



HR Future Focus Survey

Aon's Neurotech[®] Survey of HR
Professionals Using Reflection[®]:
The Future of Employee Listening

August 2023



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Overview of Aon's 2023 HR Future Focus Survey

What we found in our Neurotech® survey may surprise you

Background

We invited HR professionals to complete a new type of survey to understand their current and future people challenges.

We believe our award-winning approach uncovers far more than traditional surveys. It allowed us to understand how HR professionals truly felt about their organisation's people approach. It also enabled them to experience the power of our Neurotech® listening tool, Reflection®.

Aon's neuroscience approach is unique because it allows us to understand what people really feel, and not just what they were prepared to say. By getting to the core of a respondent's thoughts and feelings we can avoid the various biases associated with traditional surveys and ensure organisations have the right data to implement the right solutions for their people.

 [Click here to watch our Reflection® video](#)

The Results

Alongside the neuroscience survey, we also asked all attendees to respond to a traditional survey to allow us to compare the results.

The overall neuroscientific responses differed by as much as 39% compared to the traditional survey.

There were plenty of surprises when we compared what people were prepared to tell us and what they really felt!

There was a recurring theme of a lack of data-led approaches throughout the survey findings, particularly around areas such as retention, reward and DE&I strategies. This is particularly concerning amidst the current cost of living crisis, high inflation, persistent people turnover and economic uncertainty, married with shrinking budgets and rising people costs.

The Future is Neurotechnology

At Aon, we believe that a Neurotech® survey, like Reflection®, is the future of employee listening. It can add value at every step of the employee journey helping you understand what's really fuelling their behaviours and decisions.

In the current economic climate, it's never been more important to gain a deeper understanding of what employees are truly feeling. And not just what they're prepared to tell you. Reflection® can give better insight to help you decide where to prioritise and focus your resources to drive higher efficiencies and better outcomes.

To discuss employee listening in more detail please get in touch with your Aon Consultant or email:

letstalkbenefits@aon.co.uk

How to Read the Results

The difference between what we say and what we really feel

The variation in responses between the neuroscience score and the traditional score is the difference between what the respondents are truly feeling and what they are prepared to say.

As an example:	Traditional score (what we say)	Neuroscience score (what we really feel)	Difference
We do enough to support employee financial wellness	59%	20%	39%

If we only ran a traditional survey, then we would see a traditional score of 59%. This score suggests that respondents feel fairly positive about the amount of financial wellbeing support their organisation provides.

In reality, the neuroscience score of 20% suggests that respondents don't really feel that their company does enough to support employee financial wellness.

The difference between the neuroscience and traditional scores suggest that respondents are reluctant to openly admit that financial wellness support is lacking in their company. This is understandable in our example as the respondents are all people who are working in the HR world!

Unlike traditional surveys, the percentage score does not indicate a percentage of the population. Rather, Reflection® measures the strength of association with the affirmation. A high percentage score indicates a strong positive association whereas a low percentage score indicates a strong negative association. In other words, the higher the percentage score, the stronger an employee associates with this affirmation.



The Power of Neurotech® in One Image

The difference between what we say and what we really feel

Reflection® captures two types of insight:

1 Neurotech® Score

How people really feel (non-conscious, intuitive gut reactions – the unfiltered view)

2 Traditional Score

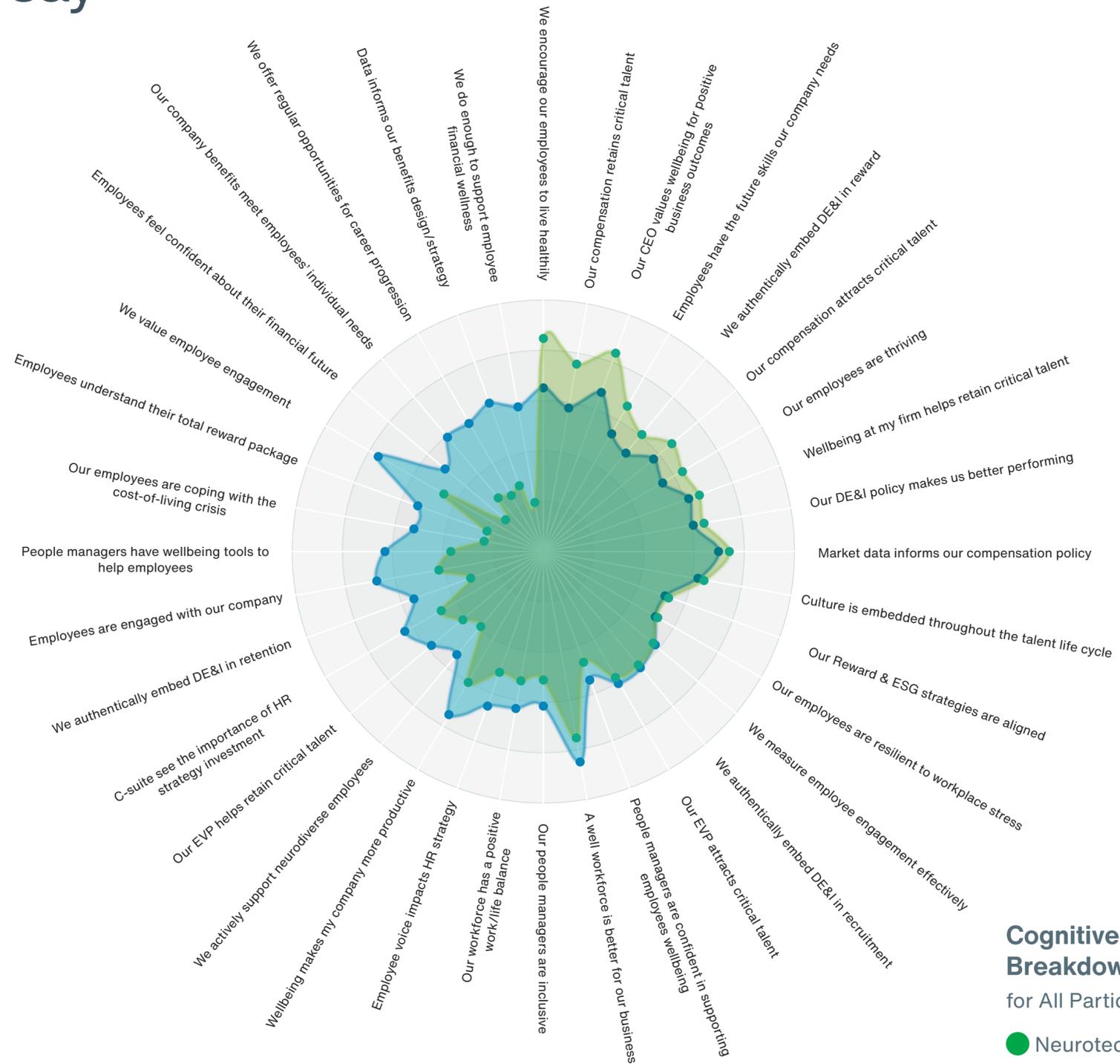
What people are only prepared to say (consciously biased, moderated answers)

The difference between the two is called the **cognitive dissonance**.

The greater the difference between the scores, the higher the levels of cognitive dissonance.

When the scores are close to each other, you have low cognitive dissonance and people are responding **authentically**.

When the gaps start to open, this suggests a degree of **inauthenticity**.



Cognitive Dissonance Breakdown

for All Participants

- Neurotech® Score
- Traditional Score

Neuroscience Bypasses Conscious Bias

Uncovering what is underneath the neural iceberg



4 Survey Results: Wellbeing

What respondents say and how they really feel

Score Colour Code: **Positive** (more than 55%), **Neutral** (45% to 55%), **Negative** (less than 45%)

	Affirmations	Traditional score (What we say)	Neurotech® score (What we really feel)	Difference	What does this tell us?
1	We encourage our employees to live healthily	65%	85%	+20%	<p>Respondents' positive Neurotech® scores indicate that they genuinely believe that wellbeing is valued at a company-level and that it's key to driving performance and retaining talent. This is reflected in their efforts to encourage a healthier workforce.</p> <p>However, the lower traditional scores, particularly on 1 and 2, suggest a reluctance to openly divulge that their organisation encourages employees to live healthily and that their CEO values wellbeing for performance. This suggests that HR respondents may be struggling to reconcile their intrinsic beliefs with anecdotal reporting, possibly causing negativity.</p>
2	Our CEO values wellbeing for positive business outcomes	67%	84%	+17%	
3	A well workforce is better for our business	85%	75%	10%	
4	Wellbeing at my firm helps retain critical talent	61%	66%	+5%	
5	Our employees are thriving	55%	64%	+9%	
6	Wellbeing makes my company more productive	75%	60%	15%	
7	Our employees are resilient to workplace stress	52%	52%	0%	<p>When we drill down to the people on the ground, the results indicate that the HR respondents don't feel that their strategy is working effectively.</p> <p>A number of factors point to this belief: a lack of enablement for people managers, impacting on their confidence; the current cost of living crisis and the lack of impactful support around financial wellbeing. The notably low Neurotech® scores here point to these being specific stressors for HR respondents. Though responses were neutral in the traditional survey, deeper analysis with Neurotech® reveals concealed negative feelings, likely influenced by anecdotal observations. The neutral score related to employees' resilience to workplace stress aligns with this.</p> <p>The lower Neurotech® scores on 7 – 12 shows that HR respondents feel that not enough is being done to support workplace resilience. It also suggests that the employee voice is emotive and valid.</p> <p>This highlights a strategic point: are organisations basing their interventions on a strategy or just on wellbeing initiatives? And is there an urgent need to focus on a data-driven wellbeing strategy? At Aon, we believe that there is.</p>
8	People managers are confident in supporting employees' wellbeing	54%	47%	7%	
9	People managers have wellbeing tools to help employees	63%	37%	26%	
10	Our employees are coping with the cost of living crisis	53%	24%	29%	
11	We do enough to support employee financial wellness	59%	20%	39%	
12	Employees feel confident about their financial future	51%	20%	31%	



Wellbeing is subjective, so employee listening is important in creating a successful strategy.

There is often a disconnect between the Leadership Team's perception of wellbeing challenges and what employees on the ground are really up against. This goes back to data and to understanding what the real underlying issues are.

Letitia Rowlin
Principal Wellbeing Consultant
Aon



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Survey Results: Reward

What respondents say and how they really feel

Score Colour Code: **Positive** (more than 55%), **Neutral** (45% to 55%), **Negative** (less than 45%)

	Affirmations	Traditional score (What we say)	Neurotech® score (What we really feel)	Difference	What does this tell us?
1	Our compensation retains critical talent	58%	76%	+18%	Results indicate that the HR respondents feel that their EVP is a good attractor but not necessarily a good retention tool. This makes sense especially as they also don't feel that: a. their company benefits meet employees' needs; b. their company offer regular career progression opportunities; c. employees understand their total reward package (again with a reluctance to openly admit these feelings). In addition, there's uncertainty around how much they truly value employee engagement.
2	Market data informs our compensation policy	70%	74%	+4%	
3	Employees have the future skills our company needs	54%	67%	+13%	
4	Our compensation attracts critical talent	57%	67%	+10%	Although respondents genuinely feel that their employees have future skills their company needs, the more neutral traditional score suggests that there may be a level of frustration that the business may not understand or value the skills they already have and that they could transition across.
5	Culture is embedded throughout the talent life cycle	63%	65%	+2%	
6	Our EVP attracts critical talent	60%	58%	2%	
7	Our reward & ESG strategies are aligned	52%	53%	+1%	HR respondents' neutral scores around reward & ESG strategy alignment, workplace work/life balance and employee voice impact suggests that they may lack sufficient data on these subjects to have an informed view.
8	Our workplace has a positive work/life balance	63%	52%	11%	
9	Employee voice impacts HR strategy	65%	51%	14%	
10	C-suite see the importance of HR strategy investment	64%	47%	17%	Results also indicate a prevailing sentiment that C-suite may not fully appreciate the significance of investing in HR strategy. This points to the importance of elevating the strategic importance of HR and moving away from being seen as a service centre to being a data-led strategic part of their business.
11	We value employee engagement	76%	46%	30%	
12	Our EVP helps retain critical talent	58%	42%	16%	
13	Data informs our benefits design/strategy	63%	28%	35%	Results indicate that, deep down, the HR respondents are not data-led, but many do not feel able to share this, openly (indicated by the higher traditional score). This is concerning, especially in the current volatile landscape where organisations are facing growing challenges around retention and wellbeing.
14	Our company benefits meet employees' individual needs	59%	28%	31%	
15	We offer regular opportunities for career progression	59%	26%	33%	
16	Employees understand their total reward package	53%	24%	29%	HR respondents do not feel equipped to become data-driven, yet they are unable to state this. It's therefore not surprising that their EVP is not helping them retain talent, benefits are not meeting employee needs and total reward packages are not understood. Finally, respondents don't feel that they offer regular career progression opportunities. Showing people how their career could develop and what their pathway could look like is a key retention tool.



The challenge around retention is significant and it's forcing organisations to reconsider their business strategy in light of talent shortages. The recruitment challenge is featuring on the risk registers of most of our clients right now, leading to a higher focus on building internal talent.

Retention is now an item of strategic and competitive differentiation and organisations need to rethink how they engage and develop their existing talent base.

Jackie Waller
Associate Partner Rewards Advisory UK
Aon



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Survey Results: Diversity, Equity, Inclusion (DE&I)

What respondents say and how they really feel

Score Colour Code: **Positive** (more than 55%), **Neutral** (45% to 55%), **Negative** (less than 45%)

	Affirmations	Traditional score (What we say)	Neurotech® score (What we really feel)	Difference	What does this tell us?
1	Our DE&I policy makes us better performing	61%	65%	+4%	HR respondents recognise the link between DE&I and performance and genuinely feel that they embed DE&I in reward and recruitment.
2	We authentically embed DE&I in reward	51%	61%	+10%	The lower traditional scores on 1 and 2 suggest that there could be a lack of data to evidence what they truly believe. This is in line with the lack of data-led benefits strategy as shown by the negative association score on “Data informs our benefits design/strategy” (28%) in the Reward section of this report.
3	We authentically embed DE&I in recruitment	60%	59%	1%	HR respondents genuinely believe in their methods of embedding DE&I and measuring employee engagement. Nevertheless, results don’t overwhelmingly skew towards the positive, implying that HR respondents are making efforts within their means, which may be constrained by limited resources, likely influenced by the current volatile climate.
4	We measure employee engagement effectively	58%	57%	1%	The results also indicate that more could be done to embed equitable reward practices.
5	Our people managers are inclusive	61%	51%	10%	The negative Neurotech® results indicate that HR respondents feel that there’s a lack of sufficient commitment to DE&I (with a reluctance to openly admit this). Although DE&I features strongly within their recruitment strategy, they feel that much more can be done to embed it into their retention strategy. For example, they feel that their organisation is not actively supporting neurodivergent employees (this is reflective of what we’re seeing in the marketplace with very few firms doing enough in this space). In addition, they’re undecided on whether their people managers are inclusive – this suggests a lack of data and tools to determine whether people managers are indeed inclusive. This all correlates with the tentatively positive scores seen previously in relation to DEI policy and embedding of DEI in reward and recruitment.
6	Employees are engaged with our company	67%	42%	25%	
7	We actively support neurodiverse employees	54%	39%	15%	
8	We authentically embed DE&I in retention	55%	31%	24%	



Not embedding DE&I in your retention strategy puts you at risk of losing the benefits of a diverse workforce: unique perspectives, better collective problem-solving, and innovative ideas.

Equity and inclusion are very important for employees and diverse talent will leave when the work environment fails to support them.

Katherine Conway
Head of Inclusion and Cultural Initiatives
Aon



Case Studies

Delivering meaningful benefits aligned to ESG values

Situation

After significant growth (organic and acquisitions), South Pole wanted to accurately understand the needs of their employees to design their first tailored, global benefits package. It was important that their benefits strategy reflected their commitment to making a difference for the planet while delivering meaningful value.

Aon Solution

Aon's Neurotech® people analytics platform, Reflection® was used to measure:

- 1) employees' true benefits aspirations
- 2) employees' alignment to their ESG values/ sustainability goals and
- 3) employee wellbeing risks especially around climate anxiety

Reflection® uses short affirmations to measure a responder's reaction time. This measures true emotions/feelings and removes conscious bias from answers. Misleading responses are reduced, providing accurate data.

The survey was run in 39 countries and in six languages.

Employee participation in the survey



of the employees took part.

Reflection® identified potential underlying problem areas that might have otherwise gone unchecked but can now be explored/remedied. As expected, employees positively overstated their responses on the traditional survey when compared to the neuroscientific survey. For example, when presented with the affirmation "I have money left over at the end of the month", they scored c.20% higher on the traditional survey than on the neuroscientific survey. This revealed that financial wellbeing was a bigger issue than employees were prepared to openly admit.

Reflection® also revealed that employees felt that their company wasn't doing enough to help them reduce their own carbon footprint (with a reluctance to openly admit this). Climate anxiety was also identified as a mental wellbeing risk for employees.

On a positive note, Reflection® reasserted that employees were truly aligned with their company's ESG values/mission, highlighting the success of their diligent recruitment process.



South Pole won the Employee Benefit Award 2023 for Best Use of Benefits Technology by implementing the Reflection® Neurotech® survey tool in their organisation.

Outcomes

Reflection's insight has ensured that South Pole is smart in how they spend their time and budget to cater to the exact benefit needs of their employees. It has also enabled them to align their benefits to their ESG strategy and ensuring equanimity/fairness for all staff globally.

As a result, all employees now have core benefits including pension, private healthcare, and long-term disability/ life assurance. South Pole is also aligning to global benchmarks – for example, in Columbia, they're ensuring family members are also supported. They're also implementing local-specific benefits such as childcare vouchers and financial wellbeing based on regional differences/demographics as identified by Reflection®.

By capturing additional employee cohort data such as, who has dependents, Reflection® has enabled South Pole to update their inclusivity policies. This includes a bereavement policy that can help everyone with absences. They have also introduced 'canine Friday' to recognise the importance of pets, who are also seen as dependents by employees.

Case Studies

Better Insight, Better Decisions

Premium Automotive Manufacturer – Unmasking employee resilience

Reflection® uncovered a real stigma around mental health amongst the predominantly male employee population. This cultural stigma was so predominant that employees preferred to paint a much more positive picture of their mental state rather than admit that they were struggling deep down.

The insight made it clear that without a cultural shift in employee wellbeing, minor changes were unlikely to make an impact.

Aon went on to recommend a holistic approach to Total Reward and Communication with a focus on both the prevention and treatment of ill-health. Results from Reflection® drove core changes to the client's employee benefits package; offering more and providing choice to allow employees to tailor benefits to their needs and support wellbeing.

Big Four Professional Services Firm – It was never really about pay and bonuses

Despite regularly listening to their employees and basing their decisions on what the data was telling them, this client wasn't achieving the desired behavioural and cultural impact.

Based on previous traditional survey insight, they believed that their biggest shortfalls lay with employee pay and bonuses.

By bypassing the conscious bias and getting to the unfiltered truth of what employees were truly feeling, Reflection® revealed that the real underlying issue wasn't related to pay and bonus.

In fact, this organisation scored the lowest on their work-life balance, their ability to manage stress and to recognise their people.

By understanding more precisely how their employees feel, a new Total Reward strategy has been developed to emotionally resonate with employees and address underlying employee concerns. Central to this is a shift towards wellbeing and work-life balance, as well as catering for needs across different demographics and job roles.



How Reflection[®] Can Help Your HR Strategy Be More Targeted

Better Insight, Better Decisions



Neurotechnology can help you shift mindsets, behaviours, and practices.



Employees answer traditional surveys using their conscious mind, thinking about the question asked and often giving a considered response. But these responses may be influenced by any number of mindsets – from being strategic in their answers, secretive or even disinterested or disruptive, which may mean employers don't create relevant and meaningful action plans to deliver the right employee experience. Using neuroscience tech to listen to employees is a key way to provide clarity and confidence to make better decisions.

Nathalie Hyatt
Strategy Principal, Health Solutions
Aon



Contact Us

Nathalie Hyatt

Strategy Principal
Health Solutions

nathalie.hyatt@aon.co.uk

aon.com/reflection

+44 344 573 0033

About Aon

Aon plc (NYSE: AON) exists to shape decisions for the better – to protect and enrich the lives of people around the world. Our colleagues provide our clients in over 120 countries and sovereignties with advice and solutions that give them the clarity and confidence to make better decisions to protect and grow their business.

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The Aon Centre, The Leadenhall Building, 122 Leadenhall Street, London EC3V 4AN.
Tel: 020 7623 5500

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