Compelling workplace causes are driving the rapid adoption of strategies.
Introduction

State of play: there's the will, the way but not the means

The continued fast-paced rise of employee wellbeing up the workplace agenda has not abated since our first 2016 survey with two thirds of our respondents having a strategy in place in 2019, compared to just one third back in 2016.

To us, three overarching themes emerge in this year’s results: there is strong board level support for wellbeing, digital and data adoption continues its rapid growth, however budgets and people resources are holding some employers back.

Looking at our first theme, the will is there at board level. Many C-suite directors recognise that the workplaces of today are highly pressurised and often stressful (or as recruitment adverts like to gloss it up, fast-paced) which takes its toll on workforces. Almost three quarters of our respondents say high pressure and high intensity environments are a problem for their organisation. That leads to staff churn, lower productivity, poor motivation and engagement as well as both mental and physical harm. The problem will only be dealt with by a change of culture led from the top and through all managers, with team leaders demonstrating healthy behaviours of leaving work on time, being seen to take proper breaks, managing teams fairly and with respect, as well as linking wellbeing to personal development training and performance reviews.

Business leaders are now far more aware that people work better if they have autonomy, a sense of purpose and achievement. CEOs are under more pressure from their shareholders to make the fundamental changes needed to improve wellbeing in their workforces as a key way to create long-term sustainable businesses filled with productive employees.

Our second theme relates to ‘the way’. Technology and data form a two-way channel that can be used to both deliver wellbeing more effectively as well as capture insights to improve and tailor offerings. That, in turn, justifies more investment in wellbeing resources. Use of apps and virtual GP services have tripled since our 2016 survey, with roughly a third of our respondents now offering these to staff. Those holding the purse strings at the top of business often ask for return on investment data before approving bigger budgets, and the anonymised data from these devices can be an important part of an HR report to its board.

But there is a way to go yet, as our third outstanding fact shows us: employers may have the will and the way, but they often do not yet have the means. Despite the improvements in data capture that we’ve detailed above, metrics and reporting are still apparently thin on the ground across all our respondents. Among those without a wellbeing strategy in place, almost half report lack of in-house expertise and funding as a barrier.

We have clearly seen tremendous strides over recent years and expect these to continue based on this research.

As always, we would like to extend a very big thank you to all our respondents to this survey (full list on pages 68 and 69). Without so many employers taking part we would not be able to present such robust results on what is happening in our market today and over the coming 12 to 24 months.

We would also like to thank our sponsors, AXA PPP healthcare. Their passion for the topic has enabled us to continue to build on this valuable annual survey.

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Comment

Wellbeing’s arrival: employers realise that health is key to creating positive cultures

There’s a lot to like about the findings of this the fourth annual REBA Employee Wellbeing Research report. And, in this the first year of our sponsorship of the report, a lot to learn.

First and foremost, employee wellbeing has arrived both as a concept and as a reality. And it is fundamental for building an open, inclusive workplace culture.

Welcome are the findings that over two thirds of respondents’ organisations have introduced a wellbeing strategy and, of those who haven’t, nearly half plan to introduce one this year.

But most welcome is the growing realisation how much mental health matters – nearly half of respondents say they have strategies in place specifically to support this. And two thirds agree that mental health is their board’s biggest wellbeing concern. The continuing chart-topping popularity of employee assistance programmes – 93.6% of respondents’ companies have them – is testament to this concern although the continuing commoditisation of this market means that much of this support is underfunded.

We are, after all, social animals and there’s value to be had in viewing the biopsychosocial continuum that underpins our wellness as ‘one health’ – a notion we’re promoting through our own #Headstrong campaign to encourage employers to give equal weighting to supporting employees’ physical and psychological wellbeing.

It’s an approach that’s based on the notion of good work. This entails creating a positive, supportive workplace culture; rewarding and treating people fairly; giving them the training, resources and support they need to do the job; and providing opportunities to grow and develop.

It also means encouraging employees to lead healthy active lives and, if they should become ill or injured, helping them get the right treatment for an early recovery back to health – and back to work.

To learn from the insights and experience of others, I heartily commend the commentaries from experts and practitioners within this report.

Also striking are the findings that wellbeing is becoming techier. Virtual GP services are making their mark, with nearly a third of respondents offering them compared with one in ten in 2016. These valued time-savers put employees in the driving seat for managing their primary care needs and look set to become a standard feature of employers’ wellbeing offerings going forward.

Broadly and generally, employers are doing a pretty good job helping their people to lead healthy, active lives. The direction of travel is good. But it’s telling that, to help them do better, respondents want benefits providers and insurers to work more effectively together.

What’s needed is a more considered approach. One that builds on their experience and know-how to unpack and make sense of the myriad of soft and hard data – from employee engagement scores, turnover and sickness absence to insurance spend on medical care and ill-health early retirement. And that then applies that insight to help employers cut through the complexity and plethora of market offerings to commend an effective plan.

So, let’s not rest on our laurels. There’s much good work to be done.

Chris Horlick, Distribution Director for AXA PPP healthcare
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To access the full research report please go to: www.reba.global/reports
Wellbeing trends in 2019

How popular are they?
More than two thirds have a defined wellbeing strategy in place 68.4%

The number of employers without a strategy could fall to less than 20% by 2020

How much is being spent?
Where employers have a plan in place, median spend per employee is £26 to £50

What are the business concerns around wellbeing?
For boardrooms it is mental health 62%

At organisation level, it is high pressure working environments 72.8%

The influence of technology
Almost a third provide access to a smartphone app for wellbeing 30.5%

A similar proportion offer access to virtual GPs 31.5%

Social media is increasingly being used as a communication tool for wellbeing 24.1%

Ongoing challenges
Of those employers with no wellbeing strategy in place, key barriers are lack of funding (46.8%) and lack of in-house expertise 46.8%

A lack of internal data is hampering efforts to measure the effectiveness of wellbeing initiatives 58.1%
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Executive summary

Stepping it up: strategies gather force

As wellbeing schemes continue to thrive they are beginning to adapt and respond to important digital trends. What will fuel progress is more dynamic use of data and greater financial investment.

Wellbeing strategies are booming

More than two thirds of respondents have a strategy in place for managing employee wellbeing.

Have a defined wellbeing strategy in place – 68.4%

This figure has more than doubled since 2016 (29.8%) and is a significant increase from 2018 when 45.2% of organisations had a defined plan in place. Wellbeing strategies are now the norm for UK businesses.

The number of employers without a strategy could fall to less than 20% by 2020

Around half of those who don’t have a strategy in place plan to introduce one in 2019.

Plan to introduce a strategy by 2020 – 46.8%

If those who are planning to implement a strategy this year act on their intentions, the number of employers without a wellbeing strategy could be as low as 17% by 2020.

The gap between wellbeing ‘haves’ and ‘have nots’ is widening

Almost a quarter of organisations that have a strategy are now spending more than £150 per head per year on employee wellbeing and well over half increased their outlay in 2018. In organisations without a wellbeing strategy, over a quarter are spending nothing at all.

Employers with a strategy spending more than £150 per head per year – 22.8%

Employers with a strategy that increased their spend on wellbeing in 2018 – 54.8%

The median spend per employee for organisations with a wellbeing strategy remains consistent with our 2018 findings at £26 to £50. Median spend at employers without a strategy is £1 to £25 per employee, again similar to last year. However, there is now a noticeable disparity between higher and lower spenders which will ultimately affect the breadth and quality of wellbeing programmes.
Funding and experience are holding organisations back

Employers say that the main barriers to introducing wellbeing strategies have been lack of funding or budget and a lack of in-house expertise.

Lack of funding or budget 46.8%  
Lack of in-house expertise 46.8%

While commitment to wellbeing strategies is clearly gathering steam, financial barriers are still a concern. Only 25.3% cite lack of senior management support as a barrier so for most respondents there is commitment within the organisation to implementing a wellbeing programme. However, the combination of lack of skills and budget may mean employers find it difficult to turn that commitment into positive action.

Most boards support wellbeing but only a handful drive it

Two thirds of respondents say that the board supports their wellbeing agenda but only one in 10 say that it actively drives that agenda across their organisation. This is roughly comparable to 2018, with a small increase in the number of boards driving wellbeing.

Board supports wellbeing agenda 2019 66.5%  
Board supports wellbeing agenda 2018 67.6%  
Board drives wellbeing agenda 2019 9.2%  
Board drives wellbeing agenda 2018 7.7%

It’s encouraging to see even a small increase in the number of boards that are driving wellbeing agendas. Engagement at board level ensures that wellbeing becomes an embedded part of company culture, rather than it being viewed as an add-on. However, as we see below, employee involvement is equally important.

Commitment from senior managers other than the board is vital for making wellbeing strategies compelling

Engaged senior managers, employee involvement and wellbeing champions are even more significant factors than support from the board when building a wellbeing culture.

Commitment from other senior managers 72.1%  
Employee involvement 63.9%  
Use of wellbeing champions 58.4%  
Support from the board 55.8%

Wellbeing strategies are at their most effective when employees contribute to the programme’s development and into the associated cultural change. While board support is still fundamentally important, this shows that wellbeing has got to draw in interest from all layers of an organisation.
Mental health is number one priority for boardrooms

An overwhelming majority of respondents believe their board's number one wellbeing concern is employee mental health. For the first time, mental health is also the top wellbeing issue being addressed in respondents' strategies.

Mental health is the biggest area of concern for the board

- 62%

Mental health is addressed in wellbeing strategy

- 83%

Stevenson and Farmer's *Thriving at work* report (see page 54) and high profile public campaigns such as Heads Together have helped to add impetus to the mental wellbeing agenda. Employers are now responding to those messages, perhaps as the link between productivity and wellbeing becomes clearer.

Big leap in number of employers taking dedicated action on mental health

Almost half of respondents now have a strategy in place specifically for managing employee mental health, compared to just 15.8% in 2018.

- Have a mental health strategy in place 2019: 45.9%
- Have a mental health strategy in place 2018: 15.8%

This is a clear indicator that employers are now much more aware of the effect of poor mental health on employees' wellbeing.

Line manager training is a fundamental part of employers' mental health strategies

Among organisations with a mental health strategy, 77.2% provide line managers with mental health training. However, this falls to less than a quarter where there is no mental health strategy.

- Offer line manager training – organisations with a mental health strategy: 77.2%
- Offer line manager training – organisations without a mental health strategy: 23.5%

Line managers play a pivotal role in workplace mental health, as they are often best placed to detect changes in behaviour or spot other potential concerns among their staff. A positive finding is that among organisations with no strategy, 42.9% plan to introduce line manager training within the next 12 months.
Awareness of recommended mental health standards at work is fairly strong

Nearly two thirds of respondents are aware of the six mental health core standards recommended by Stevenson and Farmer in their 2017 report, *Thriving at work*. However, almost half admit they haven't assessed their approach against the standards.

**Aware of *Thriving at work*'s six core mental health standards**

*Thriving at work* puts forward a framework for action on mental health, which the report said, “all organisations in the country are capable of implementing quickly”. While most are aware of the recommended standards, it seems that a large section of employers are not being persuaded to change their overall approach to supporting mental health.

High pressure work environments remain the biggest threat to wellbeing

Almost three quarters of respondents said that a high pressure work environment is the biggest hazard for employee wellbeing – the same figure as in 2018.

**High pressure work environment is the biggest threat to employees' wellbeing**

While there is more focus on supporting mental health at strategy level, employers continue to be concerned about the amount of pressure that staff are under at work. This would suggest that the root causes of poor mental health at work are not yet being fully addressed.

Employee assistance programmes (EAPs) still the most popular initiative

Employee assistance programmes are the most frequently offered benefit, with 93.6% of respondents providing this for employees. Occupational sick pay schemes are the second most frequently offered benefit.

**Offer employee assistance programme**

Three quarters (75.3%) of respondents said that they use the EAP offered via their insurer, which may in part explain why they are so popular. No doubt they fact they are commonly offered as free additional services helps too.
Measurement focuses on usage and absence rates

Almost three quarters of respondents measure the effectiveness of their wellbeing initiatives. Employee engagement levels, wellbeing programme participation rates and employee absence rates are the most commonly used measures. However, only 18.4% use return on investment as a measure of effectiveness.

The majority of employers are now measuring the effectiveness of their wellbeing programmes, although around a quarter (26.1%) do not assess this at all. Looking behind numbers such as participation rates is important for future development – signing up to a benefit is not the same as using it.

Employers say a lack of data holds them back when measuring effectiveness

Over half of respondents say that limited internal data is one of the main barriers to measuring the effectiveness of their wellbeing initiatives. This is comparable to our 2018 findings.

Limited internal data is a barrier to measuring effectiveness 58.1%

All businesses will have access to data that can help measure the effectiveness of wellbeing so this is a surprising finding but one that employers reported last year too. Rather than the lack of data itself, the challenge may lie in extrapolating insights from multiple different sources of data, or in the variability of data quality from some providers.

There has been a surge in the use of digital tools within wellbeing programmes

Almost a third of respondents now provide access to a smartphone app for wellbeing and a similar proportion offer access to virtual GPs. In 2016, the figures were 8.5% and 11.6% respectively.

Offer access to wellbeing app 2019 30.5%
Offer access to wellbeing app 2016 8.5%
Offer access to virtual GPs 2019 31.5%
Offer access to virtual GPs 2016 11.6%

Health apps are now well established in healthcare more generally and access to virtual GPs is becoming more widespread so we would expect these trends to be reflected in the workplace. Many providers are now offering apps as part of their wellbeing or healthcare services, which could also be helping to boost these figures.
Social media is becoming an established part of the communication mix

Around a quarter of respondents now use social media in their wellbeing communication campaigns, an upswing compared to last year. Around one in 10 are using audio and/or video content to communicate – more than double the figure compared to 2018.

| Use social media in wellbeing communication 2019 | 24.1% |
| Use social media in wellbeing communication 2018 | 15.7% |
| Use audio or voice content to communicate 2019  | 13.6% |
| Use audio or voice content to communicate 2018  | 6.1% |

Employers are starting to embrace the use of more varied – and modern – communication tools in which to get their wellbeing messages across. Social media allows both employers and providers to develop richer and more engaging content.

Wellbeing has a low profile in learning and development

Fewer than one in five respondents discuss wellbeing during learning and development meetings with staff.

| Discuss wellbeing during learning and development meetings | 17.1% |

Making wellbeing a part of learning and development helps reinforce it as an everyday part of business. It is also an opportunity for employers to flag up to staff what’s on offer and encourage them to take responsibility for managing their own wellbeing.
Appendix 1: About the Survey

The REBA Employee Wellbeing Survey 2019 was carried out online between February and March 2019. Responses were received from 250 wellbeing, HR and employee benefits specialists working at organisations of various sizes and across a broad range of industry sectors.

**Figure 9.1: Respondents by organisation size**

<table>
<thead>
<tr>
<th>Employees</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-249</td>
<td>39</td>
<td>15.6%</td>
</tr>
<tr>
<td>250-999</td>
<td>71</td>
<td>28.4%</td>
</tr>
<tr>
<td>1,000-4,999</td>
<td>88</td>
<td>35.2%</td>
</tr>
<tr>
<td>5,000-9,999</td>
<td>24</td>
<td>9.6%</td>
</tr>
<tr>
<td>10,000-19,999</td>
<td>18</td>
<td>7.2%</td>
</tr>
<tr>
<td>20,000+</td>
<td>10</td>
<td>4%</td>
</tr>
<tr>
<td>Total</td>
<td>250</td>
<td>100%</td>
</tr>
</tbody>
</table>

**Figure 9.2: Respondents by industry sector**

<table>
<thead>
<tr>
<th>Sector</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector</td>
<td>40</td>
<td>16%</td>
</tr>
<tr>
<td>Financial services</td>
<td>29</td>
<td>11.6%</td>
</tr>
<tr>
<td>Technology</td>
<td>24</td>
<td>9.6%</td>
</tr>
<tr>
<td>Professional services (Including legal)</td>
<td>23</td>
<td>9.2%</td>
</tr>
<tr>
<td>Not-for-profit sector</td>
<td>22</td>
<td>8.8%</td>
</tr>
<tr>
<td>Manufacturing and production</td>
<td>19</td>
<td>7.6%</td>
</tr>
<tr>
<td>Health and pharmaceuticals</td>
<td>16</td>
<td>6.4%</td>
</tr>
<tr>
<td>Media and telecommunications</td>
<td>15</td>
<td>6%</td>
</tr>
<tr>
<td>Engineering and construction</td>
<td>13</td>
<td>5.2%</td>
</tr>
<tr>
<td>Food and drink</td>
<td>11</td>
<td>4.4%</td>
</tr>
<tr>
<td>Retail and wholesale</td>
<td>10</td>
<td>4%</td>
</tr>
<tr>
<td>Transport and logistics</td>
<td>9</td>
<td>3.6%</td>
</tr>
<tr>
<td>Leisure and travel (including hotels and hospitality)</td>
<td>7</td>
<td>2.8%</td>
</tr>
<tr>
<td>Mining, oil and gas</td>
<td>7</td>
<td>2.8%</td>
</tr>
<tr>
<td>Utilities and energy</td>
<td>5</td>
<td>2%</td>
</tr>
<tr>
<td>Total</td>
<td>250</td>
<td>100%</td>
</tr>
</tbody>
</table>
Appendix 2: Full list of respondents

ABB Group
Aberdeen International Airport
Abingdon & Witney College
Accord Housing Association
Addison Lee
The Adecco Group
Advanced Supply Chain Group
Ageas
Agilent Technologies
AirTanker
The AJP Consultancy
Allegis Group
AmcoGiffen
Anglian Water
Anthony Nolan
Arnam
Arcadis
Argent Foods Limited
Arm
Arqiva
AS Watson
ASOS
Aspen Healthcare
AstraZeneca
BACP
BAM Nuttall
BGL Group
Bibby Financial Services
Birmingham City Council
Bouygues Energies & Services
bpha
Brambles
Bristan Group
British American Tobacco
Brooke
Browne Jacobson LLP
BSI
Bury Council
BWI Group UK
Caflcas
Cairn Energy
Cambridgeshire and Peterborough CCG
Camphill Village Trust
Cancer Research UK
Capco
Carettech Community Services
Carlsberg UK
CAYSH
CDK Global
Central and North West London NHS Foundation Trust
Centrepoint
CH&CO
Charles Cameron & Associates
Charles Taylor
Chemring Countermeasures
CLS
CMS Cameron McKenna Nabarro Oslwang LLP
Cobham
Coca-Cola
Codemasters
Collins Aerospace
Companies House
Concentra
Connect Group
CooperVision
Coventry Building Society
Crown Agents
Croydon Council
De La Rue
Del Monte UK
Discovery
Donnington Grove Veterinary Group
Drii-Quip (Europe)
Durham University
Dyson
Edge Hill University
Edgewell Personal Care
Eisai Europe
Eli Lilly and Company
Endemol Shine UK
Energy Lab
EnerMech
Environment Agency
Epson Europe BV
Etxe Building Performance
Euler Hermes
Expand Executive Search
Experian
Expro
Extern
Feed Communications
FIS
Forest Holidays
Fourfront Group
FTI Consulting
Garenne Group
Getronics
Great Places Housing Group
Havas Media Group
Healthcare at Home
Herbert Smith Freehills
Hotter
Hymans Robertson
IGD
IHG
IKEA
Incisive Business Media
innocent
Intellectual Property Office
Intuit
Jaguar Land Rover
JDA Software
JLL
John Lewis Partnership
Johnson & Johnson
KCA Deutag
Keoghs
KFC
Kings Secure Technologies
Knorr-Bremse
Leica Geosystems
Lendlease
Leonardo MW
Leyland Trucks
Linklaters
London Stock Exchange
Lorica Insurance Brokers
Lululemon
Macdonald Aviemore Resort
Mace Group
Maersk
Manchester Airports Group
Marie Stopes UK
Appendix 3: Who we are

About our sponsor: AXA PPP healthcare

Established in 1940, AXA PPP healthcare is one of the UK's largest, most experienced healthcare companies.

We combine our health and wellbeing expertise with your intimate knowledge of your business to devise and introduce strategies that drive awareness and engage workforces in their health – and, crucially, support and intervene when it's most appropriate.

Just like people, businesses need healthy routines. Our programmes encourage a culture of wellbeing that supports employees to live healthy, active lives and bring their best self to work.

And, if they should come to need medical care, they can be confident in the knowledge they'll get the treatment they need quickly, in privacy and comfort, for an early recovery back to health – and back to work.

We take a holistic 'bio-psycho-social' approach to supporting employee wellbeing by supporting its five key drivers: health, fitness, nutrition, lifestyle and mindset.

We’re firm believers that insight guides an ever evolving wellbeing strategy, and we apply the data we capture to show the impact on our clients' workforces and inform the development of their strategies.

For more information please visit:
https://www.axapphealthcare.co.uk/business/
About us: Reward & Employee Benefits Association

What REBA does:
REBA is the professional network for reward and benefits practitioners. We make members' working lives easier sharing experience, ideas, data and insight, and organising industry-leading events. We help members pursue best practice, increase professionalism in the industry and prepare for upcoming changes.

Our key functions are:

- Connecting members via rebaLINK and live events
- Proprietary data and insight from research
- Distributing useful content
- Curating an industry-wide research library
- Helping with the supplier selection and procurement process

Key products:

Digital
- www.reba.global for content, research, events and digital tools
- rebaLINK for member-to-member information sharing and supplier due diligence
- REBA Express, our fortnightly email
- REBA Spotlights, our topic-focused emails

Conferences
- Reward Leaders Forum, April
- Employee Wellbeing Congress, June
- REBA Innovation Day, November

Awards
- Employee Wellbeing Awards, February

Research
- Employee Wellbeing Research
- Reward & Benefits Technology Research
- Financial Wellbeing Research
- Reward & Benefits Strategy Research

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