UNLOCKING THE FUTURE OF GLOBAL WELLBEING

2025 Global Wellbeing Strategy Survey





Table of contents

Introduction	03
A global wellbeing philosophy	07
Strategic areas of focus	10
Wellbeing pillars, approaches, & offerings	15
Budget, measurement, & evaluation	19
Global wellbeing challenges	24
Key takeaways	27

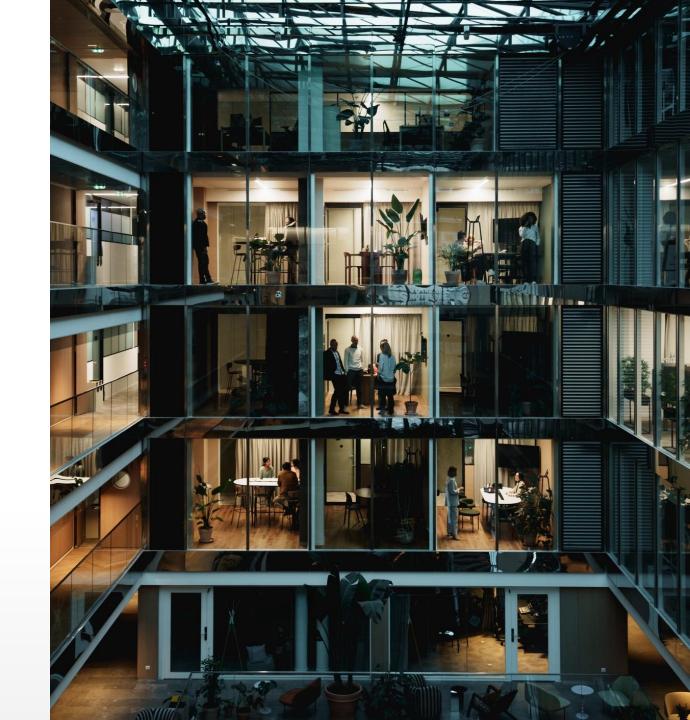




About the survey

The **Global Wellbeing Strategy Survey** was conducted in March 2025 and provides valuable insights on current and future wellbeing offerings, pillars, areas of focus, evaluation metrics, and more that multinationals are implementing or planning to introduce within their workforce.

It was developed as a tool to uncover trends and challenges that can be used to inform current and future global wellbeing strategies.



INTRODUCTION

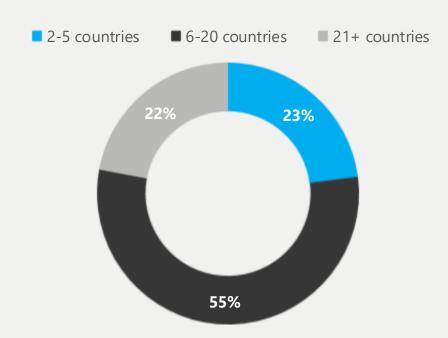
Survey by the numbers

This report features insights from **79 multinational organization** responses. The respondents included human resources, benefits, and wellbeing leaders with responsibility for employees across multiple countries including:

- Algeria
- Argentina
- Brazil
- China
- Egypt
- India
- **Netherlands**

- **Philippines**
- Singapore
- **South Africa**
- **Switzerland**
- **United Arab Emirates**
- **United Kingdom**
- **United States**

RESPONDENTS BY SCOPE OF RESPONSIBILITY



INTRODUCTION

TOP 3 FINDINGS

The survey's top three findings highlight employers' increase in wellbeing investment, coupled with a strong emphasis on maintaining consistency and enhancing the overall experience.

This reflects a broader commitment to sustained growth.

SUSTAINED OR INCREASED INVESTMENT IN WELLBEING

70% of respondents plan to maintain or increase their investment in global wellbeing initiatives over the next two to three years, illustrating a growing commitment to employee wellbeing as a strategic investment that drives long-term organizational success.

GLOBAL CONSISTENCY WITH LOCAL ADAPTATION

Half of respondents have established globally consistent wellbeing principles that are tailored to meet the unique needs of each market or are in the process of developing a comprehensive global strategy. This showcases the importance of balancing a globally consistent approach with local customization to effectively address diverse employee needs.

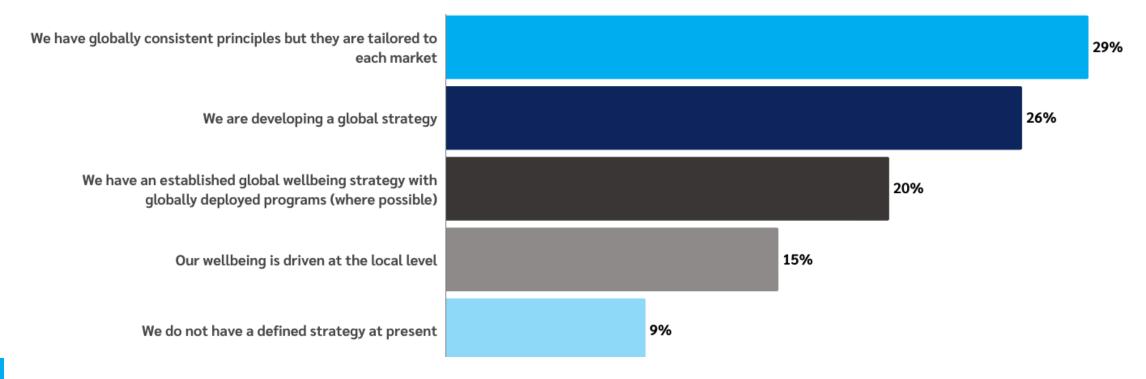
EMPLOYEE ENGAGEMENT & EXPERIENCE

Enhancing employee engagement and experience was identified as a top strategic area for over 80% of organizations represented in the survey. This renewed focus on engagement serves as a lever to bridge communication gaps, ensuring employees receive the right care when they need it.



GLOBAL WELLBEING PHILOSOPHY

How do you best describe your global wellbeing philosophy?



A global wellbeing strategy is important because it provides a framework **establishing consistency** and **strategic alignment** across global organizations.

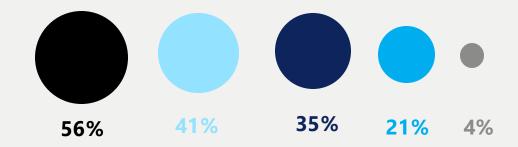
Wellbeing is essential, but programs lack integration

With a majority of respondents indicating that wellbeing is **essential** to their overall workforce strategy, yet 41% viewing it as a collection of individual initiatives, there is a **significant opportunity** for wellbeing professionals to adopt innovative approaches. By amplifying the comprehensive nature of a holistic, strategic approach, they can better integrate wellbeing into the fabric of organizational culture.



Despite rising global healthcare costs, economic fluctuations, and uncertainty, one might anticipate that wellbeing would take a backseat to other organizational priorities.

However, 56% of respondents stated that wellbeing is an essential component of their overall workforce strategy.

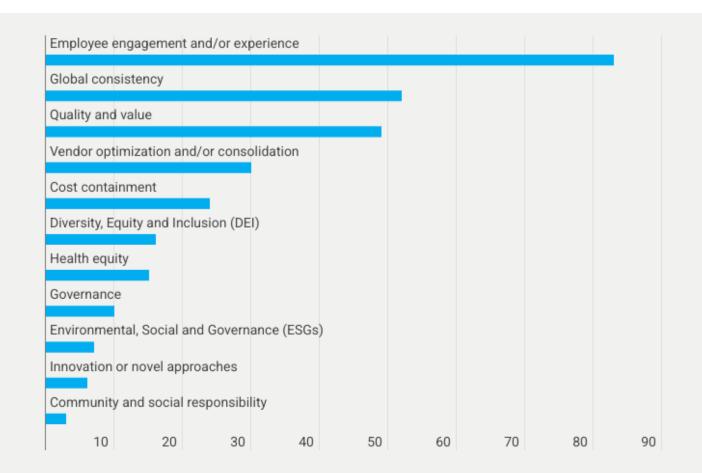


- Wellbeing is an essential piece to overall workforce strategy
- Wellbeing is viewed as a collection of individual initiatives
- Wellbeing is integrated into the company's DNA
- Wellbeing is integral to our diversity, equity, and inclusion efforts
- Wellbeing is not a priority



Emerging focus areas of wellbeing

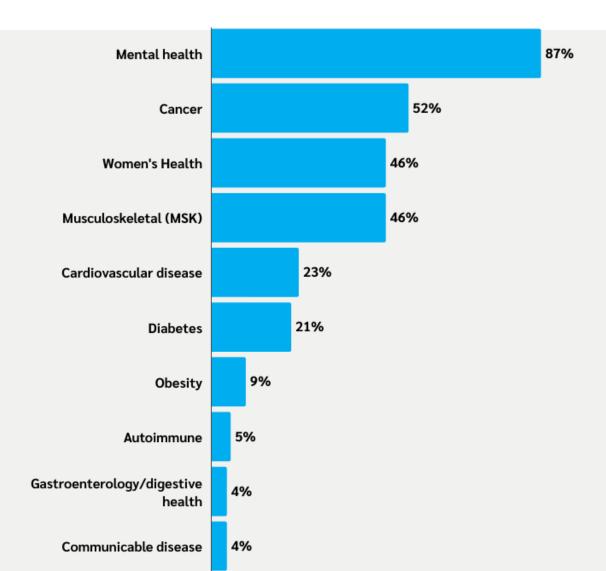
- Employee engagement and experience are overwhelmingly top strategic priorities for wellbeing professionals, presenting an opportunity for wellbeing and benefits professionals to design timely and culturally conscious communication tactics.
- The focus on global consistency underscores the desire for multinational companies to operate uniformly across their various geographies. To develop a consistent framework, it is crucial to audit current programs, renewals, and enrollment periods and establish guiding principles that inform and align decisions on benchmarks and minimums.
- The emphasis on quality and value, along with vendor optimization and consolidation, indicates a push for providers to demonstrate their value and deliver tangible results. This also suggests a potential reevaluation of the vendor market to integrate wellbeing more holistically.



Health conditions of greatest concern

When asked what health conditions were the most critical to address in the next two to three years, employers made it clear that the momentum to address **mental health** postpandemic remains strong, **while women's health** is emerging as a growing area of interest for employers.

Cancer is projected to be one of the top three concerns for employers in the coming years, likely due to its prevalence and significant impact on healthcare costs.



STRATEGIC AREAS OF FOCUS

WHAT EMPLOYERS SHOULD **KNOW**

GLOBAL ALIGNMENT NEEDS

Employers are emphasizing global alignment between wellbeing initiatives and broader organizational goals, such as fostering a supportive and equitable environment that highlights the need for consistent and culturally sensitive approaches across different geographies.

ADAPTABLE & RELEVANT TO DIVERSE NEEDS

Companies must ensure that their wellbeing programs are adaptable and relevant to the diverse needs of their workforce while maintaining a unified strategy that reflects their core values and objectives.

OPPORTUNITIES TO ENHANCE

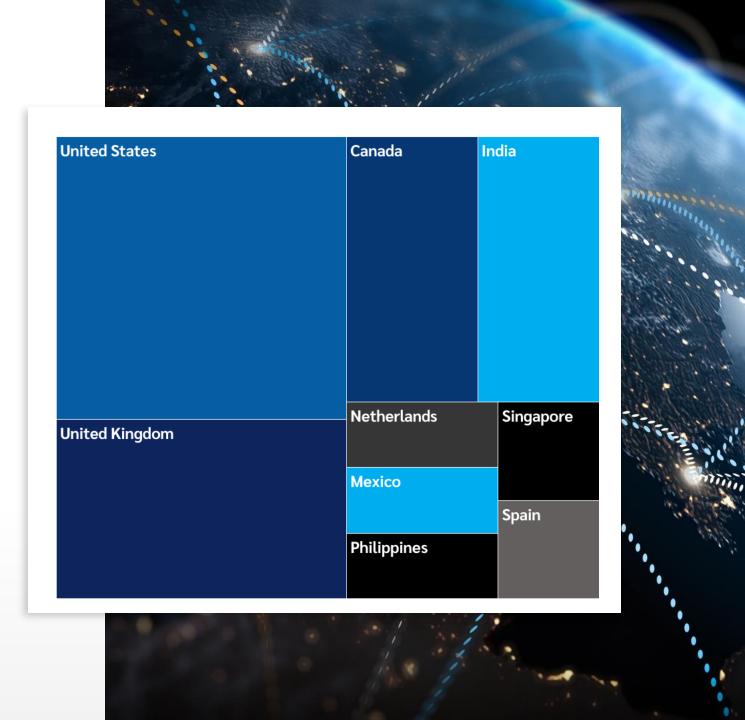
Employers are positioned with an opportunity to enhance women's health offerings, such as programs that support family forming, fertility, menopause, and conditions that disproportionally impact women, such as autoimmune and thyroid diseases. Cancer support could include offering comprehensive wraparound support for employees and their dependents living with cancer.

Markets of focus

The survey revealed the organizations are more keenly focused on specific markets including:

- United States
- United Kingdom
- India
- Canada
- Netherlands

- Mexico
- Philippines
- Spain
- Singapore

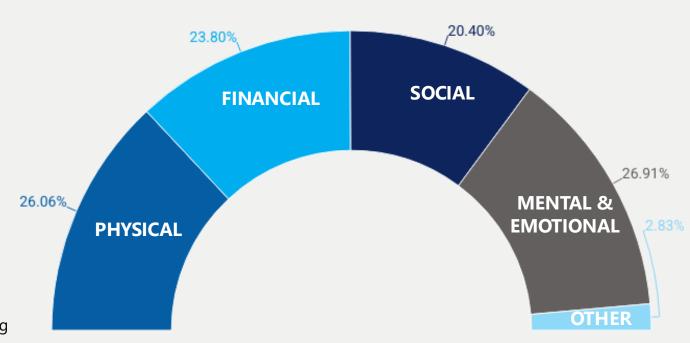




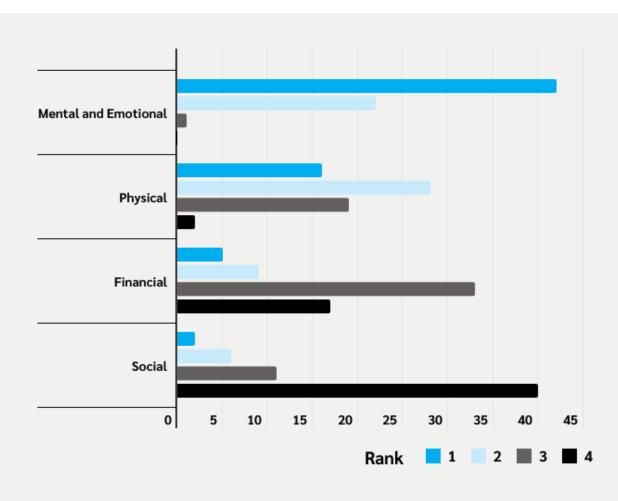
A comprehensive approach to wellbeing

Respondents indicated a balanced approach to wellbeing pillars. This broad representation suggests that organizations are increasingly recognizing the multifaceted nature of employee wellbeing and are developing strategies that address a wide range of needs.

- Physical wellbeing initiatives might involve promoting healthy lifestyles through fitness programs or challenges via a wellbeing app or through a champion network.
- Financial wellbeing can be supported globally through financial literacy and education programs, retirement planning assistance, and other resources that help employees manage their finances effectively.
- **Social wellbeing initiatives** could focus on fostering a sense of community and belonging within the workplace through teambuilding activities, social events, and inclusive workplace policies.
- Mental and emotional wellbeing can be addressed by providing access to mental health resources and counseling services and creating a supportive work environment that encourages open communication and stress management.



Mental & emotional health is a top priority



Overwhelmingly, respondents indicated that **mental and emotional wellbeing** are their first or second most important pillars to address within their wellbeing framework. This prioritization reflects a growing recognition of the critical role mental health plays in overall employee wellbeing and productivity.

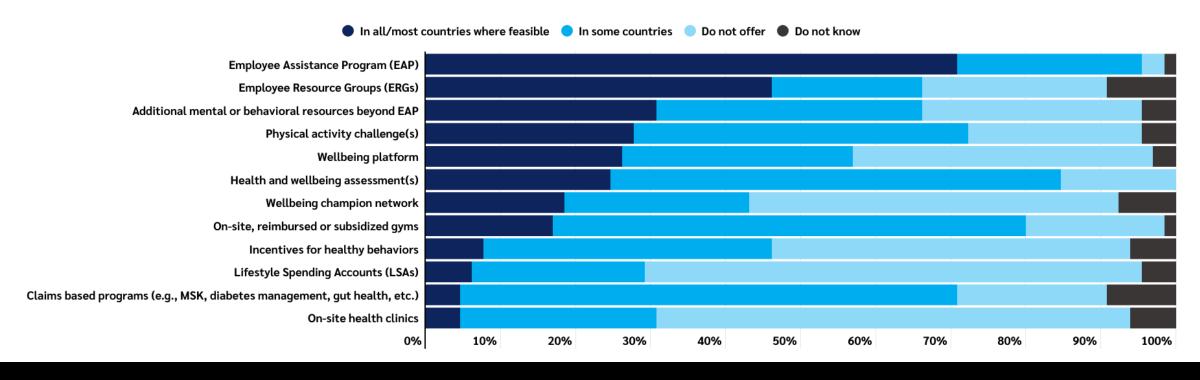
By focusing on mental and emotional wellbeing, companies can address issues such as **stress**, **burnout**, **and mental health challenges**, which are increasingly prevalent in today's fast-paced work environment.

Physical wellbeing is the next most important pillar, highlighting the continued importance of **promoting healthy lifestyles** and physical **health initiatives.** These programs not only improve physical health but also contribute to overall employee morale and engagement.

For businesses, this prioritization offers valuable insights into how to structure their wellbeing strategies.

WELLBEING OFFERINGS

Benchmarking on wellbeing global offerings



Nearly all respondents offer an Employee Assistance Program (EAP) in most or all countries where they operate. This widespread adoption underscores the importance of providing support for employees' mental and emotional wellbeing across global operations.

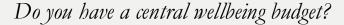
Additionally, over half of the respondents provide a variety of health and wellbeing initiatives, including health and wellbeing assessments, onsite or subsidized gyms, physical activity challenges, and specific programming based on claims data. They also offer additional mental or behavioral health resources beyond the EAP, Employee Resource Groups (ERGs), and a comprehensive wellbeing platform.

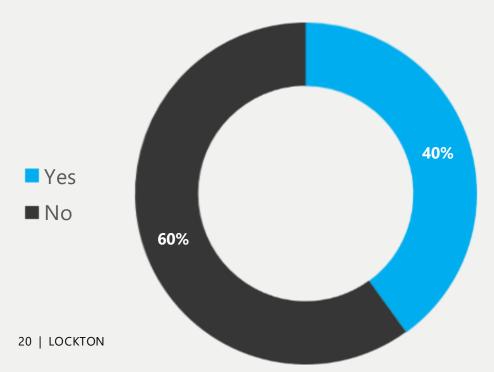
Specific programming based on claims data allows companies to tailor their wellbeing initiatives to address the most pressing health concerns within their workforce, ensuring that resources are effectively utilized.

Additional mental or behavioral health resources beyond the EAP provide further support for employees, helping to address a broader range of mental health needs.

Budget, measurement, & evaluation

Value of a centralized wellbeing budget





A majority of respondents indicated that they do not have a centralized wellbeing budget. This lack of centralized funding can present several challenges for organizations aiming to implement comprehensive and cohesive wellbeing strategies.

Without a dedicated budget, wellbeing initiatives may:

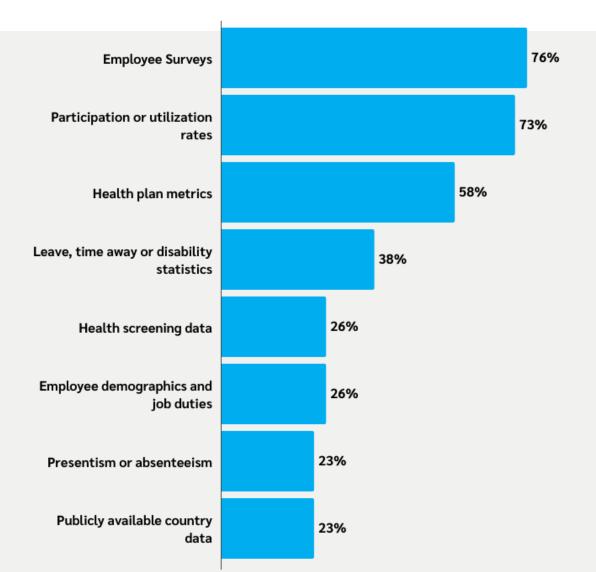
- Become fragmented or inconsistent, which is in direct conflict with respondents' desire to harmonize efforts.
- Underfunding hinders results in the lack of an ability to develop and execute a unified strategy.
- Struggle to achieve desired impact, if funded through various departments or ad-hoc allocations, as they lack the coordinated effort and resources necessary.

A centralized budget can facilitate:

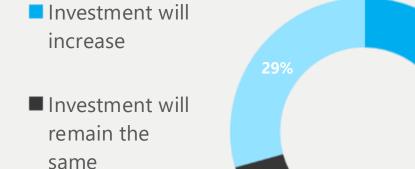
- Better tracking and evaluation of wellbeing initiatives, enabling organizations to measure their impact and make data-driven decisions.
- Streamlined efforts, reducing duplication and ensuring that resources are used efficiently.

Identifying employee needs

- Participatory data, including utilization rates and employee surveys, are the most used to inform respondents' wellbeing strategies. This is followed by health plan metrics, leave, time away, and disability data. These data sources provide valuable insights into employee engagement and the effectiveness of wellbeing programs.
- Leveraging participatory data allows for a more nuanced understanding of employee needs and preferences, enabling the development of targeted and impactful wellbeing initiatives. Health plan metrics, leave data and, in some cases, health screening information and employee demographics and job duties further complement this approach by highlighting areas where additional support may be needed.
- The reliance on participatory data and complementary metrics underscores the importance of a data-driven approach.



Continued intent to invest in wellbeing



30%

41%

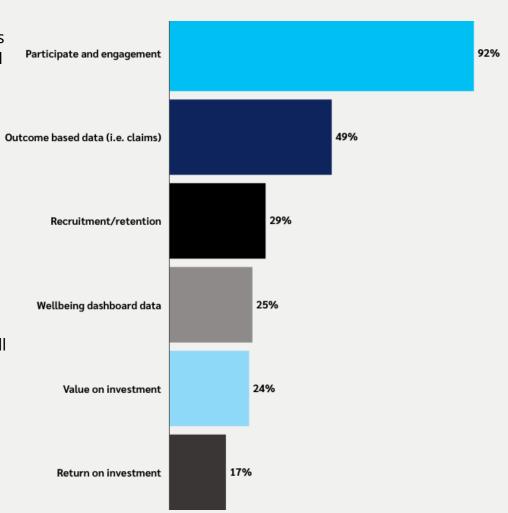
- According to the survey, 41% of respondents indicate that their investment in wellbeing will increase in the next two to three years, while 30% state that their investment will remain the same. Notably, no respondents anticipate a decrease in their wellbeing investment during this period, indicating a sustained commitment.
- The commitment to maintaining or increasing wellbeing investment reflects an understanding that employee health and wellbeing are integral to achieving broader organizational goals.
- Moreover, the sustained investment in wellbeing suggests that companies are increasingly aware of the long-term benefits of these initiatives.
- The survey results indicate a strong and sustained commitment to employee wellbeing among respondents.

No employers indicated that they intend to decrease their investment in employee wellbeing.

Do not know

Measuring success is critical

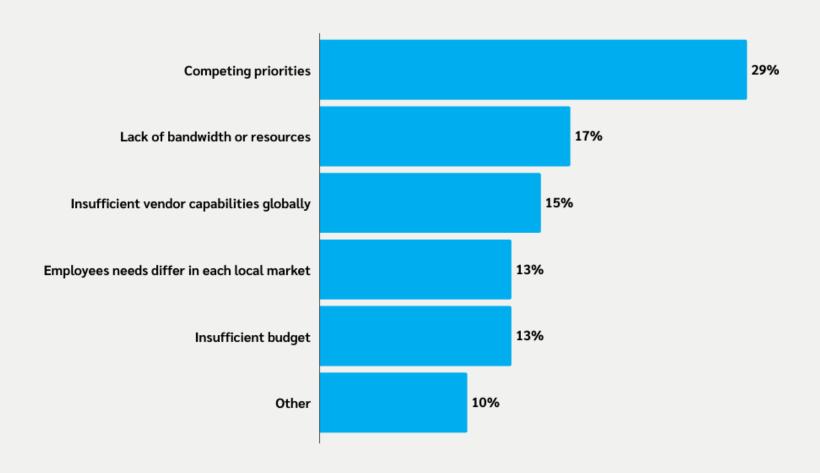
- Nearly all respondents are measuring the success of their wellbeing programs through participation and engagement metrics, while almost half are utilizing outcomes-based data. Additionally, 29% of respondents are leveraging recruitment and retention metrics to gauge program effectiveness.
- These findings highlight the importance of diverse metrics in evaluating wellbeing initiatives. Participation and engagement metrics provide valuable insights into employee involvement and satisfaction, indicating the immediate impact of wellbeing programs.
- Outcomes-based data, on the other hand, offers a deeper understanding of the long-term benefits and effectiveness of these initiatives, such as improvements in health outcomes and productivity.
- However, the relatively low percentages of respondents measuring VOI and ROI suggest that many organizations may not be fully capturing the financial impact of their wellbeing investments. VOI encompasses both tangible and intangible benefits, such as improved employee morale and reduced absenteeism, while ROI focuses on the direct financial returns. Incorporating these metrics can provide a more comprehensive view of the value generated by wellbeing programs.
- This holistic approach can help organizations better understand the full impact of their wellbeing initiatives, leading to more informed decisionmaking and optimized investments.





Competing priorities

Competing priorities is the biggest challenge in creating, deploying, or maintaining a global wellbeing strategy.



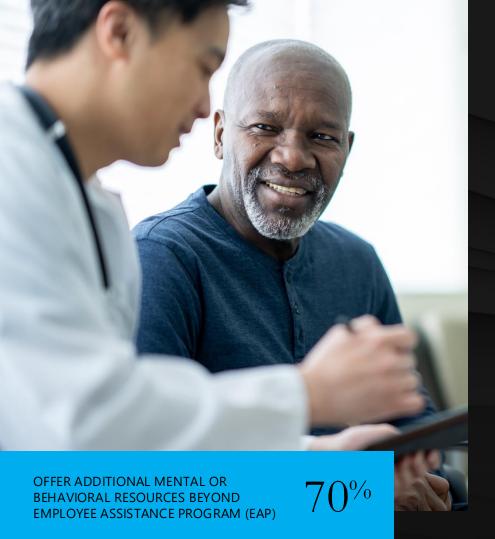


WELLBEING CHALLENGES

Surmounting challenges

CHALLENGE	SOLUTION
Competing priorities can divert attention and resources away from wellbeing initiatives, making it difficult to maintain a consistent focus.	Organizations need to integrate wellbeing into their broader strategic goals, ensuring it remains a priority alongside other critical business objectives.
The lack of bandwidth or resources suggests that many companies may be struggling with capacity issues.	Investing in dedicated wellbeing teams or leveraging external expertise can help alleviate these constraints, enabling more effective program development and deployment.
Insufficient vendor capabilities globally indicate a need for more robust partnerships with providers who can deliver consistent and high-quality services across different regions.	Companies can seek vendors with proven global experience and the ability to adapt to local market needs.
Differing employee needs in each local market underscore the importance of tailoring wellbeing programs to address specific cultural and regional differences.	A one-size-fits-all approach may not be effective; instead, organizations should develop flexible strategies that can be customized to meet diverse employee requirements.





Global wellbeing: Future areas of focus



MENTAL & EMOTIONAL HEALTH

Mental and emotional health emerged as the most highly prioritized wellbeing pillars, with mental health also ranking as the primary condition employers aim to address. This underscores the critical importance of mental and emotional wellbeing as integral components of a comprehensive global wellbeing strategy.

WOMEN'S HEALTH

Women's health has become a key area of concern, reflecting a broader recognition of the spectrum of needs unique to women in the workforce beyond family-forming support.

Globally, organizations are taking proactive steps to support women's health in a holistic way.

MENTAL HEALTH IS THE TOP CONDITION RESPONDENTS ARE MOST CONCERNED ABOUT ADDRESSING IN THE NEXT YEAR

87%

Findings & recommendations



The survey reveals that a strategic focus on wellbeing is not just a nice-to-have, but a critical component of organizational success.



The survey highlights the need for a comprehensive and integrated wellbeing strategy that aligns with broader organizational goals.

The Global Wellbeing Strategy Survey underscores that wellbeing is a business strategy and has an essential role in shaping a resilient global workforce.



Wellbeing initiatives that address physical, mental, emotional, and social health are pivotal in fostering a supportive and productive work environment.





LOCKTON IS YOUR PARTNER IN GLOBAL WELLBEING

While the complexities can be challenging, Lockton is here to guide clients toward the best strategic wellbeing investments that foster a thriving workforce.

For more information, guidance, and insights on this topic, contact Julie Sonner, Global Wellbeing Consulting Leader, Global People Solutions at julie.sonner@lockton.com.

INDEPENDENCE

changes everything.



UNCOMMONLY INDEPENDENT