

The Mental Health Index™ report

United Kingdom, December 2020



LifeWorks
by Morneau Shepell

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December highlights

For nine consecutive months, the mental health of Britons has been significantly lower than prior to the COVID-19 pandemic. After the initial significant decline measured in April 2020, there were modest increases in June and September; however, the trend has generally been downward. The mental health score in December is one point above its lowest score observed in April and May 2020 but remains a concern as it indicates that **the working population is currently as distressed as the most distressed one per cent of working Britons, prior to 2020.**

The proportion of individuals reporting more stress than the prior month (24 per cent) is one per cent higher than the previous month, while the proportion of individuals reporting less mental stress is only 6 per cent. The majority (71 per cent) indicate the same level of stress when compared to the prior month, however, given the escalation in stress each month since the pandemic, this reflects an elevated level of cumulative stress for this group as well. With recent increases in cases in many regions of the country, and the resulting restrictions, this strain will likely continue.

General psychological health continues its decline. **In December, the psychological health risk score of Britons is 3.2 points lower than at the start of the Index™**, in April 2020.

Isolation scores have remained at least ten points below the pre-pandemic benchmark. **In December, the isolation score is -11.7**, a modest improvement from November's score of -12.3.

Regional mental health scores have been trending in line with the overall Mental Health Index™ for the United Kingdom. Comparatively, Scotland and Wales are generally scoring higher than England and Northern Ireland. **In December, England, Northern Ireland, and Scotland show improvements in mental health scores; however, a modest decline is observed in Wales.**

For nine months, since significant measures were taken in managing the pandemic, Britons have had to adapt to changing conditions in all aspects of their lives, including at work. **Individuals report that the most stressful part of adapting at work during the pandemic is health and safety protocols (32 per cent), followed by job uncertainty (28 per cent), and work strain/overwork (25 per cent). The lowest mental health score (-21.6) is observed among the twenty-five per cent of individuals who report work strain/overwork as the**

A positive score on the Mental Health Index™ indicates better mental health in the overall working population, compared to the benchmark period of 2017 to 2019. A higher positive score reflects greater improvement.

A negative Mental Health Index™ score indicates a decline in mental health compared to the benchmark period. The more negative the score, the greater the decline.

A score of zero indicates mental health that is the same as it was in the benchmark period.



most stressful part of adapting at work during the pandemic, followed by twenty-eight per cent who report job uncertainty (-21.5), and twenty-three per cent who report interacting with the public as the most stressful part of adapting at work during the pandemic (-17.7).

The COVID-19 pandemic has led many Britons to reconsider their personal and professional priorities. Previous findings (November 2020) indicate that over one-quarter (26 per cent) of Britons have considered a job or career change because of the pandemic. In the current month, respondents were asked whether they have considered leaving their jobs since the beginning of 2020. Nearly one-third (30 per cent) of individuals have thought about leaving their job.

The most reported reason for considering leaving is increased mental stress/strain at work (48 per cent). One-quarter (25 per cent) have considered leaving their current job due to their employer's response to COVID-19.

As the pandemic persists into its ninth month, Britons are seeing the impact of the pandemic beyond their personal experience to its effect on others, including their co-workers. **One-third of respondents (33 per cent) report being concerned about a co-worker's mental health.**

In addition to coping with the personal impact of the pandemic, people leaders are faced with the additional strain of managing a prolonged turbulent period in their workplace. **When people leaders were asked whether they have had concerns about the mental health of employees since the onset of the pandemic, thirty per cent of supervisors agreed.**

Over one-quarter (twenty-seven per cent) of people leaders report that their employees are less productive than in 2019, whereas fifty-four per cent indicate that their employees are as productive in 2020 as they were in 2019.

With restrictions on non-essential travel across the globe, taking vacation time involves staying close to home. **Forty per cent of respondents report not using all their vacation time in 2020**, whereas forty-nine per cent report using all their vacation time. **Individuals not using all their vacation time have the lowest mental health score**, when compared to those using all their vacation time and those without paid time off.

The COVID-19 pandemic has upended organizations across the country; a boon for some while others struggle, and those doing okay but where a swing in either direction could land them in either a fortuitous or grave scenario. The perception of how an organization has treated its employees and its customers during the pandemic could have both an immediate and lasting impact on its success. **Fifty per cent of respondents agree that the way they think about and**



interact with brands/companies has been influenced by how they treated their employees during the pandemic.

More than half (fifty-seven per cent) of respondents agree that the way they think about and interact with brands/companies has been influenced by how they supported or treated their customers during the pandemic.

With the high-profile death of Black American, George Floyd, in June 2020, unprecedented awareness of anti-Black racism emerged. **Thirty-seven per cent of respondents agree that the way they think about and interact with brands/companies has been influenced by how they respond to social justice issues.** Individuals under the age of 40 are significantly more likely to agree that the way they think about and interact with brands/companies has been influenced by how they respond to social justice issues.

While the COVID-19 pandemic continues to cause restrictions and lockdowns across the country, recent vaccine developments provide some optimism for Britons. **Forty-nine per cent of respondents indicate that they would get vaccinated as soon as they are able.**

Twenty-one per cent of individuals indicate that they would get vaccinated, although not right away. Willingness to receive the vaccine increases with age.

The disruption because of the COVID-19 pandemic has been widespread, affecting Britons physically, mentally, socially, financially, at home, and in the workplace. Forty-nine per cent of individuals indicate that most of the disruption will end for them personally in the second half of 2021. **In general, the longer the disruption is believed to last because of the COVID-19 pandemic, the more negative the mental health score.**



The Mental Health Index™

The Mental Health Index™ (MHI) is a measure of deviation from the benchmark¹ of mental health and risk. **The overall Mental Health Index™ for December 2020 is -13 points.** A 13-point decrease from the pre-COVID-19 benchmark reflects a population whose mental health is similar to the most distressed one per cent of the benchmark population.



December marks the ninth consecutive month where the Mental Health Index™ reflects strained mental health in the British population

¹ The benchmark reflects data collected in 2017, 2018 and 2019.



Mental Health Index™ sub-scores

The lowest Mental Health Index™ sub-score is for the risk measure of optimism (-17.3 points), followed by depression (-15.0), anxiety (-14.6), work productivity (-12.1), isolation (-11.7), and general psychological health (-5.3). The risk measure with the best mental health score, as well as the only measure above the benchmark, is financial risk (5.3), followed by general psychological health (-5.3).

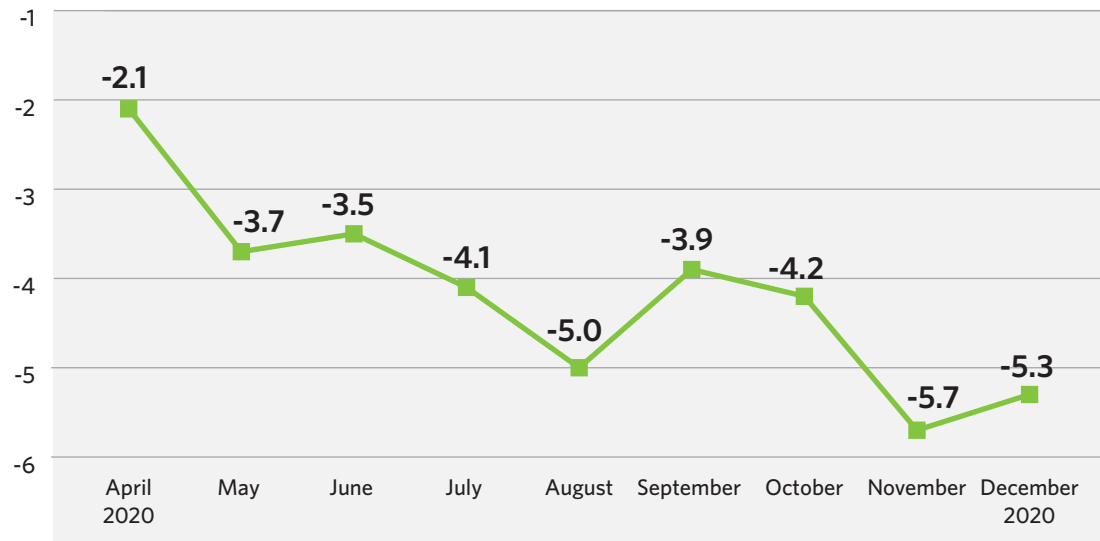
- All mental health sub-scores, except for financial risk, improved in December when compared to November although they all remain well below the pre-2020 benchmark.
- The greatest improvements in December are observed in optimism (1.7 points increase), followed by depression (1.3 points increase), and anxiety (1.0-point increase).
- The financial risk score declines modestly in December with a score of 5.3 points, down 0.2 from the prior month; however, it continues to be the strongest of all sub-scores and is above the pre-2020 benchmark.

MHI sub-scores ²	December 2020	November 2020
Optimism	-17.3	-19.0
Depression	-15.0	-16.3
Anxiety	-14.6	-15.6
Work productivity	-12.1	-12.2
Isolation	-11.7	-12.3
Psychological health	-5.3	-5.7
Financial risk	5.3	5.5

² The demographic breakdown of sub-scores are available upon request.



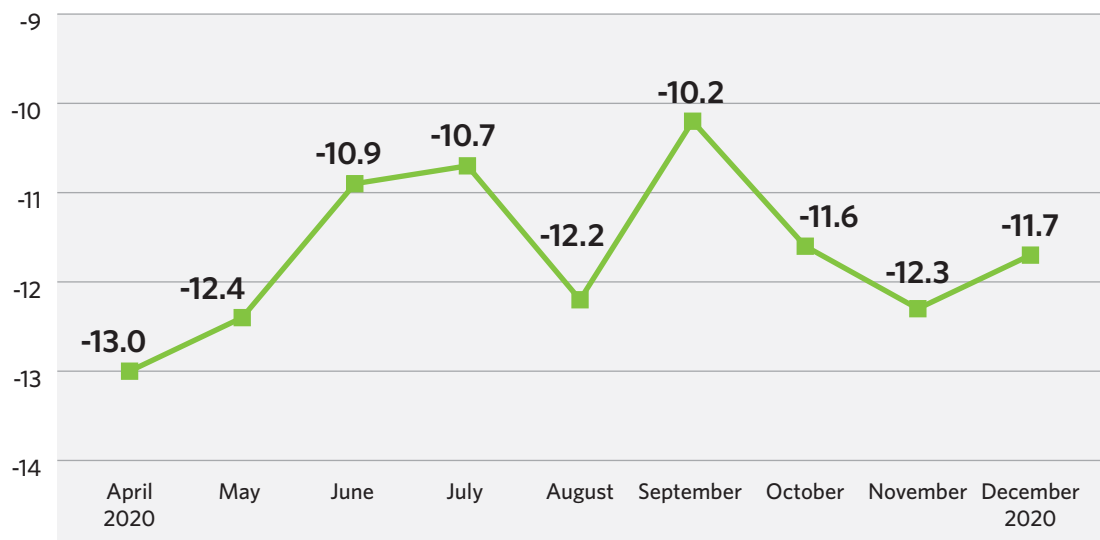
General psychological health



General psychological health

Since April, general psychological health has declined. Despite two months of modest improvements in June and September within the nine-month period since the launch of the Index™, the psychological health of Britons continues to deteriorate. While a slight increase in the score is observed in December, the psychological health risk score of Britons is 3.2 points lower than at the start of the Index™, in April 2020.

Isolation

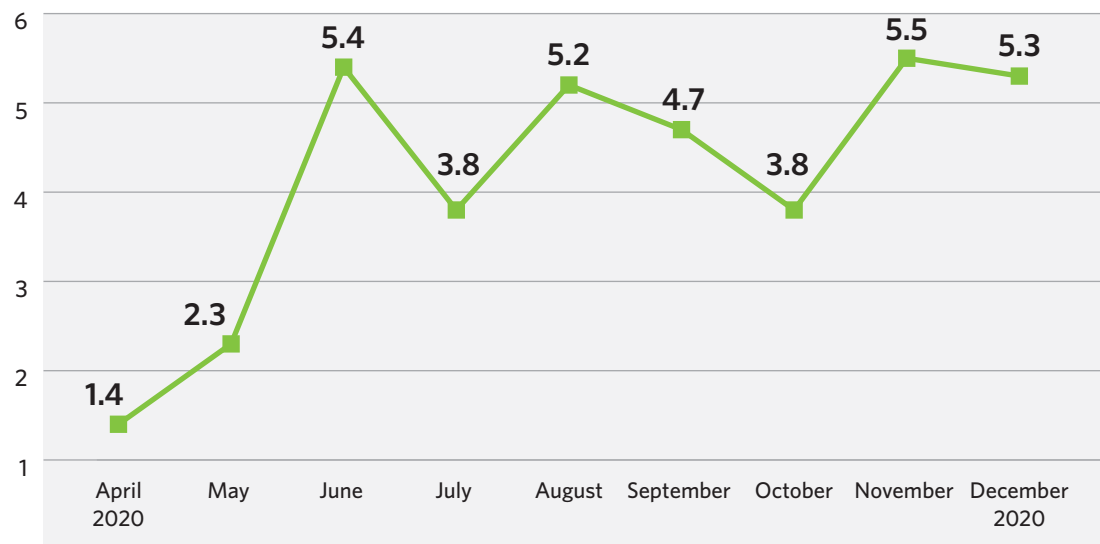


Isolation

From April to July, an increase in the isolation score was observed; however, from July to August a decline of 1.5 points was observed. September marked a recovery in the isolation score to the highest since the inception of the Mental Health Index™. From September to November, a downward trend in the isolation score was observed. In December, another recovery point occurred; however, the isolation score remains significantly below the pre-pandemic benchmark.



Financial Risk



Financial risk

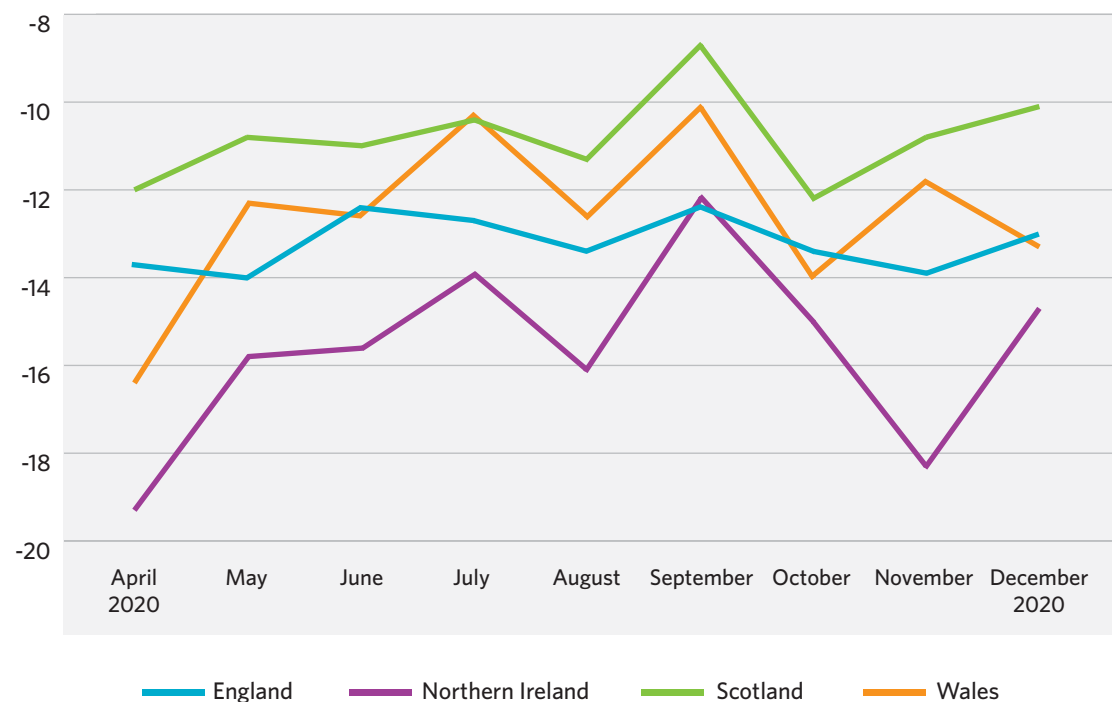
The financial risk score of Britons remains the strongest sub-scale since the inception of the Mental Health Index™ in April 2020. An uneven trend has been observed; however, the score continues to return to between 5.2 and 5.5 points at peaks throughout nine months of measurement.



The Mental Health Index™ (regional)

Regional mental health scores have been trending in line with the overall Mental Health Index™ for the United Kingdom marked by periods of increase and decrease without a consistent upward or downward trend lasting several months. Comparatively, Scotland and Wales are generally scoring higher than England and Northern Ireland. In December, England, Northern Ireland, and Scotland show improvements in mental health scores; however, a modest decline is observed in Wales.

UK regional Mental Health Index™ scores





Demographics

- For nine consecutive months, females (-15.2) have a significantly lower mental health score than males (-10.8); we have also observed that mental health scores improve with age.
- Respondents identifying as South Asian have the lowest mental health score (-17.4), followed by those identifying as East Asian (-17.1).
- Individuals identifying as Other* (aggregate of Arab/Middle Eastern/West Asian, Indigenous/Aboriginal, South East Asian, Latin, South or Central American, Pacific Islander, Mixed (Black and other), Mixed (Other)) have the highest mental health score (-10.4), followed by individuals identifying as Black (-11.4), and those identifying as White (-12.8).
- The variance in the mental health score between those with and without children has been observed since April, and results in December continue this trend with a lower score for those with at least one child (-14.9) when compared to those without children (-11.6).

Employment

- Overall, four per cent of respondents are unemployed. While most individuals remain employed, 18 per cent report reduced hours or reduced salary since April 2020.
- Individuals reporting reduced salary when compared to the prior month (-22.5) have the lowest mental health score, followed by those not currently employed (-19.1), and those who report fewer hours when compared to the prior month (-17.5).
- Self-employed/sole proprietors have the highest mental health score (-10.3), followed by respondents who report working for companies with 2-50 employees (-10.5).
- Respondents who report working for companies with 501-1,000 employees have the lowest mental health score (-16.4), followed by individuals working for companies with 51-100 employees (-16.1).

Emergency savings

- Individuals without emergency savings continue to experience a lower score in mental health (-27.7) than the overall group. Those reporting an emergency fund have an average mental health score of -7.9.



Employment status	December	November
Employed (no change in hours/salary)	-10.8	-12.0
Employed (fewer hours compared to last month)	-19.7	-20.6
Employed (reduced salary compared to last month)	-22.3	-23.9
Not currently employed	-16.9	-13.6
Age group	December	November
Age 20-29	-22.5	-20.0
Age 30-39	-17.2	-18.7
Age 40-49	-13.2	-14.8
Age 50-59	-11.0	-11.2
Age 60-69	-6.1	-7.4
Number of children	December	November
No children in household	-11.6	-12.0
1 child	-14.9	-16.2
2 children	-14.7	-16.3
3 children or more	-16.9	-22.4

Numbers highlighted in **orange** are the most negative scores in the group.

Numbers highlighted in **green** are the least negative scores in the group.

Available upon request:

Specific cross-correlational and custom analyses

Region	December	November
England	-13.0	-13.9
Northern Ireland	-14.7	-18.3
Scotland	-10.1	-10.8
Wales	-13.3	-11.8
Gender	December	November
Male	-10.8	-11.9
Female	-15.2	-15.8
Income	December	November
Household Income <£15K/annum	-23.2	-22.0
£15K to <£30K/annum	-17.6	-18.2
£30K to <£60K	-11.9	-13.0
£60K to <£100K	-9.6	-10.9
£100K and over	-0.4	-2.0

Racial identification	December	November
Black	-11.4	-7.8
East Asian	-17.1	-15.6
South Asian	-17.4	-19.5
White	-12.8	-13.6
Other*	-10.4	-14.6

* Included in this category are Arab/Middle Eastern/West Asian, Indigenous/Aboriginal, South East Asian, Latin, South or Central American, Pacific Islander, Mixed (Black and other), Mixed (Other), and Prefer not to answer, as the minimum threshold for reporting was not met for each group

Employer size	December	November
Self-employed/sole proprietor	-10.3	-12.1
2-50 employees	-10.5	-11.8
51-100 employees	-16.1	-14.8
101-500 employees	-12.5	-13.7
501-1,000 employees	-16.4	-18.2
1,001-5,000 employees	-14.7	-13.9
5,001-10,000 employees	-11.7	-14.2
More than 10,000 employees	-12.4	-12.8



The Mental Health Index™ (industry)

Individuals working in Utilities have the lowest average mental health score (-18.9), followed by individuals in Retail Trade (-17.6), and Administrative and Support services (-17.1).

The highest mental health scores this month are observed among individuals employed in Real Estate, Rental and Leasing (-2.5), Manufacturing (-7.6), and Other services (except Public Administration) (-8.2).

Individuals employed in Utilities, Wholesale Trade, and Construction have seen the greatest improvement in mental health since last month.

Improvements from the prior month are shown in the table below:

Industry	December 2020	November 2020	Improvement
Utilities	-18.9	-28.4	9.6
Wholesale Trade	-16.0	-21.4	5.4
Construction	-12.5	-15.6	3.1
Educational Services	-12.2	-14.6	2.4
Manufacturing	-7.6	-9.9	2.2
Administrative and Support services	-17.1	-19.1	2.0
Professional, Scientific and Technical Services	-9.4	-11.4	2.0
Food Services	-15.0	-16.6	1.5
Health Care and Social Assistance	-14.2	-15.7	1.5
Real Estate, Rental and Leasing	-2.5	-3.1	0.6
Other services (except Public Administration)	-8.2	-8.5	0.3
Public Administration	-12.2	-12.1	0.1
Finance and Insurance	-9.9	-9.1	-0.8
Transportation and Warehousing	-15.4	-13.7	-1.7
Retail Trade	-17.6	-15.6	-2.1
Other	-11.7	-8.9	-2.8
Information and Cultural Industries	-16.2	-13.1	-3.1
Arts, Entertainment and Recreation	-16.2	-12.4	-3.8

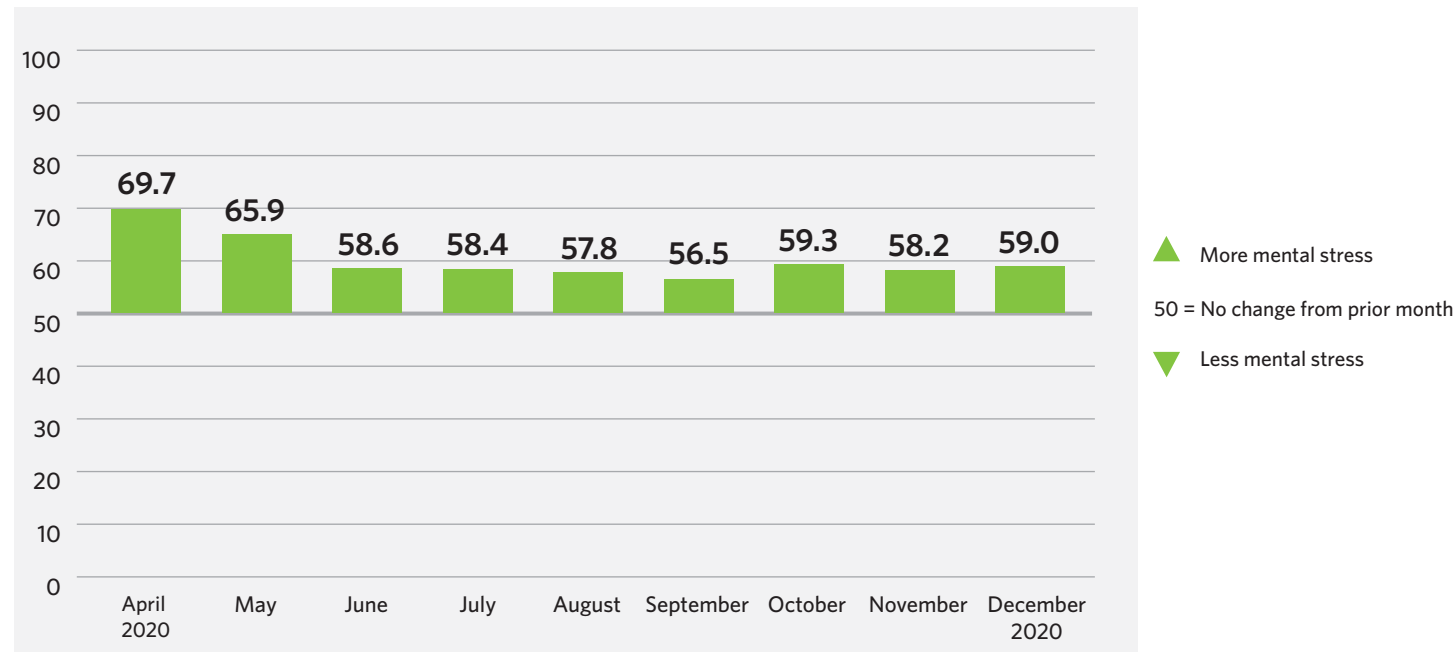


The Mental Stress Change score

The Mental Stress Change Score (MStressChg) is a measure of the level of reported mental stress, compared to the prior month. **The Mental Stress Change score for December 2020 is 59.0.** This reflects an increase in mental stress compared to the prior month. The steepness of the increase had been declining month-over-month through September, then increased in October, declined moderately in November, and increased in December.

The current score indicates that 24 per cent of the population is experiencing more mental stress compared to the prior month, with 6 per cent experiencing less. A continued increase in mental stress over the last four months indicates a significant accumulation of strain in the population.

Current month December 2020:	59.0	November 2020: 58.2
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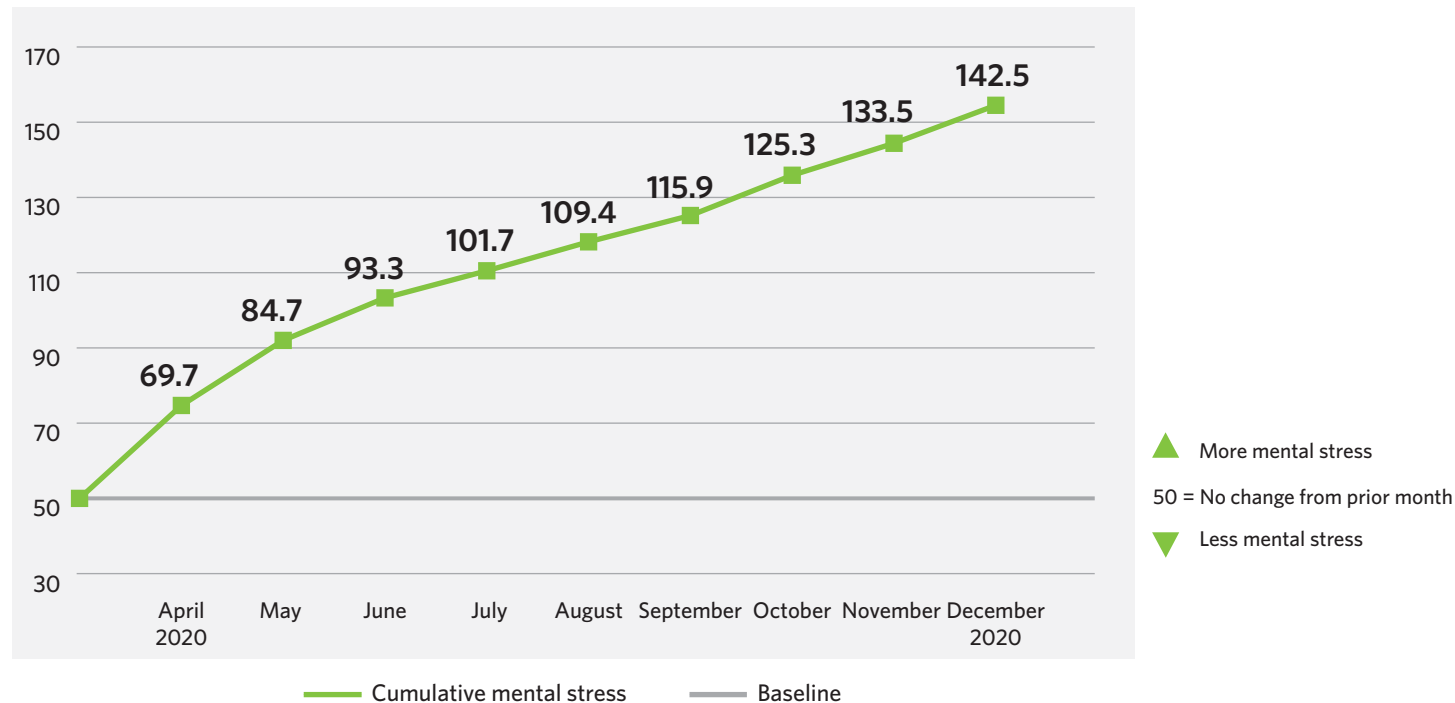


Mental Stress Change (cumulative)

The Mental Stress Change (MStressChg) score is a measure of the level of reported mental stress compared to the prior month. The change is rooted against a value of 50 implying no net mental stress change from the previous month, while values above 50 indicate a net increase in mental stress and values below 50 indicate a net decrease in mental stress. The graph below tracks the increases and decreases to account for the cumulative effect on mental stress.

The continual increase in mental stress demonstrates that Britons are reporting more mental stress month-over-month. To relieve this level of accumulated stress, a sizable portion of the population must start regularly reporting lower stress.

Cumulative MStressChg





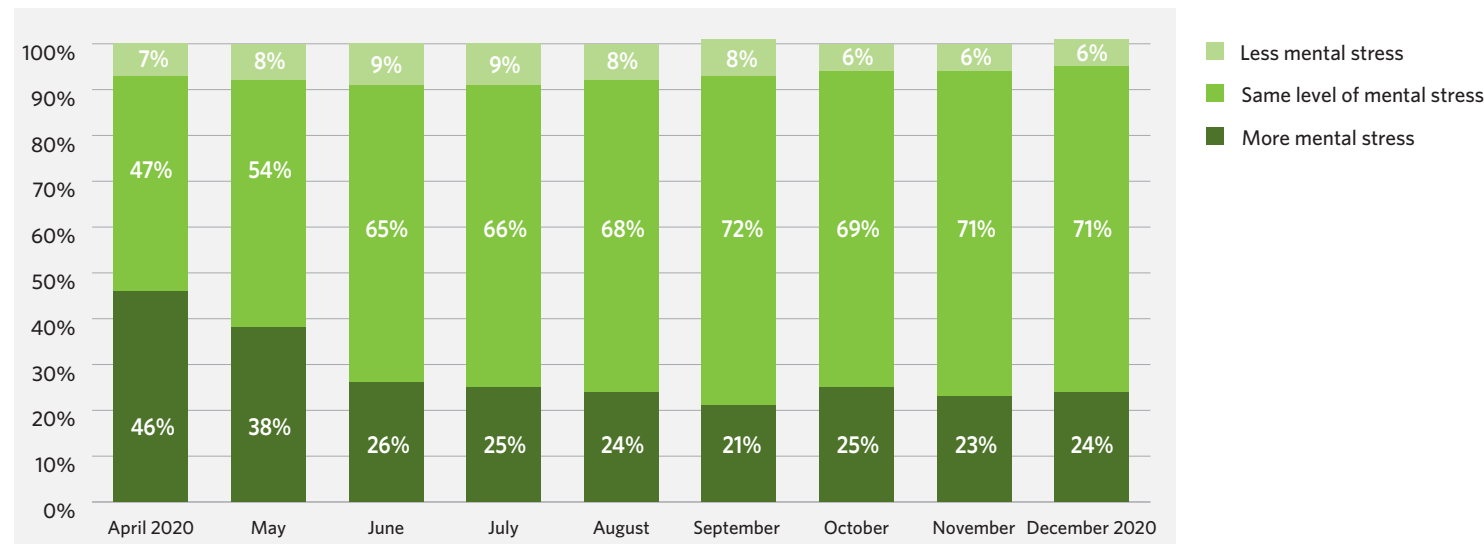
Mental Stress Change (percentages)

Mental Stress Change tracks each individual's stress changes each month. The percentages of those experiencing more stress, the same level of stress, and less stress for each month of the survey are shown in the graph below.

Over the last nine months, the percentage of those experiencing more mental stress than the previous month has steadily decreased; however, the data shows that those experiencing less mental stress is not enough to lower the overall Mental Stress Change score to below 50 (the level at which stress is lower than the previous month). As the proportion of individuals reporting the same level of stress or more stress than the previous month continues to significantly outweigh the proportion reporting less mental stress, the population will continue to feel the effects of significantly increased stress and not be able to adequately reach a more sustainable and health level of stress.

In April, 46 per cent of individuals reported an increase in mental stress. While those reporting increased month-over-month mental stress has decreased to 24 per cent in December 2020, 71 per cent of respondents report the same level of mental stress and only 6 report a decrease in mental stress.

Mental Stress Change by Month





Demographics

- As was reported in prior months, and as evidenced again in November, younger respondents are experiencing a greater increase in mental stress when compared to older respondents.
- Since April 2020, females have had larger increases in mental stress when compared with males.
- Respondents identifying as Black have the least favourable mental stress change score (59.5), followed by those identifying as White (59.2).
- Individuals identifying as East Asian have the most favourable mental stress change score (55.7).

Geography

- Considering geography, the greatest increase in stress month over month was for respondents living in Northern Ireland (63.5), followed by Wales (59.1), England (59.1), and Scotland (57.0).

Employment

- The greatest increase in mental stress is seen in employed people with reduced salary (70.4), followed by employed people with reduced hours (63.4), when compared to unemployed people (58.0) and employed people with no change to salary or hours (57.5).



Employment status	December	November
Employed (no change in hours/salary)	57.5	56.9
Employed (fewer hours compared to last month)	63.4	64.9
Employed (reduced salary compared to last month)	70.4	65.7
Not currently employed	58.0	53.2
Age group		
Age 20-29	62.8	61.8
Age 30-39	60.0	59.9
Age 40-49	60.6	58.8
Age 50-59	58.4	57.4
Age 60-69	55.9	55.9
Number of children		
No children in household	57.7	57.1
1 child	62.8	59.4
2 children	59.4	61.7
3 children or more	63.5	58.0

Numbers highlighted in **orange** are the most negative scores in the group.

Numbers highlighted in **green** are the least negative scores in the group.

Available upon request:

Specific cross-correlational and custom analyses

Region	December	November
England	59.1	58.0
Northern Ireland	63.5	65.1
Scotland	57.0	57.5
Wales	59.1	58.2
Gender		
Male	57.9	57.1
Female	60.4	59.5
Income		
Household Income <£15K/annum	65.0	63.9
£15K to <£30K/annum	60.5	60.1
£30K to <£60K	58.2	57.7
£60k to <£100K	57.9	57.1
£100K and over	56.1	52.9

Racial identification	December	November
Black	59.5	55.8
East Asian	55.7	59.5
South Asian	57.8	59.6
White	59.2	58.2
Other*	56.7	56.7

* Included in this category are Arab/Middle Eastern/West Asian, Indigenous/Aboriginal, South East Asian, Latin, South or Central American, Pacific Islander, Mixed (Black and other), Mixed (Other), and Prefer not to answer, as the minimum threshold for reporting was not met for each group

Employer size	December	November
Self-employed/sole proprietor	59.5	59.3
2-50 employees	58.0	58.6
51-100 employees	62.1	60.1
101-500 employees	58.2	57.9
501-1,000 employees	59.7	57.6
1,001-5,000 employees	60.1	57.7
5,001-10,000 employees	57.1	56.8
More than 10,000 employees	59.1	57.8



The Mental Stress Change (industry)

Mental Stress Change scores for the Management of Companies and Enterprises, Professional, Scientific and Technical Services, and Real Estate, Rental and Leasing industries are less steep when compared to the prior month.

Individuals working in Utilities have the most significant increase in Mental Stress Change (70.5), followed by individuals employed in Arts, Entertainment and Recreation (68.6), and Retail Trade (62.5).

Mental Stress changes from the last two months are shown in the table below:

Industry	December 2020	November 2020
Professional, Scientific and Technical Services	54.0	56.6
Real Estate, Rental and Leasing	55.0	55.4
Finance and Insurance	56.8	55.0
Wholesale Trade	56.9	64.0
Public Administration	56.9	55.9
Food Services	57.5	54.9
Transportation and Warehousing	58.3	57.5
Other	58.5	56.7
Manufacturing	58.9	54.8
Educational Services	59.0	58.4
Construction	59.1	61.1
Health Care and Social Assistance	60.0	60.3
Other services (except Public Administration)	60.3	58.6
Information and Cultural Industries	61.9	53.8
Administrative and Support services	62.4	58.2
Retail Trade	62.5	59.3
Arts, Entertainment and Recreation	68.6	61.8
Utilities	70.5	66.7

Spotlight

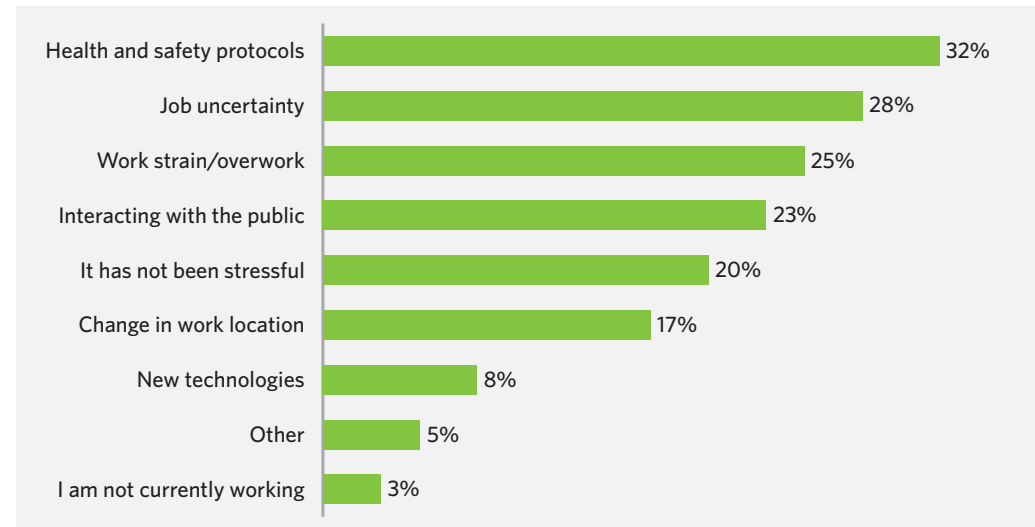
Living during a pandemic

Adaptation

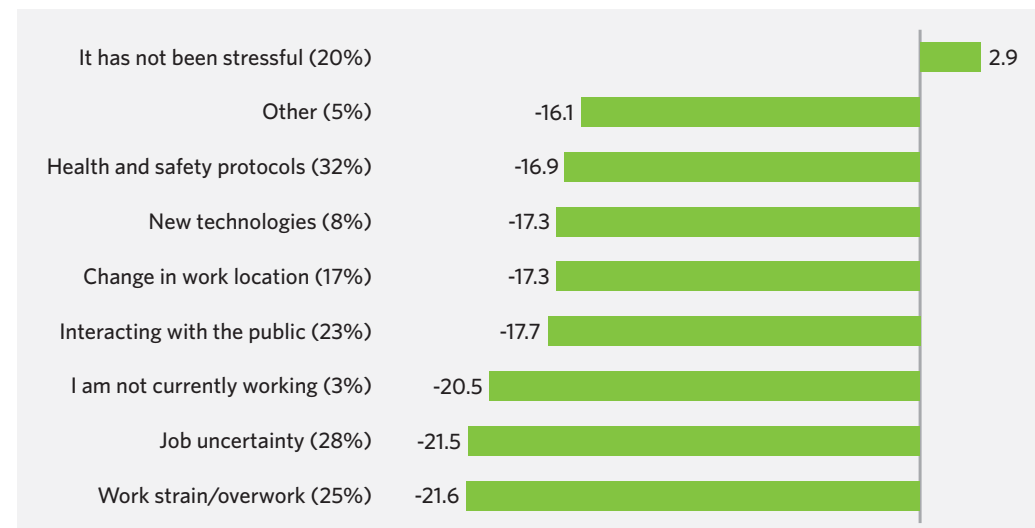
Previous findings (May 2020) show that over two-thirds (69 per cent) of Britons indicated that the COVID-19 pandemic has had a negative impact on their mental health. For nine months, since significant measures were taken in managing the pandemic, Britons have had to adapt to changing conditions in all aspects of their lives, including at work.

- Individuals report that the most stressful part of adapting at work during the pandemic health and safety protocols (32 per cent), followed by job uncertainty (28 per cent), and work strain/overwork (25 per cent).
- The lowest mental health score (-21.6) is observed among the twenty-five per cent of individuals who report work strain/overwork as the most stressful part of adapting at work during the pandemic, followed by twenty-eight per cent who report job uncertainty (-21.5), and twenty-three per cent who report interacting with the public as the most stressful part of adapting at work during the pandemic (-17.7).
- Among the five per cent of respondents that selected 'other,' as the most stressful aspect of adapting at work during the pandemic, the most common responses were home, family, and interaction with others. The mental health of the group reporting 'other' is -16.1.

The most stressful part of adapting at work during the pandemic



MHI score by the most stressful part of adapting at work during the pandemic



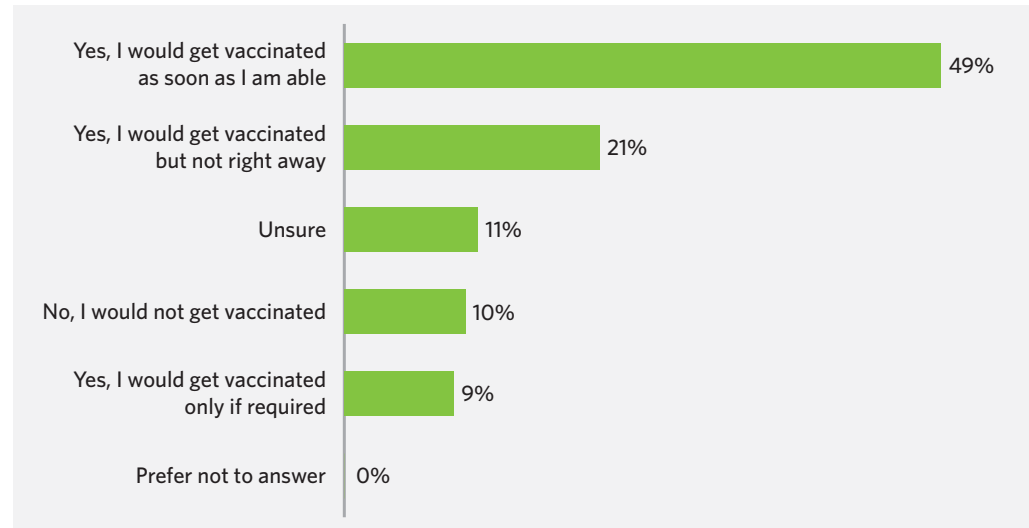


The COVID-19 vaccine

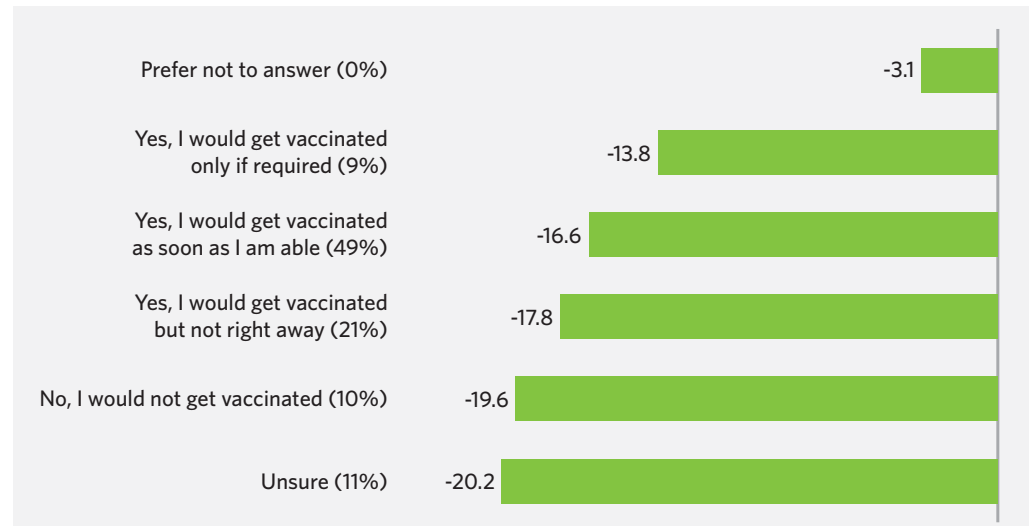
While the COVID-19 pandemic continues to cause restrictions and lockdowns across the country, recent vaccine developments provide some optimism for Britons. Individuals were asked about their willingness to take a COVID-19 vaccine.

- Forty-nine per cent of respondents indicate that they would get vaccinated as soon as they are able. Twenty-one per cent of individuals indicate that they would get vaccinated although not right away.
- Ten per cent of respondents indicate that they would not get vaccinated and the optimism score of this group is the lowest (-19.6) among those that are certain of their position.
- Males are more willing to get a COVID-19 vaccination as soon as possible (56 per cent) when compared to females (40 per cent), and females are fifty per cent more likely to report being unsure about the vaccine than males.
- Thirty-four per cent of individuals between the ages of 20 and 29 report willingness to get the vaccination as soon as possible, whereas seventy-eight per cent of respondents over the age of 70 are willing. Willingness to receive the vaccine steadily increases with age.

Willingness to take a COVID-19 vaccine



Optimism score by willingness to take a COVID-19 vaccine





Pandemic disruption to individuals

The disruption because of the COVID-19 pandemic has been widespread, affecting Britons physically, mentally, socially, financially, at home, and in the workplace. Individuals were asked when they think that most of the disruption because of the pandemic will be over for them personally.

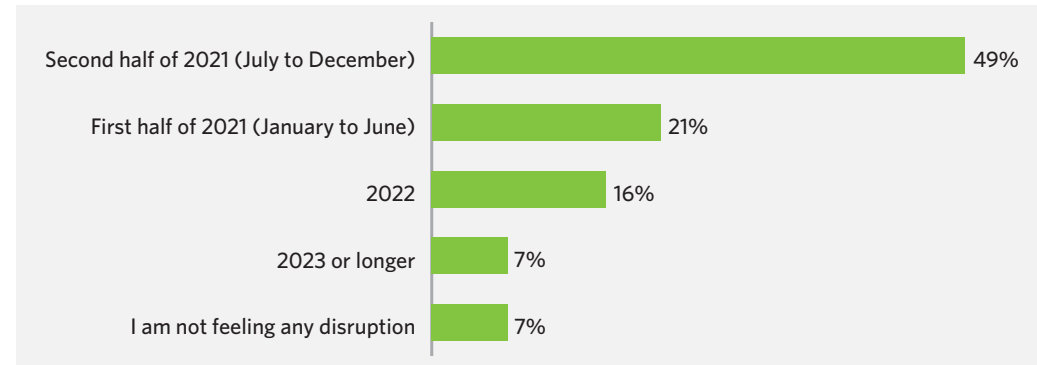
- Forty-nine per cent of individuals indicate that most of the disruption will end for them personally in the second half of 2021, and this group has a mental health score of -13.6, behind twenty-one per cent who indicate that the disruption will end for them in the first half of 2021 (-8.7), and seven per cent who do not feel any disruption (-1.0).
- In general, the longer the disruption is believed to last, the more negative the mental health score.

Concern about the mental health of co-workers

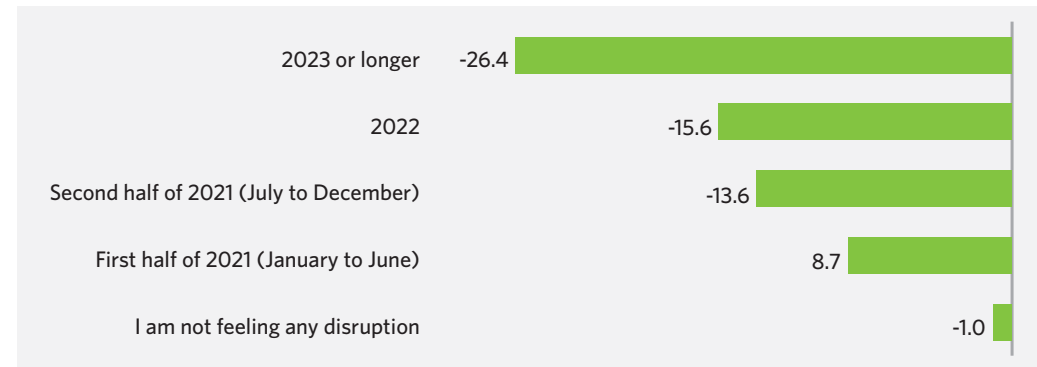
As the pandemic persists into its ninth month, Britons are seeing the impact of the pandemic beyond their personal experience to its effect on others, including their co-workers. Individuals were asked whether they have been concerned about a co-worker's mental health.

- One-third of respondents (33 per cent) report being concerned about a co-worker's mental health.

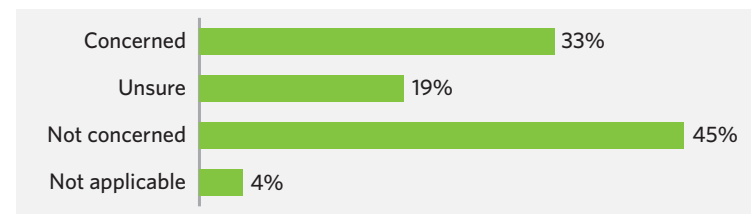
When individuals think the pandemic disruption will end for them personally



MHI score by when individuals think the pandemic disruption will end for them personally



Concern about a co-worker's mental health





Employees and the workplace

Employees thinking about leaving their jobs

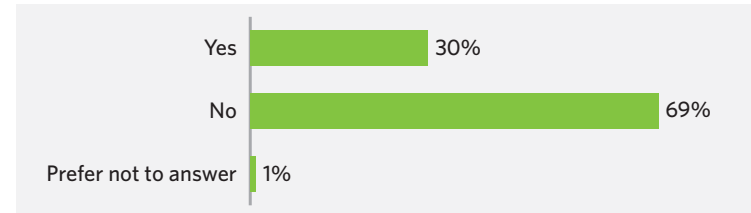
The COVID-19 pandemic has led many Britons to reconsider their personal and professional priorities. Previous findings (November 2020) indicate that over one-quarter (26 per cent) of Britons have considered a job or career change because of the pandemic. In the current month, respondents were asked whether they have considered leaving their jobs since the beginning of 2020, for any reason.

- Nearly one-third (30 per cent) of individuals have thought about leaving their job since 2020.

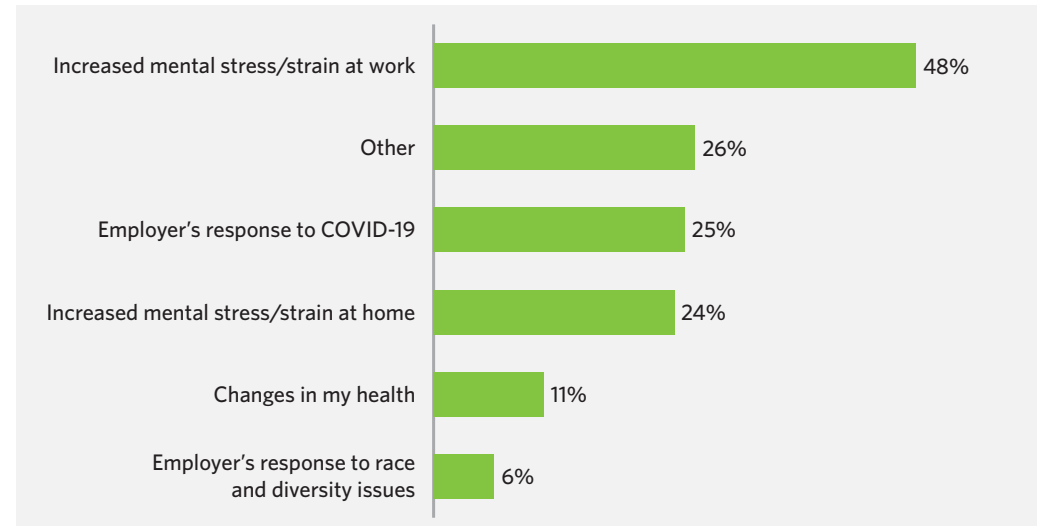
Individuals who indicated they are thinking about leaving their jobs were also asked to provide a reason for considering leaving their positions.

- The most commonly reported reason for considering leaving is increased mental stress/strain at work (48 per cent). This group has a mental health score of -27.1, more than two times lower than the overall average for Britons.
- The lowest mental health score (-32.3) is among eleven per cent of individuals who have considered leaving their jobs due to changes in their health.
- Among the twenty-six per cent that selected 'Other' as a consideration for leaving their job, the most reported reason is for retirement.

Have individuals thought about leaving their job



Reasons employees are thinking about leaving their jobs





- One-quarter (25 per cent) have considered leaving their current job due to their employer's response to COVID-19.
- Individuals working in Health Care and Social Assistance are more likely to consider leaving their jobs (33 per cent) when compared to all other industries combined (28 per cent).
- Those working for companies with 51-100 employees are most likely to consider leaving their jobs (35 per cent), while those who are self-employed are least likely (13 per cent) to leave their jobs.

People leaders

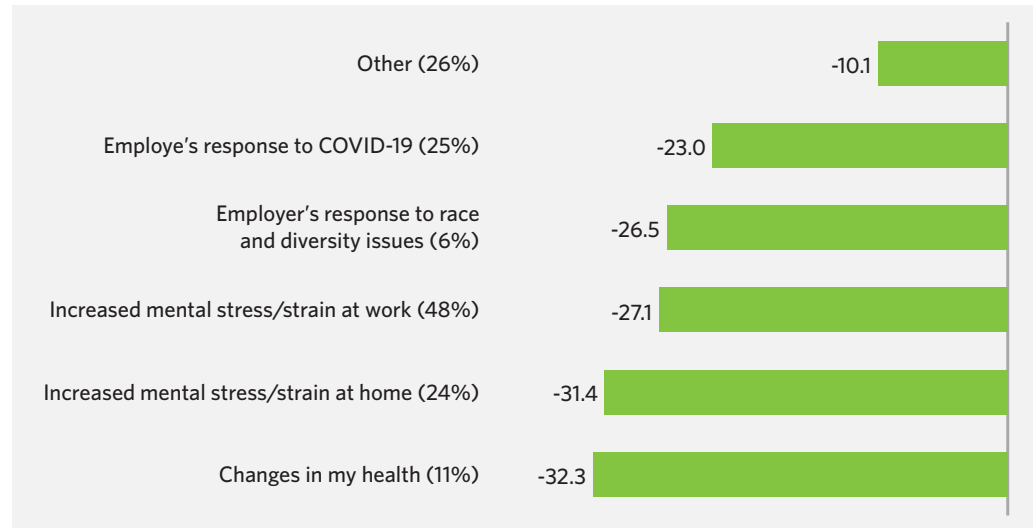
In addition to coping with the personal impact of the pandemic, people leaders are faced with the additional strain of managing a prolonged turbulent period in their workplace. Thirty-nine per cent of respondents report supervising one or more people at work.

When people leaders were asked whether they have had concerns about the mental health of employees since the onset of the pandemic, thirty per cent of supervisors agree and twelve per cent are unsure.

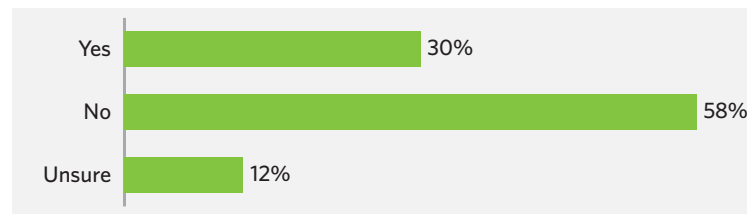
People leaders were asked to rate the productivity of their employees in 2020 when compared to 2019.

- People leaders report that over one-quarter (twenty-six per cent) of their employees are less productive than in 2019, whereas fifty-seven per cent of employees are as productive in 2020 as they were in 2019.

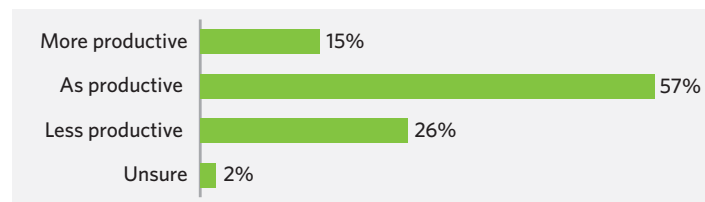
MHI score by reasons employees are thinking about leaving their jobs



Concerns about the mental health of employees since the onset of the pandemic



Supervisor estimates of how productive their employees have been in 2020 compared to 2019



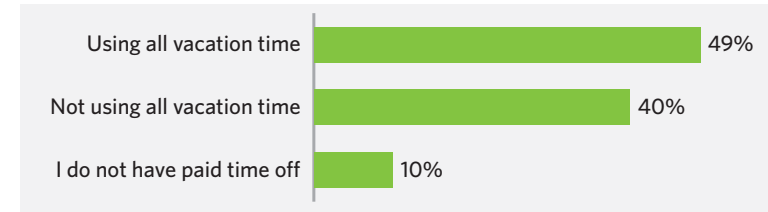


Using employer-paid vacation time

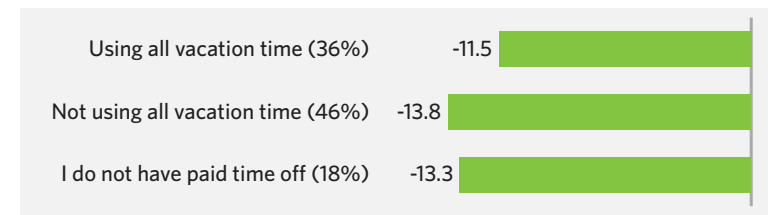
With restrictions on non-essential travel across the globe, taking vacation time involves staying close to home. With travel on hold in 2020, respondents were asked whether they will use their employer-paid vacation allotment.

- Forty per cent of respondents report not using all their vacation time in 2020, whereas forty-nine per cent report using all their vacation time.
- Individuals not using all their vacation time have the lowest mental health score (-13.8), when compared to those with no paid time off (-13.3), and those who are using all their vacation time (-11.5).
- Individuals who remain employed at their full salary and hours are significantly more likely (52 per cent) to take all their vacation when compared to those working reduced hours or in a reduced pay scenario (35 per cent).

Using vacation time in 2020



MHI score by usage of all vacation time in 2020





Expectations for the future

As Britons continue to face the impact of the COVID-19 pandemic, the New Year brings hope for a successful vaccine program and thoughts of when a return to the pre-pandemic state will be within reach.

Changes in work situation

Individuals were asked whether they expect changes in their work situation.

- Sixteen per cent of respondents expect an improvement in their work situation.
- Fourteen per cent of respondents expect their work situation to worsen.

Changes in social relationships

Individuals were asked whether they expect a change in their social relationships.

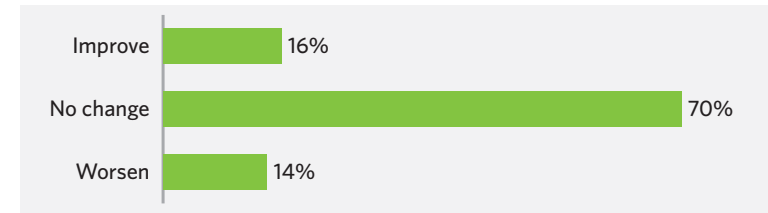
- Seventeen per cent of respondents expect an improvement in their social relationships.
- Twelve per cent of individuals expect their social relationships to worsen.

Changes in the financial situation

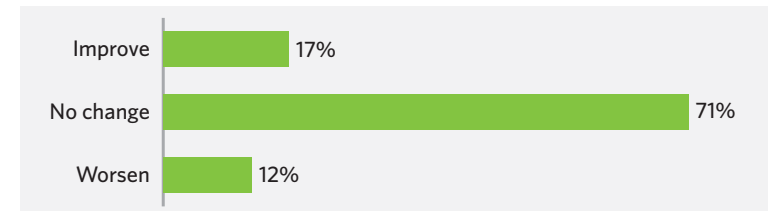
Individuals were asked what change they expect with respect to their financial situation.

- Seventeen per cent of respondents expect an improvement in their financial situation.
- Twenty-one per cent expect their financial situation to worsen.

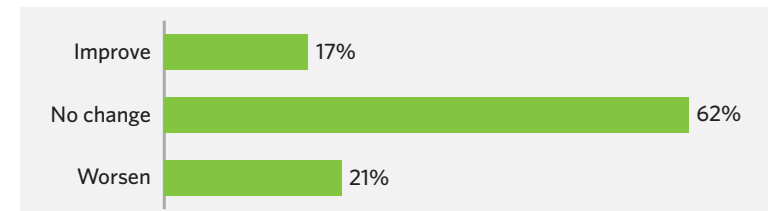
Expected future changes in work situation



Expected future changes in social relationships



Expected future changes in financial situation





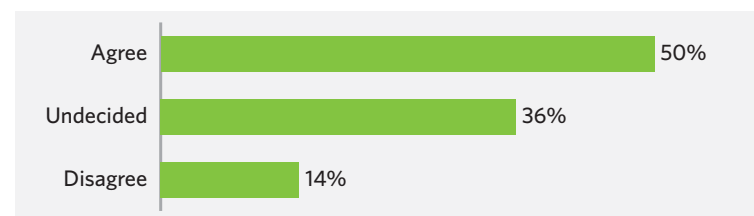
Brand loyalty

The COVID-19 pandemic has upended organizations across the country; a boon for some while others struggle, and those doing okay but where a swing in either direction could land them in either a fortuitous or grave scenario. The perception of how an organization has treated its employees and its customers during the pandemic could have both an immediate and lasting impact on its success.

How companies have treated their employees

- Fifty per cent of respondents agree that the way they think about and interact with brands/companies has been influenced by how they treated their employees during the pandemic.
- Individuals working reduced hours or with reduced pay are most likely to report that the way they think about and interact with brands/companies has been influenced by how they treated their employees during the pandemic (57 per cent), when compared with those who are employed at their full salary and hours (49 per cent).

The way individuals think about and interact with brands/companies has been influenced by how they have treated their people/employees





How companies have supported or treated their customers

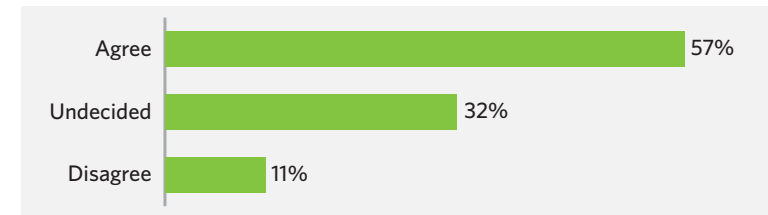
- Fifty-seven per cent of respondents agree that the way they think about and interact with brands/companies has been influenced by how they supported or treated their customers during the pandemic.

How companies have responded to social justice issues

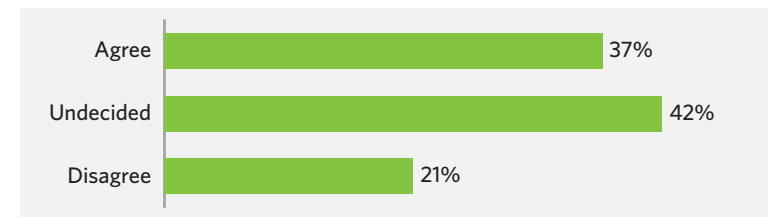
With the high-profile death of Black American, George Floyd, in June 2020, unprecedented awareness of anti-Black racism emerged. Individuals were asked whether the way they think about and interact with brands has been influenced by their response to social justice issues.

- Thirty-seven per cent of respondents agree that the way they think about and interact with brands/companies has been influenced by how they respond to social justice issues.
- Respondents under the age of 40 are significantly more likely to agree that the way they think about and interact with brands/companies has been influenced by how they respond to social justice issues (52 per cent) when compared with those 40 and older (31 per cent).

The way individuals think about and interact with brands/companies has been influenced by how they supported/treated their customers



The way individuals think about and interact with brands/companies has been influenced by their response to social justice issues





Overview of the Mental Health Index™

The mental health and wellbeing of a population is essential to overall health and work productivity. The Mental Health Index™ provides a measure of the current mental health status of employed adults in a given geography, compared to the benchmarks collected in the years of 2017, 2018 and 2019. The increases and decreases in the Index are intended to predict cost and productivity risks, and inform the need for investment in mental health supports by business and government.

The Mental Health Index™ report has three main parts:

1. The overall Mental Health Index™ (MHI), which is a measure of change compared to the benchmark of mental health and risk.
2. A Mental Stress Change (MStressChg) score, which measures the level of reported mental stress, compared to the prior month.
3. A spotlight section that reflects the specific impact of current issues in the community.

Methodology

The data for this report was collected through an online survey of 2,000 Britons who are living in the United Kingdom and are currently employed or who were employed within the prior six months. Participants were selected to be representative of the age, gender, industry, and geographic distribution in the United Kingdom. The same respondents participate each month to remove sampling bias. The respondents were asked to consider the prior two weeks when answering each question. The Mental Health Index™ is published monthly, starting in April 2020. The benchmark data was collected in 2017, 2018 and 2019. The data for the current report was collected between November 20 to November 30, 2020.

Calculations

To create the Mental Health Index™, the first step leverages a response scoring system turning individual responses to each question into a point value. Higher point values are associated with better mental health and less mental health risk. Each individual's scores are added and then divided by the total number of possible points to get a score out of 100. The raw score is the mathematical mean of the individual scores.



To demonstrate change, the current month's scores are then compared to the benchmark and the prior month. The benchmark is comprised of data from 2017, 2018 and 2019. This was a period of relative social stability and steady economic growth. **The change relative to the benchmark is the Mental Health Index™. A score of zero in the Mental Health Index™ reflects no change, positive scores reflect improvement, and negative scores reflect decline.**

A Mental Stress Change score is also reported given that increasing and prolonged mental stress is a potential contributor to changes in mental health. It is reported separately and is not part of the calculation of the Mental Health Index™. The Mental Stress Change score is (percentage reporting less mental stress + percentage reporting the same level of mental stress * 0.5) * -1 + 100. The data compares the current to the prior month. **A Mental Stress Change score of 50 reflects no change in mental stress from the prior month. Scores above 50 reflect an increase in mental stress, scores below 50 reflect a decrease in mental stress.** The range is from zero to 100. A succession of scores over 50, month over month, reflects high risk.

Additional data and analyses

Demographic breakdown of sub-scores, and specific cross-correlational and custom analyses are available upon request. Benchmarking against the national results or any sub-group, is available upon request. Contact MHI@morneaushepell.com

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