



Working Well

2021 Global Wellbeing Survey

AON

Executive summary

The 2021 Global Wellbeing Survey was developed, designed and conducted by Aon in partnership with IPSOS, a leading global market research company.

The purpose of the survey was to understand how employers around the world are addressing wellbeing and the impact having a wellbeing program has on their overall company performance.

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The survey analysis revealed four important themes:

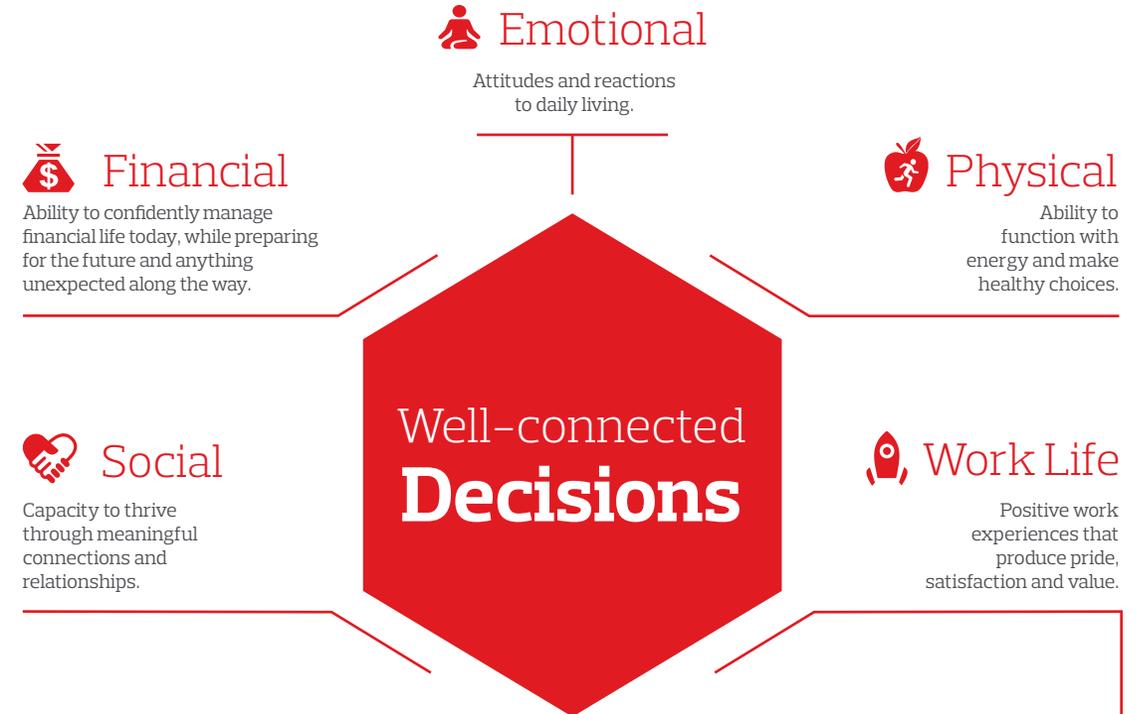


1,648 companies in 41 countries and 25 languages participated in the online survey. Responses were weighted to produce a statistically significant representation of organizations globally, regionally and by country. Of note, the outbreak of the coronavirus (COVID-19) pandemic in 2020 coincided with the research phase of this study.

Wellbeing is a people and performance approach and requires balancing the appropriate resources and opportunities, with the commitment to achieve optimal health, resilience and performance for the individual, organization, and community.

In today's environment, our research shows that wellbeing has become much more than programs, apps, tools and nice-to-have resources to change employee behavior. Wellbeing is a people and performance strategy, and is on its way to becoming the ethos of organizations around the globe. 82% of organizations globally believe wellbeing is important within their company. It is a business essential.

This executive summary focuses on the impact wellbeing has on company performance, while the body of the report will go into detail on the other three themes referenced above.



Wellbeing performance impacts company performance

We applied a predictive, analytical technique, offering actionable answers to business questions, to the survey responses. By doing so, we have identified how much of an impact or change wellbeing will have on business outcomes, and visually, how variables of wellbeing are connected with other wellbeing components and business outcomes. Every organization has slightly different methods in how they measure wellbeing performance. In the survey, we asked companies to identify first how they measured the success of their wellbeing initiatives through the following variables:

Employee satisfaction

Safety incidents, occupational health outcomes or disability data

Healthcare outcomes and cost

Net Promoter Score

Corporate Social Responsibility Score

Stock value

Profit and loss statements

Productivity measures

Participation/ Engagement in programs /Initiatives

Retention/ Turnover rates

Absenteeism

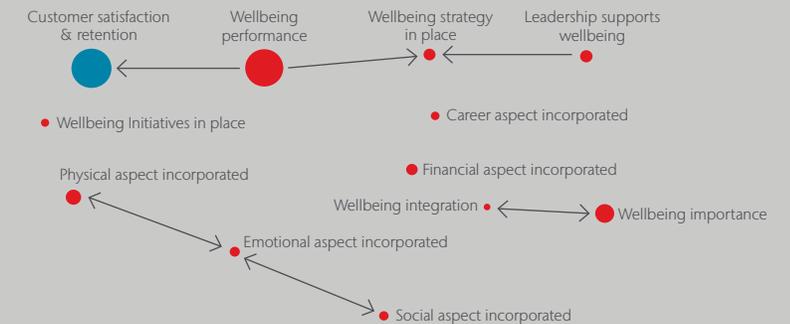
Improvement in employee health and wellbeing

The findings are meaningful. They indicate that by focusing on improving the performance of individual and organizational wellbeing, there is an impact and improvement on business outcomes. The survey findings show that improvements to wellbeing performance have the greatest impact on customer satisfaction and retention. Cultivating customer satisfaction and retention is key to business resilience, continuity and growth for all companies. Recognizing the role wellbeing plays in customer relationships and retention should become an element in strategic business discussions.

Business Outcome	Increase in Wellbeing Performance	=	Increase in Business Outcome
Customer satisfaction and retention	3%	=	1%
Employee satisfaction Customer acquisition	3.5%	=	1%
Company profit	4%	=	1%
Commitment to innovation Net Promoter Score Employee engagement	5%	=	1%
Decreased employee turnover	4%	=	1%

To further explore the impact of wellbeing on customer satisfaction and retention, we completed a regression analysis on the interaction between variables which showed that they do not operate in silos. Customer satisfaction and retention had a structural relationship with wellbeing strategy development, leadership support and the wellbeing dimensions.

The graphic below demonstrates the connection points between the various aspects of wellbeing and customer satisfaction and retention:





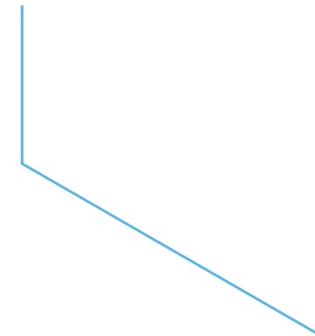
So what does this tell us?

Wellbeing performance generally has a direct connection to a strong and focused strategy, but it does not have a direct connection to individual initiatives. Wellbeing goes beyond initiatives – a strategy must be in place. Having a strategy can positively impact the performance of wellbeing, leading to higher customer satisfaction and retention. Leadership support and buy-in are critical factors in creating a successful wellbeing strategy that can positively impact overall company performance.

Wellbeing was important before 2020, but the combination of a global pandemic, social unrest and a rapidly changing economy has elevated its importance to individuals, organizations and communities. The rest of the report will establish global and regional market trends, and priorities and opportunities, as well as exploring how companies are strategizing and impacting beyond just benefit offerings. It will uncover where companies are overlooking the various aspects of wellbeing.



It also offers practical advice on how to use Aon's findings to move towards best practice.





Chapter 1

The current landscape

Wellbeing requires
a strategy

Wellbeing requires a strategy

Across the globe, employers are united by a common challenge. Since the beginning of the coronavirus pandemic, many have identified mental health issues within their populations, and a recent global survey found that 42% of employees had experienced a decline in their mental health since the pandemic started.⁽¹⁾

28% of employees are having difficulty concentrating at work

20% take longer to complete their work

15% have trouble thinking, reasoning or deciding

Although 82% of companies globally consider employee wellbeing a priority (Figure 1), many firms lack a wellbeing strategy in their culture, talent attraction and performance objectives. Of the 87% who have wellbeing initiatives in place, only 55% have a strategy (Figure 2).

Figure 1: Companies say employee wellbeing is important

82% globally say employee wellbeing is important at their company

Region	% important	Region	% not important
North America (NA)	81%	NA	2%
Latin America (LA)	83%	LA	3%
EMEA	82%	EMEA	4%
APAC	82%	APAC	3%

Countries most likely to say wellbeing is important to their company

Finland	89%
Czech Rep	88%
Norway	88%
New Zealand	88%

Countries least likely to say wellbeing is important to their company

Puerto Rico	67%
Ecuador	63%
Peru	63%

Figure 2: Companies have initiatives and strategies for employee wellbeing

87% globally have a wellbeing initiative in place

Have a wellbeing initiative			
Regions		Top countries	
NA	89%	Philippines	97%
LA	89%	Ireland	96%
EMEA	86%	Chile/ Czech Rep/ Indonesia	94%
APAC	90%		

55% globally have a wellbeing strategy in place

Have a wellbeing strategy			
Regions		Top countries	
NA	53%	Brazil	64%
LA	59%	Portugal	64%
EMEA	51%	India	64%
APAC	55%		



A long-term plan of action

Initiatives are defined as any wellbeing event, program, tool, workshop, activity, challenge or campaign, while **strategy** is defined as a long-term plan of action using resources to achieve wellbeing solutions or goals. And, of the companies with **initiatives** in place, not all are incorporating the various dimensions of wellbeing into their wellbeing **strategy**.

 Physical

70%

of companies incorporate physical wellbeing into their strategy

 Emotional

67%

of companies incorporate emotional wellbeing into their strategy

 Social

65%

of companies incorporate social wellbeing into their strategy

 Financial

54%

of companies incorporate financial wellbeing into their strategy

 Work Life

68%

of companies incorporate career wellbeing into their strategy

Creating a healthy, high-performing workforce requires employers to look beyond apps and programs. They need to create ways for wellbeing to become part of their corporate values and strategy, weaving them into their cultural fabric. Culture is the facilitator, and without it, employers cannot deliver the strategy.

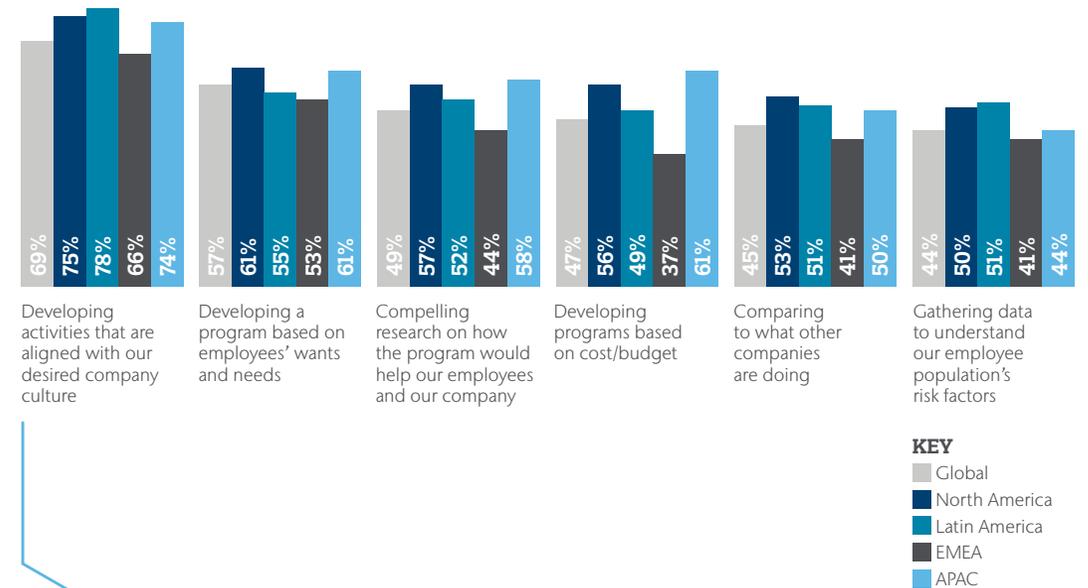
Success starts with understanding organizational culture

According to the survey, company culture is the number one driver in developing a business case for wellbeing (Figure 3).

This is especially true with employee health and wellbeing, where bad culture can sabotage even the most well-designed employee programs. Employers are finally recognizing this, but when designing and measuring the impact of benefits plans, programs and interventions, health is only one part of the strategy. Corporate culture and employee engagement are opportunities to create a more integrated way of managing workforce health.

A culture of wellbeing is not an 'initiative', but a permanent change in how work is conducted.

Figure 3: Key drivers in developing business case for wellbeing



Redefining culture with wellbeing can be challenging

42%

of employers said employee engagement/interest was a challenge when expanding or starting wellbeing initiatives (Figure 4)

Poor employee engagement not only affects culture, but can erode profits through higher employee turnover, poorer customer service and higher healthcare costs.

While many companies believe that wellbeing programs deliver value on investment (VOI), they are not always aligned with how employees view, let alone embrace, wellbeing initiatives.

Employee satisfaction, work life balance, employee productivity and stress reduction are all cited as important business issues impacted by wellbeing initiatives (Figure 5), which in turn affect the overall company culture. In fact, organizational leadership support is the strongest predictor of participation, health and medical cost impact, and employee perceptions of organizational support.⁽²⁾

Figure 4: Challenges to starting or expanding wellbeing initiatives



Figure 5: Business issues wellbeing initiatives would impact





If companies hope to see any positive VOI from improving their employees' wellbeing, workplace cultures must be the foundation for programs. Culture comes first – company cultures are the seedbeds that determine whether employee wellbeing programs flourish or die.

Shifting to remote work environments throughout the coronavirus pandemic brought home how interconnected wellbeing, work and company culture really are. Culture is often reliant on employee connections, and when asked what barriers prevented companies from doing more to develop meaningful work connections, sense of belonging and social inclusivity, companies named virtual/remote workforce (27%) and lack of overall employee engagement in the organization (20%) as two of the top four (Figure 6).

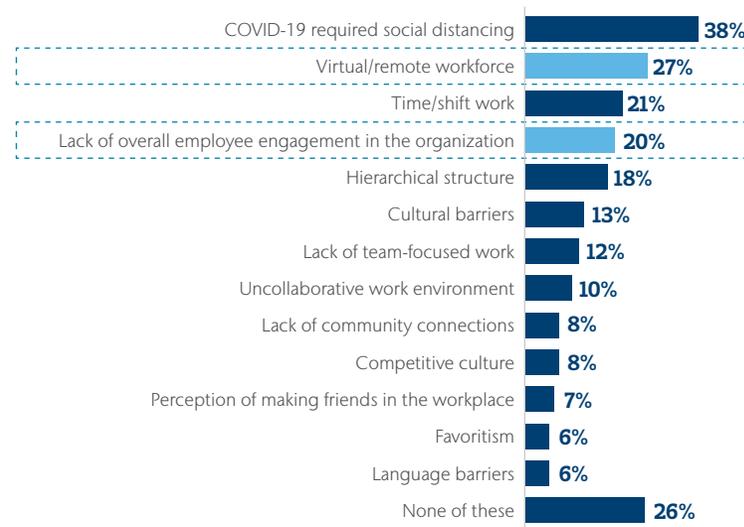
27%

Virtual/remote workforce

20%

Lack of overall employee engagement in the organization

Figure 6: Barriers to addressing social wellbeing issues



So how do we shift these cultures?

89%

of companies agree that its Chief Human Resources Officer (CHRO) is the biggest supporter of wellbeing initiatives

It starts with leadership

Cultures can be changed. And when they are planned and executed as the foundations of successful employee wellbeing strategies, they can lead to higher participation.

Making this culture shift requires culture itself to become a primary strategic priority, managed with objectives, timetables, and accountability. This begins with leadership. Leaders set the tone for company culture and wellbeing. In total, 89% of companies agree that its Chief Human Resources Officer (CHRO) is the biggest supporter of wellbeing initiatives. The next executive most engaged is the Chief Executive Officer (CEO) at 78%, regardless of company size.

There is, however, a disconnect.

53% of companies say that wellbeing is not being prioritized due to other focuses. According to [Aon's 2021 Global Human Capital Trends Study](#), workers ranked improving their wellbeing as their number three priority, while senior executives ranked it number eight. However, the study also found that 45% of employers said building an organizational culture that celebrates growth, adaptability and resilience was the most important action they will take to transform work.⁽³⁾

53%

of companies say that wellbeing is not being prioritized due to other focuses



Considering the employee journey

But where do you start? Leaders know that people create culture. And employers say that employee satisfaction and engagement (66%), attracting and retaining talent (40%) and employee retention (32%) are all impacted by wellbeing. To achieve these objectives, they must retain great people who will create a culture that attracts more talent. Create a strategy that builds wellbeing into every stage of an employee’s journey, from recruitment through to exit, down to the day-to-day.

Today, it is essential that employers integrate wellbeing into their employees’ journey, yet just 32% said they will prioritize this over the next three years, promoting their reputation as an employer that provides exceptional wellbeing resources. Company culture and employee engagement not only influence health and human capital, but also impact business performance. 50% of firms named employee engagement as a top performance measure (Figure 7).



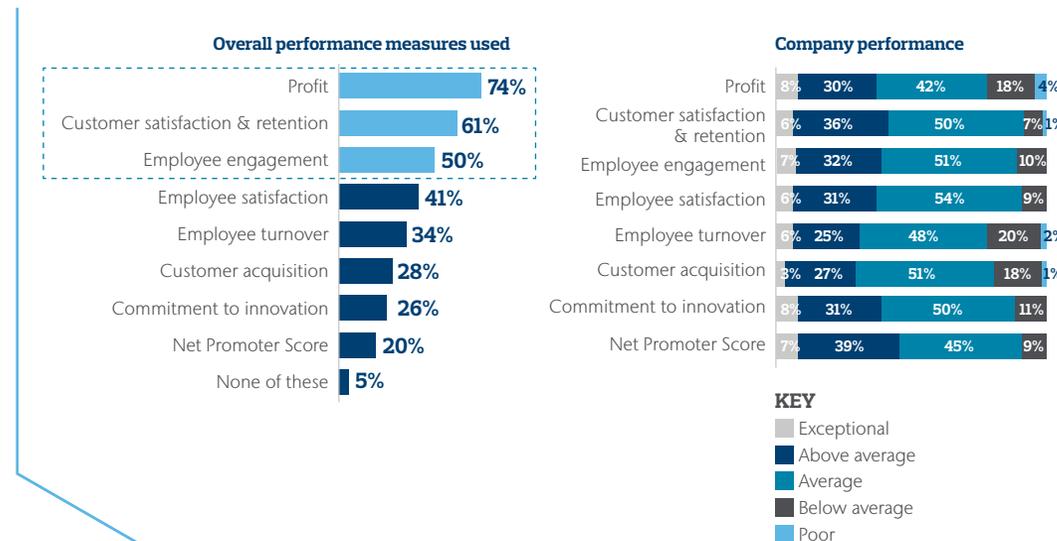
Employee satisfaction or engagement is the number one business issue that wellbeing impacts (66%), yet firms still struggle to value the return (44%) and maintain employee engagement in programs (42%)

Wellbeing as a business function – integration is essential

Employers must fully integrate wellbeing into their strategy, align measures, and develop wellbeing activities that connect with their desired company culture. To succeed, they must focus on employee engagement – there is no point in having a great program or strategy if culture is not driving it and engagement falls short.

Wellbeing is no longer optional or a narrowly focused element of the rewards menu, it must be front and center as a business imperative for leading, high-performance companies.

Figure 7: Measuring overall company performance globally



Regional spotlights

North America

North America is 4% lower than the global average for having a fully integrated wellbeing strategy.

Attracting and retaining talent is the number one factor negatively impacting businesses and the number two priority.

Two of the top five wellbeing issues are work life balance and culture, which correlates with the top two measurements of success in engagement and employee satisfaction.

Latin America

Attracting and retaining talent is number five in Latin America's list of top five factors that negatively impact businesses, while it is top of the list for other regions.

The top driver for developing a business case for wellbeing is to align with desired company culture. Improving employees' satisfaction/engagement ranks as the top business issue wellbeing initiatives would impact.

EMEA

51% of respondents in EMEA have a wellbeing strategy in place – the lowest percentage.

Only 19% say their wellbeing strategy is fully integrated with both a people and business strategy, while attracting and retaining talent is the number one factor negatively impacting businesses.

APAC

APAC has the largest gap between companies who have a wellbeing initiative in place (90%) and those who have a wellbeing strategy in place (55%).

To tackle APAC's top wellbeing issues – work life balance, work environment/culture, mental health, physical health, and burnout – organizations should consider a more strategic approach to wellbeing.

A more strategic and culture-focused approach would support the top driver in developing a business case for wellbeing: developing activities that are aligned with desired company culture (74%). APAC indicates that controlling costs is the top reason for not prioritizing wellbeing (46%); this approach would require less financial commitment than adding additional programs.

This shift to a more strategic and culture-focused wellbeing approach would also support the top measurement priorities – satisfaction (60%) and participation in programs (59%).



Chapter 2

What is causing risk to performance?

The dangers of stress,
burnout and anxiety



It would be easy to think that workplace stress has been caused by the coronavirus pandemic. However, even before the pandemic, more people around the world were under stress compared to a decade ago.



Over one in three adults (35%) said they experienced a lot of stress,⁽⁴⁾ while more than 40% of workers face high stress in their jobs, negatively affecting their productivity, health, and family stability.⁽⁵⁾ And in some countries, individuals are working more hours and taking fewer vacations than ever.⁽⁶⁾

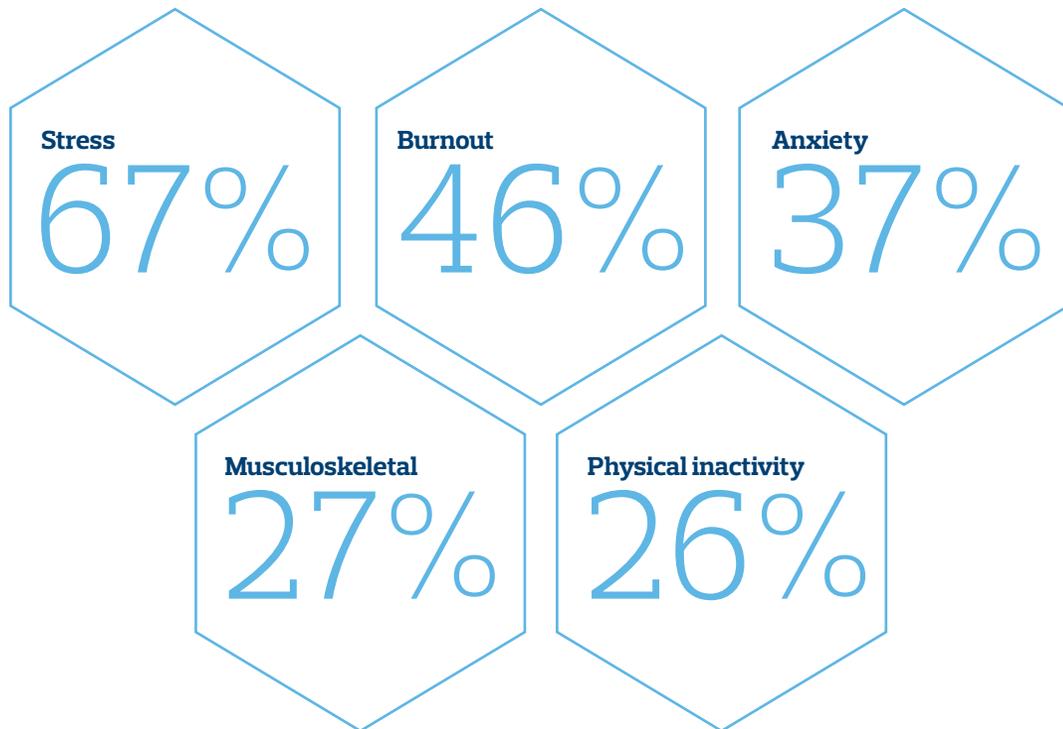
In response, the digital wellbeing market was flooded with online videos, apps and tools to assess, monitor, and improve all aspects of health.⁽⁷⁾ As measures due to the coronavirus pandemic continue to blur the line between work and life, employers are implementing these digital tools in their efforts to support employee wellbeing.

The rapid shift to a global virtual work environment, and new definition of essential workers, have significantly impacted the emotional wellbeing of employees.

Though emotional wellbeing was gaining visibility in the employer wellbeing space prior to the coronavirus pandemic, it is now a health, safety and talent issue.

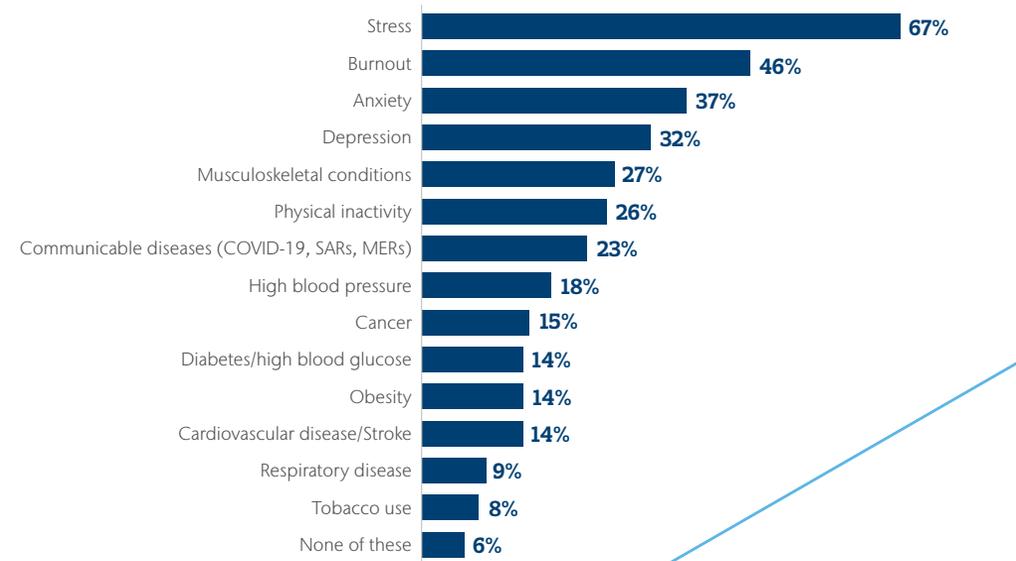
A full year of social distancing, minimal travel, school closures and economic uncertainty has resulted in emotional wellbeing issues manifesting in the physical wellbeing of employees.

The top physical wellbeing risks impacting company performance



According to research, in the UK, an estimated 91 million workdays are lost annually due to mental health disorders.⁽⁸⁾ Although emotional wellbeing issues are on the rise, the chronic conditions that were already a concern still exist. Adding emotional wellbeing issues to chronic conditions creates cost and productivity issues, and research suggests that people with depression and another illness tend to have more severe symptoms of both.⁽⁹⁾

People with mental health issues also experience higher morbidity and mortality rates compared to those without – mostly from untreated and preventable chronic physical conditions such as cardiovascular disease, hypertension and diabetes.^(10, 11)



Safety is more than just physical – it is psychological too

Psychological safety, the belief that you will not be humiliated or face negative consequences for expressing your views or making a mistake, is becoming more tangible. It was valued the third highest factor for ensuring a safe work environment, and is essential to creativity and innovation.⁽¹²⁾

57% of companies highly value psychological safety, with 27% saying they moderately value it. Additionally, 78% of survey respondents agree that safety impacts health as much as health impacts safety.

It is crucial as companies evolve their cultures to prioritize emotional wellbeing. Since the start of the pandemic, we have seen a 57% increase in anxiety⁽¹³⁾ and a 21% increase in medications related to emotional wellbeing.⁽¹⁾ The World Economic Forum estimates that by 2030, the cost of mental disorders to the global economy will reach \$16 trillion – more than diabetes, respiratory disorders and cancer combined.⁽¹⁴⁾ This has not gone unnoticed. Employers recognize that mental health and burnout pose a risk to their organizations from an operational, health and professional development perspective.

The top factors related to emotional wellbeing affecting businesses include:

27% TOP 5

of organizations said work life balance issues are disruptive to their business

Mental health (46%) and burnout (33%) rank in the top five employee wellbeing issues facing organizations (Figure 8).

Challenges to employee career development include family work life balance (37%), lack of career purpose or direction (28%) and burnout (23%) (Figure 9).

Figure 8: Top five employee wellbeing issues

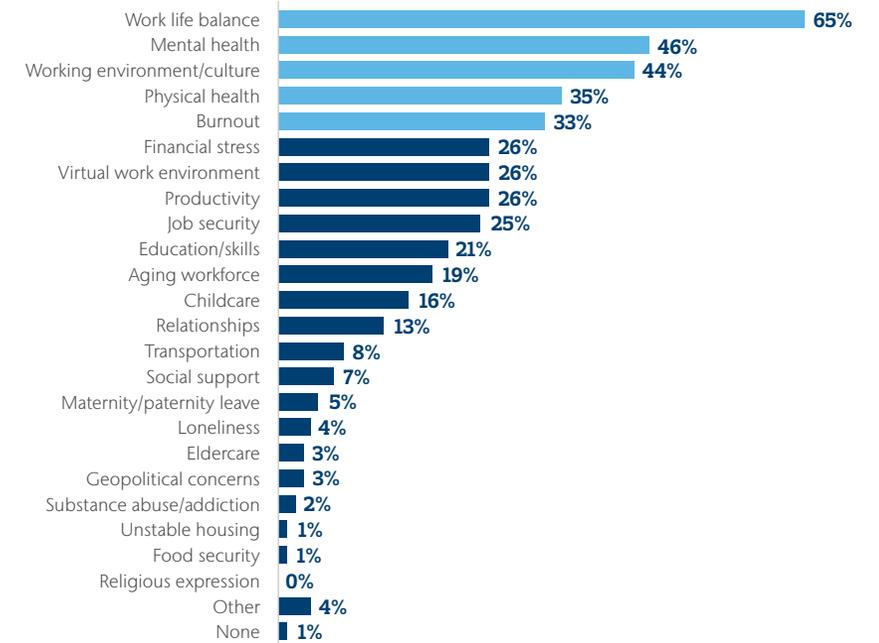
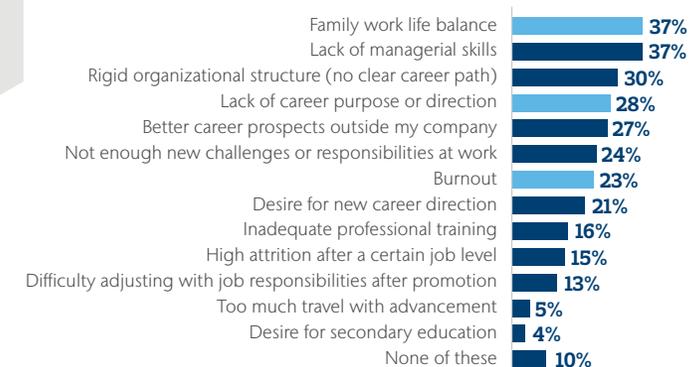


Figure 9: Challenges to company's career development



New frontiers in work life wellbeing

72%

**offer leadership/
manager training**

To advance a people and performance strategy, more employers should be considering work life wellbeing as core to their broader wellbeing strategy. Many are making a start – but there is still more to be done.

There is also an opportunity to improve manager support of career development by providing training specific to managing burnout, but currently only 18% of employers are offering this.

66%

**offer virtual
learning sessions**

Attracting and retaining talent (42%), evolving to meet changing market needs (43%) and the economic downturn caused by the coronavirus pandemic (37%) are top factors negatively impacting businesses across regions. The emotional wellbeing of employees is directly connected to each of these factors.

64%

**offer a flexible work
policy to support career
development**

Aon's 2020 [Rising Resilient report](#) showed that 40% of non-resilient workers feel unable to confide in their manager about their problems and 27% of non-resilient workers are thinking about leaving their employers.

Employers who build resilient workforces have healthier employees (+20%), lower employee turnover (+42%), better brand value (+53%) and higher productivity (+42%). Employees that feel supported by their organization are 81% less likely to seek out a new employer in the next year⁽⁴⁾. Resilient employees that have the skills to handle organizational changes due to the pandemic are more than twice as likely to say they always adapt well to change.⁽¹⁵⁾

Invest in wellbeing, reduce risk

While employers are offering valuable programs and resources to address emotional wellbeing issues, there are opportunities to increase participation and engagement through new technology, behavior and organizational change management, and transparency in communication. By doing so, organizations could reduce the costs, risks and talent issues that are tightly connected with the emotional wellbeing of their workforce.

But to do so, employers must focus on developing leadership support and making a cultural shift that embraces psychological safety and values emotional wellbeing just like they would physical safety.



Regional spotlights

North America

Stress (86%) and work life balance (84%) issues are most prevalent in North America.

Though organizations are offering communications to encourage emotional wellbeing, such as Employee Assistance Programs and leader/manager training, there is still a significant need to ease stress and improve work life balance.

There is a clear need to make a more effective business case for addressing emotional wellbeing issues, as 41% of North American survey respondents indicated that other priorities must be addressed before emotional wellbeing issues are tackled.

Latin America

The top driver for developing a business case for wellbeing in Latin America is to align with desired company culture (78%).

Similarly, improving employees' satisfaction/engagement ranks as the top business issue wellbeing initiatives would impact.

As with other regions, other issues are being prioritized over emotional wellbeing. Latin America has major barriers to addressing wellbeing, including lack of leadership buy-in (26%), COVID-19 required social distancing (35%) and compliance culture (16%). These barriers ranked higher than any other region.

EMEA

Respondents think that stress and work life balance are the key issues employees are facing from an emotional wellbeing standpoint.

While many organizations have launched programs and services to support emotional wellbeing, in EMEA there is a clear need for a strategy and business case when addressing and investing in emotional wellbeing. Combined with an evidence-based business case, organizations could address the key barriers: lack of data to justify action (26%), the need to prioritize other areas (42%) and inability to measure results (25%).

APAC

Burnout, as an emotional wellbeing issue, is most prevalent in APAC.

The lack of data available to create a business case for addressing these issues (39%), along with the inability to measure results of emotional wellbeing programs (40%), are the top barriers. These barriers are also much more prevalent in APAC than in other regions of the world.



Chapter 3

Where do we go from here?

The future
of work



Addressing stigma and providing resources

The future of work encompasses multi-dimensional wellbeing, with an emphasis on emotional wellbeing interwoven throughout organizations.

With emotional wellbeing finally in the spotlight, companies are identifying ways to build a culture that supports it and tackles historic stigmas. To help individuals get a pulse on their wellbeing, emotional fitness assessments can pave the way, supported by onsite resources such as counseling and Employee Assistance Programs.

Among other offerings, we expect to see a growth in dedicated quiet spaces, allowing individuals to step away in peace, and Mental Health First Aid training, empowering employees and people leaders to respond to the signs of mental illness and substance abuse (Figure 10).⁽¹⁶⁾

After stress, a lack of work life balance and burnout continue to be the most important emotional wellbeing issues. Companies still face demonstrable barriers to addressing these concerns, with common roadblocks including competing priorities and the inability to measure results (Figure 11).

Figure 10: Company provides emotional wellbeing initiatives

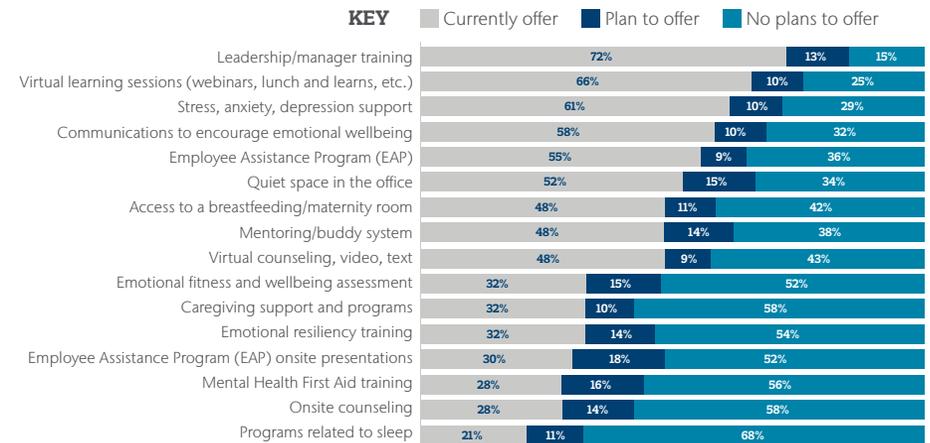


Figure 11: Barriers to addressing emotional wellbeing issues



Rethinking work life balance

Globally, employers agree on the top wellbeing issue: work life balance (65%). According to the National Business Group on Health's (NBGH) 2020 Fidelity Survey, 78% of employers include work life balance as a dimension in their company's definition of wellbeing.⁽¹⁷⁾ And they agree that the most important business issues initiatives could impact include employees' satisfaction/engagement (66%), work life balance (50%), and productivity (47%).

So how can employers support work life balance? With a flexible work style and organizational resilience.

Aon's expertise

Our assessments and analysis get to the heart of what employees want from their career. To help manage change and save costs, our organizational development strategies ensure the right people are in the right role and are fulfilled by the everyday experience of work.





Working from home reimagined

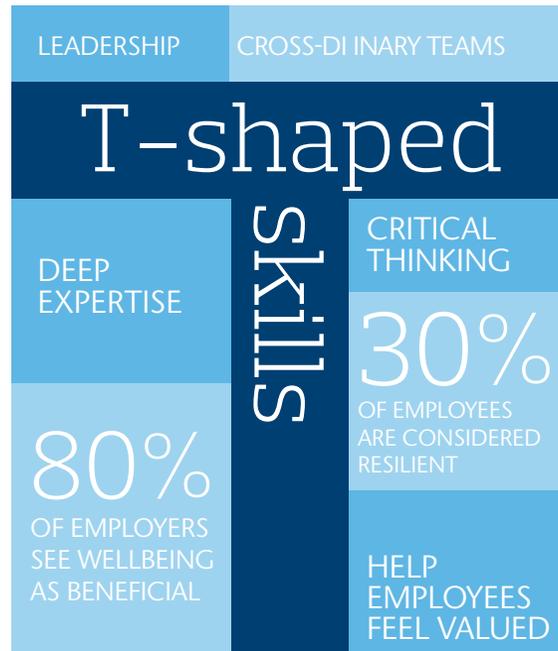
OVER
50%

of employees prefer to continue working remotely as much as possible

Historically viewed as a luxury, working from home has transformed from an interim solution into an enduring, fundamental shift. With commutes erased, some individuals have found more opportunities for family time and self-care, such as exercising and cooking more often. More than half of employees prefer to continue working remotely as much as possible, but managers must cultivate strong remote working cultures.⁽¹⁸⁾ This may include not only training on the most efficient methods to work remotely, but also a heightened oversight of quality and performance.⁽¹⁹⁾

When the time comes, some companies may consider evaluating whether employees are functionally and mentally ready to return to the physical work environment.⁽²⁰⁾

Fostering resilience and diversity



Low-wage and low-skill employees, often required to work in physical locations, have felt the largest burden throughout the coronavirus pandemic. They tend to be hourly workers and in occupations struggling with high turnover and difficult working conditions.⁽²¹⁾

Employers should consider offering flexible work policies (such as compressed work weeks, employees’ choices of days off, flextime), caregiving support, and broader wellbeing initiatives, such as training and development and mentorship programs (Figure 12).

To remain adaptable to sudden shifts, workplaces will need to be agile and cross-train employees. There will be concentrated efforts on recruiting and refining people with T-shaped skills – those with deep expertise and the ability to work in cross-disciplinary teams.⁽²²⁾ While 80% of employers see wellbeing as beneficial to their organizations in the long run, only 30% of employees are considered resilient.⁽²³⁾

Employers must create an environment where their people can adapt to adverse situations, manage stress, and retain motivation. Further to this, they will need to re-evaluate their time-off policies and identify other ways to help employees feel valued. Data should drive these decisions.⁽¹⁴⁾

Diversity, equity and inclusion will gain more traction as organizations take swift action to create and maximize opportunities for all. Workplaces that are inclusive can foster enhanced wellbeing, and employees with high levels of wellbeing are more inclusive. Effective wellbeing initiatives will accommodate the unique needs of different employees and recognize mental health and wellbeing as diversity issues.⁽²⁴⁾ Leaders must refine and redefine fair practices and processes, rooting out bias and measuring real and meaningful change.⁽²⁵⁾

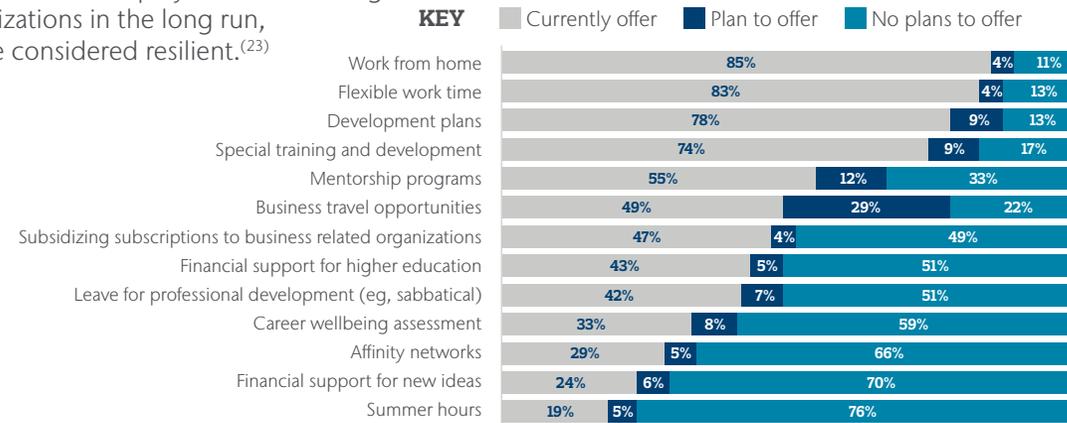


Figure 12: Company provides career wellbeing initiatives

Social connections will continue to grow

Researchers have long known how critical social connections are. Developing meaningful work connections, a sense of belonging, and social inclusivity are catalysts for employee engagement. Yet, the social distancing required due to COVID-19 is a profound barrier to wellbeing (Figure 13).

Most participants have employees connecting through video or online conferencing, but the future of work will consider the built environment, employees, their families, and the community. Shared spaces will be created to encourage collaboration, and with a growing remote workforce, charity runs/walks, social or sporting clubs, volunteer days, and employee family outings will become increasingly important (Figure 14).

Figure 13: Barriers to addressing social wellbeing issues

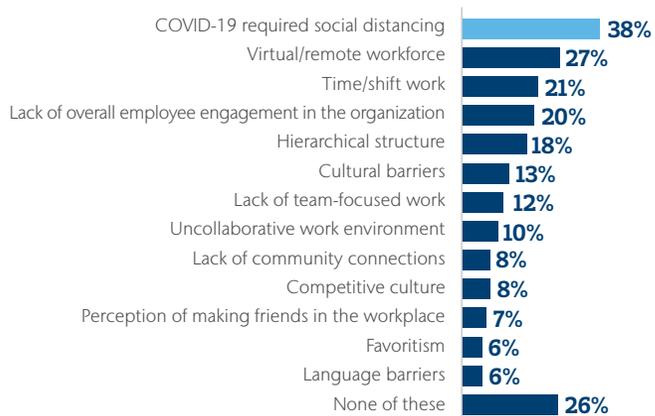


Figure 14: Company provides social wellbeing initiatives



Aon's expertise

We help you to create opportunities that provide a supportive, inclusive culture that builds deeper connections between your employees, communities and their families. Our expertise and solutions support your approaches to helping your employees feel valued, listened to and empowered to bring their whole and best self to work.

Addressing ergonomics in the workplace

Throughout the pandemic, digital and virtual capabilities have surged, and people have become comfortable with these shifts. Digital wellbeing solutions will become more widespread, especially with an increasingly remote workforce (Figure 15).

Ergonomic evaluations (Figure 16) will gain traction, as companies continue to recognize the link between health and safety. In addition to that, individuals working from home will need to assess their workspace and creatively determine how they can be most effective and healthy within their circumstances.

There will be more of an emphasis on activities that promote movement, stretching, and strengthening through fitness/wellbeing centers, group fitness classes, company-sponsored community ‘active’ activities, and team challenges. Many organizations plan to offer nutritional education and weight management (Figure 17), aiming to confront the epidemic proportions of obesity globally. Just since 1975, obesity has tripled worldwide with 39% of adults being overweight and 13% being obese.⁽²⁶⁾

While some people have benefited from additional flexibility brought about as a result of the pandemic, such as the ability to work from home, others have struggled with competing priorities, like helping children attend school remotely and making family meals. Another issue compounding sedentary lifestyles is the quarantine certain individuals endured throughout the pandemic – and there may be some degree of this in the future.

Figure 15: Company provides support services

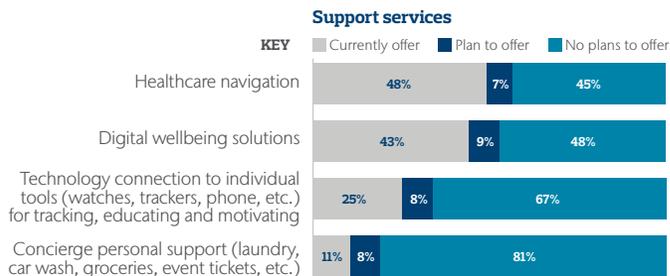


Figure 16: Company provides ergonomics

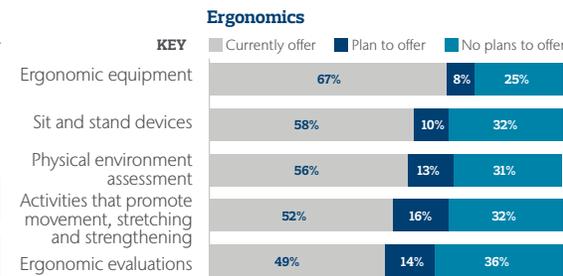
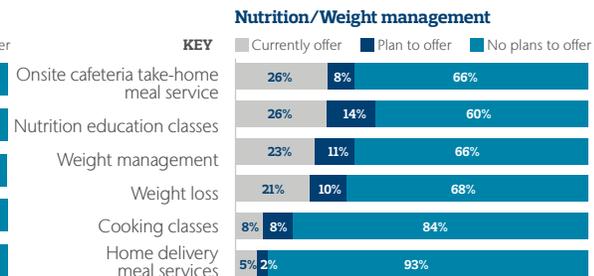


Figure 17: Company provides nutrition or weight management programs



Aon's expertise

The benefits of physical wellbeing, both in reducing health risk and positively impacting employee emotional and social wellbeing, are well documented. At Aon, we also believe a strong interconnection exists between wellbeing and work-related safety.

We can support developing a strategy that empowers your employees and flows into your organizational culture. From individual assessments to global team challenges, our data-driven approach allows us to gather, analyze and interpret a diverse range of physical wellbeing information, and turn it into actionable insights and solutions for your teams. Using well-connected data, our evidence-based strategies help reduce risk to your business and keep your employees thriving at work.

Psychological safety will be a key consideration moving forward

Organizations identified stress (67%) as the condition with the greatest impact on business performance. High-performing organizations prioritize psychological safety, encouraging employees to share ideas and offer constructive feedback to peers. Creating a culture where employees feel secure admitting mistakes and learning from failure, and ensuring employees feel comfortable talking about their life outside of the workplace, will continue to gain momentum. This will be particularly important as employees may have an adjustment period as they return to working in the new better.

67%

of organizations identified stress as the condition with the greatest impact on business performance

Aon's expertise

Emotional wellbeing is tightly connected to all other dimensions of wellbeing. By connecting data to create a cohesive story and leveraging our expertise in risk, retirement, health and human capital, we can support your entire wellbeing strategy. Our emotional wellbeing consulting and solutions will help your people feel supported, safe, and secure.



Managing financial matters

Employees' personal financial situations can significantly impact productivity, turnover, and loyalty (Figure 18). Although many participants offer financial wellbeing assistance, such as saving for retirement and employee discounts, financial wellbeing is not a focus area.

This survey found that 76% of companies have no plans to help employees with day-to-day money management and 83% have no plans to offer emergency savings. Financial wellbeing has the greatest regional disparity when it comes to employees feeling stretched due to excessive overtime, or businesses suddenly needing to increase wages due to retention issues (Figure 19). There is a huge opportunity for employers to do more to help their people with money management and savings.

Figure 18: Major challenge companies face due to employees' financial situation

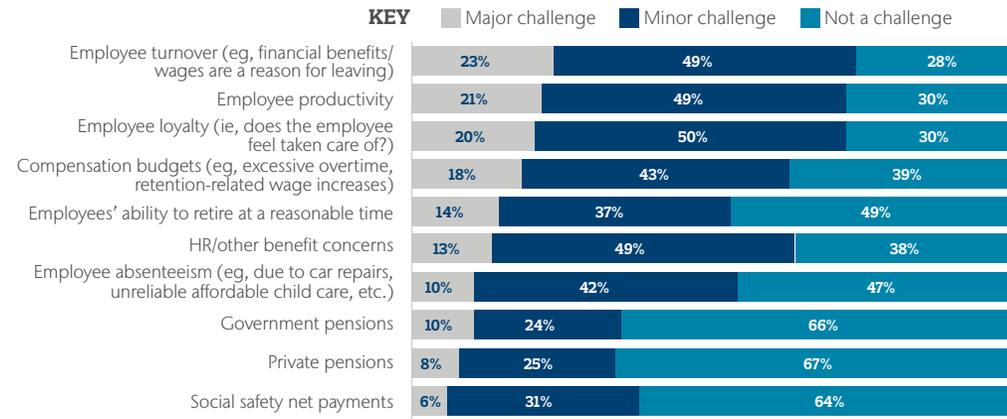


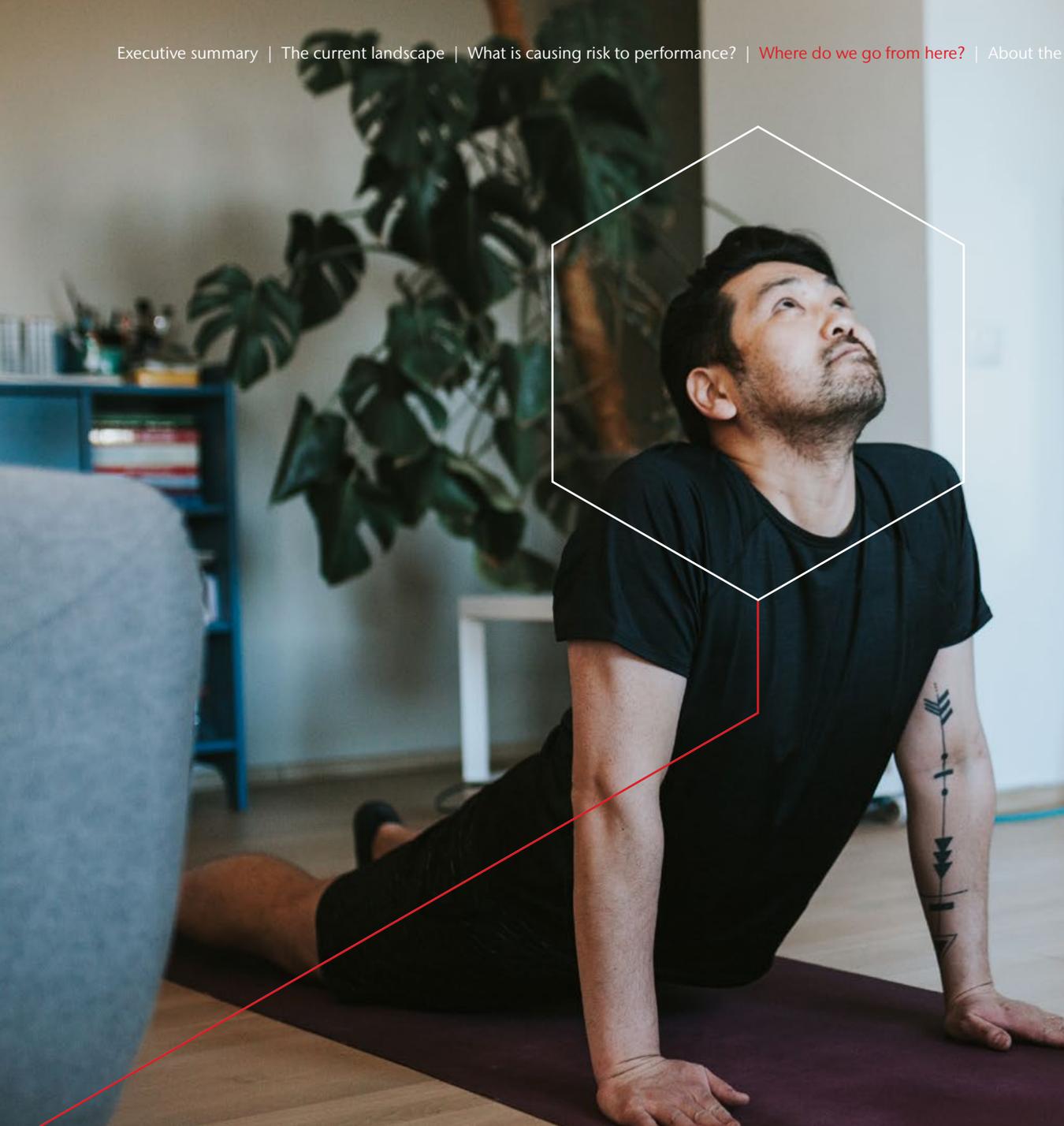
Figure 19: Major challenge companies face due to employees' financial situation

	Global	North America	Latin America	EMEA	APAC
Base	1029	233	111	532	355
Employees' ability to retire at a reasonable time	14%	11%	17%	14%	10%
Employee absenteeism (eg, due to car repairs, unreliable affordable child care, etc.)	10%	8%	17%	10%	9%
Employee productivity	21%	10%	31%	20%	23%
Employee turnover (eg, financial benefits/wages are a reason for leaving)	23%	15%	27%	20%	24%
Compensation budgets (eg, stretched due to excessive overtime or need to suddenly increase wages due to retention issues)	18%	16%	33%	16%	18%
Employee loyalty (ie, does the employee feel taken care of?)	20%	10%	28%	16%	24%
HR/other benefit concerns	13%	7%	26%	11%	14%
Private pensions	8%	3%	16%	7%	10%
Government pensions	10%	6%	19%	14%	7%
Social safety net payments	6%	4%	8%	5%	5%

% major challenge

Aon's expertise

Today, employees expect more from their employers when it comes to financial wellbeing support. Businesses must consider the impact employee financial wellbeing has on health, and ultimately the ability to retire. From our employee financial wellbeing assessments to pension consulting, we will span from 'hire to retire' and quickly get to the root cause of any potential and current issues before they occur. Through our solutions, you can take steps to support your people in making better financial decisions.



Looking to the future

To ensure wellbeing is the ethos of any organization in the future, employers must develop a better understanding of the gaps in their specific offerings. When doing so, they must consider how they can support their employees through times of isolation and uncertainty, as well as the day-to-day. Those who embrace wellbeing will find themselves equipped with a resilient workforce, prepared to withstand any future disruptions and more likely to see improved bottom line results.⁽²⁷⁾

Regional spotlights

North America

Many organizations have already built comprehensive wellbeing programs, perhaps revealing that North America has some maturity regarding flexible working and organizational resilience.

Understanding the importance of offering emotional wellbeing initiatives, North America has led the globe in doing so; North America will see growth in Employee Assistance Program onsite presentations, with 64% currently offering or planning to offer these. This region (58%) has most rapidly adopted digital wellbeing solutions, including those that address emotional wellbeing such as cognitive behavioral therapy, resilience, and mindfulness training.

Regarding work life wellbeing, North America expects growth in business travel opportunities. Diversity and inclusion is also an emerging priority; 69% of participants identified it as an aspect of career development included in a wellbeing framework. Family work life balance is a challenge to career development, due in part to both single parenting and many families having dual parents working outside the home.

North American participants have the most social wellbeing initiatives today when compared with other regions and plan to have more events outside the workspace to further nurture relationships. Required COVID-19 social distancing and a virtual workforce are major barriers to social wellbeing in this region. Still, 26% of respondents plan to offer shared spaces at work.

61% of organizations offer activities that promote movement, stretching, and strengthening. However, only 23% of adult Americans⁽²⁸⁾ and 16% of adult Canadians⁽²⁹⁾ meet the physical activity guidelines for both aerobic and muscle-strengthening activity, underscoring the need for these programs. Of all regions, North America has the most ambitious plans to bring physical wellbeing programs onsite with a keen focus on group fitness classes, fitness/wellbeing centers and healthy cafés.

Although not a prioritized dimension of wellbeing for any region, North America has built the largest foundation for financial wellbeing. 45% of North American participants offer a financial wellbeing assessment today. North America is also much more likely than other regions to offer group discounts on products and services, money management support, financial advice, financial protection from adverse events, and savings for higher education and retirement.

Regional spotlights

Latin America

This region will experience the greatest transformation in the future of work.

There are impressive expectations to offer employees emotional support, especially through assessments, access to a breastfeeding/maternity room, Mental Health First Aid training, onsite counseling, and a quiet space in the office.

From a work life view, Latin America prioritizes (69%) diversity and inclusion at the same level as in North America. Latin America has a growth mindset in work life wellbeing as well, with the greatest number of companies selecting business travel opportunities (39%), mentorship programs (21%), and work life wellbeing assessments (13%) for future offerings. Still, this region will need to find creative ways to balance family and work life since this was identified as the greatest challenge for company career development.

Nearly one-third of Latin American respondents identified time/shift work as a barrier to social wellbeing, which may compound concerns of isolation and loneliness. Nevertheless, Latin America expects the most advancement in social wellbeing with an emphasis on charity runs/walks (34%), employee family outings (25%), shared (22%) and flexible (17%) workspaces, and volunteer days (21%).

49% of Latin American participants are using digital wellbeing solutions, but there will be growth in ergonomic initiatives including evaluations, using sit and stand desks, and assessing the physical environment. More than one in four (26%) Latin American participants plan to offer activities that promote movement, stretching, and strengthening. Expansion in onsite services will also include immunizations, healthcare clinics, and health coaching. Latin America will give more attention to nutrition, weight management and fitness programs as well.

Latin America faces by far the greatest degree of challenges associated with addressing employees' financial situations, including compensation budgets, employee productivity, loyalty and turnover. Perhaps because of this, this region will have the biggest growth in financial wellbeing, predominantly offering financial advice, day-to-day money management and assessments.

Regional spotlights

EMEA

Apart from Mental Health First Aid training, this region currently lags in initiatives and plans for emotional wellbeing support.

There will be small leaps with plans for emotional wellbeing assessments (13%), emotional resiliency training (12%), onsite Employee Assistance Program presentations, and mentoring (13%).

Regarding the strength of existing and future work life wellbeing initiatives, EMEA is leading in offering mentorship programs (57%), and career wellbeing assessments (42%). Although dampened by the coronavirus pandemic, 59% of respondents offer business travel opportunities with 23% planning to offer more. More than half of participants identified diversity and inclusion as an aspect of career development (54%). Family work life balance and a lack of managerial skills will be concerns for future career development.

EMEA is ahead of the global average in providing flexible workspace arrangements and shared collaboration spaces, but with the coronavirus pandemic in the background, employers will need to focus on other avenues to support social wellbeing.

EMEA is the global leader in offering ergonomic support to employees – 78% offer ergonomic equipment and 67% offer physical environment assessment. However, there is more that can be done to support activities promoting movement and stretching. Onsite services play a huge role in this region, particularly immunizations, healthcare clinics, fitness/wellbeing centers and healthy cafeteria food offerings. Only 41% of respondents offer digital wellbeing solutions to their employees.

71% offer savings for retirement and 62% provide group discounts on products and services, which is higher than the global average. But, more needs to be done to support the financial wellbeing of employees in providing financial advice, day-to-day money management and credit and debt management. Few organizations are considering expanding financial offerings, but those that do will use financial wellbeing assessments (7%) and day-to-day money management tools (6%).

Regional spotlights

APAC

Future emotional wellbeing offerings will focus on assessments, Employee Assistance Program onsite presentations, and Mental Health First Aid training.

For work life wellbeing, APAC shows unique interest in crafting development plans, flexible work time, work from home capabilities and leave for professional development. Lack of managerial skills (39%) is identified as the top driver of challenges related to career development.

Diversity and inclusion are being addressed in this region as well, but not to the same extent as in other regions. To garner social connections, APAC plans to offer more employee family outings (26%) and charity runs/walks (26%). One quarter of APAC participants identified lack of overall employee engagement in the organization as a barrier to addressing social wellbeing.

Only 36% of APAC companies have digital wellbeing solutions, but this region has the greatest plans for offering these (12%). Ergonomics will grow in importance, and employers may assess the physical environment and equipment, while accelerating activities that promote movement. Financial wellbeing holds the lowest priority in APAC compared to other regions, with tactics for the coming years homed in on financial wellbeing assessments (9%), money management (8%), and financial advice (8%).



About the
survey

The 2021 Global Wellbeing Survey was developed, designed and conducted by Aon in partnership with IPSOS, a leading global market research company.

The purpose of the survey was to:

Establish global and regional market trends, priorities and opportunities in wellbeing in relation to business performance and outcomes

Explore how organizations are strategizing and impacting wellbeing beyond benefit offerings

Uncover where companies are overlooking aspects of wellbeing

Discover what organizations need to do to make wellbeing an integral part of their business performance

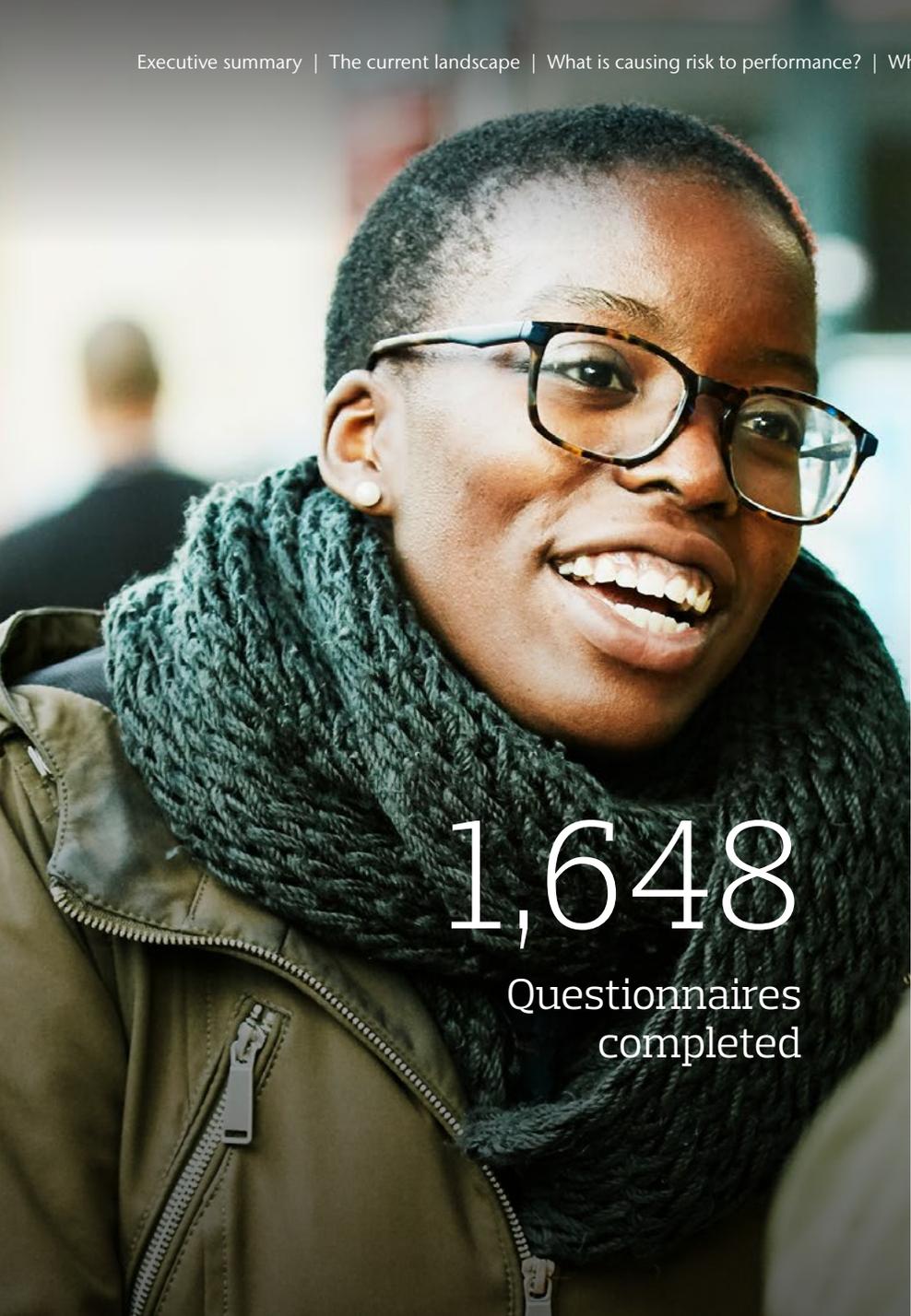
An important but unforeseen challenge for the research phase of this study was the outbreak of the coronavirus pandemic in 2020. The survey was set to field in March 2020 which, as we know now, coincided with major lockdowns around the world. A phased global electronic mailing of the questionnaire by region began on March 12. However, after the first questionnaires were sent to APAC and EMEA, it was quickly decided to hold the entire process until a later date.

The research phase was restarted six months later in September 2020. The questionnaire was modified slightly to account for fundamental changes caused by the pandemic; completed surveys from both waves are included in this report.



Sample design

The survey sample was drawn from Aon's global contact database, Aon Connect, which includes organizations who are and who are not current Aon clients. Aon Connect covers 190 countries and over 500,000 contacts. A random selection process was undertaken by IPSOS to produce the survey sample focused on the largest countries and those who use common languages. In total, 41 countries were sampled, and the survey was carried out in 25 languages.



1,648
Questionnaires
completed

Survey methods

The online questionnaire was completed by the individual considered to be the best person at each organization to answer questions related to organizational and individual wellbeing. In 70% of the respondents, the questionnaire was completed by human resource personnel. The total number of questionnaires completed was 1,648. The questionnaire was drafted by Aon in North American English and translated into 24 additional languages.

All sizes of organizations were included in the sample and the size of the responding organizations are illustrated in the table.

	Global	North America	Latin America	EMEA	APAC
Base	1648	325	162	908	526
1-250	23%	14%	13%	29%	14%
251-500	14%	8%	7%	13%	17%
501-1,000	12%	8%	9%	10%	14%
1,001-2,500	13%	12%	13%	10%	16%
2,501-5,000	9%	10%	9%	9%	10%
5,001-10,000	8%	12%	11%	8%	9%
10,001-25,000	9%	18%	15%	8%	10%
25,001-50,000	5%	9%	13%	5%	5%
50,001-100,000	4%	5%	5%	4%	2%
More than 100,000	3%	4%	6%	4%	3%

The responding organizations fell into the industry segments shown below (Figure 20). Respondents selected whether they were answering questions at a global level (ie, answering for all locations they currently operate in) or at a country level. Responses broke down as follows: 19% are not multinational organizations, 44% responded for one country only and 37% responded for all countries they operate in.

The countries included in the survey responses are presented below (Figure 21). Responses were weighted to produce a statistically significant representation of organizations within Aon Connect – globally, regionally and by country.

Figure 20

	Global	North America	Latin America	EMEA	APAC
Base	1648	325	162	908	526
Manufacturing	18%	16%	21%	19%	21%
Financial, insurance and real estate services	14%	17%	6%	14%	13%
Technology	11%	15%	15%	12%	13%
Wholesale and retail	8%	6%	5%	7%	8%
Healthcare and social services	8%	9%	5%	5%	8%
Professional, scientific and technical services	7%	7%	4%	8%	7%
Energy	4%	2%	4%	4%	4%
Transportation and warehousing	4%	2%	5%	4%	4%
Government services	3%	4%	-	2%	2%
Hospitality and food services	3%	2%	2%	2%	3%
Construction	2%	1%	1%	3%	2%
Administrative and support services	2%	1%	6%	3%	1%
Education	2%	2%	1%	2%	2%
Media, publishing, telecommunications and data processing	2%	2%	4%	3%	2%
Utilities	1%	1%	-	1%	1%
Mining and extraction	1%	2%	3%	1%	2%
Arts, sports and recreation	1%	0%	-	1%	1%
Farming, forestry, and fishing	1%	0%	1%	1%	1%

Figure 21

North America	LATAM	EMEA	APAC
Canada	Argentina	Belgium	Australia
United States	Brazil	Czech Republic	China
	Chile	Finland	Hong Kong
	Colombia	France	India
	Ecuador	Germany	Indonesia
	Mexico	Hungary	Japan
	Peru	Ireland	Malaysia
	Puerto Rico	Italy	New Zealand
		Netherlands	Philippines
		Norway	Singapore
		Poland	South Korea
		Portugal	Thailand
		South Africa	Vietnam
		Spain	
		Sweden	
		Switzerland	
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About Aon

Aon plc (NYSE:AON) is a leading global professional services firm providing a broad range of risk, retirement and health solutions. Our 50,000 colleagues in 120 countries empower results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance.

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