



IPSOS VIEWS

THE LIFE WELL LIVED IS CAMERA-SHY

**How brands can move beyond
performative wellness to support
authentic wellbeing and
human connection**

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When the world feels precarious, the privileged vocabulary of wellness is being replaced by a more grounded, collective pursuit: The Life Well Lived.

For years, the global wellness and wellbeing industries have sold a highly curated brand of contentment: one part expensive matcha powder, two parts mindfulness companionship¹, and, more recently, democratized ‘silver bullets’ for total health such as GLP-1². As recent Ipsos research highlights, wellness has evolved from a simple product category into an all-encompassing cultural belief system where individuals assume sole responsibility for self-optimization³.

But the performative gloss is starting to wear off. Despite talks of wellness and wellbeing dominating commercial culture, the Ipsos 2026 Health Service Report shows that **mental health has eclipsed even cancer as the top global health concern**, with 48% of people around the globe identifying it as a major issue⁴. When the world feels precarious, the privileged vocabulary of wellness is being replaced by a more grounded, **collective** pursuit: **The Life Well Lived**.

But to peel off the layers of wellness, wellbeing and self-care, we must go beyond the obvious. To do that, asking questions

might not be enough. We must question the answers, systematically and consistently, until the scaffolding of generic and accepted narratives about self-care starts to reveal cracks of deep, tension-filled, sometimes uncomfortable human stories.

In our research study into a Life Well Lived – and the underlying human needs driving it – we set out to explore this shift away from individualistic self-optimization to something more grounded. To do this, we combined deep motivational qualitative research designed by Ipsos’ Center for Systematic Diagnostics in Marketing (CENSYDIAM), with quantitative text analytics to identify, segment, and size qualitative insights. **100 AI-moderated in-depth interviews** across the United States, China, and France have been used to uncover deep-seated drivers that people may not consciously recognize. The Methodological Spotlight outlines the expert qualitative approach that enabled AI-led interviews to achieve depths not seen previously with standard AI moderation, peeling back layer after layer of predictable stories until the profound emotional frictions emerged.

RESEARCH SPOTLIGHT:

Beyond the surface: the science of deep insights

To push through generic findings and reveal authentic insights, AI-moderated interviews have been strengthened with the science of getting deeper in a consistent way. To achieve this, we applied three techniques: denorming, expert probing for deeper motivations, and projective techniques.



Denorming means starting every interaction with a guided warm-up conversation meant to build rapport and alleviate the typical respondent anxiety.



Expert probing goes deeper than first response, to overcome rationalizations and socially desirable answers.



Projective techniques are part of the proprietary Ipsos CENSYDIAM toolkit of emotional elicitation, meant to break down defenses and discover unconscious drivers, while making the interaction more gamified and engaging for the interviewees.

Asking direct questions such as “What are the biggest stressors in your life right now?” might reveal answers that are good and useful, but also expected and rather superficial: the cost of living, health, job insecurity. Projective techniques, such as the CENSYDIAM-validated visual metaphors, used together with indirect questioning (“Let’s play a little game. From these images, which animal best represents how your life feels right now.”) generate personal stories that are richer, deeper and more emotional, covering a broad spectrum of emotions that intermingle and influence each other. For instance, when engaging with this technique, one participant from France selected the below image and said:



“Looking for a somewhat stable job to get ahead in life. But it feels like mission impossible for people like me because hiring happens based on nepotism and favoritism... (sighs) If I don’t have connections, connections, there is no going forward in life.”

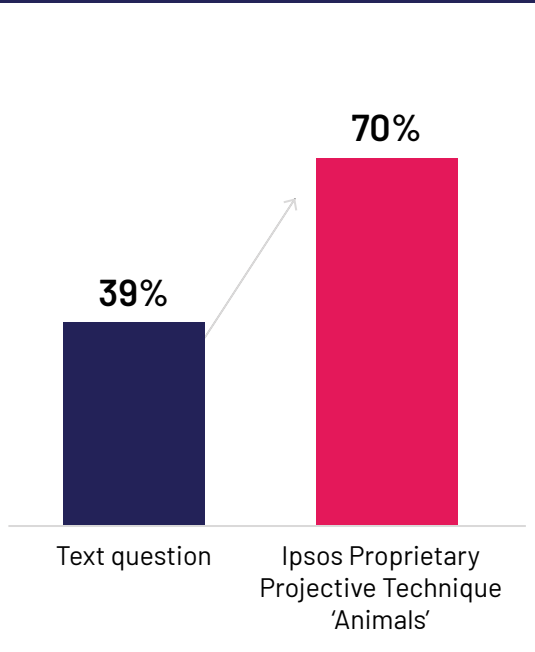
Man in his 50s, France

In this study on the meaning of a Life Well Lived, Ipsos’ proprietary projective techniques were proven to increase personal engagement. With the CENSYDIAM techniques, 70% of responses contained personal stories, compared to only 39% in the case of direct text questioning alone (Figure 1).

A participant from the US illustrated the difference between abstract financial goals and the underlying emotional need for a slow life and mental decompression through her response to the following task: *“Imagine yourself five years into the future, living your dream life. Choose a landscape that best translates that ideal future life.”* She started talking about her objective, **“So, five years from now, I hope to be settled in my career and just living life relaxed and not struggling with money at all.”** In the next breath, she selected the image below and immediately the register of the conversation changes:



Figure 1: % of personal stories in the answer



Source:
Ipsos



“The landscape that fits with that is the empty bench in the forest... just living that relaxed, calm life... The empty bench in the forest reminds me of being able to sit out there alone and hear all of the things around me and just enjoying those sounds, living a slower life, and then that would reflect with my life and living a calm, relaxed life by, yeah, just being alone, noticing everything that’s going on around me and living in the moment.”

Woman in her 30s, US.

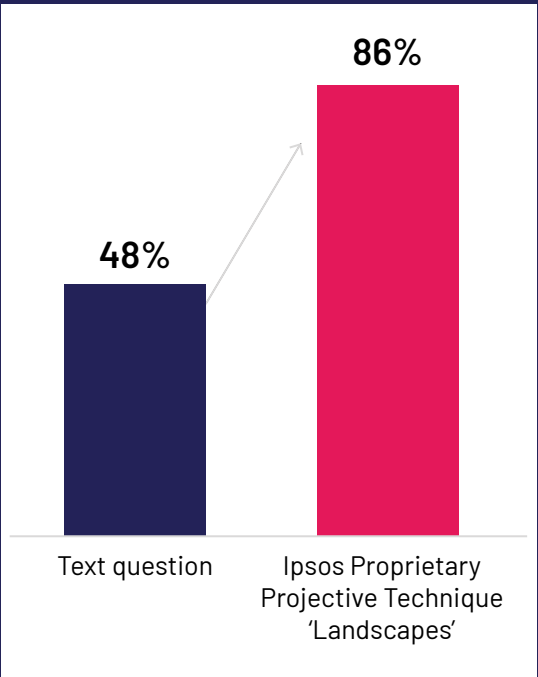


Personal stories revealed that the Life Well Lived lives off camera. The Life Well Lived is about retreat, emotional security, privacy, mental balance: everything that doesn’t show up on screens.



Figure 2 shows how CENSYDIAM’s projective techniques generated more emotional cues and enabled interviewees to articulate deep tensions and aspirations: 86% of responses contained emotional cues, compared to 48% in the case of direct questioning.

Figure 2: % of emotional cues in the answer



Source:
Ipsos

The complex design of CENSYDIAM projective techniques has led to better insight richness (operationalized through a higher volume of data and thematic amplification) and insight depth (operationalized through higher emotional engagement and more personal stories). This is what allowed a deeper view, going beyond the first answers referring to very ‘instagrammable’ ideals of wellbeing, wellness, and self-care. After intense probing and emotional elicitation, the personal stories revealed that the Life Well Lived lives off camera. The Life Well Lived is about retreat, emotional security, privacy, mental balance: everything that doesn’t show up on screens. The big question that arises during in-depth conversations is whether public institutions, industries, and brands are an ally or a threat towards a Life Well Lived. How can brands and policymakers contribute to a state that is not seen and difficult to project on screen?

There is no one-size-fits-all. Join us on a journey to find out how to become a true ally of people’s Life Well Lived.

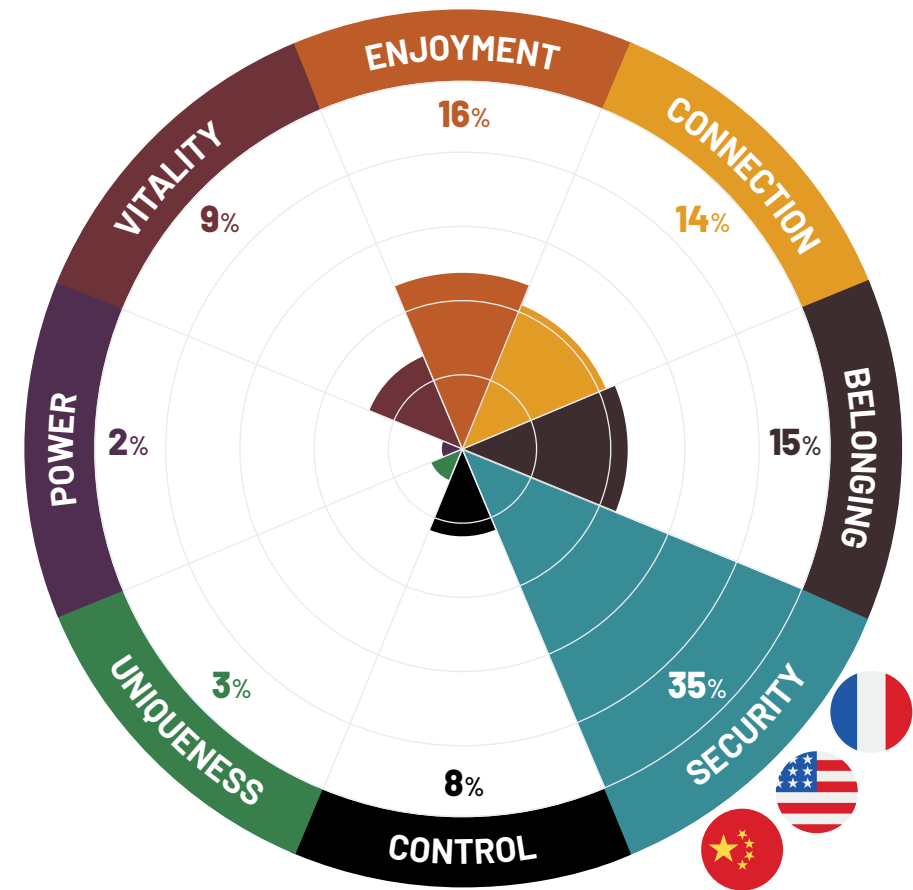
A world in retreat

Across the 100 interviewed people in the United States, France, and China, 35% of the coded responses were anchored in emotional security, intimacy, and guilt-free rest. To interpret, cluster and quantify these deep emotions, the CENSYDIAM framework of eight universal human motivations has been used as an interpretative tool aimed at “gaining insight into the fundamental motivational frame of reference and mapping the various groups of needs”⁵ across a spectrum of eight deep human motivations: Enjoyment, Connection, Belonging, Security, Control, Uniqueness, Power and Vitality.

CENSYDIAM analysis of the content revealed an overarching emphasis on defining the ideal Life Well Lived under the fundamental need for Security, as presented below in Figure 3.

Beyond the noise that can make the world feel more polarized and fragmented than ever, there is one overwhelmingly common story: the search for peace of mind. When they talk about a Life Well Lived, people refer to their inner sphere, their mental health, their intimacy, the people they most care for, the things that matter to them deeply.

Figure 3: CENSYDIAM meaning-mapping of the participants’ personal stories of a Life Well Lived.



Source:
Ipsos

“90 out of 100 participants prioritized strong, meaningful relationships as the fundamental bedrock of a good life.”



Furthermore, when talking about what allows them to reach that need for Security, 90 out of 100 participants prioritized strong, meaningful relationships as the bedrock of a good life. This qualitative finding is mirrored quantitatively in the Ipsos Happiness Report which shows that, across 29 countries, feeling appreciated and loved, alongside family relationships, are the two biggest drivers of happiness⁶.

The retreat into the inner sphere by building a feeling of Security, psychological safety, and protected sanctuary, is actively nurtured and sustained through Connection and Belonging. While this retreat into security is universal, how people build peace of mind varies sharply by country.

 **The United States overindexes on building a routine and personal accountability (the fundamental need of Control).** Workplace toxicity, rising living costs, and constant job reorganizations make everyday life feel deeply unpredictable. As one person shared: **“It’s like putting fires out every day... fire is unpredictable, and it gets you exhausted”** (woman in her 30s, US). The American participants use **Control** as a defensive shield. To manage **“smiling on the outside while acting like nothing is wrong”** (woman in her 50s, US), consumers seek to reclaim personal authority over their immediate health, routines, and living spaces. They construct this shield through reliable product habits that are as different as people are diverse: taking *Neuromints* for calm and clarity, *Om* mushroom gummies for stress relief, *Nature Made* vitamins and Vitamin D for burnout, using *Dawn Powerwash* spray to bring instant order to kitchen chores, practicing low-cost Tai Chi, walking or gym visits at *Planet Fitness*, and relying on green tea rituals or TikTok shorts to decompress.



[The French] protect psychological calm through slow, sensory nature rituals: foraging for wild berries on foot, escaping to the Normandy coast, or nurturing backyard gardens.



France differentiates itself through its focus on reconnecting with nature and setting firm boundaries which protect them from being defined by work. The French talk about the restorative value of beauty, not as an exclusive luxury but as something abundant in nature, local arts and authentic human contact. This has been decoded by CENSYDIAM experts as the fundamental need for Uniqueness. Weary of toxic workplace atmospheres and corporate pressure, French participants assert that **“wellbeing is not a brand”** (man in his 60s, France). When identifying the triggers of a Life Well Lived, interviewees in France explicitly discard heavy commercial marketing in favor of unbranded, sustainable essentials—such as chemical-free solid soaps from local makers like *Comme Avant*, eco-friendly *Yves Rocher* gels, or basic *Marseille* soap. They protect psychological calm through slow, sensory nature rituals: foraging for wild berries on foot, escaping to the Normandy coast, or nurturing backyard gardens. As one respondent explained:

“You have to know when to hang up your coat when leaving your office... so you don’t bring all these problems home with you” (woman in her 60s, France).



China’s difference compared to the other two markets is the heightened importance of family care achieved through tech liberation. People turn to the fundamental needs of Connection and Enjoyment. Facing intense economic and workload pressures, many feel **“made into beasts of burden,”** (woman in her 20s, China). Unlike the Western impulse to ‘unplug,’ Chinese consumers use technology as a supportive partner to strip away daily household chores. Highly automated appliances – anchored in *Xiaomi*, *Haier Smart Home*, and *Huawei* ecosystems – are used to **“keep our home feeling warm and close instead of rushed and chaotic”** to **“free up my hands so I can actually focus on taking care of my parents,”** (woman in her 30s, China), giving back time for multi-generational caregiving.

Energy leaks

Gender & life-stage frictions

When people talk about wellbeing, they talk about daily hacks that help overcome tensions, barriers, and frustrations – or as we refer to them ‘energy leaks’. To design

targeted interventions, brand leaders must respond to these energy leaks in their products, user experience, and services.

Energy leaks, and the hacks to overcome them, differ significantly by gender and life stage:



WOMEN: Strained by the heavy mental load of household logistics and emotional caregiving, women seek simple, low-pressure solo sanctuaries to recharge.



MEN: Across countries, drained by financial anxiety and the silent burden to provide, men universally anchor themselves in structural safety, predictability, and family stability.



YOUNG ADULTS: Exhausted by constant pressure to project success online, our interviewees in their 20s and early 30s leverage digital tools for low-stakes, everyday enjoyment allowing them to release steam.



MIDDLE-AGED: Trapped between caring for growing children and aging parents, this group is the ‘sandwich generation.’ They carry the heaviest emotional and logistical load, requiring practical solutions that restore depleted energy.



ELDERS: Confronting social invisibility and a loss of dignity; older adults seek purpose, spiritual anchors, and meaningful community contribution.

But beyond these drains, we must go deeper to the common ideal shared across regions: reaching emotional security through the cultivation of strong, meaningful relations with the people that matter. Relationships are what turns wellness into a Life Well Lived. In participant stories, meaningful connection comes down to simple, everyday moments; a quiet movie night at home with close friends or family brings far more genuine peace than impulse retail therapy. Simple moments with the people who matter might not always be on camera nor

gather followers online, but they are the bedrock of a good life.

This shift presents a challenge for industries engaged in selling aspirational lifestyles. As consumers trade external status signaling for internal social stability, we see real-world economic ripples. Examples of this include the recent downturn in luxury goods in markets like China, as well as a growing demand for shared experiences and intergenerational care technology (such as *Xiaomi* and *Haier* automated home ecosystems).

Are today's industries and brands an ally or a threat to a Life Well Lived?

In a world that still celebrates being busy over being connected, the time needed to build and maintain meaningful relationships is often squeezed out. That creates a massive strategic opportunity. While energy-draining forces are everywhere, organizations don't need to build artificial brand communities – they can play a vital role simply by serving as humble facilitators for the human connections that already matter.

Every sector – from technology and financial services to retail, healthcare and policy makers – now faces a clear mandate to support people in their search for daily security and contentment. The shift from the individualistic wellness philosophy to a Life Well Lived is not defined by which industries are involved but by how they operate. Where commercial wellness

pushed individual self-optimization and personal performance, a Life Well Lived requires every sector to act as a supportive partner: stripping away daily friction, protecting psychological security and enabling the human connections that matter most. As authors Strong and Neiland highlight, wellness must complement, rather than replace, collective systems of care⁷.

As companies rethink the value they deliver in a time of extreme scrutiny, one question must be answered first: How can your organization stop being a source of energy drain and become an authentic partner in a Life Well Lived?



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Three actions to start boosting the Life Well Lived today

Supporting people to live a good life is fundamental for the future of institutions, brand strategy, and society at large. Being a contributor to the Life Well Lived is the new definition of the familiar brand purpose language. To achieve this, trust must be (re)built between the public and the organizations that serve them. Ipsos' in-depth exploration in China, France and the US is an initial piece of analysis. The next step is for all of us who lead brands and organizations to ask ourselves the questions that arise from this exploration and identify how we can contribute to the collective achievement of a Life Well Lived:

01



What does a Life Well Lived mean for your specific audience?

The power action here is to go beyond the generic discourse of wellbeing or wellness into the authentic tensions and fears that people themselves might not know they harbor. Give those barriers a name and work towards answering them in the honest spirit of true partnership.

02



Which interventions in real life can you design to stop the constant energy drain?

In what people call an 'endurance economy,' the most impactful social action a brand can take is to treat citizens, consumers, users, patients, and customers like adults, providing radical transparency rather than vague promises of support. For instance, study participants highlighted *Kirkland* at *Costco*. The brand's food donation program acts as a proxy for consumer values, while its fair pricing provides instant inflation relief at the register.

03



Do you have any tools at your disposal able to amplify people's greatest resource, which is real-life relationships and communities?

Instead of striving to forge new, artificial communities around a brand, leverage your current infrastructure – journey touchpoints, physical retail spaces, digital platforms, apps – as community hubs to build resilience against mental strain, isolation, and polarization.



The bottom line for brands



Consumers are tired of being told they need to constantly fix, track, or optimize themselves. Today, people are growing weary of loud marketing and unrealistic expectations, choosing instead to focus on what actually feels grounding.



Moving forward, successful brands won't try to reinvent a projected image of a customer's life. Instead, they will actively contribute to reducing everyday friction, protecting personal peace, and supporting the real human relationships that bring genuine contentment.

“Simple moments with the people who matter might not always be on camera nor gather followers online, but they are the bedrock of a good life.”



Methodology spotlight

Unlocking deep need states through AI-driven qualitative probing

Depth and rich emotional meanings are not a given in AI-moderated interactions. Open-ended interviewing is much more complex than it might seem, as the objective of the interaction is not only answering questions, but consistently and meaningfully questioning the answers to go beyond the obvious.

To uncover true emotional need states rather than surface-level answers, this pilot utilized an advanced conversational AI moderator trained in CENSYDIAM motivational projective interviewing techniques. The direct questioning used in traditional surveys often suffers from *rationalization* – where respondents give conventional, expected answers about ‘wellness’, ‘self-care’ or ‘wellbeing’. By leveraging dynamic multi-turn probing and projective visual exercises at scale, the AI moderator continuously laddered down into participants’ unconscious motivations.

Unstructured interview transcripts were transformed into a structured corpus using natural language processing techniques, including response extraction and text cleaning. Subsequently, LLM-assisted quantitative text analytics were applied to scale the identification of themes reflective of deep human needs. To maximize validity, a controlled, task-based LLM workflow was used, analyzing respondents individually and separating analytical steps into distinct tasks. The quality of the classification model was evaluated by reviewing the LLM’s reasoning and validating it against the underlying participant responses.

Respondents were analyzed individually rather than in batches, ensuring that classifications were derived from each respondent’s own statements rather than from patterns inferred across the broader dataset. This reduced hallucination risk and ensured classifications were based on respondent evidence rather than model assumptions, enabling a scalable and robust quantification of qualitative insights.

This method to bypass superficial cliches and expose raw emotional drivers across cultures has been explored in a previous Ipsos AI moderation experiment⁸. The authors of *Mind or Machines* have paved the path for using emotion frameworks to fully harness the scalability and always-on access of moderator bots powered by sophisticated Large Language Models, without missing the human moderator’s **ability to generate insight depth and quality. This solid background enables the further use of AI moderation to uncover systemic anxiety, frustration about the perceived betrayal of public institutions meant to protect people, and the deep need for a protective sanctuary.**

Endnotes

- 1 Since 2025, mindfulness companionship has been massively facilitated by Gen AI. According to Harvard Business Review, the top use for AI is therapy and companionship for the second year in a row: [How People Are Really Using AI in 2026](#)
- 2 [Global Perceptions of Obesity: An Ipsos Syndicated Study - 2026](#) across 14 countries shows GLP-1 weight-loss drugs are now driven largely by social media influence rather than medical guidance, showing a shift toward self-directed healthcare.
- 3 Ipsos. 2026. [Rethinking wellness: From product category to cultural belief system](#)
- 4 [Ipsos Health Service Report 2026](#)
- 5 Jan Callebaut et al., The Naked Consumer Today: The Secret of Motivation Research in Global Marketing. (Antwerp: Censydiam Institute, 1994): 131.
- 6 [Ipsos Happiness Survey 2026](#)
- 7 Ipsos. 2026. [Rethinking wellness: From product category to cultural belief system](#)
- 8 [Ipsos Views: Mind or Machines - Exploring AI moderation and when to use it](#)

Further reading



[Ipsos Health Service Report 2026](#)



[Global Attitudes to Happiness 2026](#)



[Rethinking Wellness: From Product Category to Cultural Belief System](#)

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