



Global Wellbeing Survey

2023 Global Survey: Workplace Health and Wellbeing Priorities



Introduction

Employers are focused on health, wellbeing, and culture, now more than ever

In a volatile and uncertain business environment, companies are committing to wellbeing initiatives in a big way with strategies to attract and retain talent. It would be reasonable to think that this area may decrease in importance and priority due to financial pressures that many are feeling, but Virgin Pulse found the opposite in our Global Wellbeing Survey.

Wellbeing is still a priority, and its importance has grown over the past few years. Companies are continuing to increase their commitment to health and wellbeing in both support and financial investment; and have learned the lesson that one way to attract and retain talent is to build a sustainable working life for employees. Wellbeing, a people and performance approach for companies, is a major part of that.

The survey has unequivocally highlighted the continuing need for employee mental health assistance. The growing demand for support in this area is clearly evident, and it is noteworthy that organizations are prioritizing mental wellbeing programs with great emphasis.



Read on to Learn:

- 01 Top HR priorities for 2024
- 02 Rising importance of engagement and culture
- 03 Current state and opportunities
- 04 How work culture and mental health are at the forefront of issues needing to be tackled
- 05 How health, wellbeing, and benefits communication continues to evolve
- 06 Lessons to be learned from leaders



The health and wellbeing of employees has never been more critical to organizations, and expectations in this area are increasing all the time. Employees want to work for a company where their health and wellbeing is a priority, and they are seen as whole people. This survey really highlights that a focus on culture is key to engaging people – and was heartening to see that investing in a health and wellbeing program had a positive impact on ROI and positive employee behavior.”



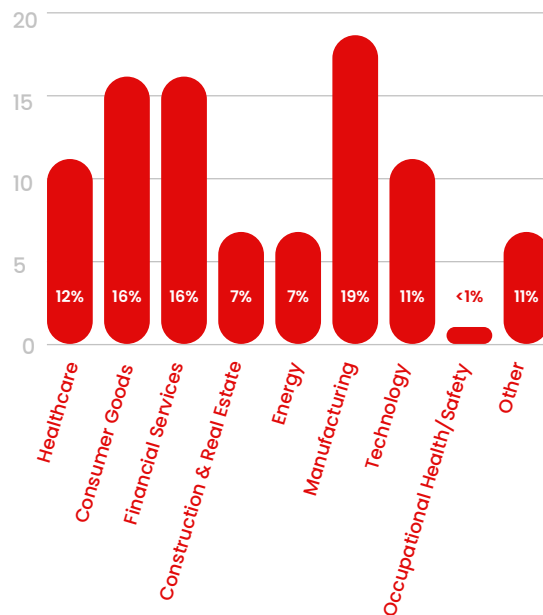
Jeff Jacques
Chief Medical Officer, Virgin Pulse

About the Research:

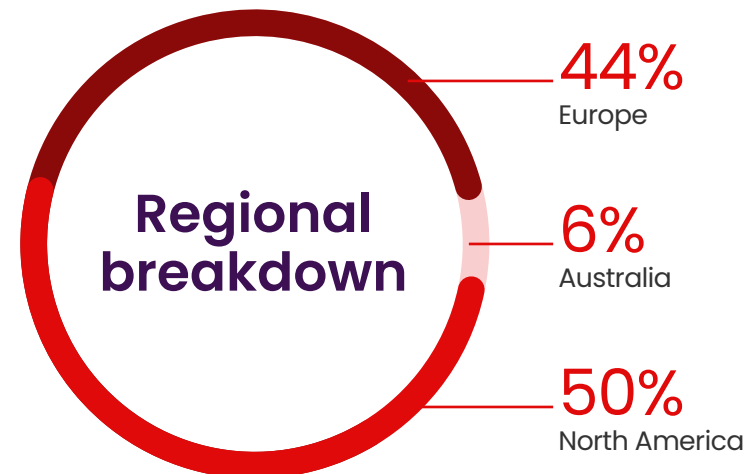
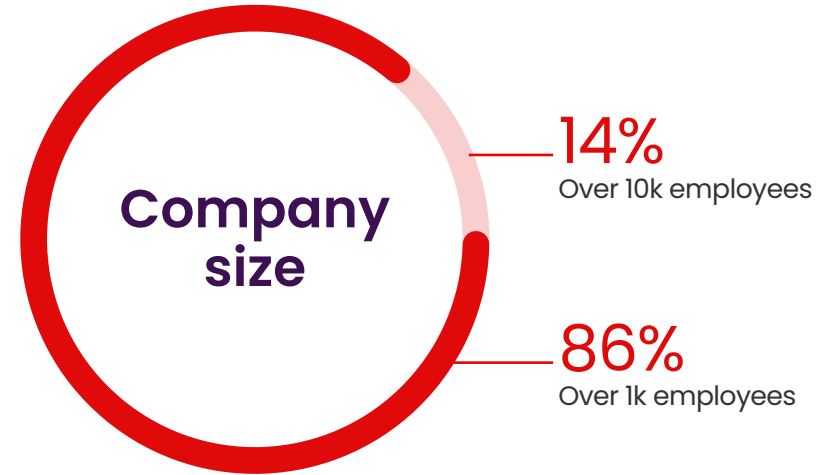
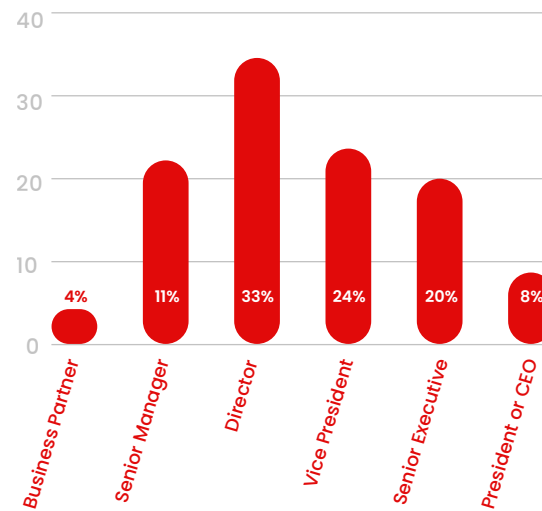
Virgin Pulse has partnered with YouGov to conduct a survey for greater insight into health and wellbeing benefit programs. Respondents include a large proportion of HR practitioners, management and c-suite executives.

- **612 respondents from organizations of 1K+ employees participated in the survey across multiple industries.**
- **Regions of focus included US, Canada, UK, France, Germany, Belgium, Switzerland, The Netherlands and Australia.**
- **Where applicable, data is compared to previous survey results to identify trends.**

Industries



Job Titles



About the Research:

Key Findings

Top HR priorities are to increase employee engagement & satisfaction, work/life flexibility, and employee health and wellbeing to retain talent. Organizations look to wellbeing programs to help address those priorities.

Investment in wellbeing programs continues to grow as respondents say they can clearly see an ROI of their wellbeing efforts and ranked positive employee behaviors as top outcome of their program.

The most popular health and wellbeing programs include mental health and stress management, health risk assessment, physical activity, and financial management offerings.

The majority of survey respondents indicated that improving the health of employees and increased retention & recruitment as goals for their health and wellbeing efforts for the next 1-2 years.

Of those that cut costs in 2022 or have plans to in 2023/2024, an overwhelming majority have shifted cost to employees by increasing employee contribution.

To maximize efficiencies and outcomes, the majority of HR leaders say their job would be easier if all benefits were on one technology platform. They also want faster negotiations and implementations with new resources/partners and improved employee awareness and benefits utilization.

Social media has evolved to become a primary means of communicating employee benefits, second only to email and replacing intranet as previous number two.

In 2024, employers indicated they are adding/increasing investments in:

- Health and wellbeing programs
 - Mental health programs
 - Flexibility
-



Stats



71%

of survey respondents say they can clearly see an ROI of their wellbeing efforts.



59%

planned to add to their health & wellbeing programs in the past year.



67%

ranked positive employee behaviors as top outcome of their programs.



56%

said that mental health was an important part of their wellbeing programs.



66%

use social media to raise awareness of wellbeing programs.



Top HR Priorities for 2024

It is simple for organizations to say that wellbeing is important and a priority. But how they are supporting wellbeing and integrating it into their larger organizational strategy and culture shows their commitment.

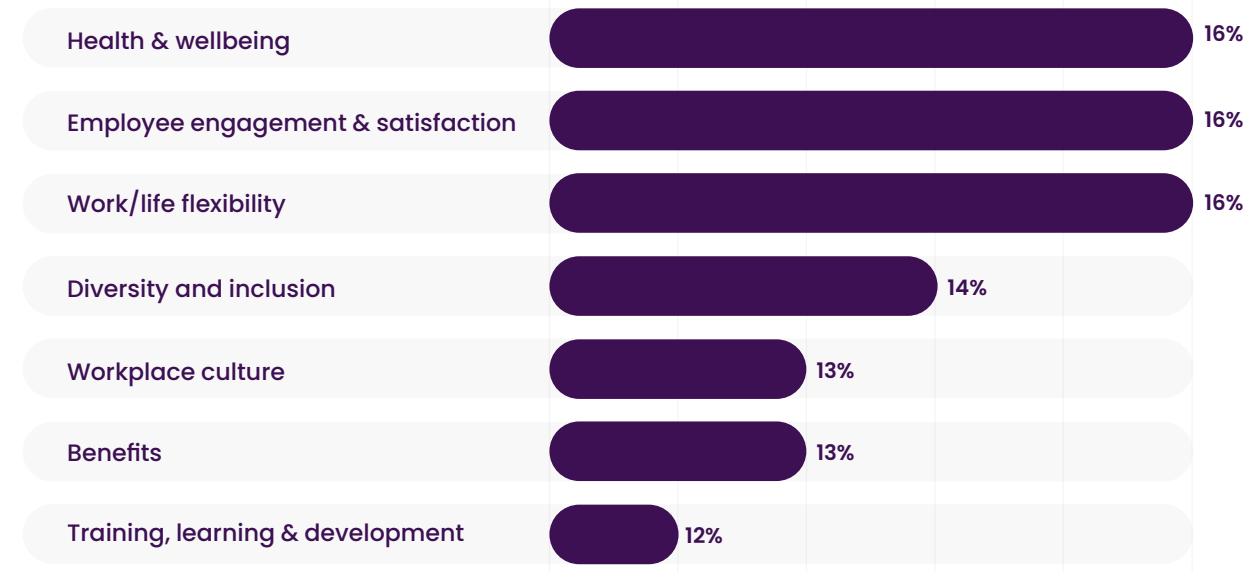
As HR leaders prioritize efforts for 2024, employee engagement & satisfaction, work/life flexibility, and employee health and wellbeing are top of the list to retain and recruit talent. This aligns with our [2023 Global Report](#) that found people want their employers to recognize and bring forward health and wellbeing as a top priority.

The working environment has changed post pandemic, and with more flexibility offered these days, employees are adding this to their non-negotiables.

Organizations look to wellbeing programs to help address those priorities. With 28% believing that a healthy workforce is the key driver for employee engagement. (Fig 2).

However, as you can see there is a broad mix of organizational priorities that all hold weight, this signals that these are all unique and individual to the business, but all supported by health and wellbeing programs.

Fig 1: Global Talent and Retention Priority



When you think about talent retention what are your top priorities?

n=600

Global takeaway:

Looking at the global results from a regional perspective, Australia prioritized DE&I as top priority, Belgium was the only country where training and learning and development was the most important, and France prioritized employee benefits ahead of all others.

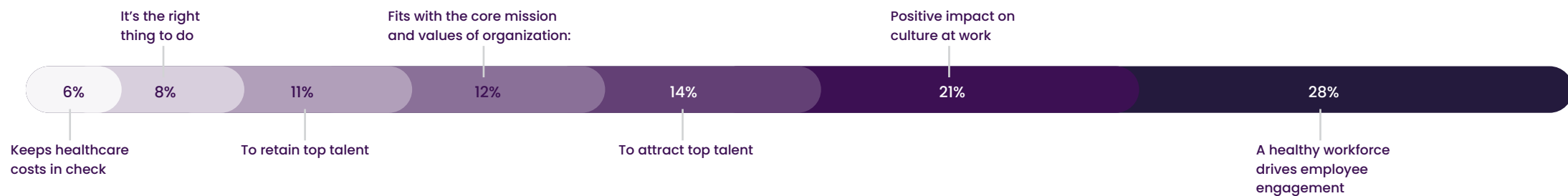
Engagement and Culture are Key

Wellbeing initiatives and strategies are not enough on their own. A health and wellbeing strategy that is integrated with larger organizational requirements to positively impact employee engagement and culture is fundamental.

We found that employee engagement and culture are big areas of focus for organizations. Many stated that a healthy workforce drives employee engagement (28%) with 21% stating that culture was also a key area of focus.

This ties in with the organization's challenge to retain staff and nurture talent. When there is a culture of health and wellbeing and employees feel engaged, we see increases in motivation and productivity and a decrease in churn.

Fig 2. What is your main driver for offering wellbeing programs?



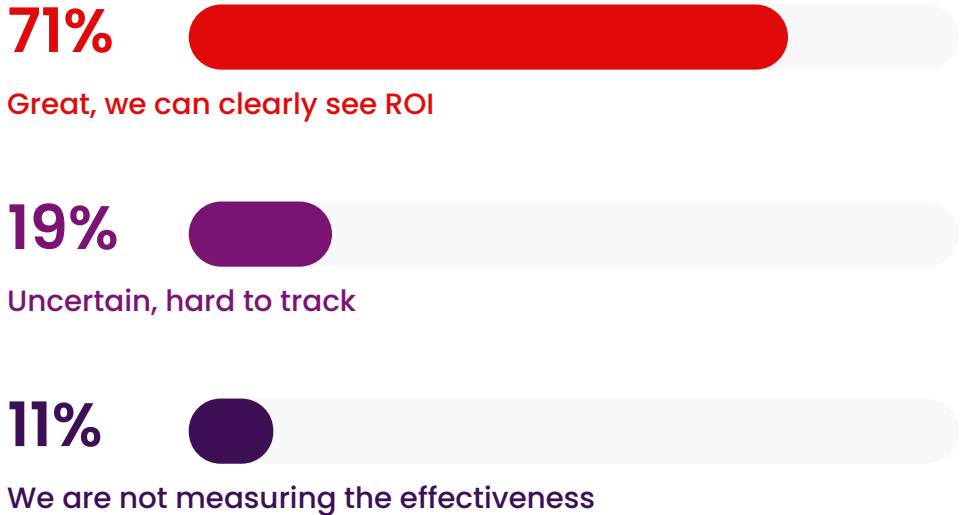
Global takeaway:

Globally, employee engagement and culture were the primary areas of focus, except for the Netherlands where the top priority was retaining top talent (**22%**) and Switzerland where it was seen as the right thing to do (**26%**). In Switzerland, only **8%** emphasized the impact on their working culture as a priority.

Clear ROI of Wellbeing Efforts

When asked about return on investment of wellbeing initiatives and strategies, the overwhelming majority (71%) agreed that they can clearly see ROI from their program, meaning wellbeing is seen as vital to financial success through an outcome-driven wellbeing approach. This is a change from the last global survey created before the pandemic, where only 23% indicated that they could clearly measure the impact of their investment.

Fig 3: How satisfied are you with measurement of your wellbeing efforts?

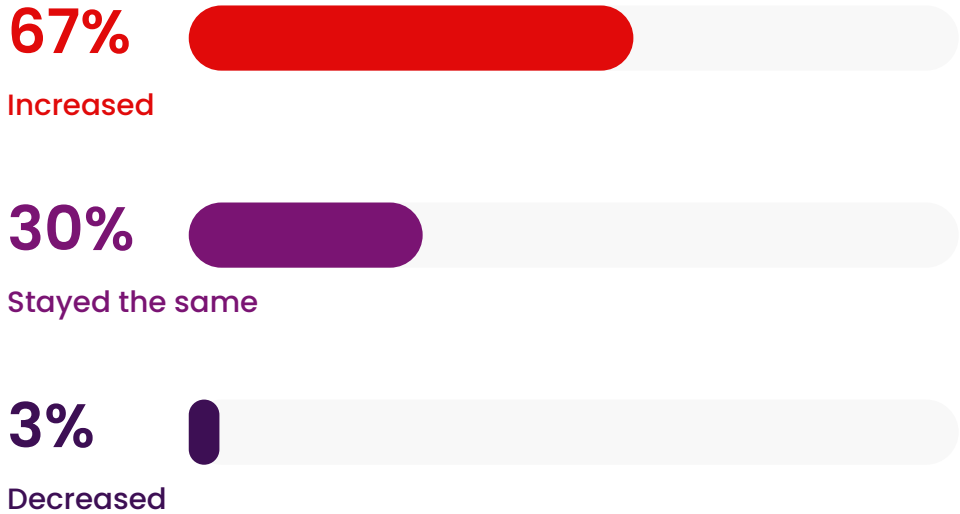


It's clear that employee health and wellbeing outcomes are of great importance for a variety of reasons. While ROI is certainly important in its own right, it's crucial to ensure that any investment you make is actually working for you. Beyond this, organizations also consider metrics like employees utilizing benefits, improved satisfaction, and increased productivity to get a more complete picture of their return on investment. That's why a VOI (Value-on-Investment) model is often preferred - it's more comprehensive and adaptable to fit a wide range of organizational needs.

Our research also found that participation continues to grow. The impact between participation, engagement, and ROI is setting businesses in great stead to be able to deliver a fully functioning health and wellbeing program that delivers for its people and ensures that the business is thriving.

As you can see in Fig. 4, 67% have experienced an increase in participation. This ties in closely with health and wellbeing becoming more important to employees and the greater need for it when it comes to mental health which we look at next.

Fig 4: How has participation in wellbeing programs changed from last year?



Global takeaway:

For the US we see the participation figure rise even higher to **80%**, and France **75%**.

Survey respondents in Belgium and Germany were more likely to say that participation had stayed the same over the past year.

Improving Work Culture and Mental Health are Most Important Parts of Health and Wellbeing Programs

It's not surprising that mental health has really come to the forefront over the last few years. This combined with work related stress accounted for a huge 27% of organizations biggest challenges.

Fig 6. Shows that 56% of organizations felt that mental health was the most important element that they offered as part of their wellbeing programs. Stress Management (49%) and Health Risk Assessments (41%) were also key.

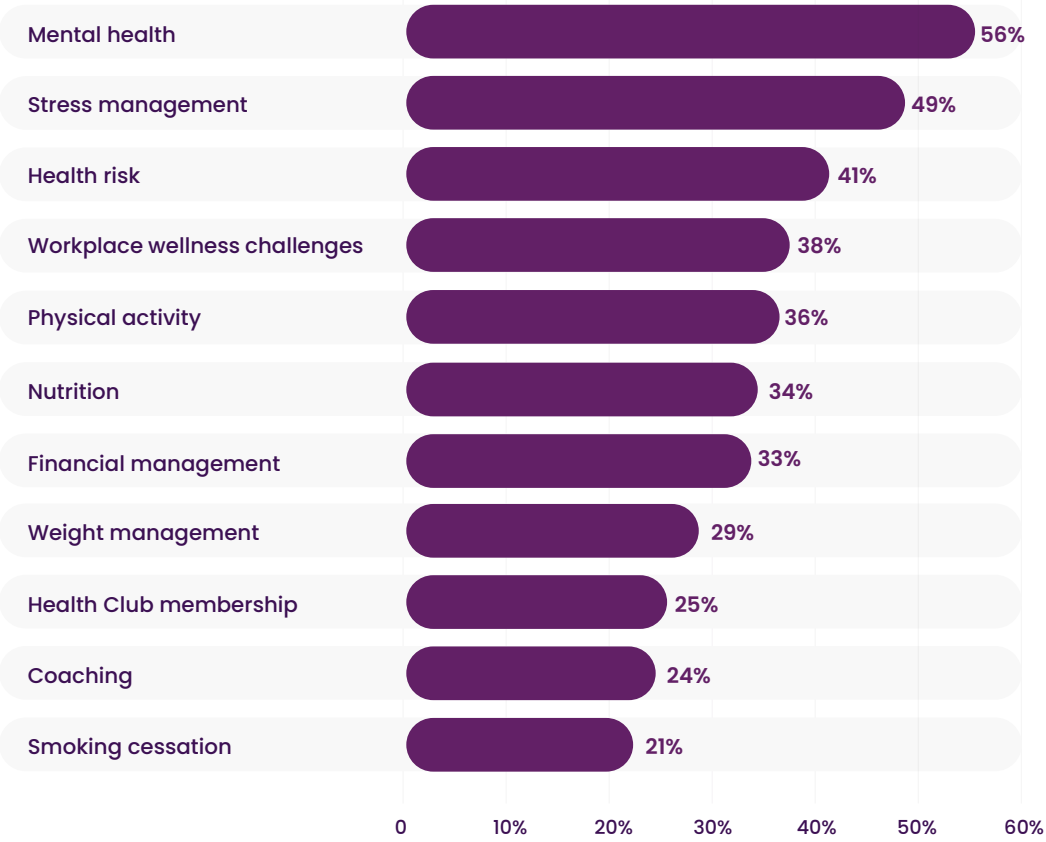
When we asked people to rank their top 3, improving work culture was also identified as a key challenge (Fig 5).

Fig 5: What are currently your biggest challenges around your employees' health and wellbeing?



Data reflects survey responders ranking top three responses in order of importance

Fig 6: What are your top health and wellbeing program priorities?



It's worth noting that there has been a clear shift in priorities regarding wellbeing programs. Smoking cessation, once a top priority, now appears to have fallen to the bottom of the list. This highlights the significance of regularly reviewing priorities, particularly in light of societal changes that can greatly impact people's support needs. In today's world, mental health is at the forefront of people's minds, given the numerous crises that have affected us in recent years. This is a crucial area that requires more attention and support.



	US	UK	France	Germany	Switzerland	Belgium	The Netherlands	Australia	Canada
1	Mental health	Mental health	Stress Management	Mental health	Stress Management	Physical Activity	Mental health	Nutrition	Stress Management
2	Stress Management	Stress Management	On-site Gyms	Weight Management	Nutrition	Stress Management	On-site Gyms	Mental health	Mental health
3	Health Risk Assessments	Health Risk Assessments	Mental health	Workplace Wellness Challenges	Physical Activity	Mental Health	Health Risk Assessments	On-site Gyms	Workplace Wellness Challenges

Rating of importance (1-3)

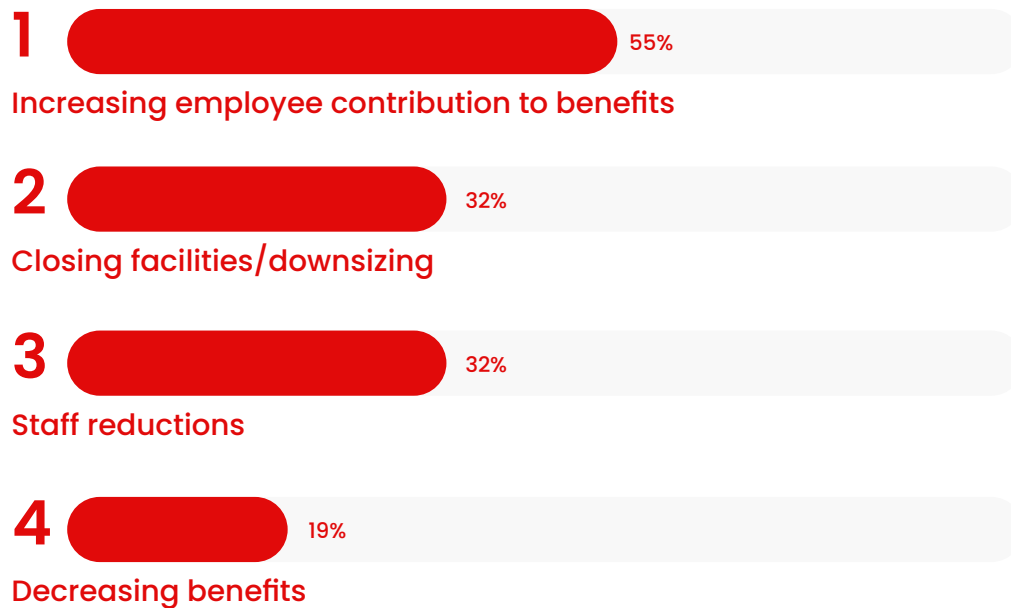


Preparing for 2024

Of those organizations focused on cost, many are opting to shift the responsibility of cutting expenses to their employees rather than reducing their workforce in 2024.

They are achieving this by asking employees to contribute more towards their benefits. This is a trend that is being observed globally, with staff reductions and site closures being secondary measures. One possible reason for this shift is the adoption of hybrid working, which has resulted in less demand for office space.

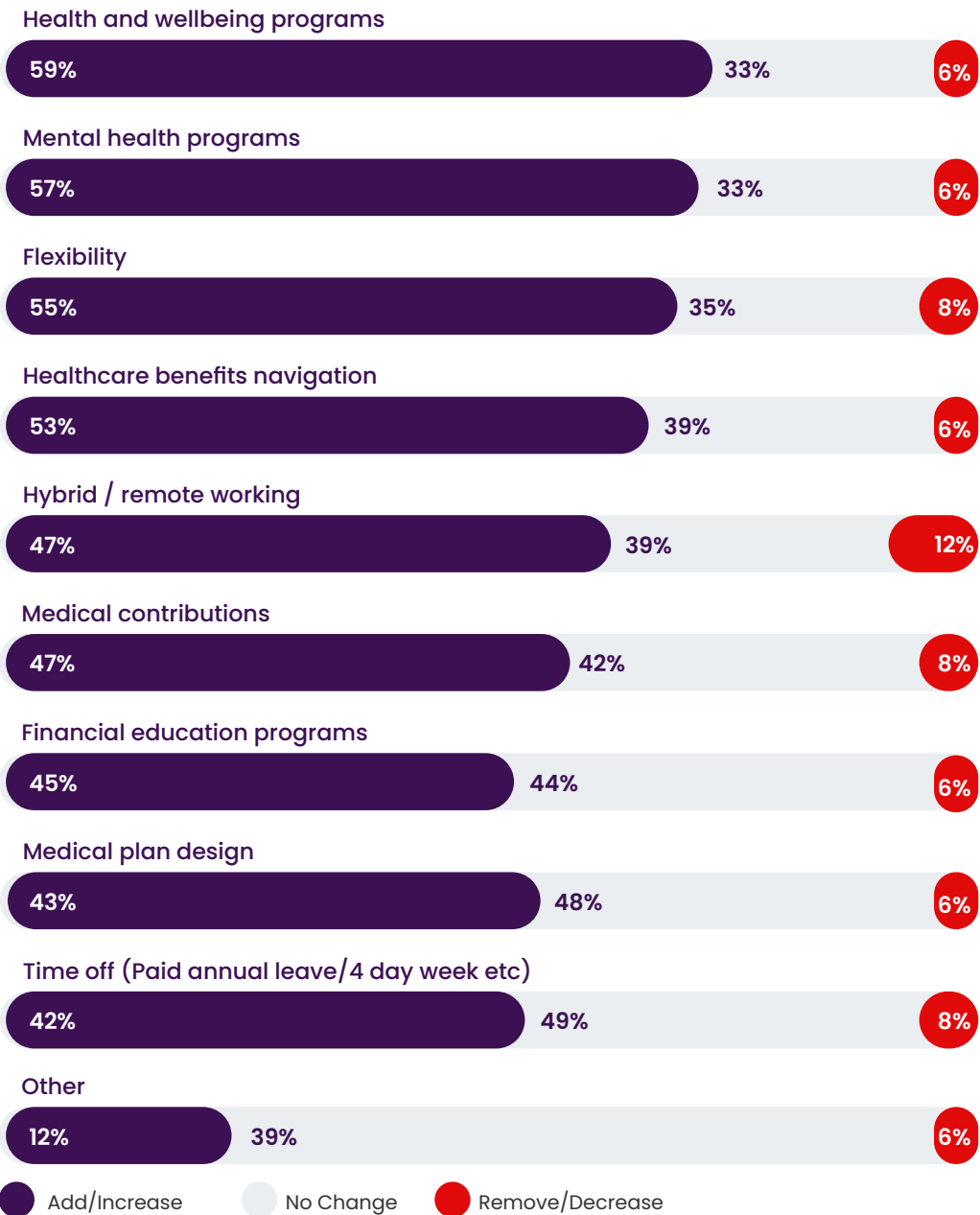
Fig 7: Areas organizational leaders look to for cost savings



Despite the challenges of managing costs, the survey found that a majority of respondents (59%) plan to introduce or increase their health and wellbeing programs while 55% will be offering more flexibility. The importance of mental health programs was also evident, indicating that companies are allocating resources towards addressing this area of concern. Again, we see mental health programs mentioned – so it seems this is an area of challenge where organizations are looking to invest their efforts and budget.



Fig 8: What changes are you planning to make to employee benefits for 2024?



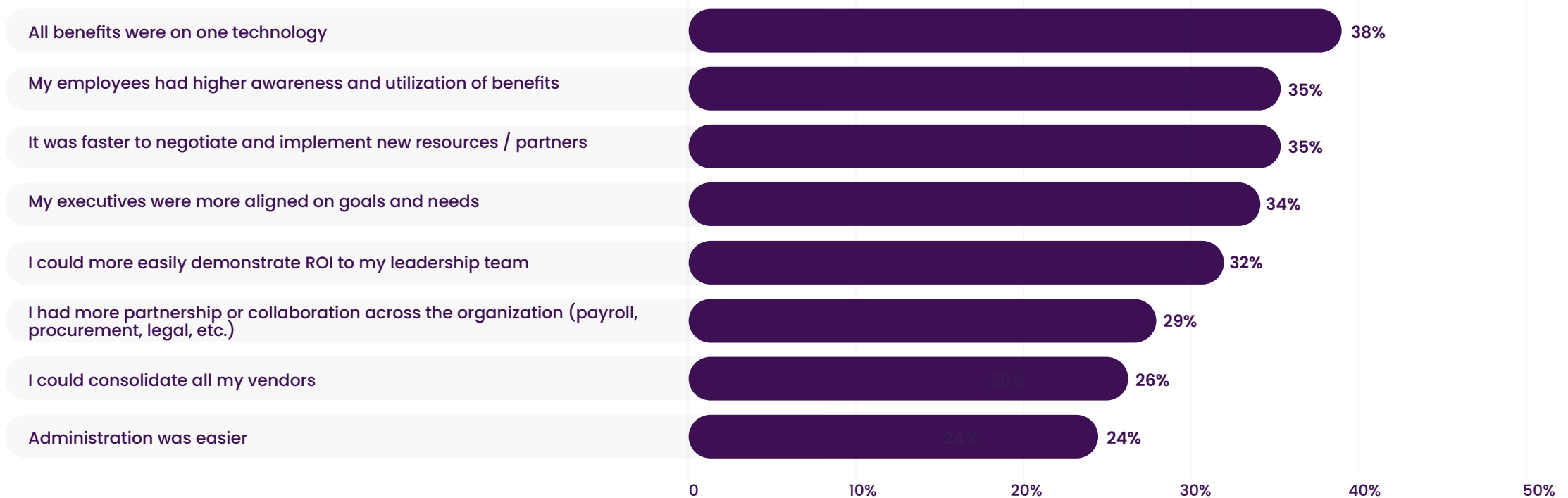
Global takeaway:

Globally, regions are focused on enhancing employee benefits contributions. The US prioritizes health and wellbeing programs, flexibility, and mental health programs as the top three areas for improvement, while the UK places the most significant emphasis on mental health. France stands out with a recognition of a need for healthcare benefits navigation and advocacy programs.

Health and Wellbeing Program Obstacles

To maximize efficiencies and outcomes, over a third of HR leaders say their job would be easier if all benefits were on one technology platform (38%). They also voiced the importance of moving swiftly with negotiations and implementing new resources and partnerships to ensure employees not only have access to critical benefits but are aware of and use their benefits.

Fig 9: Looking at overall employee Health and Wellbeing initiatives we asked people to complete the following sentence: My job would be easier if...



Global takeaway:

HR leaders in Australia and Switzerland noted that their job would be easier if it was faster to negotiation and implement new resources and partners well above other regions at **43%** and **51%** respectively.

Those that wished executives were more aligned on goals and needs include Belgium **44%** and France **42%**, with France and Germany also wanting to demonstrate ROI to leadership team more effectively.

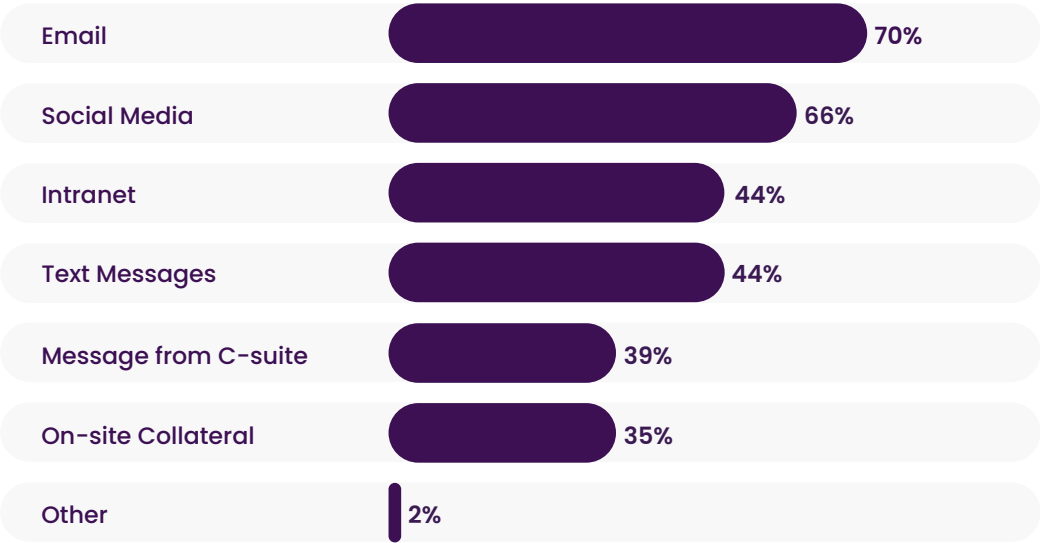
Communication is Key, But What Has Changed?

The 2023 [Edelman Trust Barometer](#) reveals that business is now viewed as the only global institution to be both competent and ethical. Business now holds a staggering 53-point lead over government in competence and is 29 points ahead on ethics. Employee communication is therefore critical, with people looking to their organizations as the trusted source for health and wellbeing advice. In our survey we asked respondents the channels they are utilizing to connect and communicate with employees. The 2023 results indicated email continues to lead as a primary communication channel to raise awareness of benefits, with the largest growth in social media increasing from 21% in our survey back in 2018 to 66% in 2023.

“Social media utilization as an employee communication channel has increased 200% from 2018 to 2023”

According to [LinkedIn’s 2022 Global Talent Trends](#), their data shows that there is a 147% increase in shares of a job post that mentions wellbeing since the pandemic, leading to an 73% increase in company posts on LinkedIn about wellbeing since 2019. And women are 41% more likely to engage with company wellbeing posts, compared to all other company posts, further highlighting how whole-person wellbeing programs and engaging employees through social media help to retain and recruit talent.

Fig 10: Which communication channels do you use to raise awareness of your wellbeing programs?



Global takeaway:

France emerged as a region placing personalized messaging from the C-Suite as top communication method. Text messaging is more popular in Switzerland, Canada, France, and Belgium than other regions with ranges from **50-67%** preferring this channel to connect with employees.

Conclusion

Participation and engagement in wellbeing programs are on the rise, with organizations recognizing their positive impact on key challenges like mental health, resulting in a clear ROI. Investing in these programs will continue to increase as the impact of retaining talent becomes apparent. Employees now expect more focus on their health and wellbeing, and these programs will continue to evolve and personalize to meet individual needs.

As budgets tighten and employees are asked to do more with less, we see a trend of costs shifting to employees through increased contributions. However, it's crucial to drive efficiencies and outcomes while meeting employees' thirst for benefits to be available on one platform.



Lessons to be learned from wellbeing leaders

At Thrive Summit 2023, we brought together three client award winners to share the secret sauce behind their health and wellbeing program success.

The logo for Faith Technologies, featuring the word "FAITH" in a large, bold, white sans-serif font above the word "TECHNOLOGIES" in a smaller, bold, white sans-serif font. A registered trademark symbol (®) is located to the right of "TECHNOLOGIES". The logo is set against a dark purple rectangular background.

Creating a Culture of Care with Faith Technologies Incorporated

Faith Technologies Incorporated is an organization in the construction industry that faces high levels of suicide and mental health concerns among its employees. To address these issues, Faith has implemented a health and wellbeing program that focuses on creating a culture of care. This program aims to remove stigma, encourage regular check-ins with coworkers, and provide employees with two paid hours per month of recharge time. This time can be used for self-care, seeing a mental health practitioner, attending mental health training, or anything else that promotes a healthy headspace for a safe and productive work environment. Currently, 90% of employees take advantage of this benefit, with 95% of field employees utilizing it monthly.

Faith Technologies places great importance on supporting each individual's unique needs in their wellbeing program. Instead of checkboxes, healthy habit development is encouraged and rewarded. This mentality is instilled from day one, as new hires receive a Max Buzz fitness device and are onboarded into the Virgin Pulse platform. This integration into a culture of wellbeing provides employees with the hands-on resources they need to succeed both in their work and personal lives.



Seeing Program Outcomes with Tokio Marine North America Services

TMNA delivers core professional services across U.S., Hawaii, and Mexico for Tokio Marine Group, Japan's first insurance company. As the responsible party for the benefits and culture of six distinct companies, TMNA has achieved notable success by actively listening to and understanding its employees, thereby enabling them to effectively reach their intended audience. By remaining consistent and integrating into existing cultural dynamics, TMNA has observed a 34% decrease in high-risk employees moving to lower-risk categories and a 70% increase in engaged employees maintaining or improving their weight.

However, the journey for TMNA hasn't been without its challenges. Although they possessed the financial resources to implement a wellbeing program, they initially lacked leadership buy-in. Despite this initial setback, the team remained committed to their belief in the impact of health and wellbeing. They implemented grassroots efforts such as employee testimonials, actively promoting positive press, intentionally applying for and winning external awards like the Healthiest Employer Award, and consistently sharing their successes internally and with stakeholders. TMNA has also experienced success to create buzz throughout the organization by partnering with employee resource groups, DEI committees, business partners, and Emerging Leaders Program. Through these efforts and their resulting employee outcomes, TMNA has been able to avoid increasing employee deductions due to claims experience, thereby further securing leadership buy-in.



Enhancing Company Culture with Toyota

Toyota has a reputation for maintaining high levels of employee satisfaction through its strong company culture. The company is constantly innovating to prioritize the health, benefits, and wellbeing of its staff, as well as their families. By doing so, Toyota creates a positive work environment where employees feel supported and motivated, leading to increased productivity and overall happiness.

Toyota's approach is centered around the individual, building a community that provides ongoing support to its members. The company measures the success of its programs by looking beyond cost savings and focusing on whether or not employees are utilizing their benefits, feeling more productive, and happier.

In the past year, Toyota has focused on improving employee engagement in areas that were previously underutilized. The company achieved this by partnering with business allies and utilizing the Virgin Pulse platform to host monthly events that were previously held separately. These sponsored activities have increased awareness of other resources available on the platform, such as mental health resources, coaching, and benefits. By conducting these events each month, Toyota keeps the platform at the forefront of employees' minds and encourages them to use it more frequently. This strategic partnership approach has proven to be effective, as it helps employees engage with the platform in a way that is both relevant and familiar.

About Virgin Pulse

Virgin Pulse is the leading digital-first health, wellbeing, and navigation company that empowers organizations across the globe to activate populations, improve health outcomes, and reduce spend in an era of accelerating cost and complexity. Virgin Pulse's Homebase for Health® connects data, people, and technology to deliver high tech, human touch experiences that engage and reward individual journeys. Virgin Pulse impacts over 100 million people across 190 countries by helping Fortune 500, national health plans, and many other organizations change lives – and businesses – for good.

Learn more at virginpulse.com

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