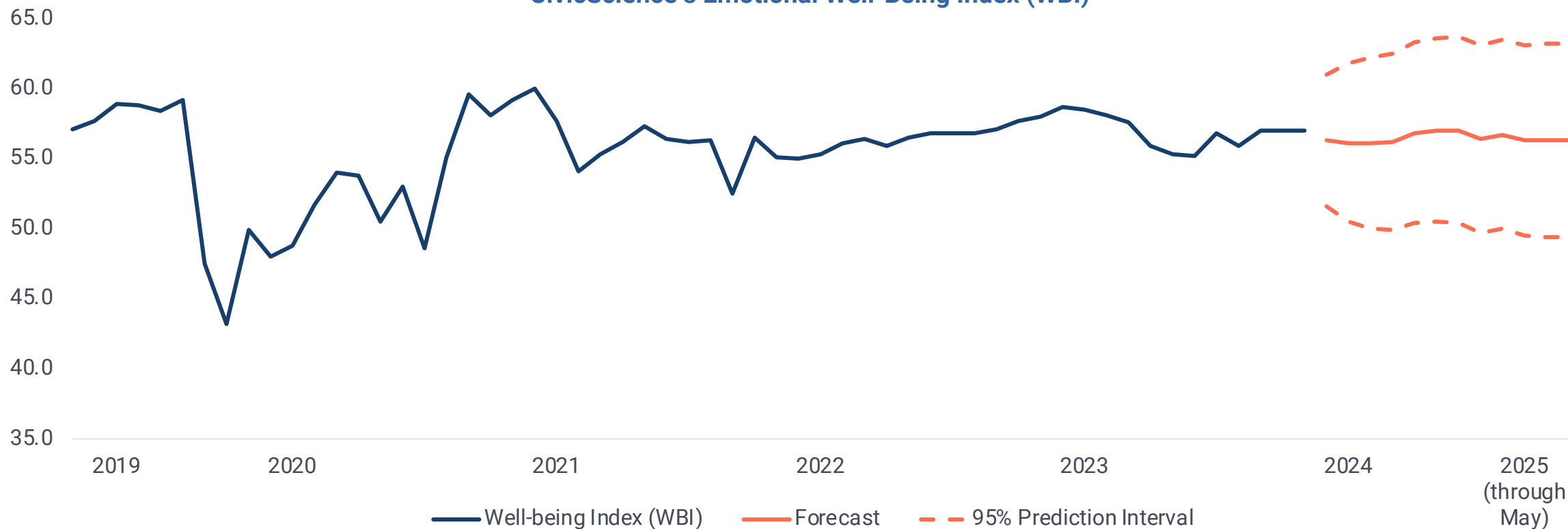
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Impulse Control Index is an estimate of the percentage of respondents with a high degree of impulse control. 248+ responses autoweighted by US Adults from January 1, 2024 to April 30, 2024

When it comes to America's Emotional Well-being, what might the future hold?

Under "business-as-usual" conditions, we can expect the emotional well-being of the average American to remain mostly steady through the next year, with a slight increase toward the end of the year during holiday season.

CivicScience's Emotional Well-Being Index (WBI)



CivicScience's Emotional Well-Being Index is an estimate of the percentage of Americans who, in the past week, report feeling positive emotions (e.g., happiness and excitement) in the absence of overwhelming negative emotions (e.g., stress, sadness, fear, and worry).

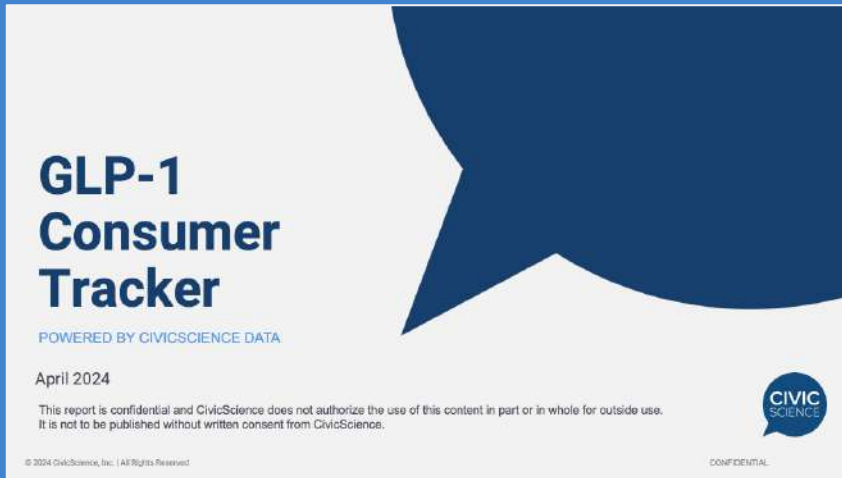
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Click on the links below to see additional CivicScience report offerings!

[GLP-1 \(Ozempic\) Consumer Tracker](#)

[The Election Mindset Tracker](#)

[Pulse of the US Beauty Buyer](#)



Click [here](#) to contact us and learn more about these reports or the other ways to work with us!

Appendix



The CivicScience Intelligent Polling Platform and Methodology

We've pioneered a new method of "always-on" quantitative online research that can capture representative samples all day, every day.



Our data sourcing

We source our data through partnerships with hundreds of online and mobile content publishers. For them, the integration of our polls and quizzes improves on-site engagement time and provides audience detail unavailable elsewhere. We aggregate all the response data into our centralized platform.



Our collection process

Our quizzes and polls are non-intrusively embedded in a website's content experience and serve a short set of diverse questions designed to keep respondents engaged. If they choose, respondents can continue to answer a seemingly endless series of fun quizzes and engagement questions as well as custom and syndicated research questions.



Our respondents

Our data is reliable and organic because our polls are 100% voluntary and respondents are kept anonymous, even to us. They enjoy voicing their opinions and seeing aggregate results presented back to them. Because we collect large response volumes on a national scale, we can deliver representative samples that can be segmented and analyzed in many ways.



Our analytics

As respondents answer our questions, we store all their answers over time in an anonymous profile. We then use proprietary advanced technology to analyze the data in aggregate and in near real time, cross-tabulating questions to find statistically meaningful correlations for clients to navigate.

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