



RETURN ON WELLBEING → RETURN ON WELLBEING → RETURN ON WELLBEING → RETURN ON WELLBEING → RETURN ON WELLBEING →



Employee wellbeing is no longer nice to have, it's a must.

Learn how corporate wellness programmes drive bottom-line savings



Presented by **Gympass**



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Chapter 01

Foreword

“How are you doing?”

It’s a simple question with a complex answer. At any moment, your wellbeing depends on so many different parts of your life: feeling engaged and competent, your physical health, having a sense of meaning and enjoying positive relationships, to name a few.

Given that we spend a third of our lives working¹, our jobs deeply influence how we’re doing. Yet wellbeing literature so often ignores work when exploring how to improve one’s life. This is absurd – our work is an integral part of our lives and greatly influences our wellbeing, for better or for worse. Companies that capitalise on this by prioritising employee wellbeing are seizing on an opportunity to transform lives.

Caring for a workforce means investing in them as people, supporting their holistic wellbeing. And wellbeing truly is a business investment. Prioritising people’s health and happiness creates the space and energy needed to engage fully in their work. This kicks off a virtuous cycle. When businesses help employees thrive, employees help businesses thrive.



“Prioritising people’s health and happiness creates the space and energy needed to engage fully in their work”

Livia Martini
– Chief People Officer

Gympass asked over two thousand human resource leaders around the world who are investing in workforce wellbeing to gauge the business impact of their wellness programmes*. Their answer is clear: It's an investment that pays in spades. **Ninety percent of the companies that measure their wellness programme's return on investment see a positive return** – the same rate at which they report positive returns from their overall benefits programmes.

This is due to a wellness programme's dual impact, as they decrease costs while increasing productivity. On the expenditures side, 78% of respondents said their wellness programme reduced their health care costs and 85% said it decreased the cost of talent recruitment, retention and/or engagement. When it comes to bolstering productivity, **100% of HR leaders surveyed said wellness programmes are important to employee satisfaction**, and 85% report decreased utilisation of sick days. These results were consistent around the world for businesses large and small.

I've seen this happen first-hand. From individuals with burnout or suffering from anxiety, to people with mild but chronic health conditions, to team members with severe impostor syndrome – investing in wellbeing is the answer. When you create a psychologically safe environment, with leaders modelling investments in their own wellbeing, the organisation is transformed – one healthy and happy individual at a time. And not only the individuals feel it, their teams do as well because through this process they become much better people leaders.

Today's workers know this too. We surveyed workers worldwide last year for Gympass' 2022 Work-Life Wellness Report to gauge the global status of work-life wellness. Four out of five told us they would consider leaving a company that doesn't focus on staff wellness. A whopping 85% percent said they'd be more likely to keep their current job if their employer placed more emphasis on wellbeing. These trends only stand to strengthen as Gen-Z joins a workforce that is already 75% Millennial². Both groups are part of a multi-generational trend insisting that work fit into their life instead of squeezing life in around work. And, given the stats detailed in these pages, their emphasis on wellness holds dividends for us all.

In this report, we assess how HR leaders think their employee wellbeing is faring, explore how their executive teams view and fund wellness programmes, and identify where businesses see returns from those efforts. Also included is a helpful guide to measuring the ROI of a wellbeing programme for the one of five HR leaders who don't know how to measure the returns of their wellness initiatives, or for anyone who'd like to capture a clearer picture of why wellness pays.

It is my hope that the human resource representatives reading this report feel empowered to show their leaders how employee wellness is a strategic investment. I hope that they chart a data-driven course from where their workforce wellbeing is to where it could be – and that they lead the way with genuine care.



– Gympass Chief People Officer

*For an explanation of how the study was conducted, see section: 9.3 Methodology



The state of work-life wellness

Chapter 02



Work-life wellness (n)

an attainable state of wellbeing where life's experiences in and outside of work interact to the benefit of happiness, health and performance.

Chapter 02

Wellness is no longer “nice to have” in the workplace – it’s a must.

If the last few years taught us anything, it’s that a sick and stressed workforce is no good for business. Organisations need happy, engaged, healthy workers in order to thrive. And thrive they do: Companies that provide the right employee benefits and wellbeing supports are more likely to turn a higher profit³, exceed financial targets, have lower rates of absenteeism and healthcare costs⁴, and see increased stock appreciation⁵.

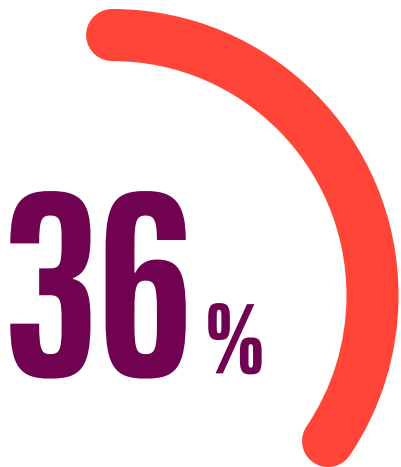
But employers are not actualising the full potential of wellbeing in the workplace. As detailed in Gympass’ 2022 [Work-Life Wellness Report](#), one out of every four employees is unhappy at work and says their job doesn’t give them time to tend to their wellbeing. More than a third feel entirely unsupported, reporting their employer demonstrates no commitment at all to their wellbeing. And these issues matter to employees – 85% of workers say they’d be more likely to stay in their current role if their employer focused more on their wellness.



believe their wellbeing is just as important as their salary.



would only consider companies that emphasise employee wellbeing if looking to change jobs.



of respondents worldwide do not think their employer demonstrates commitment to their wellbeing.

Source: Gympass’ 2022 Work-Life Wellness Report

We’re already seeing these priorities shape where and how people work. Trending digital chatter about “the great resignation” and “[quiet quitting](#)” reflect an ongoing evolution of the role employment plays in peoples’ lives. As this transformation continues, companies that master employee wellbeing will reap the rewards. Consider, for example, that wellness benefits are the second-most important factor for employees considering a new job (after salary). This means wellness programmes can sharpen a talent acquisition strategy in a tight labour market. And about four out of every five workers say they would consider leaving a company that doesn’t focus on staff wellness⁶. It costs six to nine months of salary to replace an employee⁷, so even a small boost in employee retention generates notable savings.

THE GOOD NEWS	THE BAD NEWS
The business world recognises this wellness crisis: 95% of business leaders said burnout is contributing to worker churn as early as 2019 ⁸ , and concern over worker burnout has only grown since.	Business leaders and human resource representatives often overestimate the impact of their current wellbeing efforts. While nearly 80% of employers say their company resources have improved mental health, only about a third of their workers agree ⁹ .

A similar gap exists between human resources departments and the general workforce. Thirty-eight percent of HR leaders say their company offers physical wellbeing support, while a mere 17% of employees agree¹⁰. And despite these ongoing efforts, nearly half of the workers surveyed in Gympass’ Work-Life Wellness Report said their wellbeing declined in 2022. The need for improved work-life wellness is crystal clear. The question is how to deliver it.

Continued reading: [Why work-life wellness can save the workforce](#)



Trends in corporate wellness

Chapter 03



Given the many benefits of a holistically healthy workforce, business leaders are enthusiastic about employee wellness – but they want to check its increasing cost.

More than 90% of human resource leaders surveyed by Gympass say their C-suite cares about employee wellbeing and view wellness programmes as important for staff satisfaction and retention.

Most also see these initiatives as important to attracting future employees, with 91% of CHROs citing wellness programmes as important for talent acquisition.

In light of this optimism, it's no surprise that nearly nine out of 10 of these leaders view wellness programmes as a competitive advantage. But it's not one they can get for free. The cost of providing such benefits continues trending upward: 68% of HR representatives say their benefits costs have increased, with 64% bolstering their budgets to accommodate the rise.

Sixty-four percent also say their programmes extend to employees' family members. And

this is an expense they are unlikely to cut, as three out of four respondents say offering family wellness support is very or extremely important.

Fortunately for the 58% of HR leaders feeling pressure to decrease their wellness and benefits costs, 85% of C-suite respondents say they view wellness programmes a cost-savings measure. This suggests that – perhaps after addressing the initial investment – HR leaders can find common ground with even the most penny-wise CFOs.

Continued reading:

[101 unique employee benefits](#)



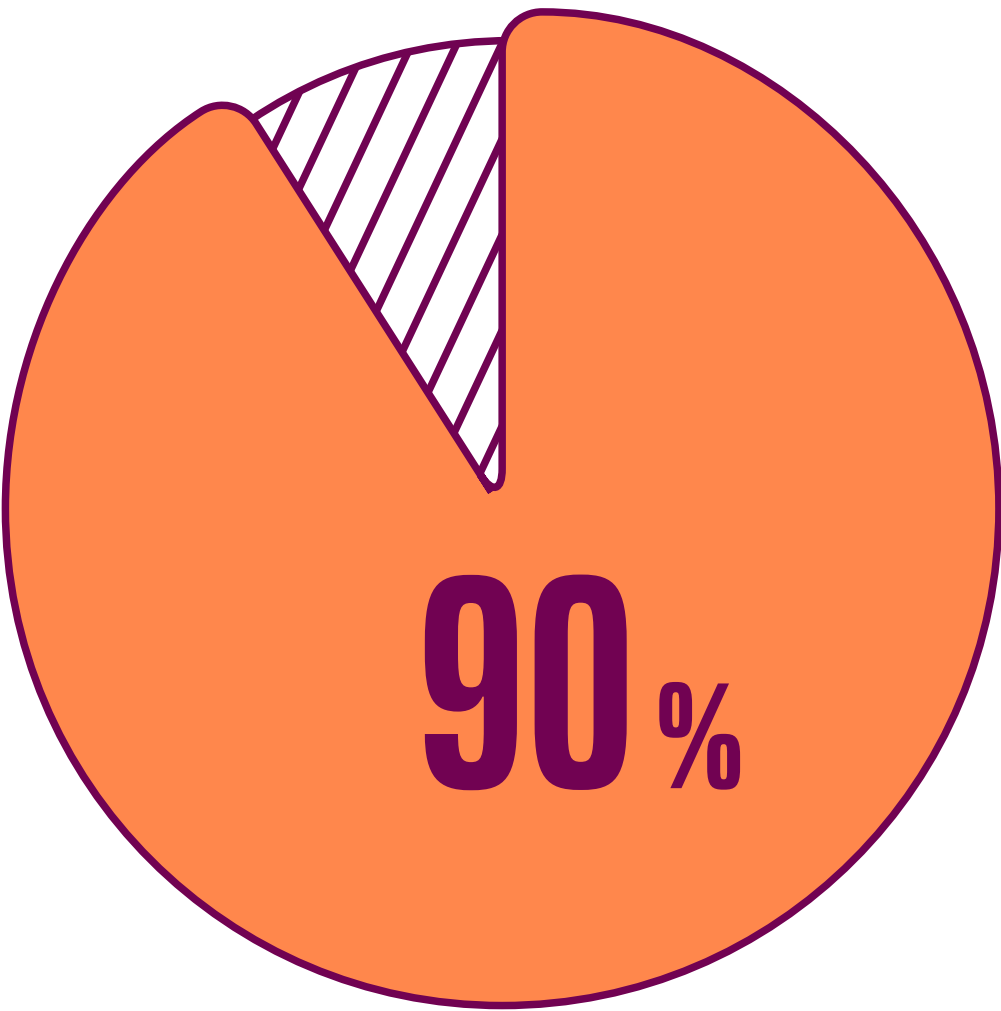
The impact of corporate wellness programmes

Chapter 04



So, leaders are optimistic that investing more in their wellness programmes can actually help them lower the overall costs of their HR budget. How? Focusing on preventative healthcare over reactive healthcare. But can wellness programmes really deliver bottom line savings?

Yes. Resoundingly so.



Chapter 04

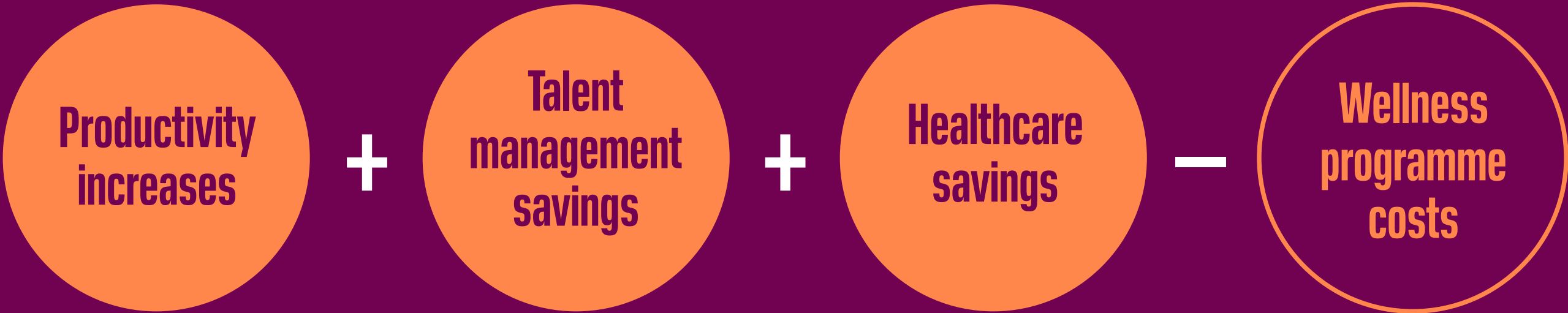
Ninety percent of HR leaders who measure the impact of their wellness initiatives said they see a positive return on investment.

This comes from a wellness programme’s dual impact, as they reduce healthcare and talent costs while increasing output.¹¹ Both sides of this equation matter – a lot. Burnout alone is costing companies around the world \$322 billion annually in voluntary turnover and lost productivity.¹²

In this section, we dig into this duality. We pinpoint where companies report getting their money’s worth from wellness, a measure that can be easily quantified with the following formula:

Understanding the ROI of your wellness programme

See **section seven** to learn how you can calculate these variables to measure your own company’s wellbeing ROI



Over half of companies with a positive ROI from their wellness programme offer some form of mental wellness support and flexible work arrangements. These are the same two wellness programmes HR representatives globally say are most valued by their employees.

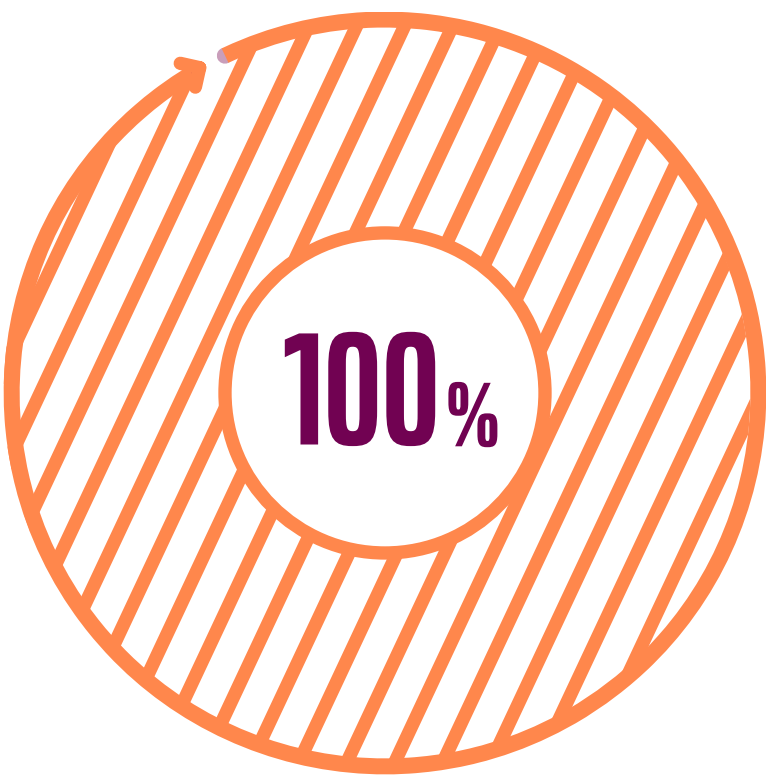
4.1 Productivity increases

Wellness programmes support employee health and morale, both of which are good for business. Happy employees are the most productive members of the workforce, with research showing satisfied departments produce a 23% higher profit than those that are miserable¹³.

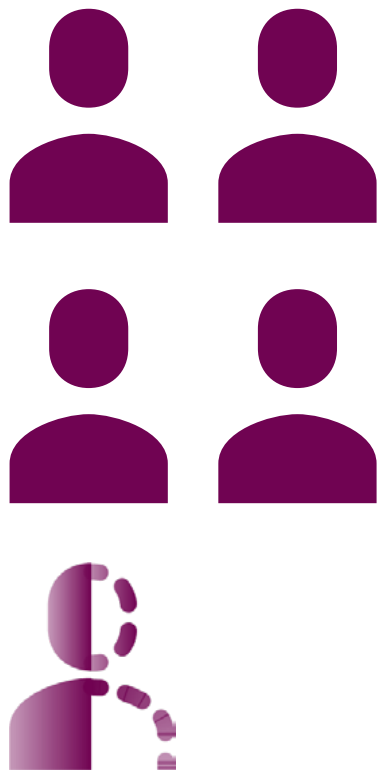
Every single HR leader in Gympass’ survey said wellness programmes are important for employee satisfaction, with 84% saying a wellness programme is very important or extremely important. And these are not companies that have magically always had happy employees: 98% of HR leaders saw an improvement in employee satisfaction after rolling out a wellness programme, with 63% noting it had a very positive or extremely positive impact.

Wellness programmes also boost output by keeping employees healthy, allowing them to do better work with fewer interruptions. Employees are 20% less productive when they work while sick, which, for example, costs the U.S. economy an estimated \$234 billion annually¹⁴.

Healthy employees are also less likely to call in sick. Wellness programmes have been shown to reduce the number of sick days taken by employees by 25%.¹⁵ HR leaders surveyed by Gympass say they’ve seen these numbers in action: **85% have watched their wellness programme lower the number of sick days taken by employees.**



100% of HR leaders say wellness programmes are important for employee satisfaction.



More than four out of every five HR leaders saw a decrease in the number of sick days taken by employees as a result of their wellness programme.

The bottom line:
Wellness programmes increase productivity.

4.2 Talent management savings

Taking care of your employees is vital. After all, no work gets done without them! But that doesn't mean meeting their needs is easy or cheap. There are expenses associated with every single stage of talent management, from acquiring new talent to retaining staffers to offboarding team members when they eventually say goodbye.

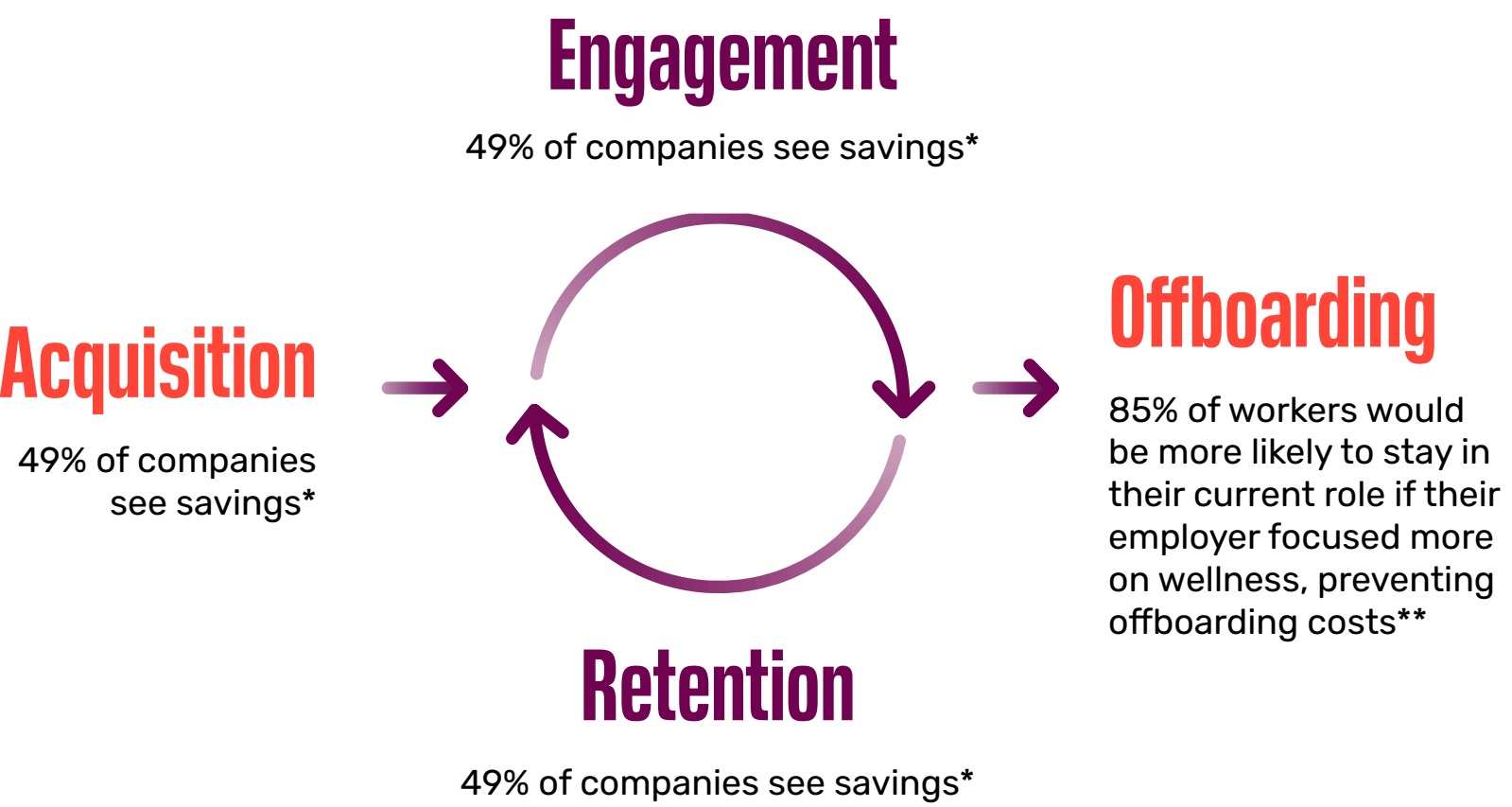
HR leaders say wellness programmes make this process more affordable and easier. Eighty-five percent of those surveyed by Gympass say their initiative produced talent management savings, and the majority say their programme is important for employee acquisition, satisfaction and retention.

4.2.1 Reduced costs

In the first stage of talent management, employee acquisition, 45% of HR leaders see savings from wellness programmes. Nearly half of HR leaders say their wellness programme reduced costs in the subsequent stages of employee engagement and retention.

Even a wellness programme focused on one aspect of wellbeing has been shown to produce savings across industries. Every dollar invested in the mental health of non-office workers, for example, has been shown to return \$5.80 in mining, \$3.50 in manufacturing and \$2.30 in construction operations.¹⁶

How wellness programmes reduce talent management costs



*Based on companies who reported the ability to measure the ROI of wellness programmes
**Gympass 2022 work-life wellness report

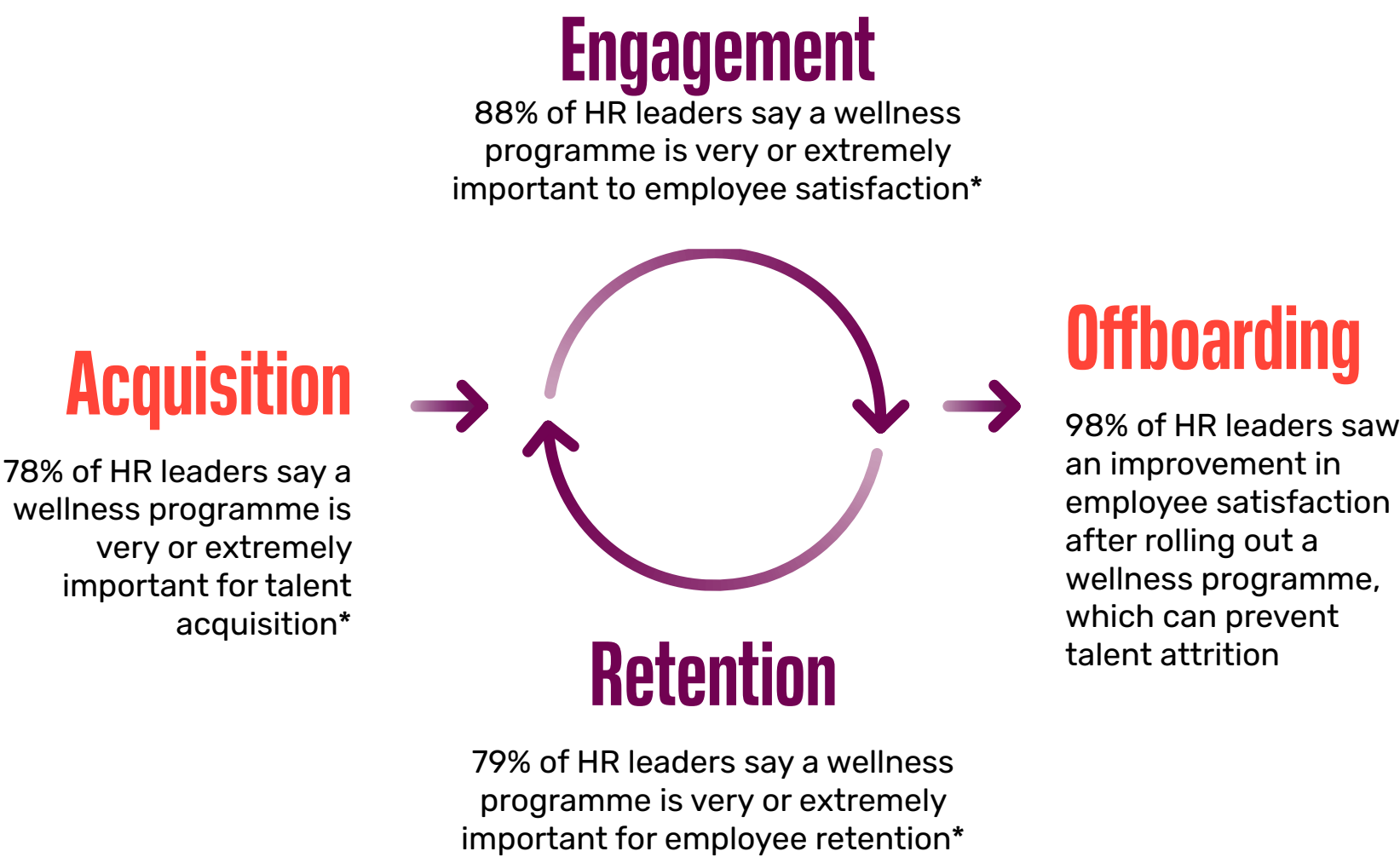
4.2.2 Meeting employee needs

On top of generating savings, HR leaders say wellness programmes better enable them to meet employee needs throughout the talent lifecycle.

Consider, for example, that 62% of workers identify employee wellbeing as a key deciding factor when applying for a new job¹⁷ and 85% would stay in a role if their employer prioritised wellbeing.¹⁸ HR leaders are seeing these worker preferences in action. The vast majority of companies that measure the impact of their wellness programme say it is very important or extremely important for employee acquisition (78%), satisfaction (88%) and retention (79%).

In this light, a wellness programme can draw in new talent faster (reducing cost-to-hire) while simultaneously proving to current employees they are cared for (reducing expensive turnover).

How wellness programmes enhance talent management



The bottom line:
Wellness programmes reduce the costs and complexity of talent management.

*Based on companies who reported the ability to measure the ROI of wellness programmes

4.3 Healthcare savings

The savings from wellness programmes are not limited to talent management – HR leaders say they reduce healthcare costs as well.

Healthcare is an extremely common benefit around the world, with 71% of companies surveyed by Gympass offering health insurance.* This is the case for good reason. Health insurance is among the most sought-after perks, and it costs businesses less to provide healthcare than it does to replace an employee.¹⁹

But money well spent is still money spent, and these costs are not insignificant. The average healthcare premium for a single U.S. employee in 2021, for example, was \$6,440, while the annual family plan costs \$16,253 a year.²⁰ And while the U.S. does have the world's highest per-capita healthcare expenditures,²¹ it is not the only nation grappling with rising healthcare costs: a 2022 survey of medical insurers in 55 countries found that **78% anticipated rising costs around the world over the next three years.**²²

The 58% of HR leaders feeling pressure from their C-suite to reduce healthcare costs will be glad to hear these numbers can be minimised, as \$3 out of every \$4 spent annually is to address preventable conditions.²³ Wellness programmes target these preventable expenses, with 78% of companies saying their wellness programme reduced their health care costs.*

To see this in action, consider Gympass' impact on employer healthcare costs. A multi-year study by an external healthtech company assessed the Gympass programme's effect across four large Brazilian companies with a combined eligible workforce of more than 30,000 employees. This study found companies save on their overall employee healthcare costs, thanks to increased preventative care and decreased hospitalisations.

Employees who exercise at least five times per month with Gympass reduce their total healthcare costs by 18%. Even one monthly fitness check-in makes a difference: users who exercise at least once a month decrease their total healthcare costs by 5% compared to their peers who do not use Gympass at all. Savings are even greater for hospitalisation expenses, which are among the most costly healthcare claims. Employees who use Gympass to exercise at least 5 times per month reduce their average hospitalisation cost by 26%.**

The bottom line:
wellness programmes reduce the cost of employee healthcare.

*This global statistic excludes German respondents as health care is not furnished by employers in this region

** Savings calculated based on a study conducted from Jan 2019 - May 2022. Reduction of total costs is a median of Gympass client-provided data. Cases of labor, neonatal, oncology, home care, transplants and dialysis were not considered in this analysis.



Worldwide wellness

Chapter 05



It's time to zoom in on the wellbeing of each country included in this report. In this section, we analyse the perspectives on wellness held by a nation's business leaders, as well as the impact wellness programmes have on their employees and operating costs.

Chapter 05

5.1 Argentina



Argentinian HR leaders are enthusiastic about the positive business impacts of wellness programmes. They report some of the best healthcare returns globally, outpacing every country except Brazil in the percentage of respondents who reported a decrease in sick days and healthcare costs. Workers are similarly enthused, with Argentina citing some of the world’s highest wellness programme enrolment rates.

The impacts of wellness programmes

86%

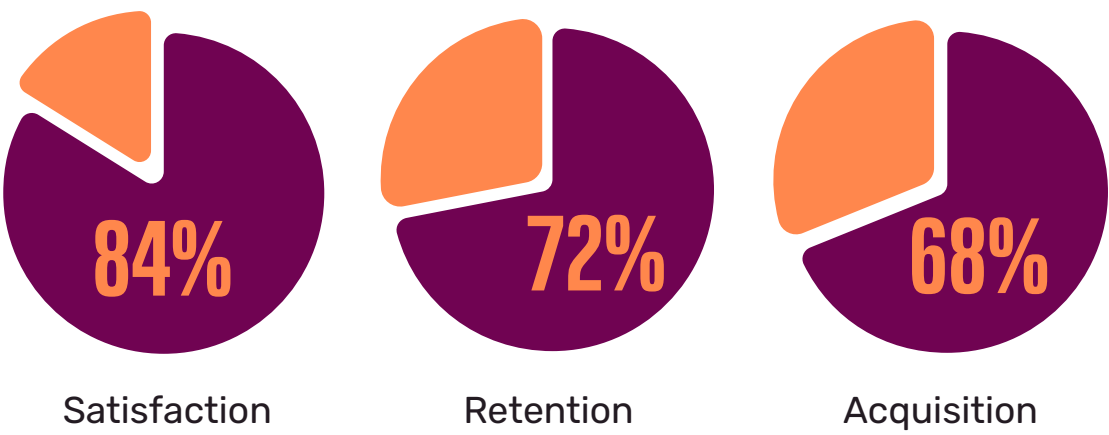
The vast majority of companies in Argentina that measure a return on their wellness programmes **see a positive ROI.**

Leader perspectives on wellness

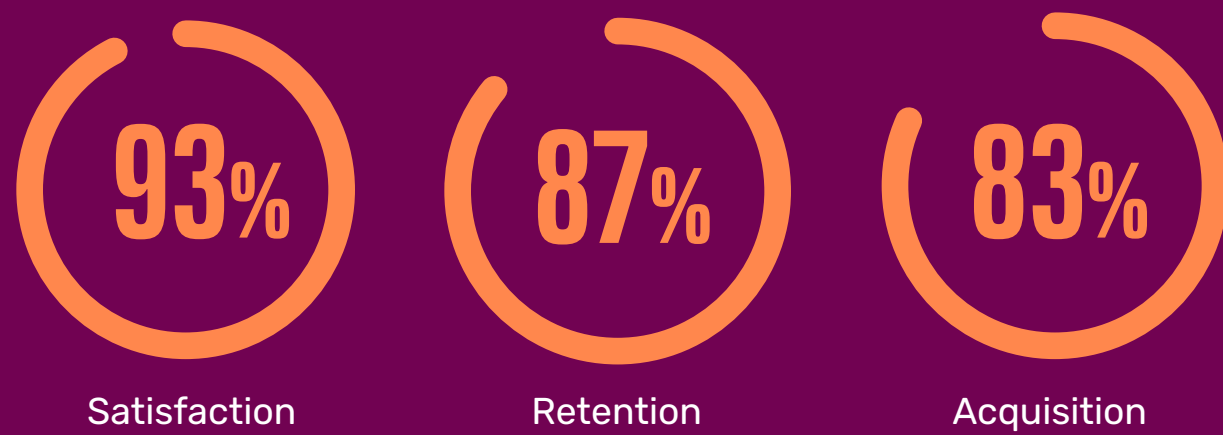
Business leaders in Argentina care about workforce wellbeing, with nine out of 10 respondents saying their C-suites care about employee wellness.



Argentinian HR leaders say wellness programmes are an important talent management asset: 84% of respondents say wellness programmes are very important or extremely important for employee satisfaction, 72% say the same for employee retention and 68% say the programmes are important for talent acquisition.



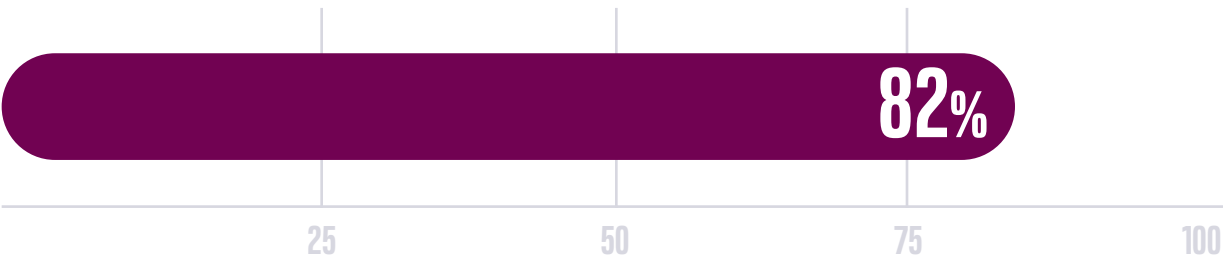
Leaders view wellness programmes as important for their employee relations: 93% of respondents say their C-suite considers wellness programmes important for employee satisfaction, with 87% saying they are very important for employee retention and 83% saying they are important for talent acquisition.



Companies pay less for healthcare and have healthier employees: 82% percent of companies report their wellness programme decreased the cost of healthcare benefits and 88% saw a decrease in sick days as a result of their wellness programme.



The vast majority of leaders see the value in wellness programmes, with 82% of C-suites considering wellness programmes as both a competitive advantage and cost-savings measure.



5.2 Brazil



Brazil is all-in on wellness from the C-suite down. Its HR leaders provided some of the sunniest perspectives globally, from how much their C-suite values employee wellness to how many see sick day usage drop thanks to their wellness programmes. This enthusiasm is matched by their employees, with Brazil ranking as one of the countries with the highest rates of employee enrolment in wellness programmes.

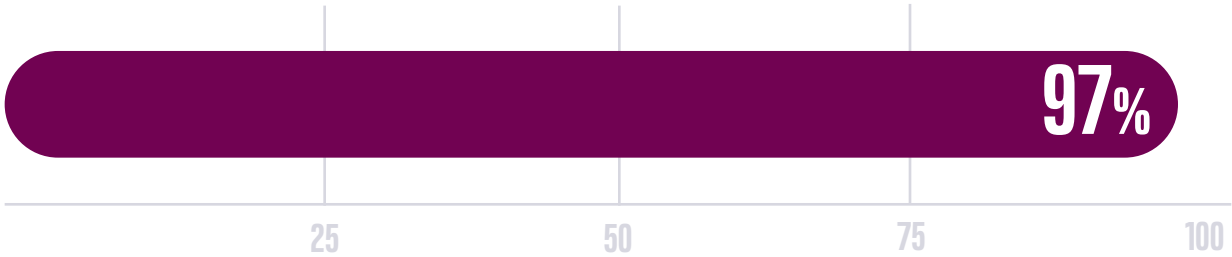
The impacts of wellness programmes

97%

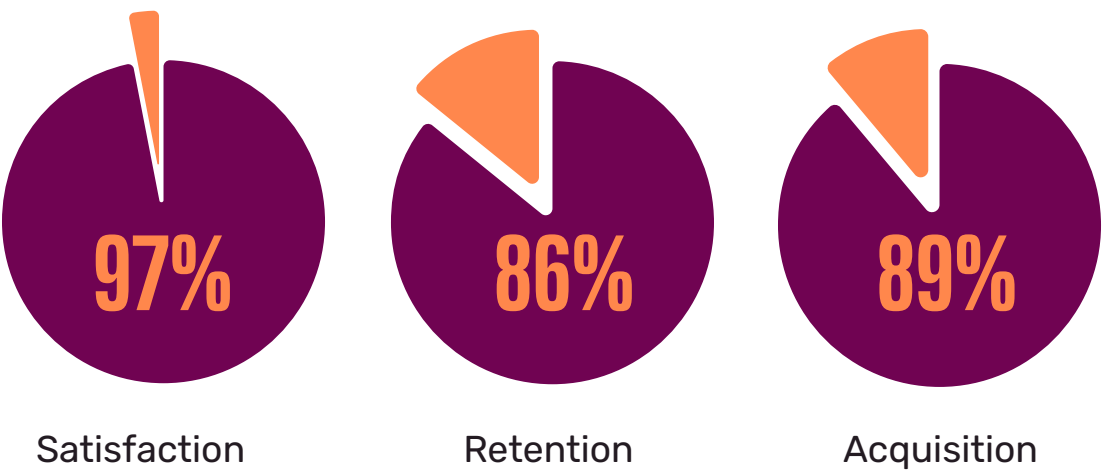
Ninety-seven percent of Brazilian companies that measure the ROI of their wellness programmes see a positive return.

Leader perspectives on wellness

Support for employee wellness from leadership is nearly universal, with 97% of Brazilian C-suites valuing employee wellness.



HR leaders view wellness programmes as important for attracting and keeping talent, with 89% of HR leaders saying wellness programmes are extremely or very important for talent acquisition and 97% saying the same for employee satisfaction. Eighty-six percent of HR leaders report these initiatives are important for employee retention.



There is near-unanimous excitement among Brazilian executives about wellness programme's impact on talent management, as the vast majority say they are important for employee satisfaction, retention and acquisition.



Companies with wellness programmes spend less on healthcare and have healthier employees, with 82% seeing a decrease in the cost of healthcare benefits and 88% of companies credit wellness programmes with a decrease in employee sick days.



Leaders see the potential of wellness programmes, with 90% of C-suites considering wellness programmes a cost-savings measure and 85% viewing them as a competitive advantage.



5.3 Chile



Chile’s workforce is among the most enthusiastic about wellbeing initiatives of the regions we surveyed, tying with Brazil for highest rates of employee enrolment in wellness programmes. But they aren’t leading from behind – C-suites are enthusiastic about wellness, with nine out of 10 valuing employee wellness and the vast majority seeing programmes as important for talent management. This rosy view is reflected in company balance sheets, and 87% of companies that measure ROI reporting a positive return.

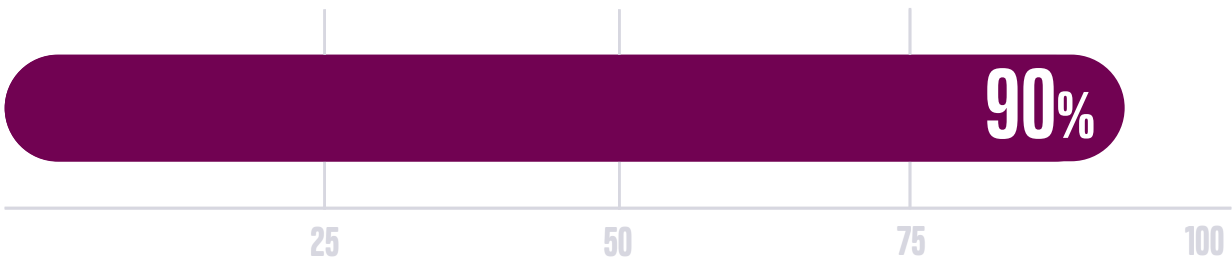
The impacts of wellness programmes

87%

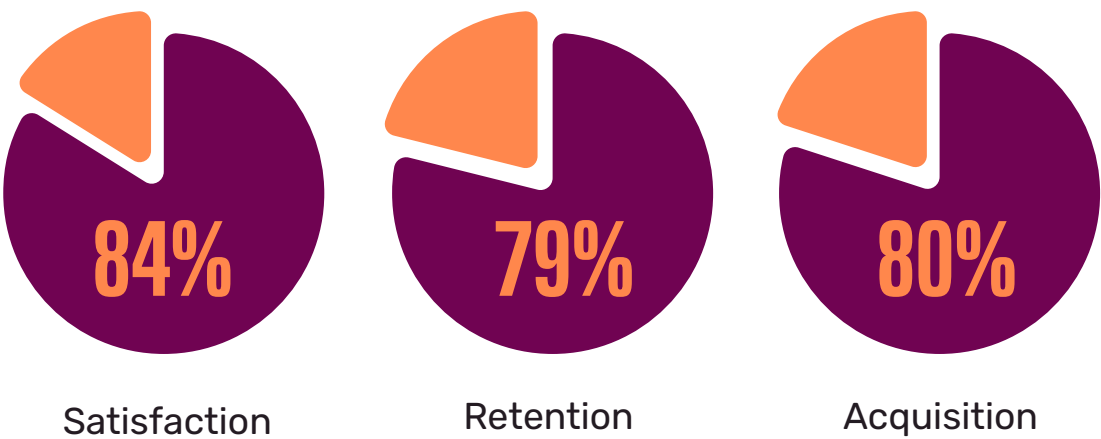
Among companies that can quantify the impact of their wellness programme, **87% see a positive ROI.**

Leader perspectives on wellness

Ninety percent of HR leaders say their C-suite values employee wellness.



Talent management is bolstered by wellness programmes, with 84% of Chilean HR leaders saying wellness programmes are very or extremely important for employee satisfaction, 79% rating them as very important or extremely important for retention and 80% saying they are very important or extremely important for acquisition.



Chilean executives see wellness programmes as useful talent management tools. Ninety-two percent of local HR leaders said their C-suite considers wellness programmes as important for employee satisfaction, 90% say they’re seen as important for retention and 86% view them as important for acquisition.



The vast majority of companies see wellness programmes improve employee health, with 79% of respondents reporting a decrease in the cost of healthcare benefits as a result of their wellness programme and 85% seeing a decrease in sick days.



C-suite leaders are bullish on wellbeing, with 87% considering a wellness programme a competitive advantage, and 74% of C-suites viewing them a cost-saving measure.



5.4 Germany



Wellness programmes have the backing of German C-suites and staffers alike. Executive leaders overwhelmingly care about their staff’s wellness, and see wellness programmes as enhancing business outcomes. Simultaneously, 86% of companies saw a decrease in sick days taken by employees. Thanks to such improvements, 88% of companies that measure see a positive ROI from their programmes, including in employee health. Most companies see a drop in sick days as a result of their wellness programme.

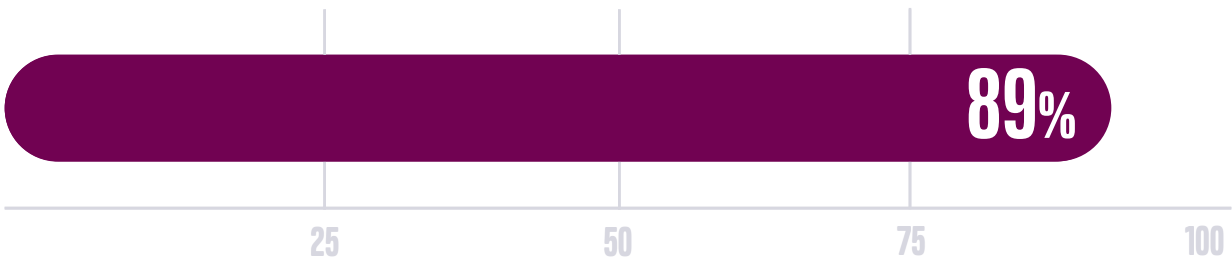
The impacts of wellness programmes

88%

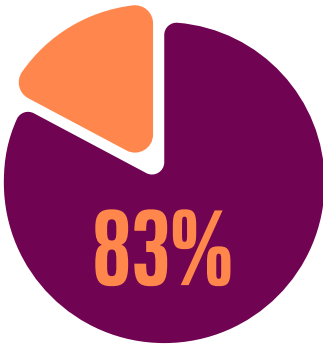
Wellness programmes are worth their cost, with 88% of companies that measure their wellness programmes saying they **see a positive return**.

Leader perspectives on wellness

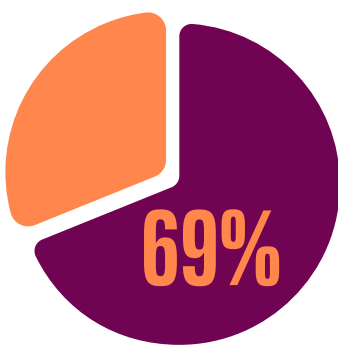
The vast majority of leaders care about workforce wellbeing, with 89% of respondents say their C-suite values employee wellness.



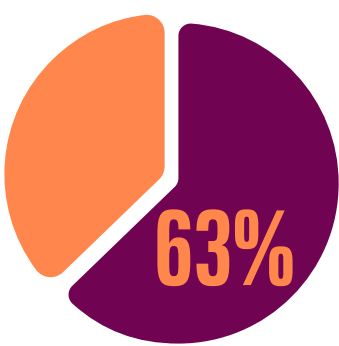
The majority of German HR leaders say wellness programmes are very important or extremely important for employee satisfaction, retention and acquisition.



Satisfaction



Retention



Acquisition

German C-suites see their wellness programme as an effective talent management tool.Nine out of 10 respondents say their C-suite views wellness programmes as important for employee satisfaction and retention, and four out of five view them as important for talent acquisition.



Apple icon 87%

Sick days dropped for 87% of companies as a result of their wellness programme.

Most leaders think supporting wellness gives their business an edge, with 83% of respondents saying their C-suite views wellness programmes as a competitive advantage and 73% see them as a cost-savings measure.



More than half of German HR leaders say **employee engagement has become less expensive as a result of their wellness programme**.

5.5 Italy



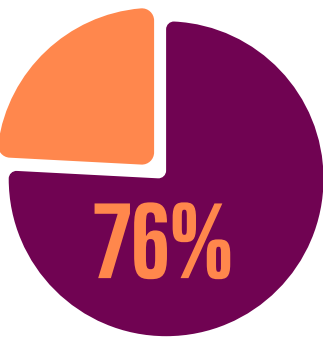
Italian workers and leaders see a benefit in wellness programmes, according to the majority of local HR leaders. About three out of four HR leaders here say wellness programmes are very important or extremely important for employee satisfaction. Executive leaders throw their support behind the programmes, seeing they provide cost-savings and competitive advantages. The vast majority (88%) of respondents who measure the outcome of their initiatives see a positive ROI.

The impacts of wellness programmes

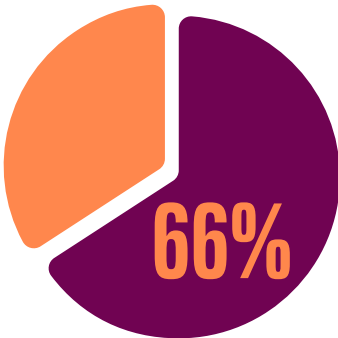
88%

88% of Italian companies that measure the return of their wellness programme **see a positive ROI**.

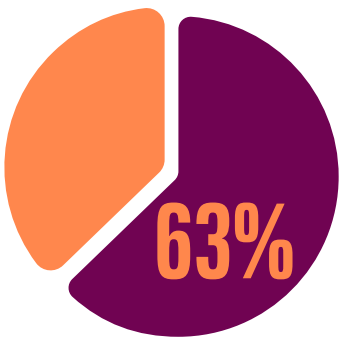
The majority of HR leaders see wellness programmes as **aiding talent management**, with 76% of HR leaders saying wellness programmes are very or extremely important for employee satisfaction, 66% say the same for retention, and 63% view them as very important or extremely important for employee acquisition.



Satisfaction



Retention



Acquisition

Companies commonly see **health returns from their wellbeing initiatives**, with 78% of Italian respondents reporting a decrease in sick days and 74% seeing a dip in healthcare costs.



74%



78%

Leader perspectives on wellness

Most Italian business leaders want to see their workforce thrive: 87% of respondents say their C-suite values employee wellness.



The overwhelming majority of C-suites see the **talent management advantages of wellness programmes**, according to respondents, who said they are seen as important for employee satisfaction, retention and acquisition.



Satisfaction



Retention



Acquisition

HR leaders report their C-suite sees **hard-line business advantages from wellness programmes**, with 83% saying their C-suites consider a wellness programme a cost-saving measure and 87% saying these leaders see the programmes as a competitive advantage.



5.6 Mexico



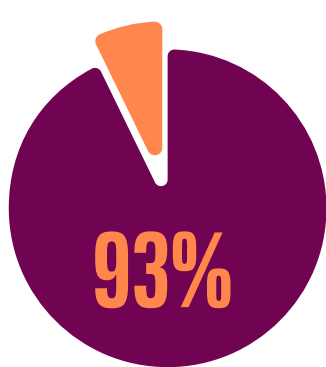
Mexican leaders are near the top of the global pack when it comes to rosy views of wellness programmes. The nation ties with Brazil for the highest rates of C-suites valuing employee wellness, and the view that these programmes as an asset for talent management is near universal. Employees are highly engaged with these initiatives: three out of four companies say at least half of their employees are enrolled in the programme.

The impacts of wellness programmes

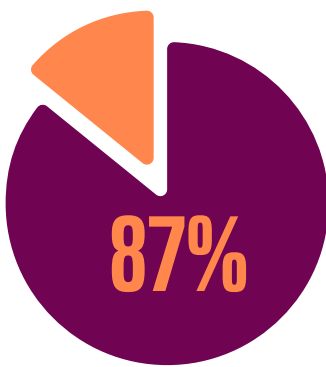
92%

Ninety-two percent of companies that measure their wellness programme’s ROI **see a positive return.**

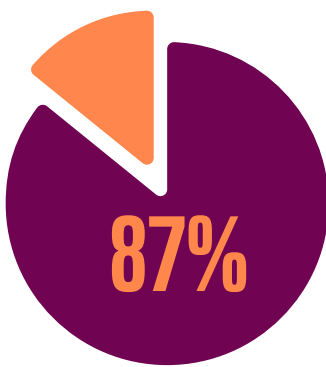
HR leaders say wellness programmes are a vital aspect of their talent management strategy, with 93% of HR leaders saying their initiative is very important or extremely important for employee satisfaction, and 87% saying the same for talent acquisition and employee retention.



Satisfaction



Retention



Acquisition

Improved employee health is a common result from wellness programmes, as 88% of respondents saw a decrease in sick days and 81% reported a dip in cost of healthcare benefits.



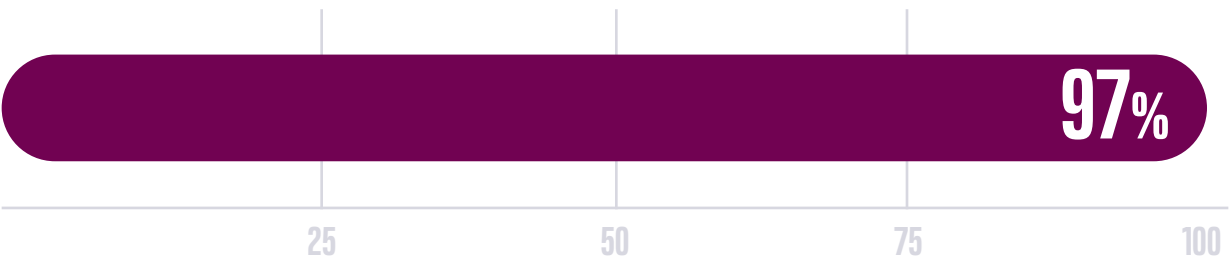
81%



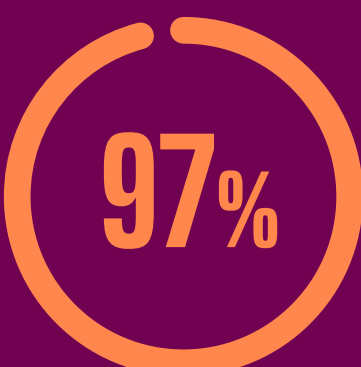
88%

Leader perspectives on wellness

Caring about workforce wellbeing is near-universal in Mexico, with 97% of respondents saying their C-suite values employee wellness.



An overwhelming majority of respondents say their **C-suite considers wellness programmes as important for employee retention, satisfaction and acquisition.**



Satisfaction



Retention



Acquisition

HR leaders say most of their C-suites see wellness programmes as both a **competitive advantage (92%)** and a **cost-savings measure (86%)**.



5.7 Spain



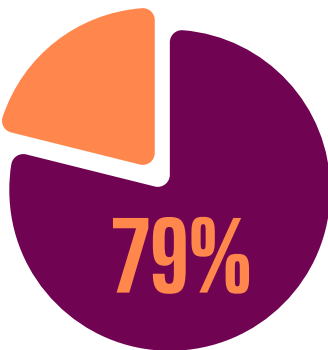
Spanish leaders and workers are reaping the rewards of employee wellbeing. In a region where 88% of companies that measure ROI see a positive return on their wellbeing programme, the vast majority of leaders see wellness programmes as a competitive advantage and a cost-cutting measure that improves talent management. Three out of four HR leaders say at least 50% of their company’s workforce is engaged in their corporate wellness activities.

The impacts of wellness programmes

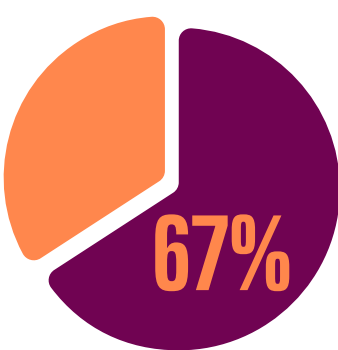
88%

Most companies in Spain that measure the ROI of their wellness programme **see a positive return on investment.**

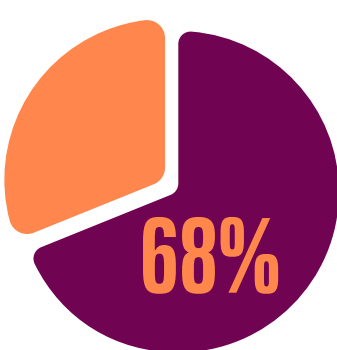
HR leaders say wellness programmes aid talent management, with 79% saying it’s very positive or extremely positive for employee satisfaction, 67% saying the same for employee retention, and 68% saying it’s very important or extremely important for talent acquisition.



Satisfaction



Retention



Acquisition

Healthcare savings are a common outcome of wellness programmes, with 74% of companies reporting a decreased cost of health care benefits and 83% seeing a drop in the number of sick days taken.



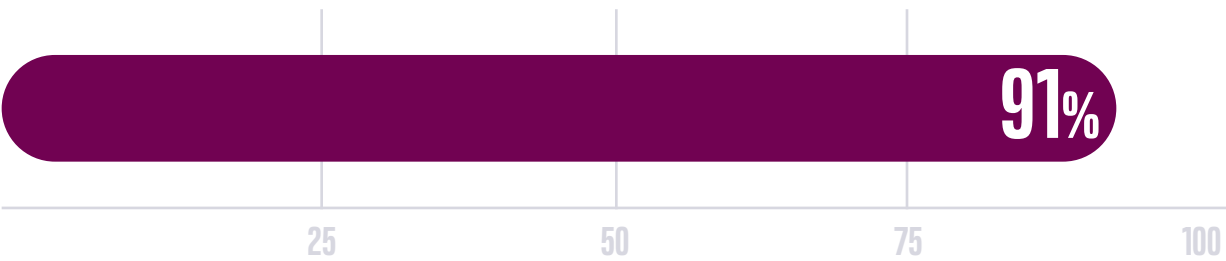
74%



83%

Leader perspectives on wellness

HR leaders overwhelmingly say their C-suite values employee wellness



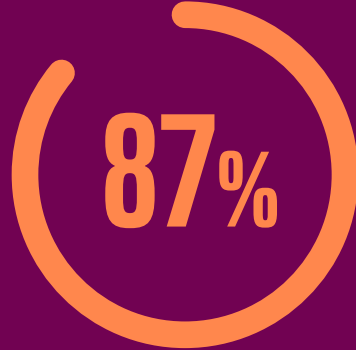
It’s extremely common to view wellness programmes as strongly improving talent management efforts, with most HR leaders saying their C-suite views these initiatives as important for employee satisfaction, retention and acquisition.



Satisfaction



Retention



Acquisition

C-suites see wellness programmes as furthering their organisation, with 92% of respondents saying their C-suite considers wellness programmes a competitive advantage and 80% saying it’s seen as a cost-savings measure.



5.8 United Kingdom



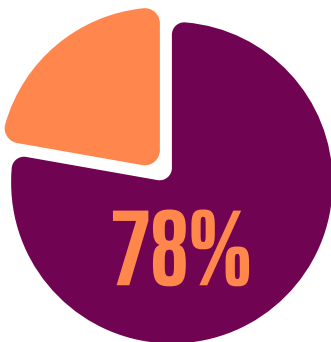
HR leaders in the U.K. see cascading benefits from their corporate wellness programmes. Three out of four HR leaders say wellness programmes are very or extremely important for employee satisfaction and retention, and a hefty majority say their corporate health costs drop. Leaders are supportive of these efforts: 91% of C-suites value employee wellness, according to respondents, and the majority see the benefits it provides to talent management. The overwhelming majority of companies that measure the return of their wellness programme see a positive ROI.

The impacts of wellness programmes

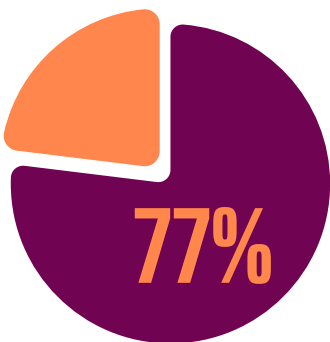
93%

A strong majority of companies that measure the ROI of their wellness programme **see a positive return.**

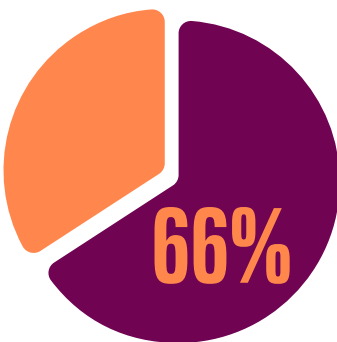
HR leaders say wellness programmes are very important or extremely important for their talent management work across employee satisfaction, retention and acquisition



Satisfaction



Retention

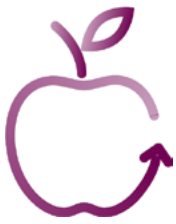


Acquisition

Wellness programmes benefit employee health, with 82% of respondents reporting a decrease in sick days and 74% saying the cost of providing healthcare benefits dropped



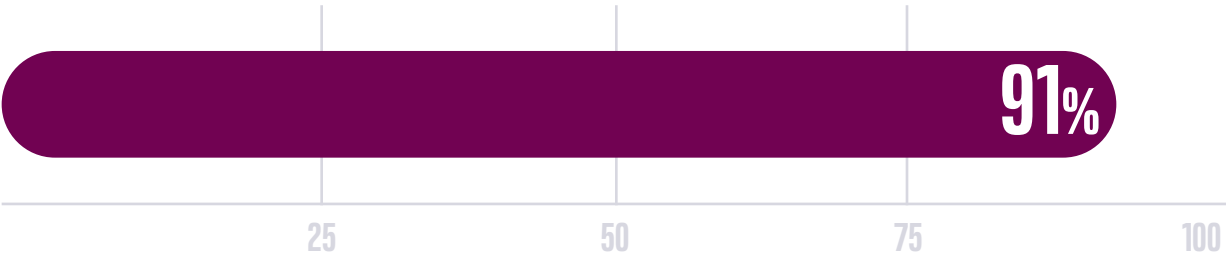
74%



82%

Leader perspectives on wellness

The vast majority of respondents in the UK say their C-suite values employee wellness.



Seventy-seven percent of HR leaders say wellness programmes are very or extremely important for employee retention

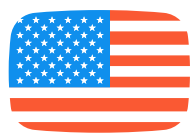


Retention

HR Leaders say their C-suites see wellness programmes as furthering their business goals, with 85% saying their C-suites consider wellness programmes a competitive advantage. Seventy-seven percent view them as a cost-savings measure



5.9 United States



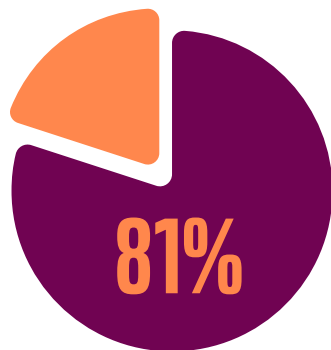
HR leaders in the United States say their C-suites and staff are enthusiastic about wellness programmes. Eighty-three percent of leaders see these programmes as a cost-savings measure, and four out of five HR leaders say they are very or extremely important for employee retention. This is evidence-backed excitement, as nine out of 10 companies that measure their ROI see a positive return.

The impacts of wellness programmes

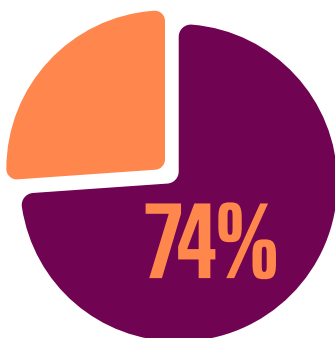
60%

Sixty percent of U.S. HR leaders say their wellness programme had a **very positive or extremely positive impact on employee satisfaction.**

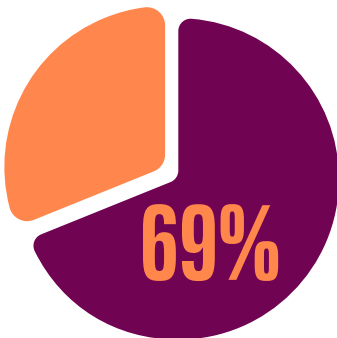
Talent management efforts benefit from wellness programmes, with 81% of respondents citing their wellness programme as very important or extremely important for employee satisfaction, 74% seeing them as very important or extremely important for employee retention, and 69% saying the same for talent acquisition.



Satisfaction



Retention



Acquisition

Companies are reaping the health rewards of wellness programmes, as 82% say they've had a decrease in sick days and 75% report a drop in healthcare costs.



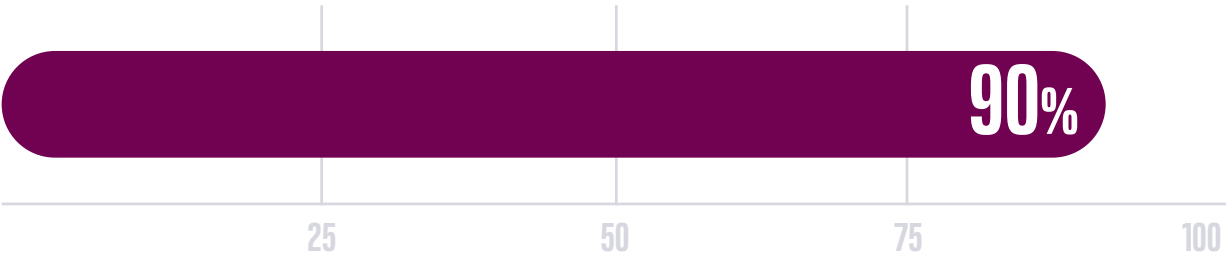
75%



82%

Leader perspectives on wellness

Leaders see the importance of workforce wellbeing, with 90% of U.S. respondents saying their C-suite values employee wellness.



C-suites see wellness programmes as a powerful talent management tool, with 92% of C-suites considering wellness programmes important for employee satisfaction, 90% saying they are important for employee retention, and 88% saying they are important for talent acquisition.



Satisfaction



Retention



Acquisition

U.S. leaders see wellness programmes as an edge in the workplace, with 85% of HR leaders saying their C-suites consider wellness programmes a competitive advantage and 83% consider them a cost-saving measure.





Conclusion

Chapter 06



*The results of the survey are clear:
you cannot separate company
performance and employee wellbeing.*

Chapter 06

Profit and wellness are intertwined. Employees make a business run, so their physical and mental health shape an organisation's trajectory.

This becomes very clear when we look at an individual employee. Nobody would be surprised to hear that an employee who is struggling physically or mentally has become less productive, or that they are more likely to miss work, or that they may even consider quitting. One would not, for example, expect a chronically exhausted teacher to have perfect attendance, or for a burned out doctor to provide better care than a healthy co-worker. Yet this foundational relationship between individual wellness and performance is too often forgotten when an organisation is looked at from the birds-eye view.

This oversight is a detriment to a company's bottom line, but the measurable returns of wellness programmes bring this reality back to the forefront. Wellness programmes have a positive return for nine out of every 10 companies that measure their impact –

and that return is strong. It takes the form of operational savings, with 78% of HR leaders seeing reduced healthcare costs from their wellness programme and 85% reporting lower talent management expenditures. It is evident in decreased absenteeism, with 85% of respondents reporting a decrease in employee sick days. It appears as well in increased employee engagement, with 100% of HR leaders surveyed saying wellbeing initiatives are important for employee satisfaction.

This cascading **return on wellbeing** removes any illusion of conflict between caring for workers and tending to the bottom line. Fostering wellness is a win-win. **As companies look to improve worker wellbeing and drive growth, wellness programmes stand as an integrated and proven path.**



How to convince your CEO & CFO to invest in a wellness programme



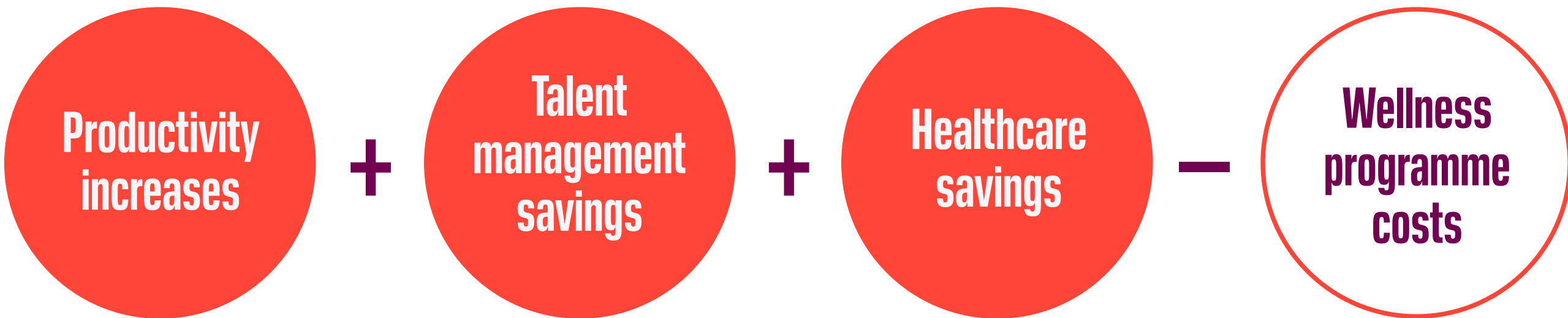
Chapter 07

Leaders are excited about wellness, but that enthusiasm doesn't always translate into action.

Despite all of the upsides C-suites see in these initiatives – from employee satisfaction to an increased competitive advantage – about half also told Gympass they view wellness programmes as a fad in which they don't see the value. When leaders want to support wellbeing but are unconvinced wellness programmes will have a lasting impact, it's not surprising they may hesitate to invest. Wellbeing is imperative, so you want a solution you're confident works.

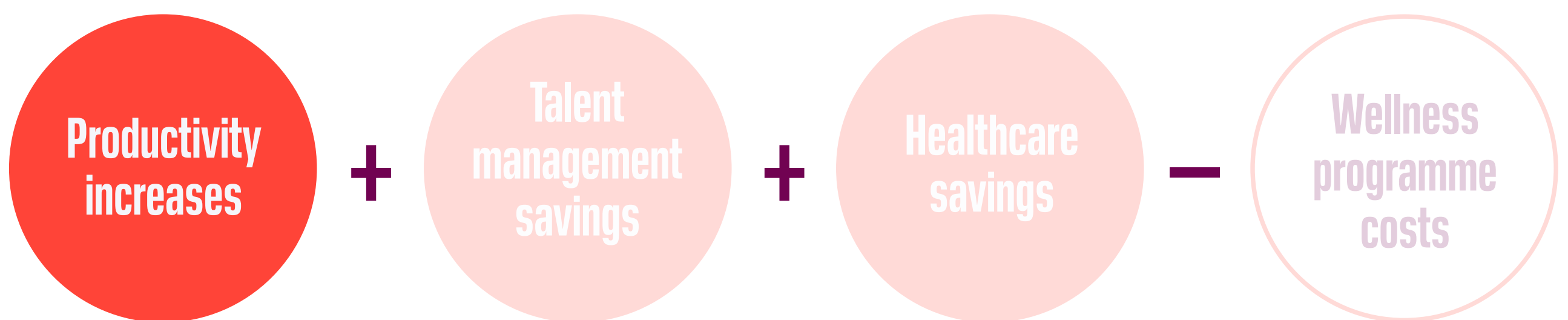
7.1 How to calculate the ROI of your wellness programme

If you feel overwhelmed at the idea of proving the financial ROI of a wellness programme to your boss, you're not alone. About one in five HR leaders we surveyed say they can't measure the return of their wellness initiative. But doing this doesn't have to be intimidating! There's a straightforward formula you can use to quantify your return:



This section explains how you can populate each of these variables to calculate your company's return on wellbeing.

7.1.2 Measuring productivity increases



Each figure in this section helps assess how a wellness programme is impacting your workforce productivity. You can use one of the measures listed below or the sum of several to measure the value of your productivity increases.

A) Employee productivity

Productivity formulas are great ways to quantify employee output. These let you analyse how much value workers are producing for the company. While the variables utilised in such formulas vary industry-to-industry, the generic productivity formula is: Productivity = output / input. Output can be determined by your company's key performance indicators (KPIs), which are predefined benchmarks for employee performance and efficiency. These focus on vital statistics, like clients served or units delivered. Your input will be company assets expended to create that output, like budget or employee time. Examples of useful productivity formulas include:

- **Revenue per employee.** Take your revenue over the last 12 months and divide it by the number of full-time equivalent employees at the company. The result will let you know how much revenue is generated, on average, by one full-time worker.
- **Profit per employee.** Also known as net income per employee (NIPE), find this figure by dividing your net income over the last twelve months by the number of full-time equivalent employees at your company. If you see your profit per employee increase after the implementation of a wellness programme, that indicates the initiative could already be paying for itself.

Productivity software tools are helpful to gauge the output of individual information workers, as it's more complicated to numerically quantify the output of, say, a content marketer working on several projects than a factory worker producing one widget. Productivity software like Asana and Monday let you evaluate how many tasks an office worker completes and when, giving you a window into their production rates. If you know the pound value of each task completed, you can calculate the productivity value for any given position.

B) Absenteeism and injuries

If your employees are missing work more than usual due to sickness, stress or mental health issues, a lack of workplace wellness is already impacting your organisation and dragging down productivity. Fatigue alone costs U.S. businesses an estimated \$136.4 billion annually.²⁴ Metrics you can collect to gauge this include:

Sick leave or health-related absenteeism

This data is automatically collected through time-off requests in systems like Workday. Employees, on average, use two to three paid sick days a year.²⁵ If your organisation's rate is significantly higher, your employees would likely benefit from additional health support. It may also be beneficial to pay attention to the reasons behind the sick days taken. If illnesses are potentially linked to working conditions, this is another area in which improvements or wellness support could help the organisation.

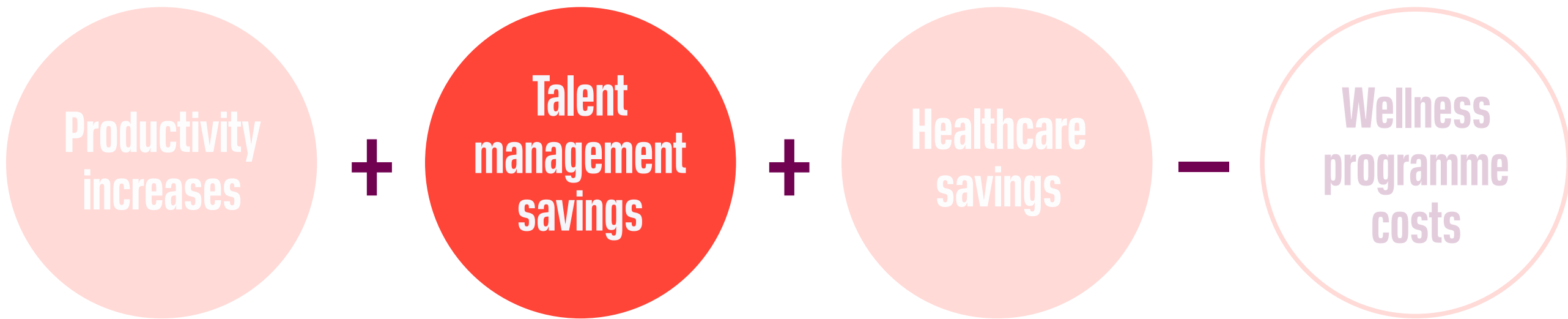
Fatigue-related injuries

Such as if an employee falls asleep while operating heavy machinery or drops packages from muscle overexertion. Both of these situations could be avoided if employees had more quality rest and recovery, whether that's between tasks or shifts. This can be promoted through wellness programmes that support sleep habits or offering mid-day meditation classes.

Workplace accidents

If an employee strains their back lifting construction materials or throws their back out when they lean over a low filing drawer, you have a workplace accident on your hands. Strength and stretching classes could help prevent such injuries – an attractive proposition given the average cost of a workplace injury claim is \$40,000.²⁶

7.1.3 Measuring talent management savings



Competitive wellness perks attract new talent and lengthen employee tenure. In an internal study of more than 5,000 Gympass users in the U.S., we found those who utilised the service for just two months were 57% more likely to stay at their company²⁷. As it costs the average employer \$4,000 just to hire a new team member²⁸, higher retention very quickly translates into savings.

Each figure in this section helps assess how a wellness programme impacts the cost of your talent lifecycle.

Candidate pipeline

Assess how many applicants you are receiving for your open job postings. This sum is the size of your candidate pipeline, or the number of workers interested in filing an opening at your company. Remember: 62% of workers say employee wellbeing is a deciding factor in whether or not they apply for a new job²⁹. Advertising your wellness programme in job listings may increase the number of applicants you receive for each opening, which means you have a larger talent pool from which to hire.

Time to hire

This measures how long it takes to move an employee from the start of the hiring process to accepting an offer. An attractive wellness programme can help shorten this timeline, for example, by reducing the amount of time spent negotiating an offer with your top candidate.

Cost to hire

Research shows it costs six to nine months of an employee’s salary to replace them³⁰. This includes internal costs, such as staff time spent recruiting and referral bonuses, and external costs, like job

posting fees and background checks. Wellness programmes can reduce this cost by making your company more attractive to potential candidates, reducing the amount of staff salary that goes toward finding the right hire.

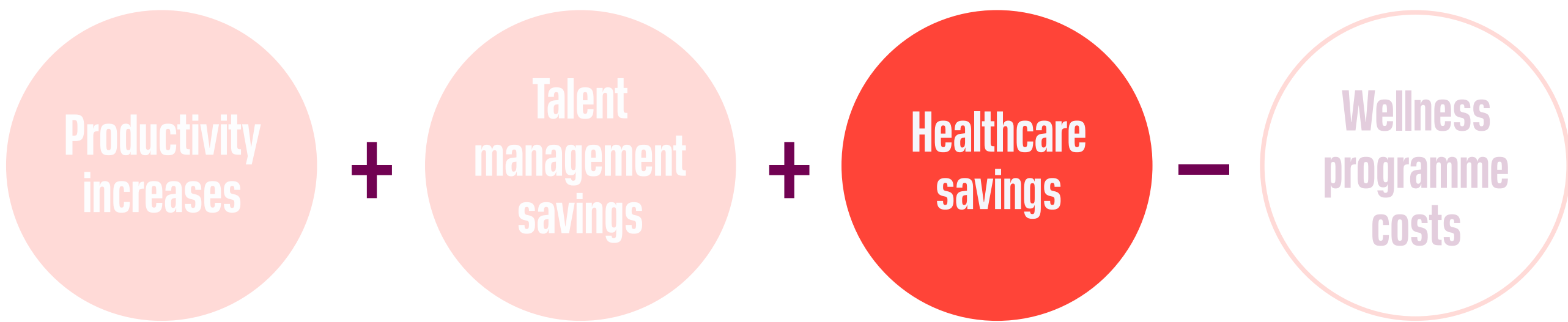
Turnover rate

To measure this, divide the number of employees who leave in a specified time period by the average number of employees at your organisation during the same period. The rate of employees leaving your organisation can drop as a result of a wellness programme, as they often improve employee satisfaction and people are less likely to seek a new position when they are pleased with their current position.

Retention rate

Take the average number of employees during a given period, then subtract the number who left. Finally, divide by the average number of employees at your organisation. Wellness programmes can encourage employees to stick around by fostering a supportive, healthy culture of which people want to be a part.

7.1.4 Measuring healthcare savings



This is one of the most tangible measurements for capturing the success of your wellbeing programme. The majority of North American employers save \$3 in healthcare costs for every \$1 they invest in a wellness programme. This section helps assess how a wellness programme³¹ impacts the cost of providing employee healthcare.

A) Health costs

Insurance companies and providers typically send businesses quarterly or annual updates summarising claims made on the organisation’s policy. These reports are normally sent to the finance or human resource departments. Major claims (usually over \$100,000), may be individually specified. These health care claims can give insight into:

Annual medical costs for the company and per employee

These numbers can help you project expected healthcare costs for the coming year or budget how much to tack onto the budget for a new hire.

Costs per diagnosis code

A diagnosis code is an individual series of numbers and letters assigned to a disease. These can help you identify preventable conditions your employees are experiencing that may be ameliorated by a wellness initiative, and guide which ones you want to tackle first.



Costs per procedure code

Similar to a diagnosis code, a procedure code is a unique ID. In this case, it describes any medical care provided, from surgery to medication. From this you can assess how much the company pays over time for care, from Lexapro to knee replacements.

Place of service

With this information, you can see whether care was administered at a primary care office visits, urgent care, telemedicine, etc., each of which have a different cost. Visits to the emergency room are typically the most expensive.

B) Health risks

Ways you can assess employee health risks before and after implementing a wellness programme:

Health risk assessments

These appraisals collect health information about participants to evaluate an individual’s current health status and habits, and to identify any potential hazards. These often include biometric screenings, which collect information like weight and blood pressure. When done repeatedly over time, they can help people track their health trajectory.

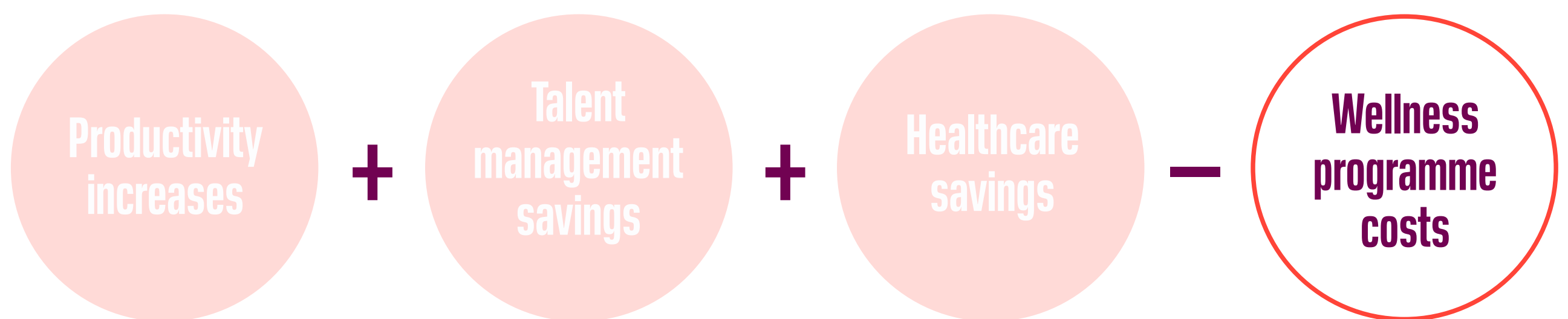
Participation in preventative healthcare programmes

As the saying goes, an ounce of prevention is worth a pound of cure. Preventative healthcare, like annual visits to the doctor, cost less than emergency care and can stop major health issues before they arise.

Participation in behaviour-change programmes

Such as smoking cessation and stress reduction. These initiatives can help employees break suboptimal habits that threaten to degrade their long-term health.

7.1.5 Wellness programme costs



The full cost of running a wellness programme will rely on a variety of factors, from rolling it out to maintaining the initiative and measuring its impacts. Some of the expenditures you'll want to keep in mind include:

Programme enrollment

Some initiatives, like a Work Week Steps Challenge, can be rolled out without paying an external party. Others, like hosting a flu shot clinic, will have a cost.

Administration expenditures

The time your department puts into planning, promoting and overseeing these programmes is valuable. Estimate how many hours a programme will take to oversee to evaluate how much it will cost the company in staff time.

Staff costs outside of HR

Many wellness programmes, like a financial fitness webinar or lunch-and-learn, happen when your staff is on-the-clock. You will want to account for this participation cost, as well as consider any additional compensation you want to offer non-HR staff that steer the programme. If you want to promote diversity, equity and inclusion in your office by establishing affinity groups, for example, offering additional compensation to group leaders can strengthen the programme's impact and longevity.

Remote office support

How and where we work strongly influences our wellbeing. Flexible work arrangements – which can involve hybrid and remote work or flex working hours – are a high-demand wellness programme. More than half of HR leaders surveyed for this report (52%), in fact, said flexible work arrangements would be highly valued by their workforce. Committing to this style of work for the long-haul may mean investing in systems that will make this easier over time, such as enterprise videoconferencing or work-from-home internet subsidies.

Rewards and incentives

Some companies opt to incentivise participation in a wellness programme with gift cards for the winner of a competition, or extra days off work for completing a challenge. Be sure to budget how much you plan to spend on any programme rewards.

Ongoing expenses

Consider payments you will need to make on a recurring basis for extended wellness programmes, like offering gym membership reimbursements, subscriptions to mental wellness apps or child care subsidies.

7.2 How to communicate the impact of wellness programmes to leadership

How you present this data to leadership will depend on whether you're looking to make an initial investment in a new wellness programme or seeking to renew or expand an existing initiative.

If you are looking to pitch a new program, consider sharing your idea prior to budgeting season when there may be funding available for new projects. Start by presenting internal data that quantifies why your employees need wellness support, like low employee net promoter scores, higher-than-average absenteeism, or growth in per-employee healthcare costs. Then focus on uncovering isolated pockets of spending around your current wellness activities and highlight the cost savings associated with consolidating them into a holistic wellness program. While you will want to back your recommendation with multiple data points, keep your pitch focused on the most salient numbers. Bringing too much information to the table can overwhelm your decision-makers.

You can then highlight external research (like this report) that shows how supporting wellbeing can address those issues in a way that also produces savings. It's a good idea to present programmes you think would best address the wellness struggles

your employees are facing. This enables you to give your C-suite a concrete idea of how much your proposed solution will cost and a projected point at which you anticipate returns. If you want additional support through this process, reach out to a [Gympass Wellbeing Specialist](#) – they can help you gather data and frame your talking points!

Once you have a programme up and running, you will want to give annual reports tracking the effects of the programme. This is where the 'Company Wellness ROI' formula will be helpful, as it lets you condense dozens of variables into one number. This makes it easier for decision-makers to see the value in continuing the programme.

In between these yearly check-ins, it's a good idea to also provide leaders with quarterly impact reports that detail gains, like decreased sick days, or share wellness success stories from around the organisation. This way, the positive impacts of employee wellbeing remain visible throughout the year!



About Gympass

Gympass is making wellbeing universal. Founded in 2012, Gympass is a corporate wellness platform that offers employees access to a global network of 50,000+ gyms, classes, trainers and wellbeing apps through affordable, flexible monthly subscriptions. 10,000+ companies use Gympass to improve their employees’ work-life wellness, resulting in a happier, healthier and more productive workforce. Companies that offer Gympass see 43% better retention rates and up to 24% less annual employee health care costs. Get a corporate quote or check out employee eligibility at Gympass.com.

11

countries

7,500

cities

50,000+

in-person and virtual gyms, classes, trainers and wellbeing apps

10,000+

clients

200 million

check-ins

900+

activities

6 billion

minutes of employee wellbeing

“Gympass is a great help for our busy routine. You can combine your schedule with your workout routine, making it possible to find gyms according to your needs. Every company should include Gympass in their benefits.”

Gympass User

“Gympass allows me to easily manage our wellbeing benefit and see the return on our investment.”

Renata Rezende
– HR Operations & Solutions Manager, AstraZeneca





Appendices

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9.2 Methodology

Gympass conducted its Return on Wellbeing survey to assess the return on investment of corporate wellness programmes.

Between 26 and 30 January 2023, a total of 2,078 human resource directors, managers, vice-presidents, and chief-level leaders were surveyed online through the polling agency QuestionPro. QuestionPro calculated that the results have a 95% confidence level and a 7% margin of error.

Each respondent worked for an organisation that offered at least one general benefit and one wellness benefit. The countries included in this survey were the United States and United Kingdom, Brazil, Argentina, Chile, Spain, Italy, Germany and Mexico. Between 227 and 239 responses were collected from each country.

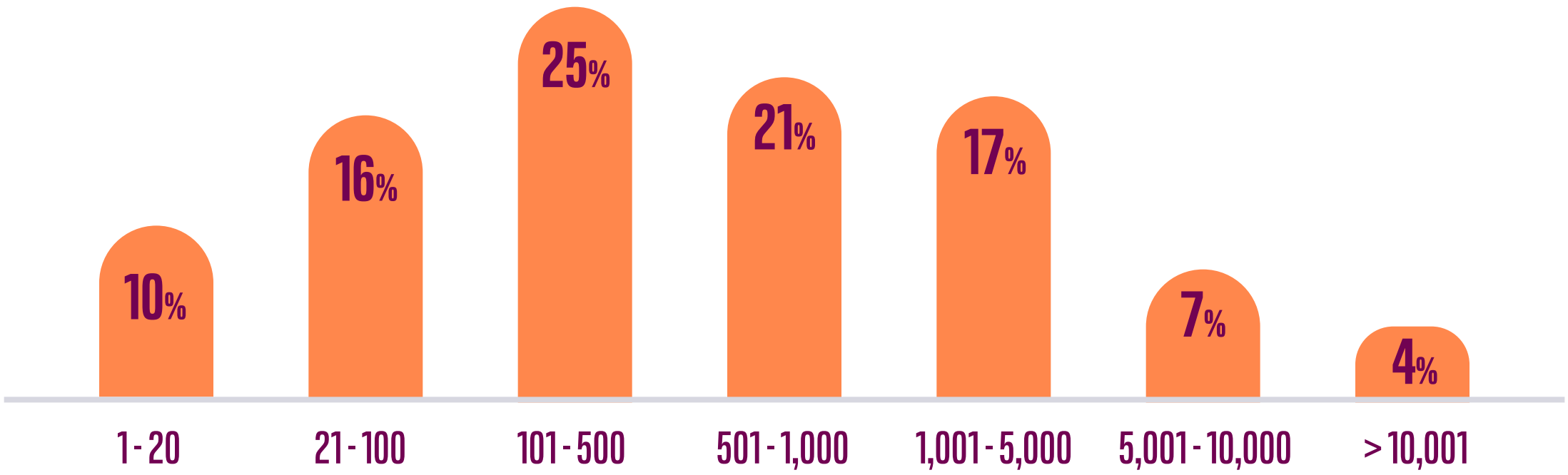
Response options for the survey's 33 questions (see "Survey Questions") included Likert Scales, multiple choice, drop downs and matrices. Where necessary, response options were adapted to reflect regional variations in benefit availability. Respondents in Germany, for example, were not surveyed about healthcare benefits as healthcare access is not within the scope of the private sector in that region. Respondent groups were representative of their respective countries.

9.3 Global demographics

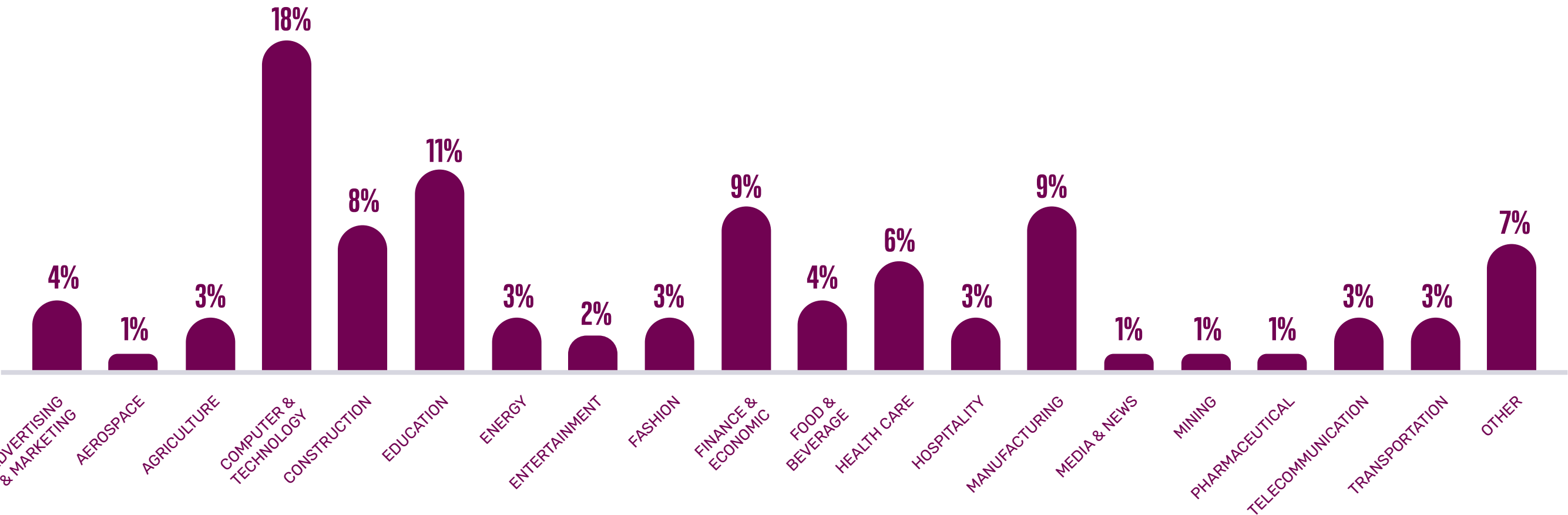
What is your role?



How many full-time employees (FTEs) are in your company?



Which of the following best describes your industry?



9.4 Survey questions

The following questions were presented to the U.S. survey participants. These responses were used as the basis for the main section of this report.

Part 1: Demographic/Company information

1. What is your role?
2. In which department do you work?
3. How many full-time employees (FTEs) are in your company?
4. Which of the following best describes your industry?

Part 2: Benefits information

1. Which of the following benefits do you offer to your employees? (select all that apply)
2. Which wellness programmes do you offer as part of your overall benefits programme? (select all that apply)
3. Which wellness programmes do you think would be most valued by your employees, even if you do not currently offer them?

Part 3: Impact of benefits programmes

1. By how much have the costs of benefits changed since your last budget cycle?
2. By how much have your benefits budgets changed since your last budget cycle?
3. Are you able to measure the return on investment (ROI) of your overall benefits programme?
4. Do you see a positive or negative return on investment (ROI) from your overall benefits programme?
5. Are you able to measure the specific return on investment (ROI) of your wellness programme?
6. Do you see a positive or negative return on investment (ROI) from your wellness programme?
7. Which activities have become less expensive as a result of your wellness programme? (select all that apply)
8. Approximately what percent of your eligible employees take advantage of your wellness programme?
9. How has your wellness programme impacted the number of sick days taken by your employees?
10. How has your wellness programme impacted the cost of your health care benefits?
11. Have you noticed a change in employee satisfaction after you started to offer a wellness programme?
12. How important is your wellness programme to employee satisfaction?
13. How important is your wellness programme to employee retention?
14. How important is your wellness programme for talent acquisition?
15. Does your wellness programme extend to family members?
16. How important is having a family-based wellness programme to your employees?

9.4 Survey questions











Part 4: Leaders' perspectives on wellness











Answer according to the following statements
(Strongly Agree, Agree, Slightly agree, Slightly disagree, Disagree, Strongly disagree)











- 1. Your C-suite considers wellness programmes a cost-saving measure.
- 2. Your C-suite is pressuring you to reduce the cost of your wellness programme.
- 3. Your C-suite is pressuring you to reduce the cost of your overall benefits programme.
- 4. Your C-suite values employee wellness.
- 5. Your C-suite considers wellness programmes important for employee satisfaction.
- 6. Your C-suite considers wellness programmes important for employee retention.
- 7. Your C-suite considers wellness programmes important for talent acquisition.
- 8. Your C-suite doesn't see the value in wellness programmes.
- 9. Your C-suite considers wellness programmes a fad.
- 10. Your C-suite considers wellness programmes a competitive advantage.

9.5 Global results











9.5.1 Demographic/Company information











What is your role?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
C-Level	16%	12%	7%	10%	31%	17%	22%	8%	18%	20%
Vice President	10%	9%	3%	16%	14%	8%	14%	13%	4%	9%
Director	38%	44%	49%	43%	17%	53%	31%	53%	17%	33%
Manager	36%	35%	40%	31%	38%	23%	32%	26%	61%	38%

How many full-time employees (FTEs) are in your company?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
1 - 20 FTEs	10%	13%	7%	13%	5%	11%	13%	9%	10%	11%
21 - 100 FTEs	16%	27%	15%	16%	12%	19%	15%	19%	11%	10%
101 - 500 FTEs	25%	24%	20%	20%	31%	28%	23%	26%	22%	29%
501 - 1,000 FTEs	21%	17%	20%	30%	20%	20%	22%	24%	16%	25%
1,001 - 5,000 FTEs	17%	10%	27%	14%	20%	15%	19%	10%	22%	15%
5,001 - 10,000 FTEs	7%	3%	7%	6%	6%	6%	4%	9%	12%	7%
> 10,001 FTEs	4%	5%	5%	2%	6%	1%	3%	3%	7%	3%

Which of the following best describes your industry?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Advertising & Marketing	4%	8%	2%	6%	5%	4%	2%	6%	1%	1%
Aerospace	1%	0%	0%	0%	1%	0%	3%	1%	1%	1%
Agriculture	3%	5%	1%	3%	8%	3%	2%	0%	3%	1%
Computer & Technology	18%	20%	40%	10%	15%	19%	19%	13%	16%	13%
Construction	8%	7%	5%	13%	5%	8%	8%	10%	6%	14%
Education	11%	16%	7%	9%	13%	11%	10%	11%	11%	8%
Energy	3%	3%	1%	8%	4%	5%	6%	0%	3%	1%
Entertainment	2%	3%	1%	3%	1%	1%	3%	0%	2%	3%
Fashion	3%	2%	2%	4%	1%	6%	2%	4%	3%	1%
Finance & Economic	9%	7%	8%	15%	7%	7%	12%	13%	8%	6%
Food & Beverage	4%	1%	4%	6%	4%	4%	6%	3%	4%	5%
Health Care	6%	6%	6%	6%	7%	6%	3%	3%	9%	12%
Hospitality	3%	2%	2%	4%	2%	3%	2%	6%	5%	4%
Manufacturing	9%	4%	7%	2%	6%	9%	10%	10%	12%	17%
Media & News	1%	1%	0%	0%	2%	0%	0%	0%	0%	1%
Mining	1%	0%	0%	4%	0%	0%	0%	0%	1%	0%
Pharmaceutical	1%	4%	1%	0%	1%	1%	1%	0%	0%	0%
Telecommunication	3%	3%	2%	5%	2%	3%	2%	2%	2%	2%
Transportation	3%	1%	3%	2%	5%	5%	3%	5%	1%	1%
Other	7%	8%	6%	2%	10%	5%	7%	9%	11%	9%

9.5.2 Benefits information











Which of the following benefits do you offer to your employees? (select all that apply)	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Health Insurance	71%	93%	87%	74%	-	73%	67%	93%	58%	90%
Dental Insurance	38%	34%	77%	49%	-	31%	32%	20%	27%	69%
Vision Insurance	21%	24%	-	32%	-	19%	25%	16%	13%	61%
Life Insurance	44%	69%	49%	48%	-	41%	37%	65%	30%	60%
Wellness programmes	38%	33%	42%	41%	22%	25%	33%	30%	47%	43%
Retirement Plans	52%	68%	34%	39%	34%	42%	49%	54%	49%	60%
Paid Time Off	54%	74%	26%	51%	-	58%	67%	71%	68%	68%
Student Loan & Tuition Assistance	19%	23%	26%	25%	-	25%	14%	29%	9%	19%
Stock Options	13%	7%	9%	11%	14%	12%	9%	8%	14%	15%
Training & Development	59%	60%	67%	46%	30%	60%	55%	48%	80%	55%
Other	2%	1%	3%	3%	0%	2%	3%	0%	3%	1%











Which wellness programmes do you offer as part of your overall benefits programme? (select all that apply)	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Fitness programmes	33%	22%	43%	28%	49%	20%	33%	13%	37%	49%
Health Education	42%	46%	44%	44%	49%	41%	39%	47%	26%	42%
Mental Wellness Support	53%	57%	63%	46%	38%	51%	37%	56%	66%	62%
Childcare	33%	33%	29%	41%	33%	31%	31%	47%	27%	27%
Flexible Work Arrangements	53%	54%	57%	44%	43%	60%	63%	56%	56%	44%
Wellness Challenges	24%	25%	24%	32%	15%	26%	21%	20%	22%	29%
Yoga & Meditation Classes	16%	14%	13%	23%	21%	16%	15%	9%	19%	16%
Diversity, Equity & Inclusion	44%	53%	52%	45%	32%	47%	29%	50%	52%	39%
Financial Wellness programmes	27%	28%	24%	25%	20%	22%	21%	31%	34%	36%
Free Healthy Snacks	29%	30%	37%	30%	32%	24%	24%	31%	25%	25%
Other	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%











Which wellness programmes do you think would be most valued by your employees, even if you do not currently offer them? (select all that apply)	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇽	UK 🇬🇧	US 🇺🇸
Fitness programmes	29%	20%	40%	22%	43%	18%	27%	14%	34%	46%
Health Education	33%	30%	40%	28%	38%	33%	32%	37%	19%	40%
Mental Wellness Support	47%	48%	61%	45%	33%	49%	35%	47%	48%	55%
Childcare	43%	37%	42%	46%	34%	38%	44%	47%	52%	49%
Flexible Work Arrangements	52%	55%	64%	38%	37%	55%	63%	50%	57%	50%
Wellness Challenges	23%	24%	25%	24%	19%	20%	20%	23%	18%	30%
Yoga & Meditation Classes	15%	12%	14%	12%	16%	13%	19%	9%	15%	29%
Diversity, Equity & Inclusion programmes	30%	28%	35%	31%	23%	31%	24%	34%	26%	38%
Financial Wellness programmes	31%	28%	40%	24%	17%	25%	27%	36%	41%	46%
Free Healthy Snacks	23%	20%	35%	15%	20%	15%	24%	21%	26%	28%
Other	0%	1%	0%	1%	0%	0%	0%	0%	0%	1%











9.5.3 Impact of benefits programmes











By how much have the costs of benefits changed since your last budget cycle?	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇽	UK 🇬🇧	US 🇺🇸
>50% increase	3%	7%	3%	3%	1%	3%	2%	4%	2%	2%
50% increase	6%	6%	7%	6%	7%	3%	3%	6%	8%	5%
40% increase	6%	11%	4%	4%	10%	5%	5%	5%	5%	8%
30% increase	13%	13%	11%	15%	10%	10%	12%	16%	17%	13%
20% increase	20%	23%	21%	18%	18%	23%	19%	18%	21%	16%
10% increase	21%	11%	19%	21%	21%	24%	21%	15%	25%	27%
No change	14%	11%	16%	13%	14%	14%	18%	15%	13%	9%
10% decrease	6%	5%	7%	8%	7%	8%	7%	5%	4%	7%
20% decrease	4%	6%	4%	4%	3%	5%	5%	4%	2%	6%
30% decrease	3%	3%	3%	3%	3%	4%	5%	6%	2%	3%
40% decrease	1%	0%	1%	0%	2%	0%	1%	3%	1%	2%
50% decrease	1%	2%	1%	1%	1%	0%	1%	0%	0%	1%
>50% decrease	2%	3%	3%	3%	2%	2%	0%	2%	0%	2%











By how much have your benefits budgets changed since your last budget cycle?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
>50% increase	3%	4%	3%	3%	1%	2%	2%	2%	5%	2%
50% increase	6%	8%	7%	5%	5%	4%	3%	7%	8%	6%
40% increase	8%	12%	3%	11%	13%	6%	7%	7%	9%	7%
30% increase	11%	13%	13%	9%	10%	9%	7%	14%	10%	12%
20% increase	17%	19%	18%	15%	16%	18%	15%	15%	16%	18%
10% increase	20%	16%	18%	19%	21%	24%	20%	21%	18%	23%
No change	17%	9%	20%	15%	18%	17%	24%	11%	19%	15%
10% decrease	7%	8%	6%	9%	5%	7%	10%	10%	6%	4%
20% decrease	5%	4%	4%	5%	4%	6%	6%	4%	6%	5%
30% decrease	3%	5%	3%	4%	1%	3%	3%	6%	1%	3%
40% decrease	1%	1%	2%	2%	2%	1%	1%	1%	1%	3%
50% decrease	1%	0%	1%	2%	0%	0%	0%	2%	0%	2%
>50% decrease	1%	2%	2%	1%	3%	2%	1%	1%	0%	1%











Are you able to measure the return on investment (ROI) of your overall benefits programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Yes	80%	77%	89%	87%	73%	83%	72%	87%	64%	83%
No	20%	23%	11%	13%	27%	17%	28%	13%	36%	17%











Do you see a positive or negative return on investment (ROI) from your overall benefits programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Positive	84%	84%	91%	84%	83%	88%	77%	90%	78%	83%
Negative	9%	11%	3%	10%	7%	9%	12%	7%	12%	12%
I Don't Know	6%	5%	6%	6%	10%	3%	10%	3%	10%	4%











Are you able to measure the return on investment (ROI) of your wellness programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Yes	79%	81%	87%	89%	71%	81%	69%	90%	63%	76%
No	21%	19%	13%	11%	29%	19%	31%	10%	37%	24%











Do you see a positive or negative return on investment (ROI) from your wellness programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Positive	83%	83%	90%	84%	79%	82%	78%	89%	81%	82%
Negative	9%	10%	5%	11%	8%	12%	11%	7%	6%	9%
I Don't Know	8%	7%	5%	5%	13%	6%	11%	5%	13%	9%











Which activities have become less expensive as a result of your wellness programme? (select all that apply)	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Employee Acquisition	41%	50%	35%	48%	40%	42%	38%	50%	26%	38%
Employee Retention	49%	28%	45%	51%	47%	51%	60%	41%	64%	53%
Employee Engagement	48%	40%	53%	35%	53%	54%	56%	40%	54%	43%
Company Reputation	36%	42%	34%	43%	28%	36%	41%	42%	28%	28%
None of the Above	5%	4%	4%	4%	6%	2%	4%	4%	8%	7%











Approximately what percent of your eligible employees take advantage of your wellness programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
100%	8%	12%	12%	8%	3%	7%	11%	9%	9%	4%
90%	11%	10%	15%	9%	9%	10%	9%	13%	11%	11%
80%	17%	18%	22%	20%	18%	13%	13%	18%	14%	13%
70%	15%	17%	13%	17%	12%	17%	17%	15%	11%	13%
60%	14%	12%	13%	18%	17%	13%	13%	10%	13%	14%
50%	12%	10%	9%	12%	12%	17%	10%	9%	16%	12%
40%	10%	10%	8%	8%	11%	11%	9%	10%	9%	12%
30%	6%	5%	5%	3%	7%	5%	10%	7%	7%	10%
20%	4%	3%	1%	2%	5%	3%	3%	3%	4%	7%
10%	3%	2%	1%	2%	3%	1%	3%	3%	5%	3%
0%	1%	0%	0%	1%	3%	2%	1%	2%	0%	1%











How has your wellness programme impacted the number of sick days taken by your employees?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Significantly Decreased	24%	27%	35%	27%	27%	19%	16%	28%	16%	21%
Decreased	31%	39%	30%	27%	28%	34%	31%	34%	26%	27%
Slightly Decreased	30%	22%	23%	29%	32%	30%	31%	26%	40%	35%
Did Not Decrease at All	15%	12%	12%	28%	13%	17%	22%	12%	18%	18%











How has your wellness programme impacted the cost of your health care benefits?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Significantly Decreased	14%	16%	25%	13%	-	15%	9%	20%	8%	9%
Decreased	32%	40%	31%	33%	-	29%	28%	34%	29%	29%
Slightly Decreased	32%	27%	26%	33%	-	30%	37%	27%	37%	37%
Did Not Decrease at All	22%	18%	18%	21%	-	26%	26%	19%	26%	25%











Have you noticed a change in employee satisfaction after you started to offer a wellness programme?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Extremely Positive Impact	23%	22%	39%	21%	26%	14%	14%	28%	19%	27%
Very Positive Impact	40%	36%	38%	54%	31%	45%	40%	48%	36%	33%
Positive Impact	27%	32%	17%	19%	30%	33%	33%	20%	27%	30%
Somewhat Positive Impact	8%	9%	5%	6%	11%	6%	10%	4%	15%	8%
No Impact At All	2%	1%	1%	1%	3%	1%	4%	1%	4%	2%

How important is your wellness programme to employee satisfaction?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Extremely Positive Impact	35%	28%	58%	28%	33%	22%	33%	39%	33%	37%
Very Positive Impact	49%	56%	39%	55%	49%	57%	43%	54%	45%	44%
Positive Impact	13%	14%	3%	13%	14%	19%	22%	6%	16%	15%
Somewhat Positive Impact	2%	2%	0%	3%	3%	2%	2%	1%	5%	3%
No Impact At All	0%	0%	0%	1%	1%	0%	0%	0%	1%	1%











How important is your wellness programme to employee retention?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Extremely Positive Impact	31%	20%	47%	29%	32%	20%	28%	37%	33%	32%
Very Positive Impact	44%	53%	38%	50%	37%	47%	38%	50%	44%	42%
Positive Impact	19%	24%	13%	13%	24%	24%	29%	11%	16%	19%
Somewhat Positive Impact	5%	4%	1%	7%	3%	8%	4%	2%	6%	4%
No Impact At All	1%	0%	0%	1%	3%	1%	1%	0%	1%	2%











How important is your wellness programme for talent acquisition?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Extremely Positive Impact	30%	24%	43%	28%	30%	21%	24%	36%	31%	29%
Very Positive Impact	43%	44%	45%	52%	37%	47%	39%	51%	35%	41%
Positive Impact	21%	23%	10%	13%	26%	27%	32%	11%	27%	24%
Somewhat Positive Impact	4%	9%	0%	6%	5%	4%	4%	1%	4%	5%
No Impact At All	1%	1%	1%	2%	3%	1%	1%	0%	4%	1%











Does your wellness programme extend to the family members of your employees?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Yes	64%	69%	67%	72%	61%	72%	48%	77%	43%	69%
No	36%	31%	33%	28%	39%	28%	50%	23%	57%	31%
I Don't Know	-	-	-	-	-	-	1%	-	-	-











How important is having a wellness programme that both your employees and their family members can benefit from?	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Extremely Important	32%	26%	48%	34%	24%	22%	23%	48%	27%	34%
Very Important	44%	46%	40%	52%	40%	52%	46%	45%	38%	41%
Of Average Importance	17%	21%	11%	13%	27%	20%	19%	7%	22%	17%
Of Little Importance	5%	6%	0%	1%	7%	6%	13%	0%	9%	6%
Not At All Important	1%	1%	0%	0%	3%	0%	0%	0%	4%	1%











9.5.4 Leaders' perspectives on wellness











Your C-suite considers wellness programmes a cost-saving measure.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	21%	15%	27%	15%	25%	20%	20%	25%	17%	26%
Agree	35%	39%	39%	33%	26%	30%	37%	40%	37%	35%
Slightly Agree	25%	28%	23%	26%	23%	30%	27%	22%	23%	22%
Slightly Disagree	13%	12%	6%	15%	18%	14%	12%	8%	15%	14%
Disagree	4%	3%	1%	7%	5%	5%	3%	5%	7%	2%
Strongly Disagree	2%	3%	1%	5%	4%	1%	1%	1%	1%	1%
I Don't Know	-	-	2%	-	-	-	-	-	-	-

Your C-suite is pressuring you to reduce the cost of your wellness programme.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	15%	8%	10%	12%	18%	14%	17%	17%	16%	17%
Agree	22%	24%	16%	24%	19%	25%	23%	25%	21%	21%
Slightly Agree	22%	23%	14%	22%	23%	27%	22%	22%	21%	17%
Slightly Disagree	18%	22%	22%	18%	20%	16%	21%	10%	22%	13%
Disagree	15%	19%	25%	17%	11%	15%	13%	20%	11%	20%
Strongly Disagree	9%	3%	11%	7%	8%	4%	4%	6%	9%	11%
I Don't Know	-	-	3%	-	-	-	-	-	-	-

Your C-suite is pressuring you to reduce the cost of your benefits programme.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	15%	8%	10%	12%	18%	14%	17%	17%	16%	17%
Agree	22%	24%	16%	24%	19%	25%	23%	25%	21%	21%
Slightly Agree	22%	23%	14%	22%	23%	27%	22%	22%	21%	17%
Slightly Disagree	18%	22%	22%	18%	20%	16%	21%	10%	22%	13%
Disagree	15%	19%	25%	17%	11%	15%	13%	20%	11%	20%
Strongly Disagree	9%	3%	11%	7%	8%	4%	4%	6%	9%	11%
I Don't Know	-	-	3%	-	-	-	-	-	-	-

Your C-suite values employee wellness.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	37%	36%	50%	35%	28%	31%	25%	60%	34%	36%
Agree	37%	36%	36%	40%	31%	42%	41%	28%	35%	39%
Slightly Agree	18%	18%	11%	15%	29%	18%	21%	9%	22%	16%
Slightly Disagree	6%	7%	1%	7%	6%	6%	10%	3%	7%	7%
Disagree	2%	3%	0%	0%	4%	2%	2%	0%	1%	2%
Strongly Disagree	1%	0%	1%	2%	1%	1%	1%	0%	0%	2%
I Don't Know	-	-	1%	-	-	-	-	-	-	-

Your C-suite considers wellness programmes important for employee satisfaction.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	37%	37%	55%	40%	27%	29%	23%	54%	30%	34%
Agree	38%	38%	34%	36%	36%	44%	47%	30%	38%	39%
Slightly Agree	18%	18%	10%	16%	26%	19%	23%	11%	24%	19%
Slightly Disagree	4%	3%	0%	4%	7%	6%	6%	3%	4%	4%
Disagree	2%	2%	0%	2%	2%	2%	1%	0%	2%	3%
Strongly Disagree	1%	1%	0%	1%	1%	0%	1%	0%	2%	1%
I Don't Know	-	-	0%	-	-	-	-	-	-	-

Your C-suite considers wellness programmes important for employee retention.	Global 	Argentina 	Brazil 	Chile 	Germany 	Spain 	Italy 	Mexico 	UK 	US 
Strongly Agree	32%	27%	43%	31%	27%	25%	23%	44%	30%	35%
Agree	40%	39%	41%	38%	37%	44%	46%	38%	37%	32%
Slightly Agree	20%	18%	12%	20%	26%	22%	23%	15%	25%	23%
Slightly Disagree	5%	13%	3%	6%	5%	5%	5%	2%	5%	4%
Disagree	3%	3%	0%	3%	5%	3%	2%	1%	2%	3%
Strongly Disagree	1%	1%	0%	1%	1%	1%	1%	0%	0%	3%
I Don't Know	-	-	0%	-	-	-	-	-	-	-

Your C-suite considers wellness programmes important for talent acquisition.	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇪	UK 🇬🇧	US 🇺🇸
Strongly Agree	28%	27%	41%	29%	20%	27%	23%	37%	21%	29%
Agree	39%	39%	44%	36%	35%	35%	41%	42%	41%	39%
Slightly Agree	21%	18%	11%	21%	24%	26%	24%	17%	25%	21%
Slightly Disagree	8%	13%	2%	8%	12%	8%	10%	3%	10%	6%
Disagree	3%	3%	0%	4%	7%	3%	1%	0%	3%	3%
Strongly Disagree	1%	1%	1%	2%	1%	1%	0%	0%	0%	3%
I Don't Know	-	-	1%	-	-	-	-	-	-	-

Your C-suite doesn't see the value in wellness programmes.	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇪	UK 🇬🇧	US 🇺🇸
Strongly Agree	13%	8%	9%	10%	17%	14%	12%	19%	13%	12%
Agree	20%	15%	15%	18%	20%	21%	23%	17%	19%	23%
Slightly Agree	16%	16%	9%	15%	18%	20%	18%	13%	12%	13%
Slightly Disagree	14%	17%	11%	14%	16%	11%	15%	9%	18%	13%
Disagree	18%	23%	29%	25%	15%	21%	19%	26%	22%	14%
Strongly Disagree	19%	22%	25%	17%	13%	14%	13%	17%	16%	24%
I Don't Know	-	-	1%	-	-	-	-	-	-	-

Your C-suite considers wellness programmes a fad.	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇪	UK 🇬🇧	US 🇺🇸
Strongly Agree	12%	6%	7%	10%	20%	8%	12%	14%	11%	15%
Agree	18%	13%	9%	15%	24%	24%	23%	13%	19%	18%
Slightly Agree	15%	15%	6%	12%	18%	18%	18%	10%	17%	14%
Slightly Disagree	13%	14%	14%	11%	13%	14%	15%	7%	15%	11%
Disagree	21%	29%	38%	33%	12%	24%	19%	29%	19%	21%
Strongly Disagree	21%	23%	24%	20%	13%	13%	13%	26%	19%	22%
I Don't Know	-	-	2%	-	-	-	-	-	-	-

Your C-suite considers wellness programmes a competitive advantage.	Global 🌐	Argentina 🇦🇷	Brazil 🇧🇷	Chile 🇨🇱	Germany 🇩🇪	Spain 🇪🇸	Italy 🇮🇹	Mexico 🇲🇪	UK 🇬🇧	US 🇺🇸
Strongly Agree	28%	30%	29%	29%	27%	32%	20%	40%	18%	30%
Agree	37%	29%	37%	39%	33%	36%	41%	38%	39%	39%
Slightly Agree	22%	23%	19%	19%	23%	24%	27%	14%	28%	17%
Slightly Disagree	8%	10%	6%	7%	12%	6%	9%	5%	11%	10%
Disagree	3%	5%	5%	5%	4%	1%	3%	2%	3%	3%
Strongly Disagree	2%	3%	4%	1%	1%	1%	1%	1%	1%	2%
I Don't Know	-	-	1%	-	-	-	-	-	-	-



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