



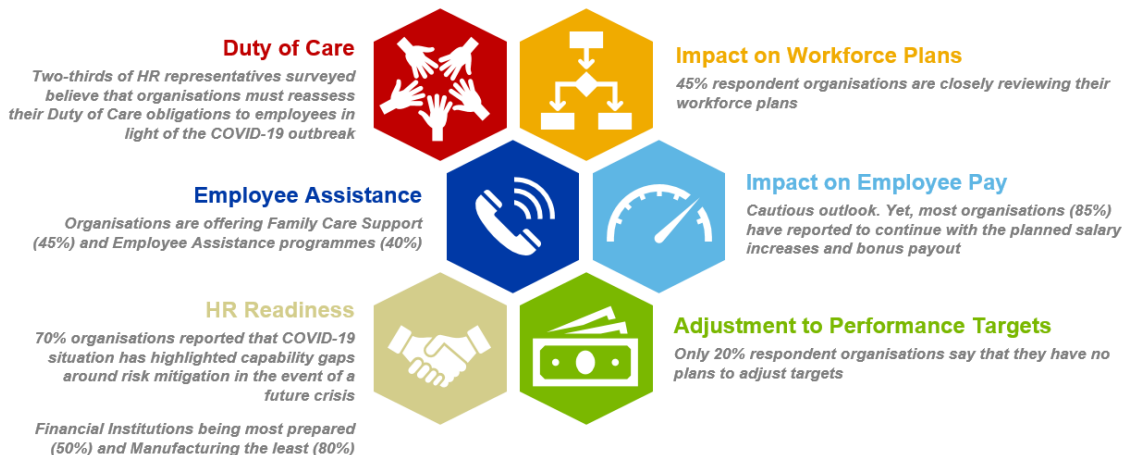
Pulse Survey Results: Navigating the Impact of COVID-19 on Workplace and Rewards Practices

APAC Edition

About This Report

Dear APAC COVID-19 Pulse Participants,

On behalf of the team that have worked across the region to put this study together, we want to thank you for your time in answering these questions. As we looked at the answers, a number of themes emerged:



As you look through the answers to the questions and if you have further queries, please do not hesitate to reach out to us personally – we are here to support you across the country, across the region, and globally.

Sincerely,

Alexander Krasavin | Craig Torgius



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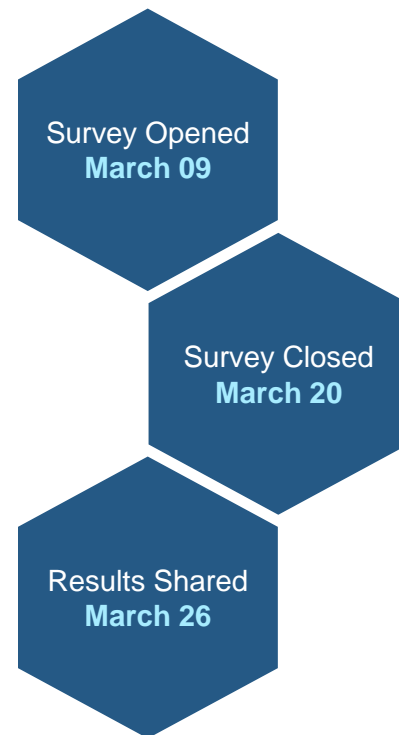
Study Overview

In light of the rapidly evolving COVID-19 pandemic and its widespread social and business implications, we partnered with our clients to create a pulse survey on the workplace, human resources and compensation policies being put in place by companies in APAC as they move to keep employees safe and adjust to an increasingly volatile market.

This study builds upon similar efforts by our teams in China and includes questions on:

- New or enhanced welfare measures for employees
- Employee communication practices
- Compensation actions directly related to the outbreak
- Workforce planning changes
- Travel restrictions
- Work-from-home policies
- HR Preparedness

Our March study of companies in APAC region garnered submission from a total of 304 organisations. This report summarises cross-industry results.



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Navigating the Impact of COVID-19 on Workplace and Rewards Practices

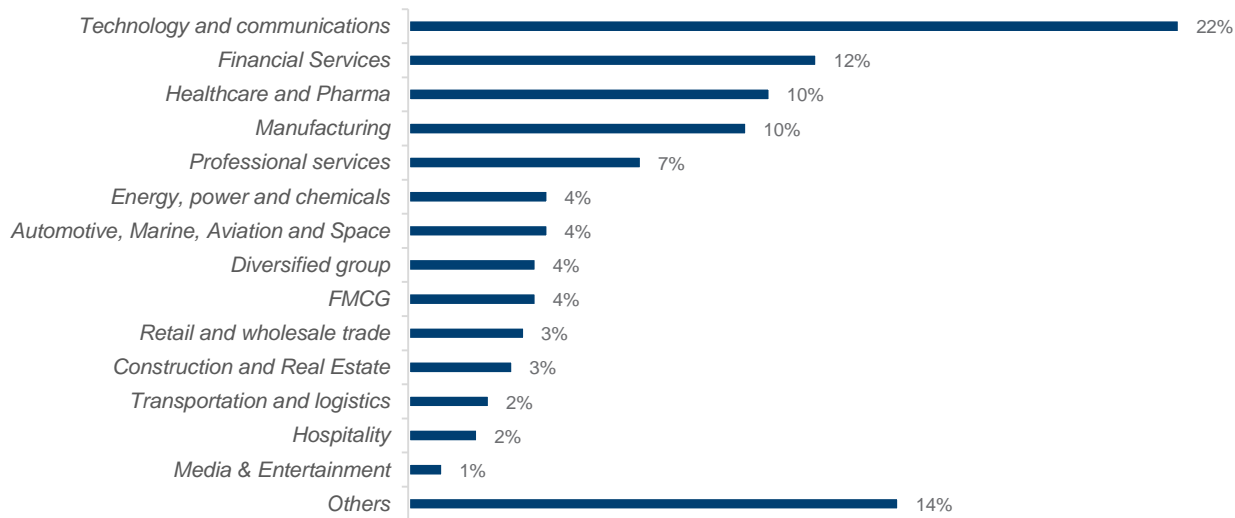
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Participant Demographics

Participant Demographics

Industry Distribution:

All study participants were asked to self-select their primary industry from the following options. Additional information on sub-industries was collected and can be used to create targeted reports upon request.



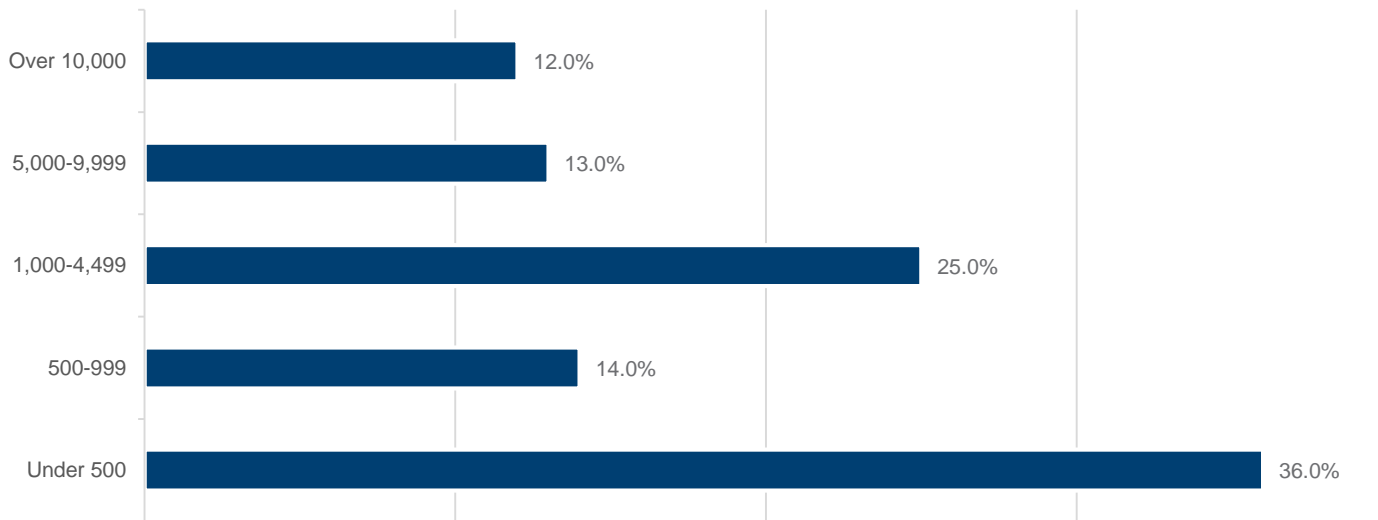
Number of Responses = 304

'Others' comprise E-Commerce companies, BPOs, Education Sector, Foundations & NGO

Participant Demographics

Company Headcount:

All study participants were asked to provide their APAC headcount according to the categories below.



Number of Responses = 304

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

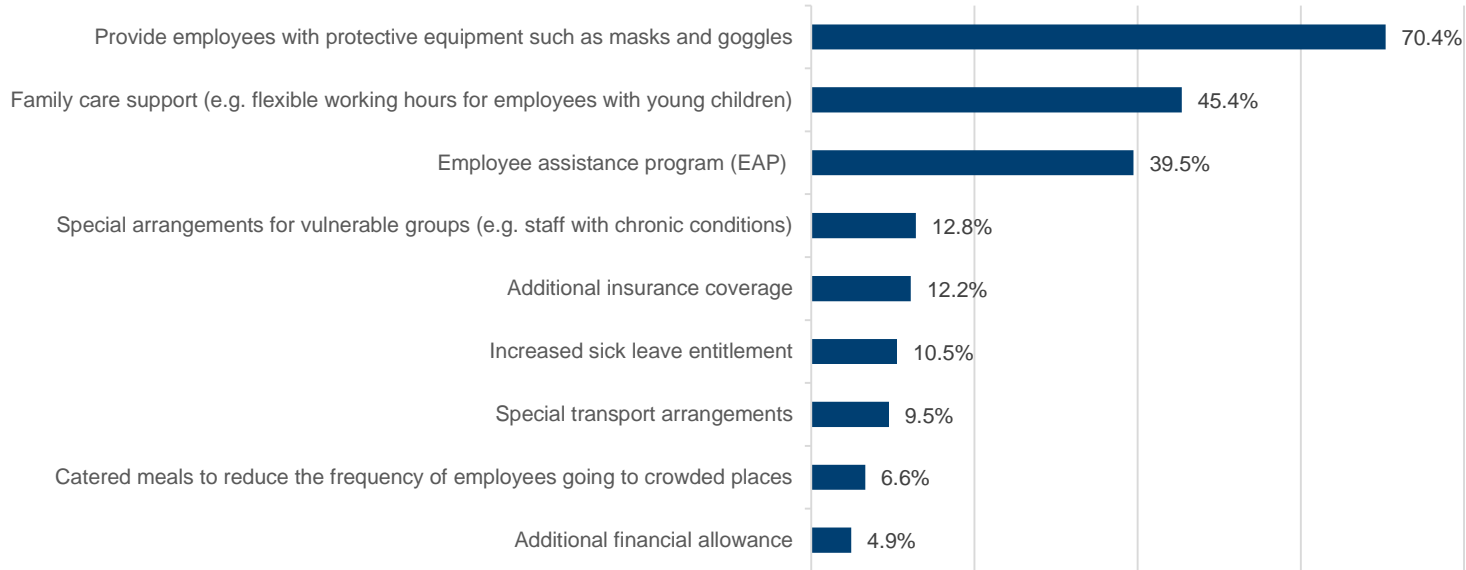
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Employee Assistance and Communication

Employee Assistance and Communication – APAC narrative

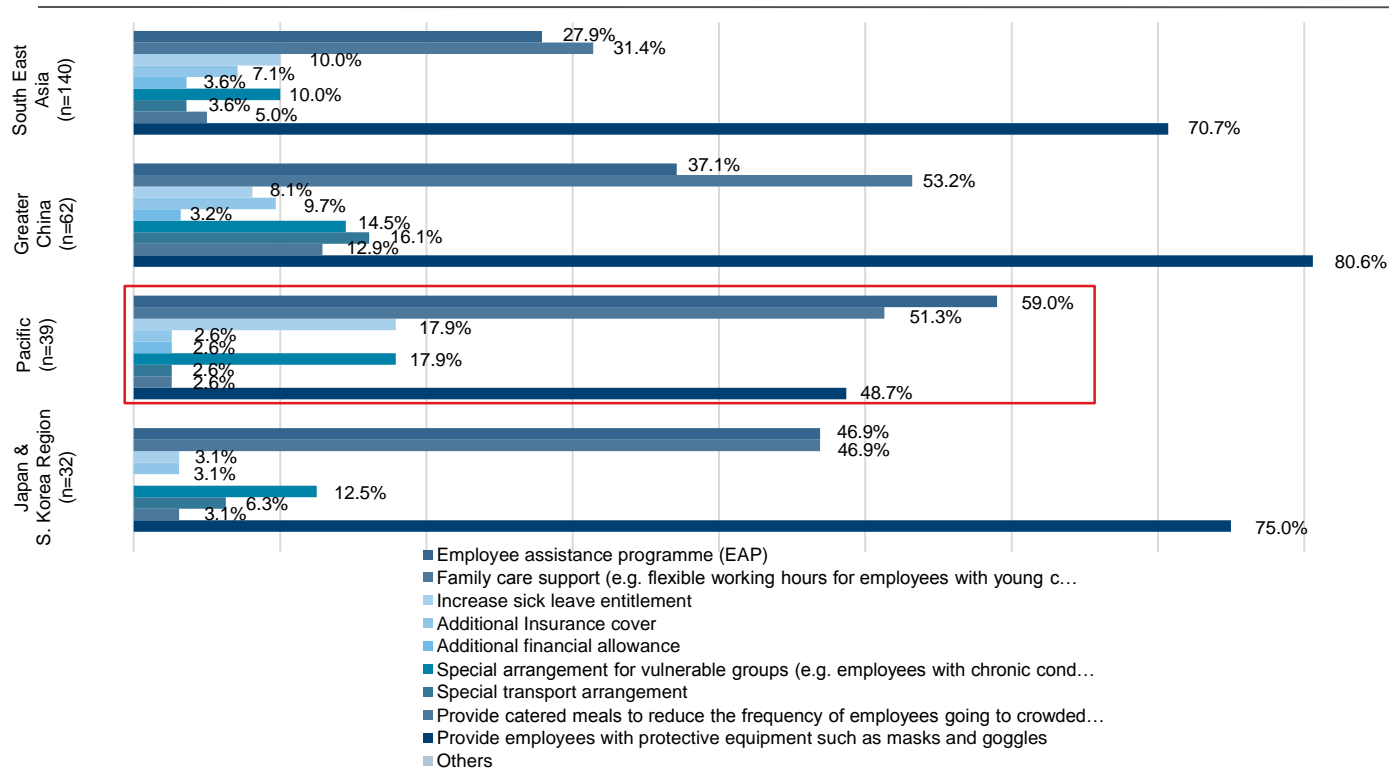
Question:

Which of the following employee welfare measures have been adopted by your organisation in light of the COVID-19 pandemic? *(Please select all that apply)*



Responses from 304 Participants

Employee Assistance and Communication – Regional Perspectives



Instant Insight

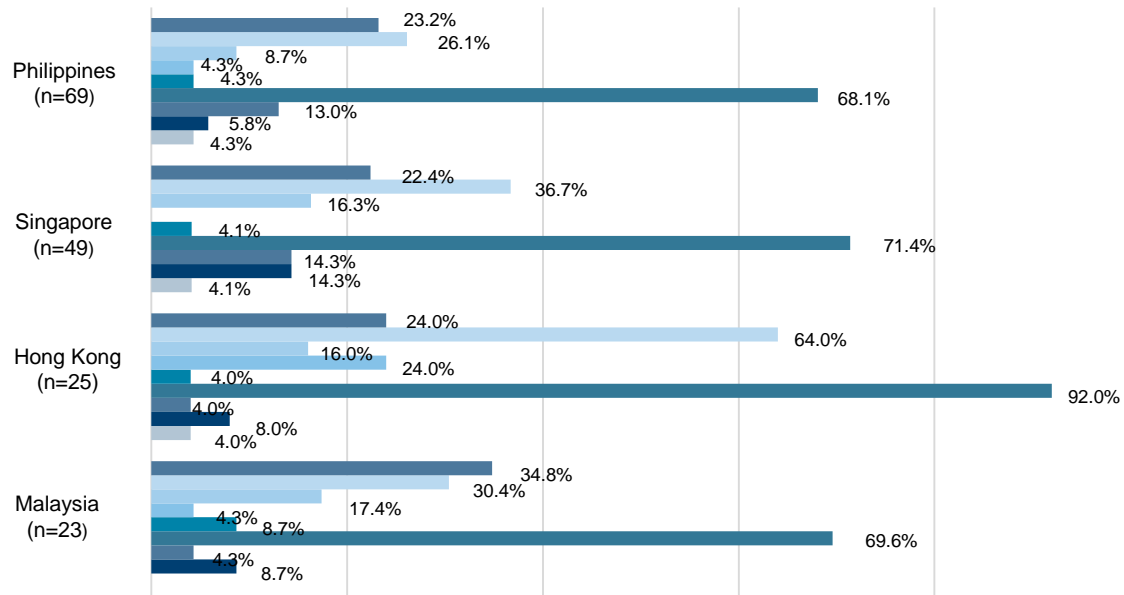
Organisations in Pacific, have proactively instituted EAPs (59% vs. APAC 39.5%) and special arrangements for vulnerable groups (18% vs APAC 12.8%) viz. offering remote working and flexibility. However, measures such as providing additional Insurance coverage for employees have less prevalence than other APAC regions (2.6% vs APAC 12.2%).

South East Asia Region comprises responses from Singapore, Malaysia, Indonesia, Thailand, Vietnam, Philippines

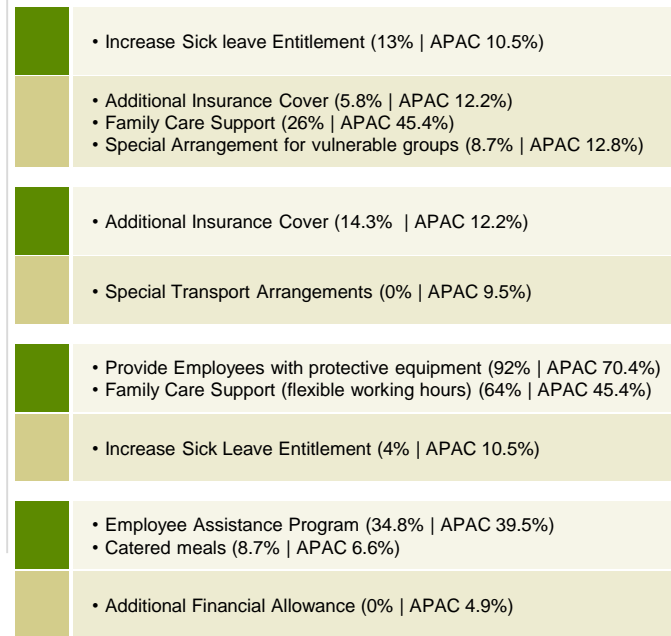
Greater China Region comprises responses from China, Hong Kong and Taiwan

Pacific Region comprises responses from Australia and New Zealand

Employee Assistance and Communication – Location Specific Perspectives



- Employee assistance programme (EAP)
- Family care support (e.g. flexible working hours for employees with young c...)
- Increase sick leave entitlement
- Additional Insurance cover
- Additional financial allowance
- Special arrangement for vulnerable groups (e.g. employees with chronic cond...)
- Special transport arrangement
- Provide catered meals to reduce the frequency of employees going to crowded...
- Provide employees with protective equipment such as masks and goggles



■ Measures of high focus ■ Measures of moderate focus

Employee Assistance and Communication – Differentiated Practices

Question:

Which of the following employee welfare measures have been adopted by your organisation in light of the COVID-19 pandemic *(Please select all that apply)*

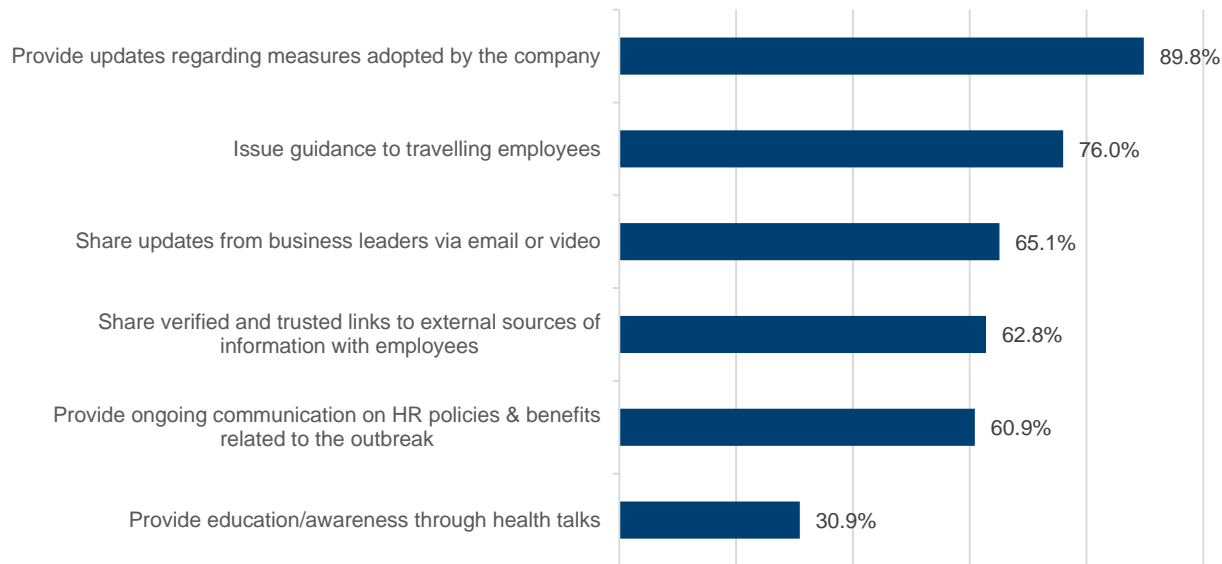
Following differentiated measures have been reported by organisations

- Two organisations in SEA have offered their employees free offered them Vitamin packs to help them focus on their health
- A Financial Services organisation has started sharing food coupon e-vouchers with employees to order their lunch at home
- A pharmaceutical organisation has activated a suspension of field coverage for the hospitals with confirmed cases
- A SEA based organisation has offered a 'Daily allowance' to employees who are put on Quarantine Order, Leave of Absence and Stay-Home Notice
- A Hongkong and Taiwan based Technology organisation has offered Paid leave for employees who have children below the age of 12
- One organisation has reported that its Insurance companies have simplified the claims process and provided customer service hotlines for assistance if needed
- A SEA-based Educational institution has issued oral digital thermometers to staff
- An Australian Financial Services firm has offered a provision of "Special Leave" for employees that are required to self-isolate, and continued payment to casuals & some contractors not eligible for sick leave that are required to self-isolate (with medical certificate)

Employee Assistance and Communication (Cont.)

Question:

How is employee communication related to the COVID-19 pandemic being managed in your organisation? *(Please select all that apply)*



Number of Responses = 304

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Instant Insight

Organisations share Information via dedicated COVID-19 webpage. FAQs, current status, links to Government issued communication have been hosted.

Social mobile applications and tools have been used by multiple organisation to share information with employees.

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

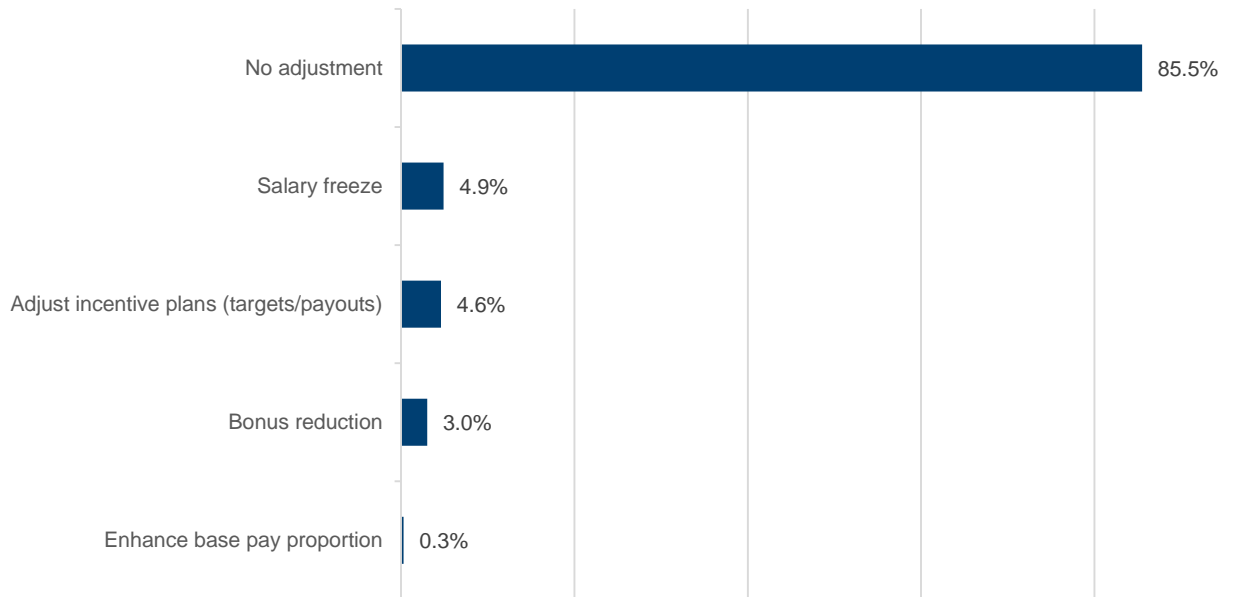
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Changes to Compensation and Hiring Plans

Changes to Compensation – APAC narrative

Question:

Is your organisation considering ways to compensate employees differently in light of the COVID-19 pandemic? *(Please select all that apply)*



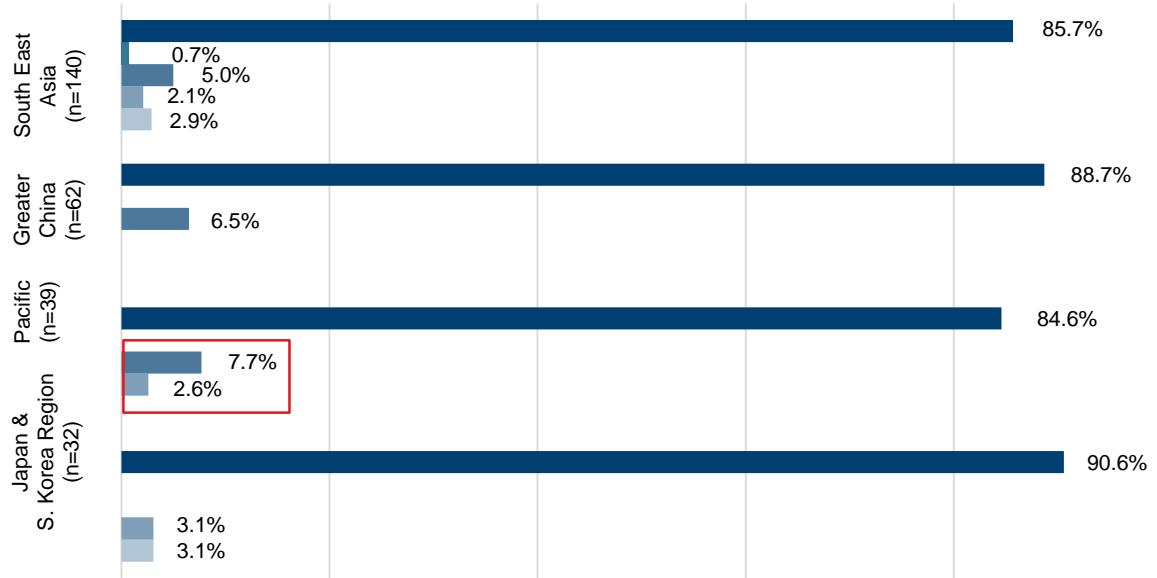
Number of Responses = 304

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Instant Insight
Cautious outlook. Yet, most organisations (85.5%) have reported to continue with the planned salary increases and bonus payouts.

Changes to Compensation – Regional Perspectives



- No Adjustment
- Salary Freeze
- Adjust Incentive Plans
- Enhance base-pay proportion
- Bonus Reduction

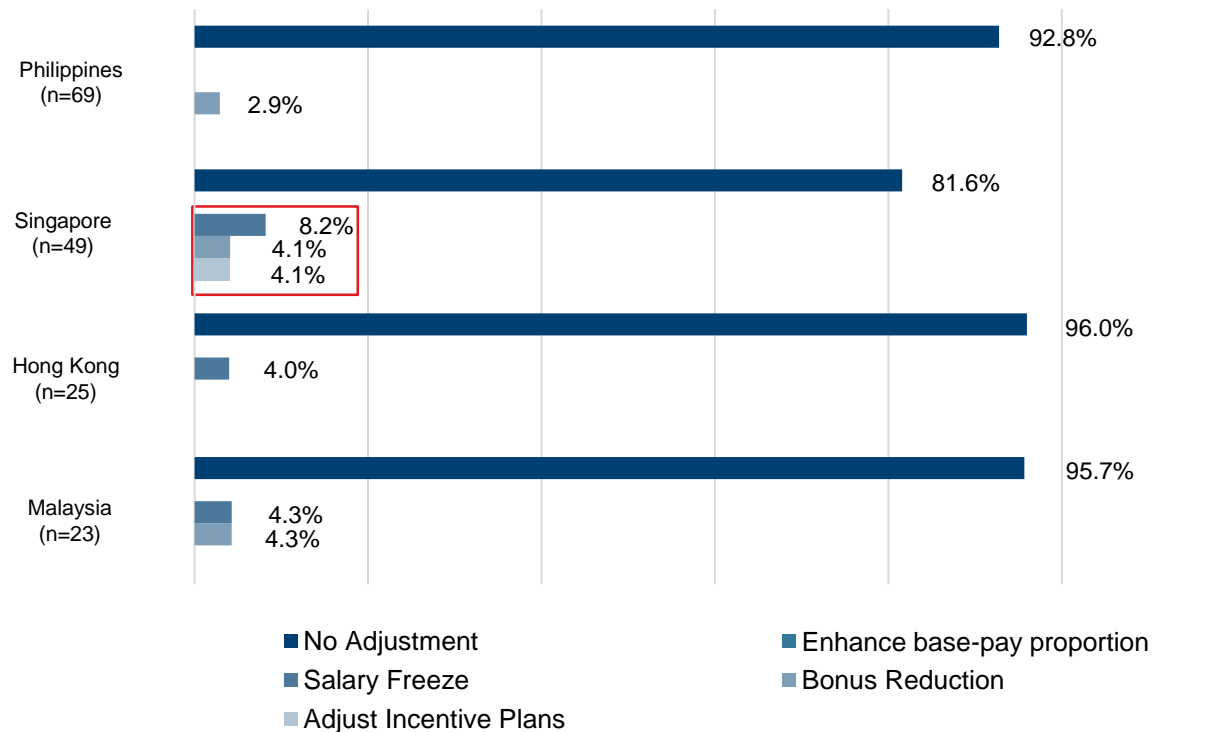
South East Asia Region comprises responses from Singapore, Malaysia, Indonesia, Thailand, Vietnam, Philippines

Greater China Region comprises responses from China, Hong Kong and Taiwan

Pacific Region comprises responses from Australia and New Zealand

Instant Insight
 Organisations in Pacific have adopted a cautious approach towards employee compensation actively considering salary freezes and bonus reduction.

Changes to Compensation – Location Specific Perspectives



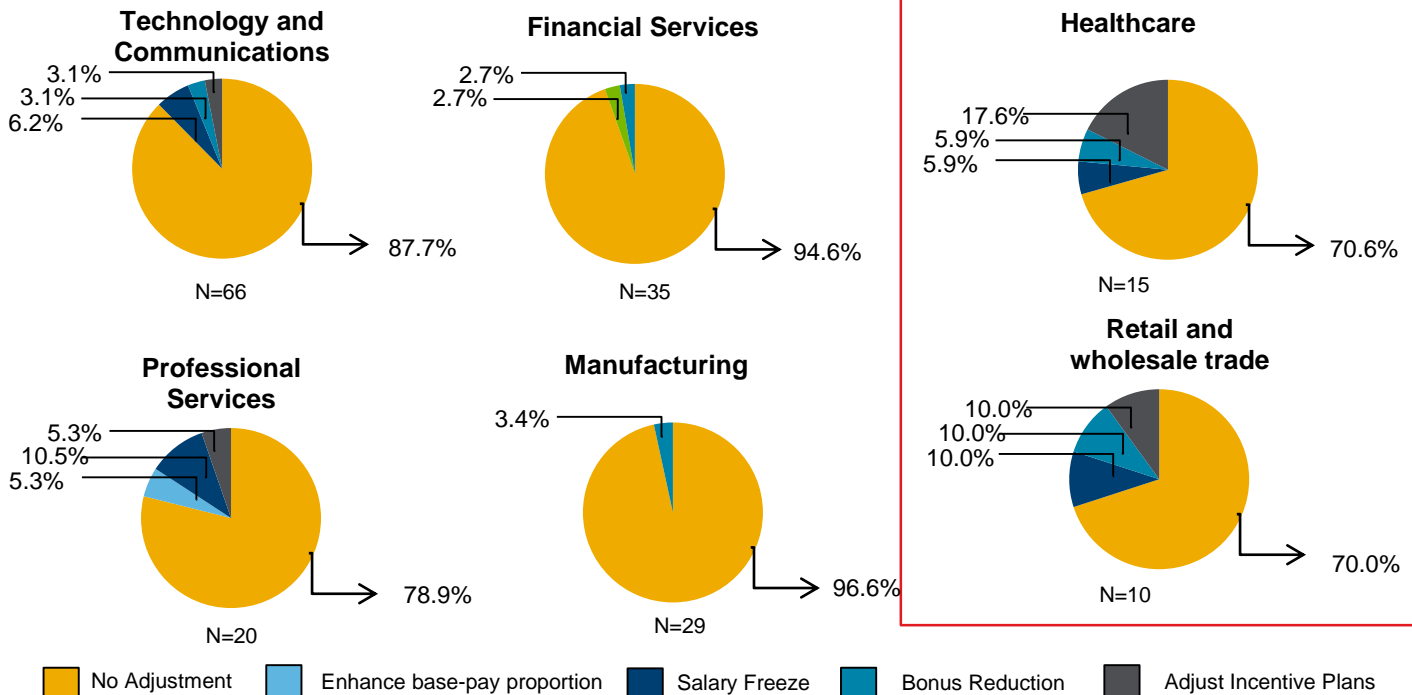
Instant Insight

Organisations in Singapore have adopted a cautious approach to employee compensation. Greater proportion of organisations have reported compensation reviews compared to other locations.

Changes to Compensation – Industry Insights

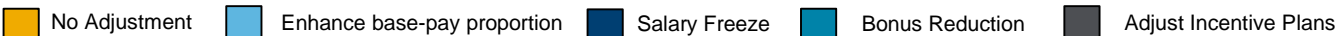
Question:

Is your organisation considering ways to compensate employees differently in light of the COVID-19 pandemic? *(Please select all that apply)*



Instant Insight

Organisations in Healthcare, Retail & wholesale trade and Professional Services sectors have adopted a relatively cautious approach (compared to other sectors) to employee compensation and have reported Salary freezes and muted bonus payouts.



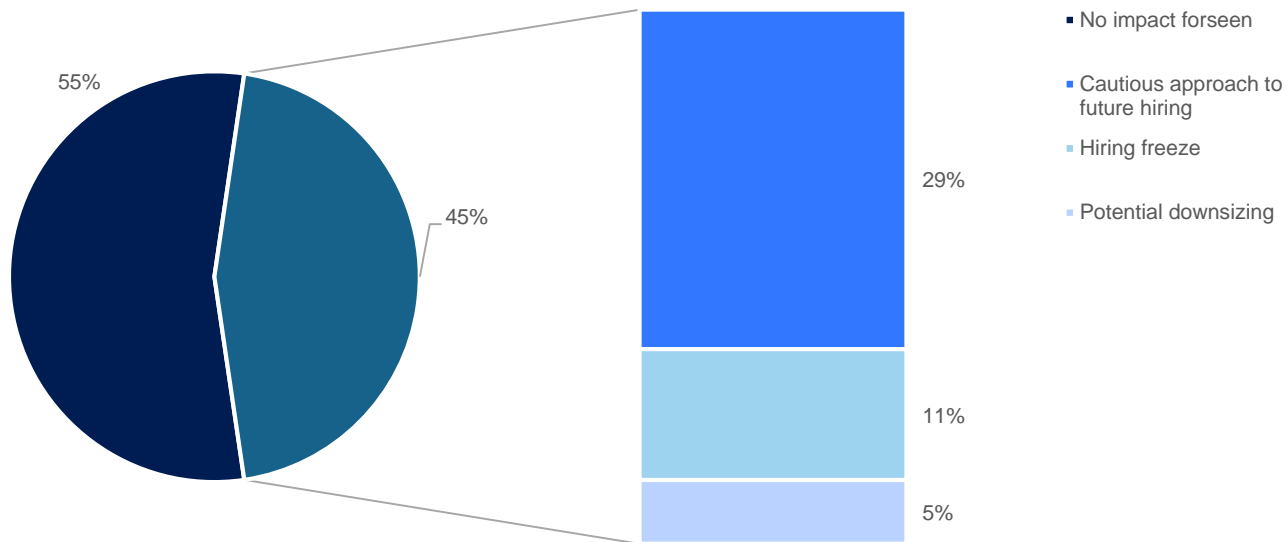
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Impact on Hiring Plans – APAC narrative

Question:

How do you expect the COVID-19 pandemic to impact workforce planning?



Instant Insight

45% respondent organisations are closely reviewing their workforce plans.

29% respondent have reported to adopt a cautious approach to hiring.

Number of Responses = 304

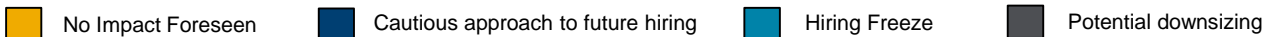
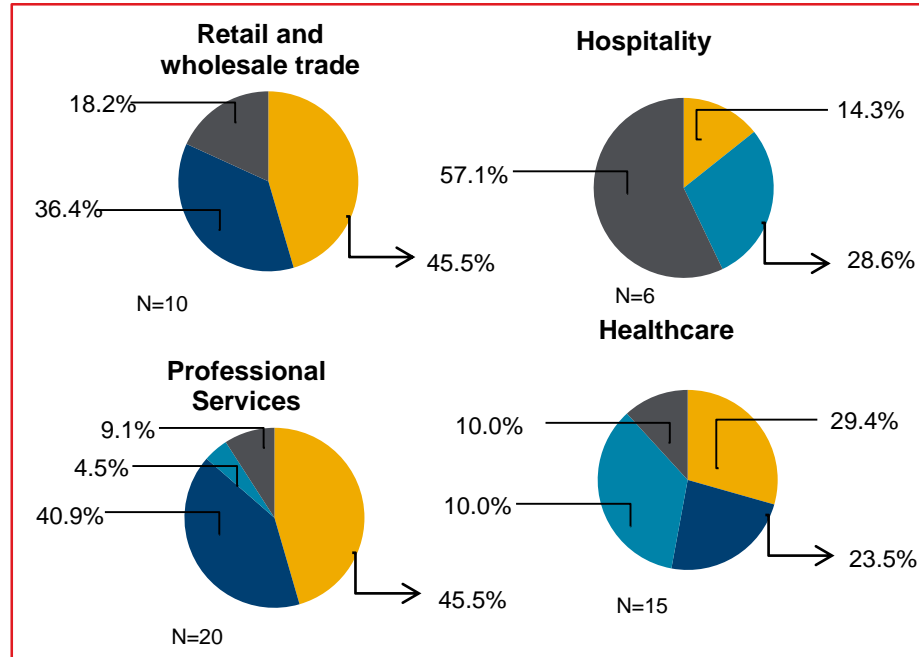
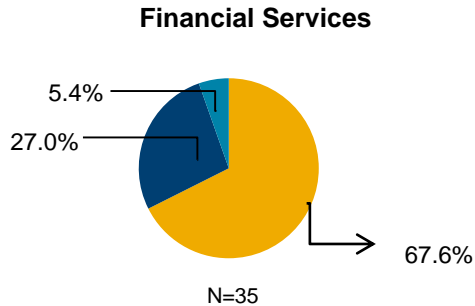
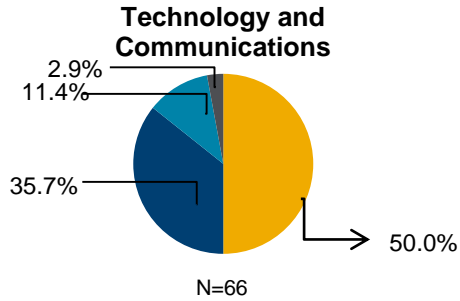
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Impact on Hiring Plans – Industry Insight

Question:

How do you expect the COVID-19 pandemic to impact workforce planning?



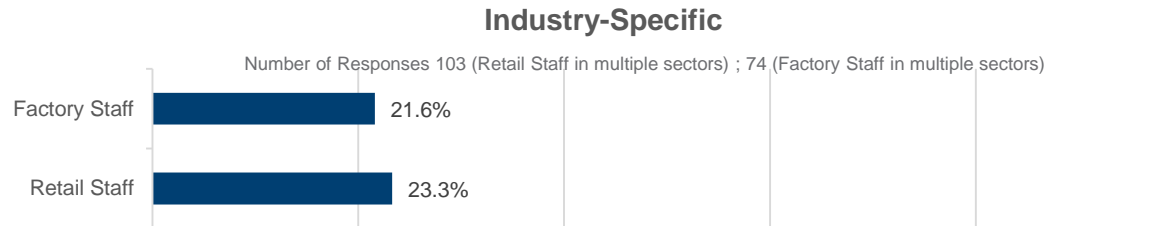
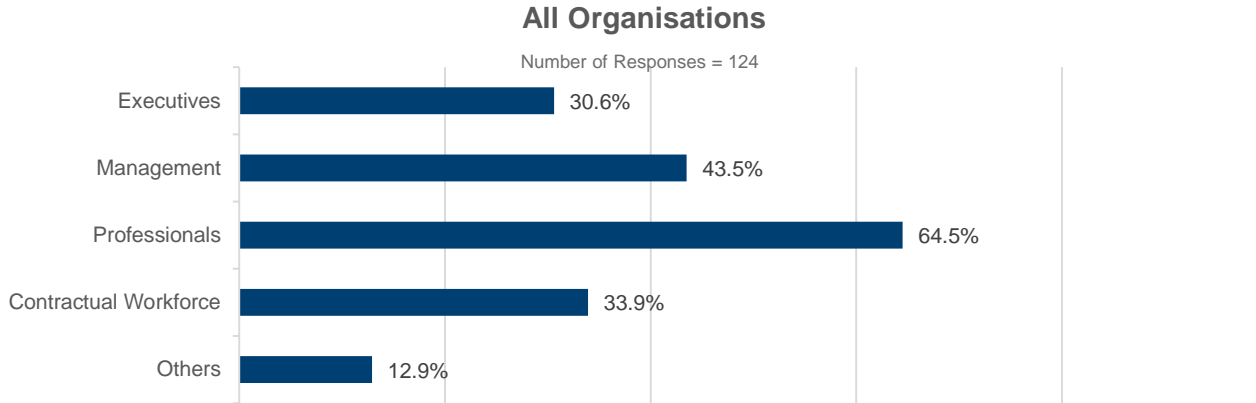
Instant Insight

While a 'Cautious approach to Hiring' is being adopted across sectors, Hospitality and Healthcare may be impacted by 'Hiring Freeze' and 'Downsizing'.

Impact on Employee Groups – APAC narrative

Question:

In case of the above measures, which group of employees would most likely be impacted?



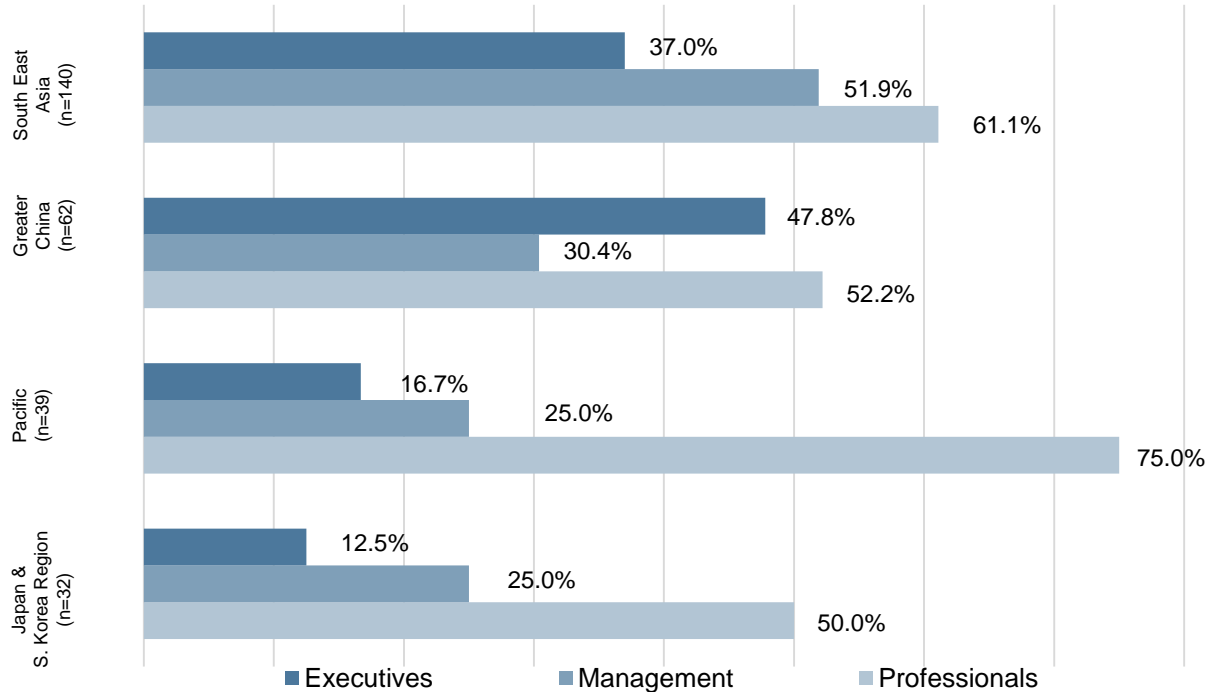
Instant Insight

Contractual Workforce and Professionals are expected to be most impacted by change in workforce plan.

Impact on Employee Groups – Regional Perspective

Question:

In case of the above measures, which group of employees would most likely be impacted?



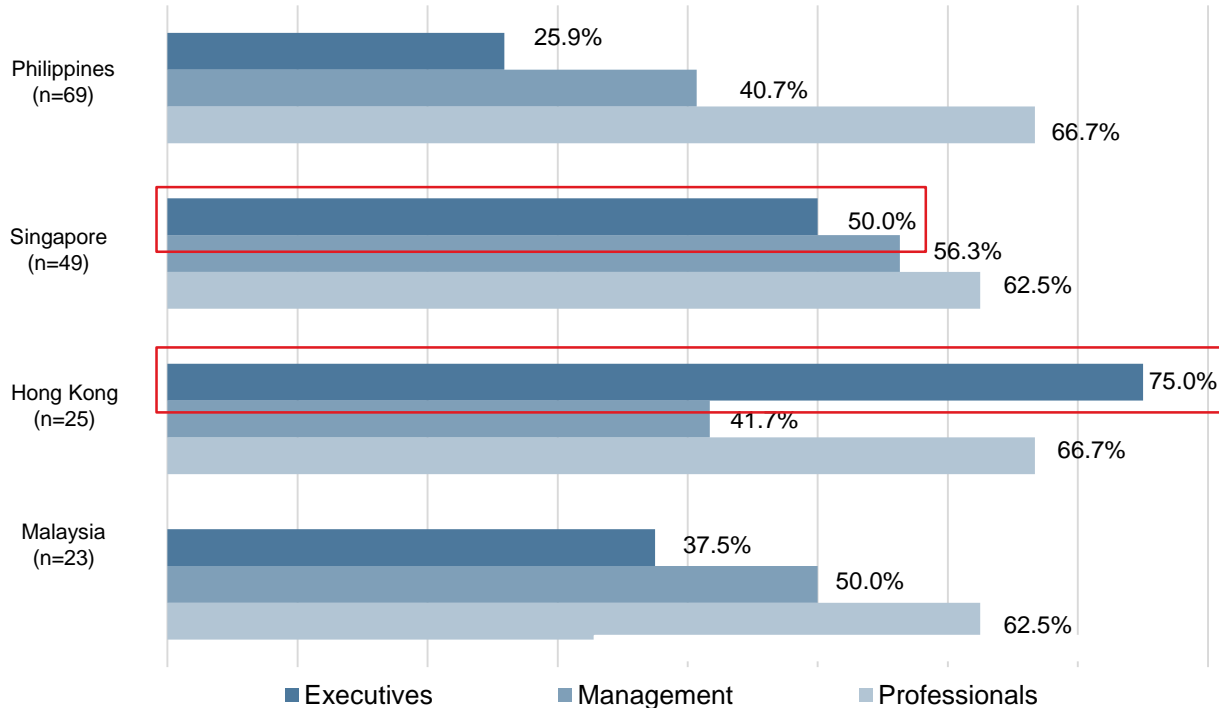
Instant Insight

Impact on workforce planning measures is reported to be spread across employee groups (Executives, Management and professionals) in Greater China South East Asia.

Impact on Employee Groups – Location Specific Perspectives

Question:

In case of the above measures, which group of employees would most likely be impacted?



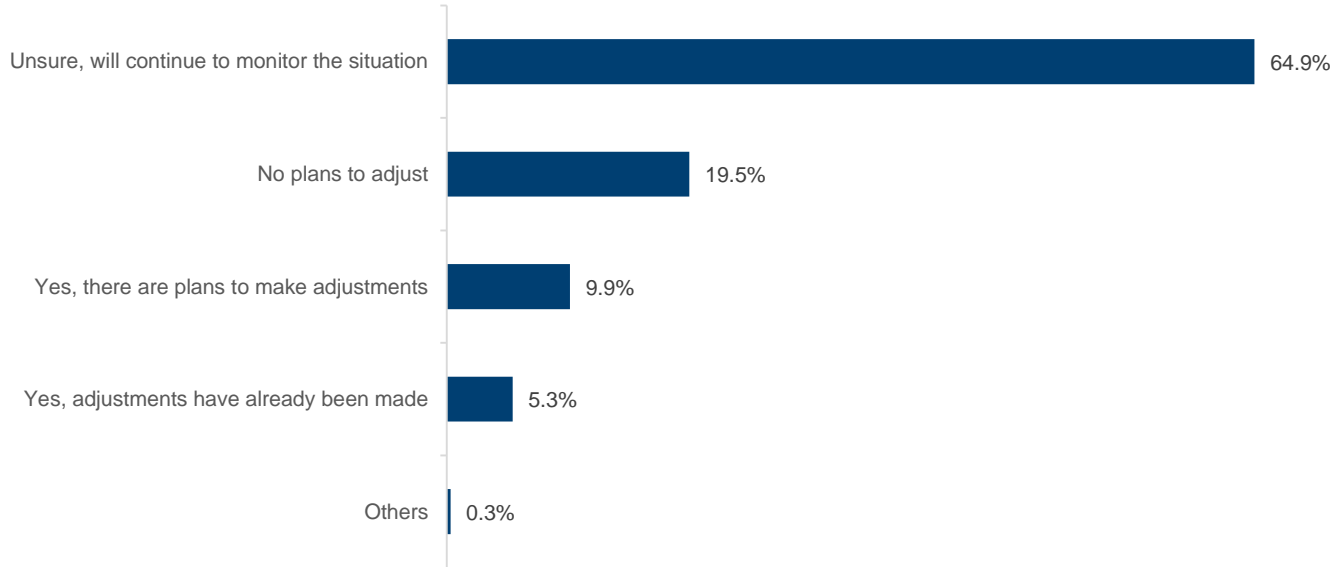
Instant Insight

Singapore and Hong Kong based organisations have reported a greater impact on Executives compared to organisations in other locations.

Changes to Performance Targets – APAC narrative

Question:

Is your organisation planning to re-evaluate and adjust performance targets in light of the COVID-19 pandemic?



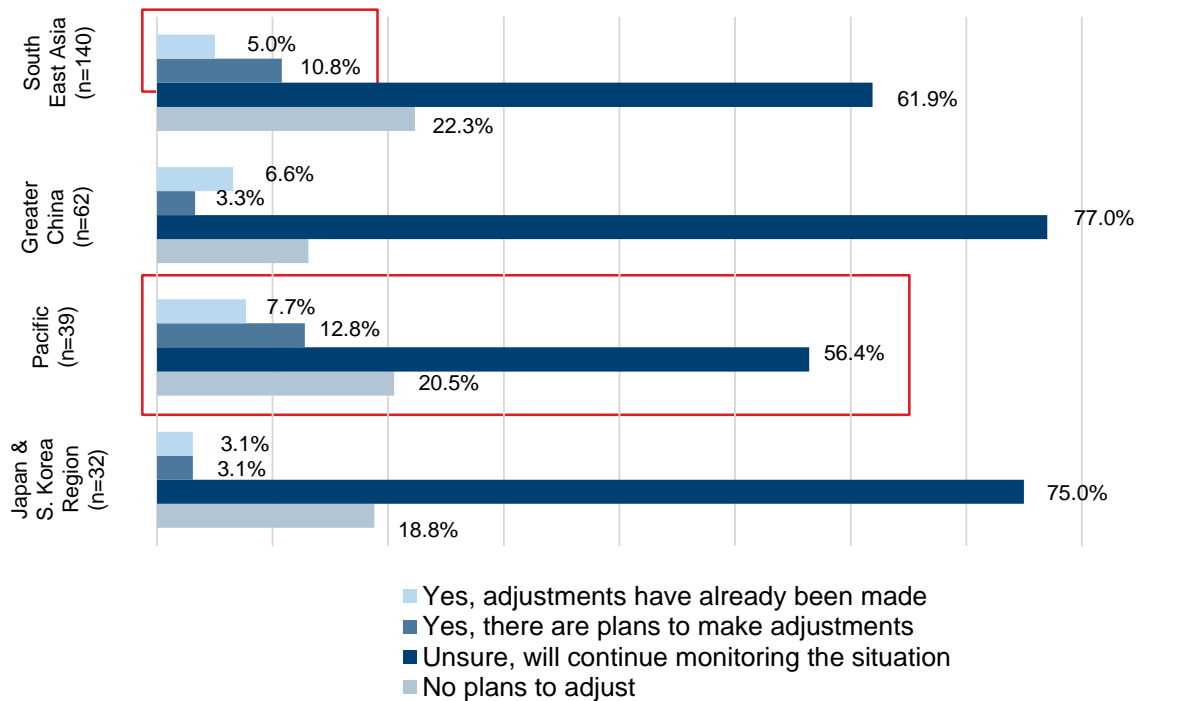
Number of Responses = 304

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Instant Insight
Only 20% respondent organisations say that they have no plans to adjust targets.

Changes to Performance Targets – Regional Perspective



Instant Insight

SEA and Pacific based organisations have reported adjustments / plan to adjust performance target.

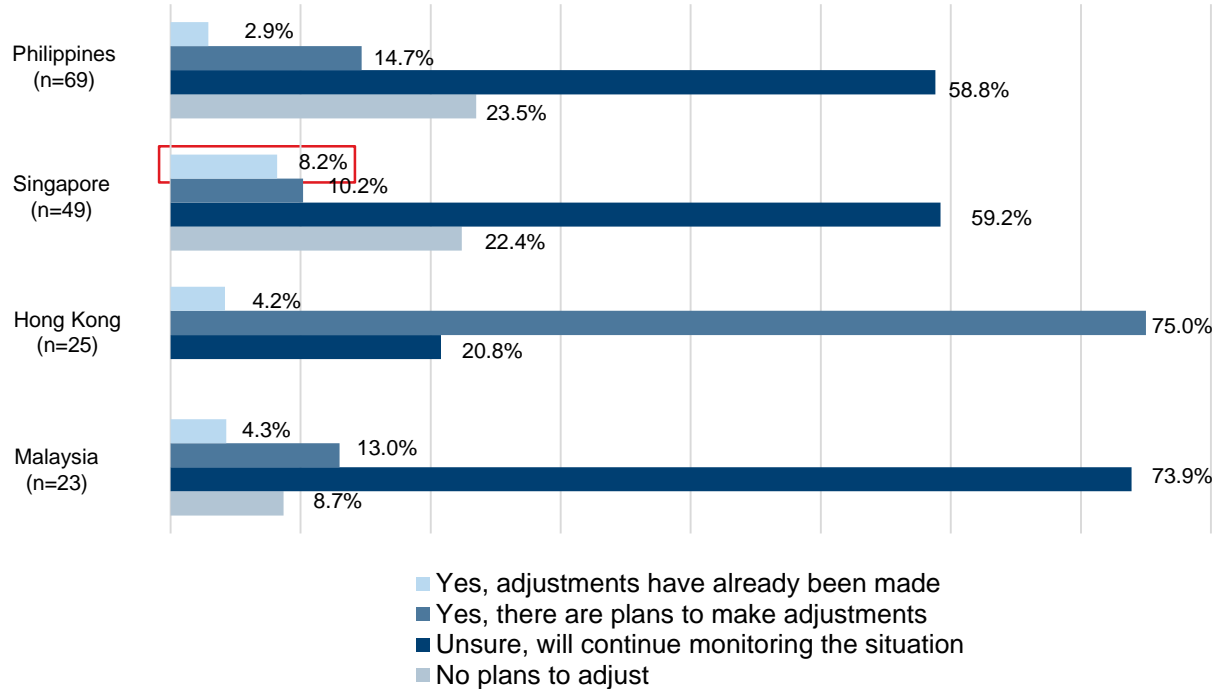
In Greater China, Japan & South Korea Regions, a relatively higher proportion of organisations continue to monitor the situation before committing to / planning to making target adjustments.

South East Asia Region comprises responses from Singapore, Malaysia, Indonesia, Thailand, Vietnam, Philippines

Greater China Region comprises responses from China, Hong Kong and Taiwan

Pacific Region comprises responses from Australia and New Zealand

Changes to Performance Targets – Location Specific Perspectives



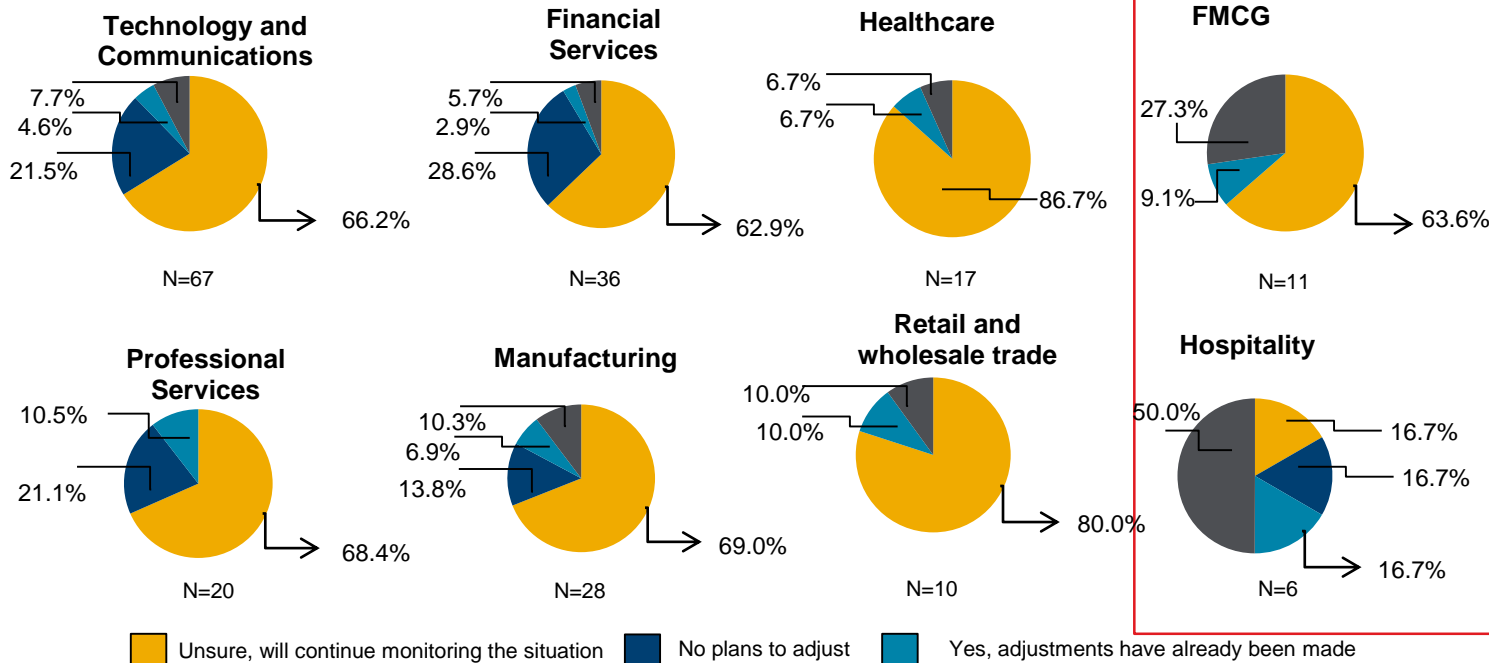
Instant Insight

Singapore reports a higher proportion of organisations which have already made adjustments to performance targets.

Changes to Performance Targets – Industry Insights

Question:

Is your organisation considering ways to compensate employees differently in light of the COVID-19 pandemic? *(Please select all that apply)*



Instant Insight

FMCG and Hospitality are sectors where a greater proportion of organisations have reported adjustments / plans for adjustments of performance targets.

Most companies in other sectors continue to monitor the situation closely.

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

APAC Edition

Workforce Safety Measures

Workforce Safety Measures

Question:

Which of the following control measures have been adopted by your organisation in the context of the recent COVID-19 pandemic? *(Please select all that apply)*

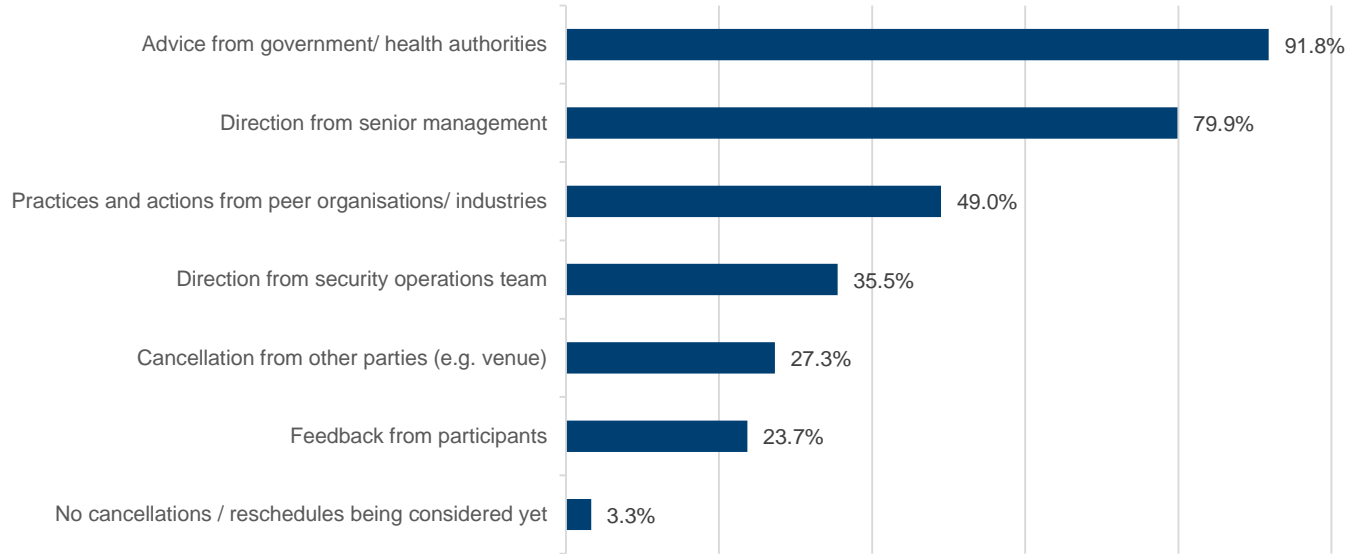


Number of Responses = 304

Control Measures

Question:

What are the considerations when deciding whether to cancel/ postpone and event?



Number of Responses = 304

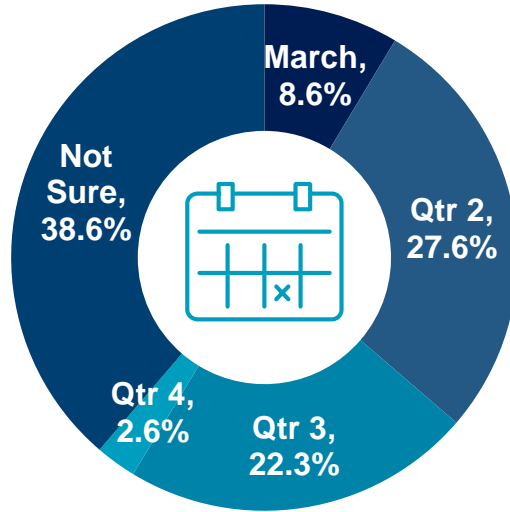
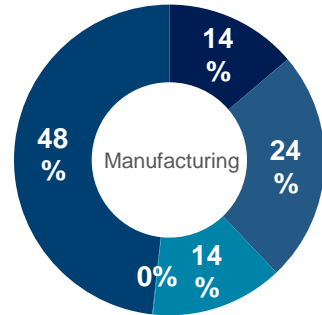
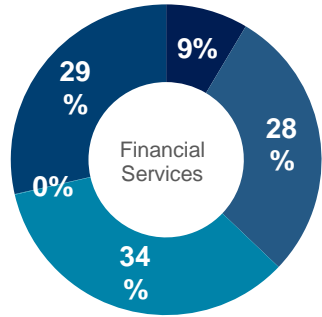
Instant Insight

The decision on whether to cancel an event is somewhat reactive where most employers depends on advices and instructions from health organisations and company management.

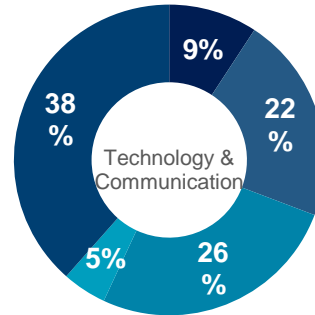
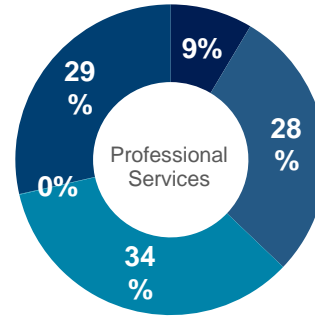
Workforce Safety Measures

Question:

When do you estimate your organisation will resume normal operations?



Number of Responses = 304



Instant Insight

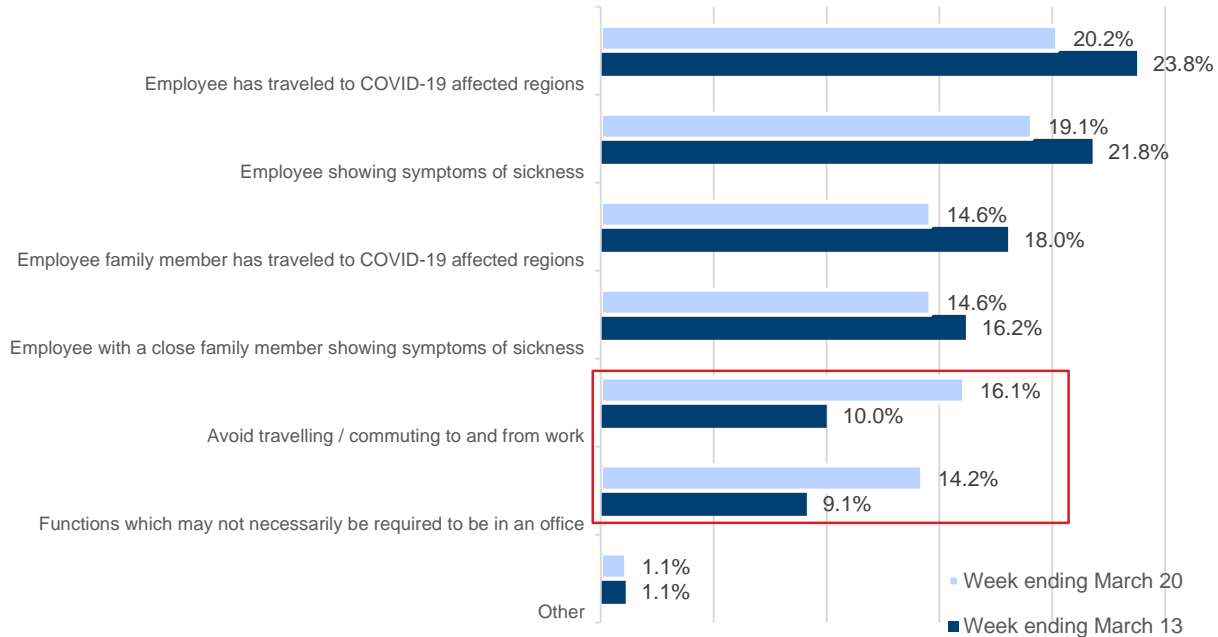
Most companies do not expect to resume normal operations until the second half of the year.

The uncertainty in resuming normal operation is most significant in the manufacturing industry.

Workforce Safety Measures (Cont.)

Question:

For which of the following reasons would an employee be required to work from home?
(Please select all that apply)



Number of Responses = 304

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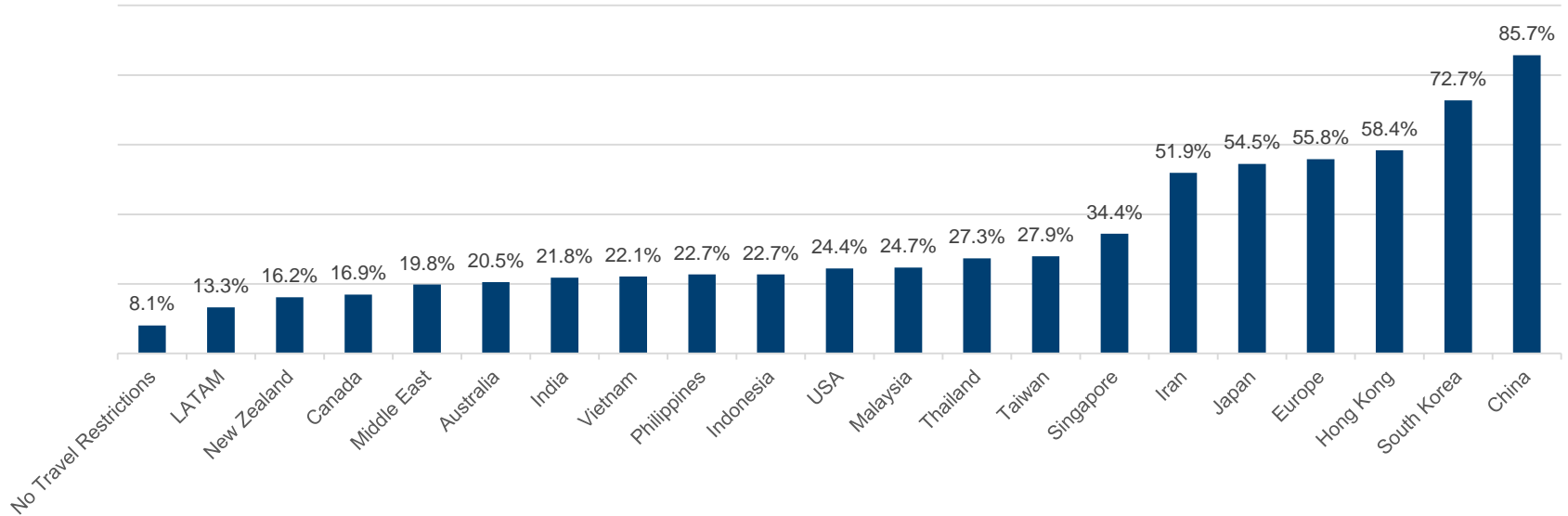
Extra Insight

In the recent week, more number of organisations offered Work From Home to employees to prevent commute to work and have only those functions in office deemed necessary for operations.

Workforce Safety Measures (Cont.)

Question:

Which locations has your organisation placed travel restrictions on in the context of the recent COVID-19 pandemic?
(Please select all that apply)



Number of Responses = 304

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

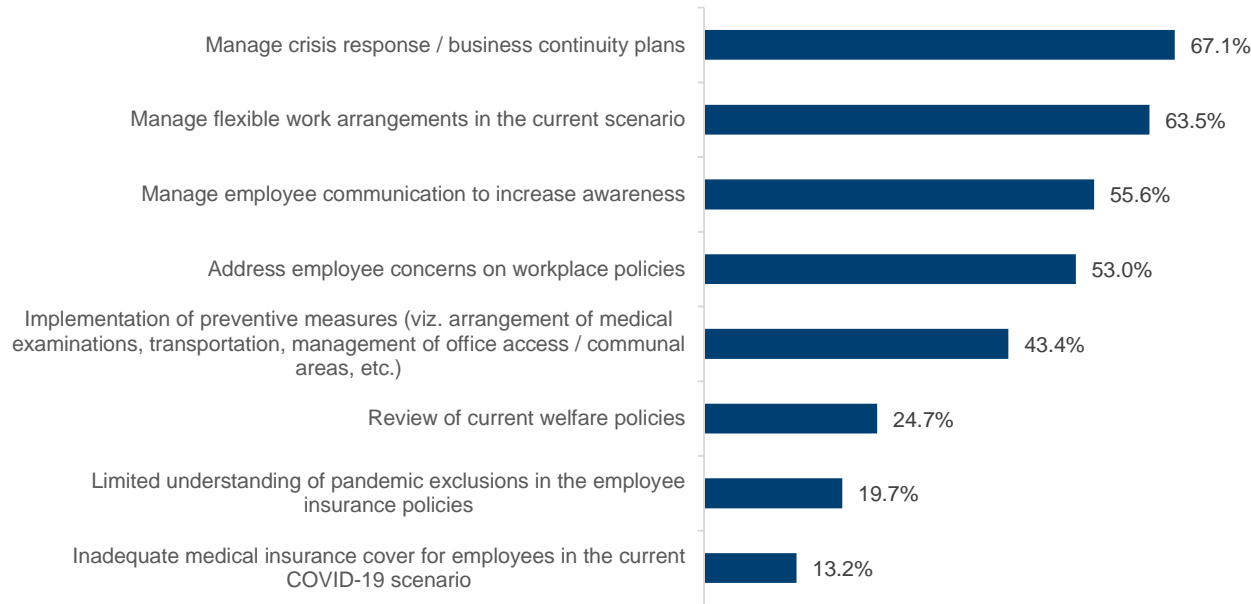
APAC Edition

Challenges and Readiness

HR Challenges and Readiness

Question:

What are the main challenges faced by HR during the COVID-19 outbreak?



Number of Responses = 304

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Instant Insight

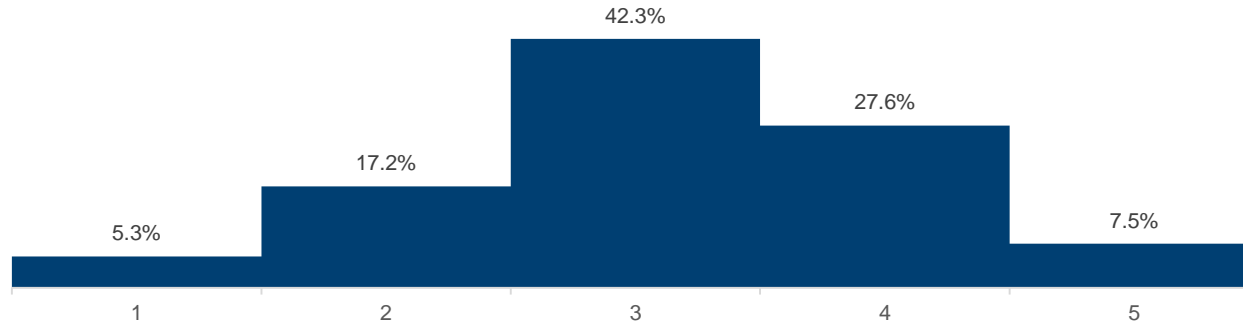
HR departments are focused on minimising disruption to normal operations and providing employees with up-to-date information.

The fast-moving nature of the crisis has challenged HR departments' ability to perform these operations.

HR Challenges and Readiness

Question:

Do you believe that your HR department was adequately trained, equipped and ready to deal with the challenges posed by the COVID-19 outbreak?* Rate your readiness 1-5 (5 being sufficiently ready to deal with this event)



Number of Responses = 304

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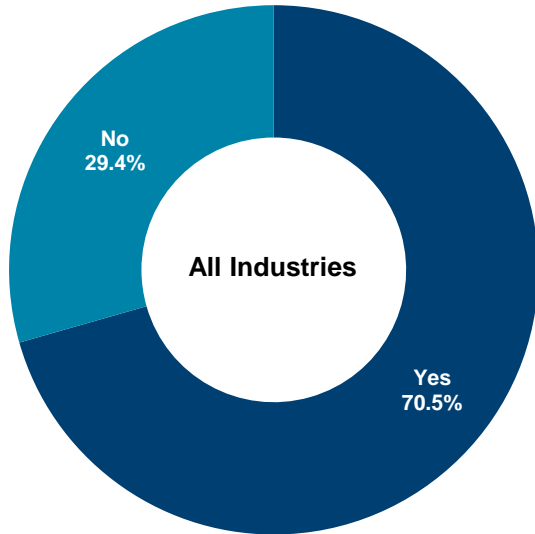
Instant Insight

Among the top 5 industries with the most respondents for the survey, respondents in financial services (19%) were the most likely to believe that their HR departments were sufficiently ready (rating = 5) to deal with COVID-19.

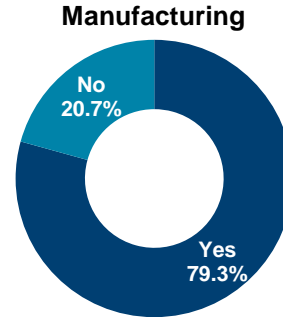
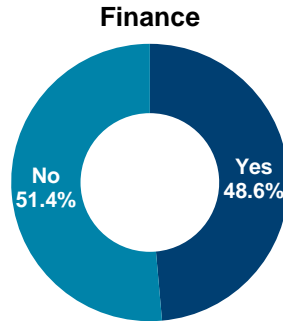
HR Challenges and Readiness

Question:

Has the COVID-19 situation highlighted capability gaps around risk mitigation and / or insurance solutions in the event of a future crisis?



Number of Responses = 304



Instant Insight

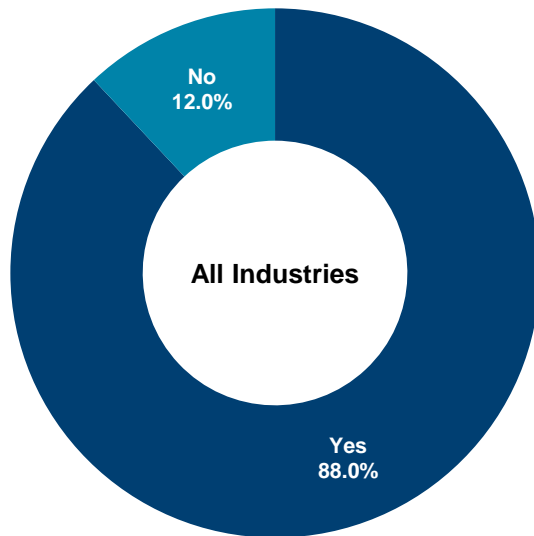
Respondents in financial services appear to be split on their satisfaction with their coverage.

However, respondents in manufacturing are most likely to believe that COVID-19 has highlighted gaps in their risk mitigation / insurance solutions.

HR Challenges and Readiness

Question:

Has the COVID-19 situation allowed you to effectively demonstrate the importance of your HR strategies towards mitigating people risk?



Number of Responses = 304

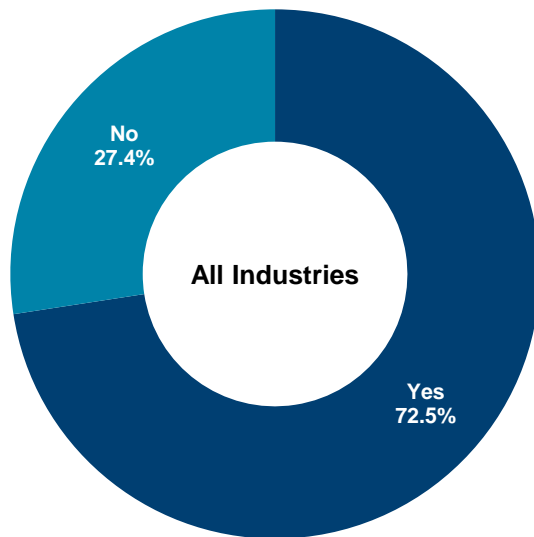
Instant Insight

While many HR representatives see gaps in their insurance products, nearly 7 in 8 surveyed are satisfied with their strategies to deal with the COVID-19 situation.

HR Challenges and Readiness

Question:

Post-COVID-19, do you believe your organisation needs to reassess their Duty of Care obligations to employees?



Number of Responses = 304

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Instant Insight

Two-thirds of HR representatives surveyed believe that organisations must reassess their Duty of Care obligations to employees in light of the COVID-19 outbreak.

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

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Study Participants

Study Participants (Cont.)

- AAXIS Commerce
- AbbVie GK
- Aberdeen Standard Investments (Asia)
- ABN AMRO Bank N.V.
- Aboitiz Equity Ventures, Inc.
- AC Energy, Inc.
- Accenture
- Acer
- AGR Operations Manila, Inc.
- Air Products Industrial Gases Pte Ltd
- Align Technology
- Alstom
- Alta Resources
- American Express
- Amorepacific Group
- Anchor Insurance Brokerage
- ANFLOCOR
- Arab Bank Australia Limited
- Arrow Electronics
- ARS Realty
- ASDAS
- Aster DM
- Aten International Co., LTD.
- AUDI SINGAPORE PTE LTD
- Aurecon Australasia Pty. Ltd.
- Autodesk
- AXA
- Ayala Foundation, Inc.
- B&M Global Services Manila, Inc.
- Bank of the Philippine Islands
- Baxter Healthcare
- BDO
- BIOMIN Singapore Pte Ltd
- BMC Software
- BMES
- Bocimar Hong Kong Limited
- Bose Singapore Pte Ltd
- Boston Scientific
- Boustead Services Pte Ltd
- Boyd & Moore
- BP
- Breadtalk Group Ltd
- Brown-Forman
- ByteDance
- Caben Asia Pacific Ltd.
- Canva
- Catapult Sports
- Cathay Pacific Airways Ltd
- Chanel
- Cheetah Digital
- China Telecom Global Limited
- CHUANG'S CONSORTIUM LTD
- Citi
- Cityneon Holdings
- Classic Fine Foods Phils Inc.
- CLSA
- CNH Industrial Services (Thailand)
- CNQC (South Pacific) Holding Pte Ltd
- Co.op Food
- Covance Asia Pte Ltd
- Cover Genius
- Credit Suisse
- CS-PAC GLOBAL BPO, INC.
- CTCI
- Danaher China
- Danone
- DB Industries
- Deacons
- Deloitte
- DELTA
- Dentsu Aegis Network
- Deputy
- DESTINI OIL SERVICES SDN BHD
- Diversey Philippines
- DLF GLOBAL
- Docusign
- Dolby Japan
- Dragon Capital
- DuPont
- DXC Technology
- Dyson
- Dystar India
- E&V Water and Life Philippines/
- E*TRADE Information Services, LLC

Study Participants (Cont.)

- Eaton
- Ecolab Korea
- Ecolab Ltd. Taiwan
- Ecolab Philippines Inc.
- EFCC TUNG Fook Church Ltd
- EHS Lens Philippines Inc
- Endace
- EnerSys Reserve Power Pte Ltd
- ENGIE Services Singapore Pte Ltd
- ERM Korea Ltd.
- Essilor Shared Services Philippines Inc
- Euroclear
- Ever Consumer Sales Inc.
- Eximius BPO Services, Inc.
- Exyte Asia-Pacific Holding Ltd
- EY
- Faeyza
- Family Office Exchange
- Fastron Sdn Bhd
- Federal Land Inc.
- FPG Insurance
- Fresenius Medical Care
- Funai Electric Phils., Inc.
- G4S (Hong Kong - Holding) Ltd.
- Gartner
- Genesys
- Genpact Services LLC
- GESS
- GI Philippines Corp
- GlaxoSmithKline
- Global Benefits Group Thailand
- Global Payments Process Centre Inc
- GlobalFoundries Singapore Pte Ltd
- Google Operations Center
- Go-VA
- Grab
- Graniterock
- Graymont (Unichamp Mineral Philippines Inc)
- GSK
- GSK Consumer Healthcare India
- GSK Taiwan
- GSK Thailand
- Guiltfree Industries Limited
- Halliburton Worldwide Ltd.
- Hapag-Lloyd Vietnam
- HCF
- Heidelberg Phils. Inc.
- Heidrick & Struggles Singapore Pte Ltd
- Hewlett Packard Enterprise
- Hewlett Packard Enterprise Korea
- Hewlett Packard Enterprise Taiwan Ltd.
- Hilti Asia Ltd
- Hinduja Global Solutions, Ltd.
- Hitachi Cable Philippines Inc.
- Hitachi Consulting Asia Pacific PTe Ltd
- Hong Kong Council for Accreditation of Academic and Vocational Qualifications
- Hong Kong Television Network Limited
- Hospitality Resources Inc/The Reef Island Resort
- HP Inc.
- HTC
- IBM
- IBM Korea
- ICTSI
- IHS Markit
- Illumina
- Indeed
- Infineon Technologies Taiwan Co., Ltd.
- Institutional Shareholder Services, Inc.
- Integrated Computer Systems, Inc.
- Interflour Group Pte Ltd
- Investment & Capital corporation of the Phils
- ISS, Inc
- Iyasare
- Jebsen & Jessen Business Services (M) Sdn Bhd
- JG Summit Holdings, Inc.
- JLL
- Johnson & Johnson
- JT International Thailand Ltd.
- Julies Franchising Corporation
- Juniper Networks
- Kentop(THAILAND)Ltd
- KGI Securities (Singapore) Pte Ltd
- Kimberly Clark Philippines
- Kimberly Clark Vietnam

Study Participants (Cont.)

- Klook Travel Technology
- Kuok Group
- Lam Research
- Lazada
- Li & Fung (Trading) Limited
- Lime Technology Pte Ltd
- Linfox International
- LioHo Machinery
- Liteon
- Lookwell Philippines Corporation
- LSEGH, Inc.
- Lumileds Malaysia Sdn Bhd
- Lyreco
- M&G Investments
- M1 Limited
- Manhattan Associates
- Marina Bay Sands Pte Ltd
- Mattel Asia Pacific Sourcing Limited
- Maxim Integrated
- Maxis
- Medochemie
- Meinhardt (HK) Ltd
- Mercedes-Benz Taiwan
- Merck Sharp & Dohme
- Mesoblast
- MINDS
- MNF Group
- Mondelez Sales Malaysia Sdn Bhd
- Mondelez Vietnam
- MSD China
- Mylan Australia
- Navig8 Group
- NCR Asia Pacific
- NEC Corporation
- New Development Bank
- Nib nz limited
- Nokia Taiwan
- Nomura International Hong Kong Limited
- Northern Trust
- Novartis Healthcare Philippines
- Novartis Singapore Pte Ltd
- Novo Nordisk
- NTT DATA Business Solutions APAC
- NTUC Enterprise
- NuWorks Interactive Labs Inc.
- OCBC Bank
- Offensive Security Certifications Inc
- ON Semiconductor
- Ontic Engr & Mfgr Asia-Pacific Pte Ltd.
- OPTODEV INC
- Optus
- Ortho Clinical Diagnostics
- Oshkosh Commercial (Beijing) Co., Ltd
- OVS Hong Kong Sourcing Limited
- Pave
- Pavilion Energy
- Payoneer
- Perkinelmer
- Philippine Airlines
- PHILIPPINE TELEGRAPH & TELEPHONE CORPORATION
- Philips
- Philips Electronics Hong Kong Ltd
- Phocas
- PHPC Co., Ltd. Inc.
- Pivotal Software Australia
- PT Ecart Webportal Indonesia (Lazada Indonesia)
- Pure International (HK) Limited
- Qube Research & Technologies HK Ltd
- Rakon Limited
- Razer
- RB Malaysia Health
- Red Hat
- REERACOEN BPO INC
- Rest Super
- RFM
- Ricoh Australia
- Rockwell Collins (Shanghai) Avionics Trading Company Ltd.
- Rotagilla
- S&P Global
- Salesforce
- Sanofi
- SAP
- SAP (Australia and New Zealand)
- Sauwat Strategy

Study Participants (Cont.)

- Saxo Capital Markets Pte Ltd
- School of the Arts
- Scoot Tigerair Pte Ltd
- Servier Philippines, Inc.
- Shatin Baptist Church
- Shionogi (S) Pte Ltd
- Sicuro Group
- Siemens Healthineers Korea
- Siliconware Precision Industries Co., Ltd
- Silverpeople
- Simpleshow
- Singapore International Foundation
- SMART MODULAR TECHNOLOGIES SDN BHD
- Smit Singapore Pte Ltd
- Solvay
- Sony Electronics Asia Pacific Pte Ltd
- Sophos Computer Security Pte. Ltd.
- Straightarrow Corporation
- SUNeVision Holdings Ltd
- Swiggy
- Symmetry Medical Malaysia Sdn Bhd
- T&T Salvage Asia Pte Ltd
- Taisho pharmaceuticals philippines inc
- TCBALL Beverage Can VN ltd
- TeleChoice International Limited
- Teleflex Korea
- TenX
- The BellaVista Hotel
- The fullerton hotel
- The Hong Kong Philharmonic Society
- TMF Philippines
- TPV
- Transitions Optical Philippines, Inc.
- TRI-AD, Inc.
- TSRC
- Uber
- Ubiquity Global Services
- UBS
- UGS America Sales, Inc.
- Varian Medical Systems Pacific Inc
- Vocus Group
- Wall Street Courier Services Inc.
- Wallem Shipping Singapore Pte Ltd
- Wells Fargo
- Whitney Su
- Wolverine World Wide HK Limited
- Workplace options asia
- WorldRemit Service Centre Ltd.
- Xylem Water Solutions
- Zebra Technologies Asia Pacific Pte Ltd
- 3M Korea
- 5th Leg

Navigating the Impact of COVID-19 on Workplace and Rewards Practices

APAC Edition

Additional Information

Contact Our Team

If you have questions about this study, or want to speak to a member of our team about developing new workplace and rewards practices in response to COVID-19, please contact our study leaders below:

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Additional Aon Resources

To learn more about Aon's complete set of COVID-19 resources and insights, including information on business continuity, communications, cyber security, healthcare, insurance, risk management and supply chain issues, among others, please visit:

<https://www.aon.com/event-response/coronavirus.aspx>

We encourage all clients to bookmark Aon's COVID-19 response site to stay connected to our latest insights on addressing this pandemic at an enterprise-wide level.

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