

The Mental Health Index™ report

The United States, December 2020



LifeWorks
by Morneau Shepell

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December highlights

For nine consecutive months, the mental health of Americans has been significantly lower than prior to the COVID-19 pandemic. After the initial significant decline measured in April 2020, there were modest increases from April to July 2020. A reversal of this trend occurred in August and September, followed by a modest improvement in October, and declines in November and December, dropping to its lowest point, equal to April 2020. The level of mental health in November remains concerning as it indicates that **the working population is currently as distressed as the most distressed seven percent of working Americans, prior to 2020.**

The proportion of individuals reporting more stress than the prior month (25 percent) is four percent higher than the previous month, while the proportion of individuals reporting less mental stress is only 8 percent. The majority (67 percent) 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 Americans is at the lowest point (1.2) since the inception of the Index™, in April 2020.**

Isolation scores have remained at least 9 points below the pre-pandemic benchmark, which indicates significantly greater isolation. **In December, the isolation score is -9.0, which is at its lowest level** and 1.1 points below the previous lowest score in April 2020.

Regional mental health scores since April have shown general improvement until July; however, since July, all regions have shown a declining trend. Since October, all regions have continually declining scores culminating in scores below or nearing the lowest scores since April. **The greatest decrease in mental health is observed in the Western United States with a decline of 1.3 points from November.**

For the ninth consecutive month, full-time students have the lowest mental health score (-19.8) when compared to individuals across all industry sectors. Further, students have the most significant increase in mental stress change (68.1), when compared to all other groups.

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.



For nine months, since significant measures were taken in managing the pandemic, Americans 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 the health and safety protocols** (43 percent), followed by interacting with the public (29 percent), and job uncertainty (24 percent). **The lowest mental health score (-16.7) is observed among the twenty-four percent of individuals who report job uncertainty as the most stressful part of adapting at work during the pandemic**, followed by twenty-one percent who report work strain/overwork (-16.5), and fifteen percent who report a change in work location (-12.8).

The COVID-19 pandemic has led many Americans to reconsider their personal and professional priorities. Previous findings (November 2020) indicate that nearly one-quarter (24 percent) of Americans 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. Over one-quarter (28 percent) of individuals have thought about leaving their job. **The most reported reason for considering leaving is increased mental stress/strain at work (53 percent)**. Nearly one-third (31 percent) have considered leaving their current job due to their employer's response to COVID-19.

As the pandemic persists into its ninth month, Americans are seeing the impact of the pandemic beyond their personal experience to its effect on others, including their co-workers. **Over one-third of respondents (35 percent) 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-nine percent of supervisors agreed.**

People leaders report that twenty-one percent of their employees are less productive than in 2019, whereas fifty-two percent of 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. **Nearly half of respondents (48 percent) report not using all their vacation time in 2020**, whereas only thirty-four percent report using all their vacation time. Individuals



without paid time off have the lowest mental health score, when compared to those using all or partial vacation time.

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-four percent 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.**

Sixty percent 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. **Forty-two percent 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 Americans.

Thirty-seven percent of respondents indicate that they would get vaccinated as soon as they are able. Twenty-eight percent 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 Americans physically, mentally, socially, financially, at home, and in the workplace. Forty-four percent of individuals indicate that most of the disruption will end for them personally in the second half of 2021, and this group has the lowest mental health score (-7.1) other than ten percent of respondents who report not feeling any disruption. **In general, the longer the disruption is believed to last because of the COVID-19 pandemic, the more negative the mental health score.**

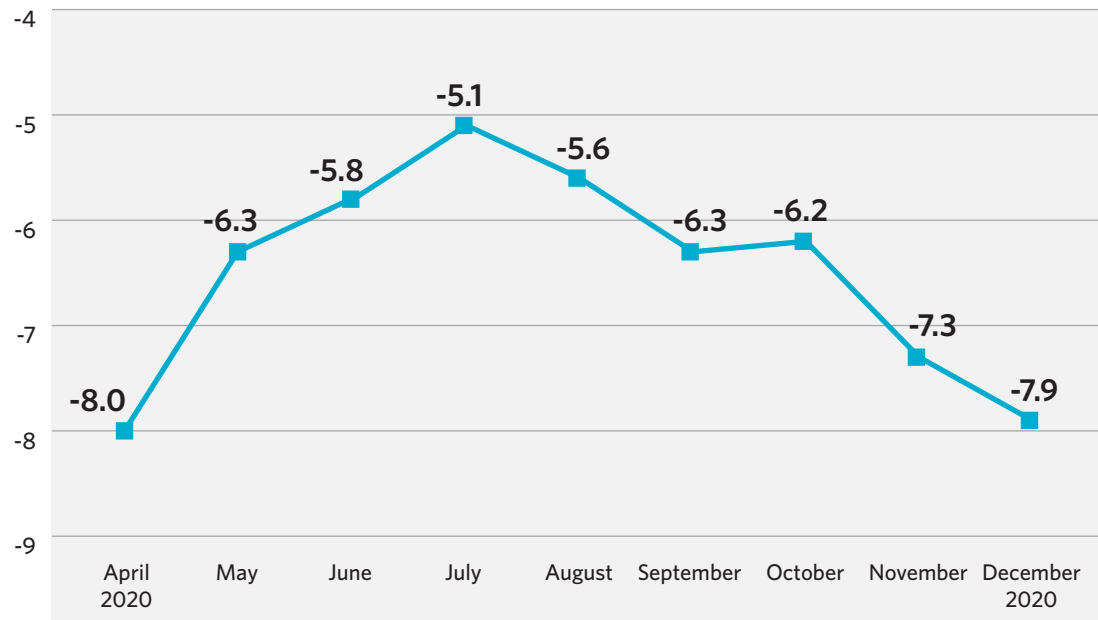


The Mental Health Index™

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 -8 points.** An 8-point decrease from the pre-COVID-19 benchmark reflects a population whose mental health is similar to the most distressed seven percent of the benchmark population.

Current month
December 2020: **-8**

November 2020: -7



December marks the ninth consecutive month where the Mental Health Index™ reflects strained mental health in the U.S. 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 anxiety (-10.2), followed by work productivity (-9.9), depression (-9.7), isolation (-9.0), and optimism (-7.7). The risk measure with the best mental health score is financial risk (5.1), followed by general psychological health (1.2).

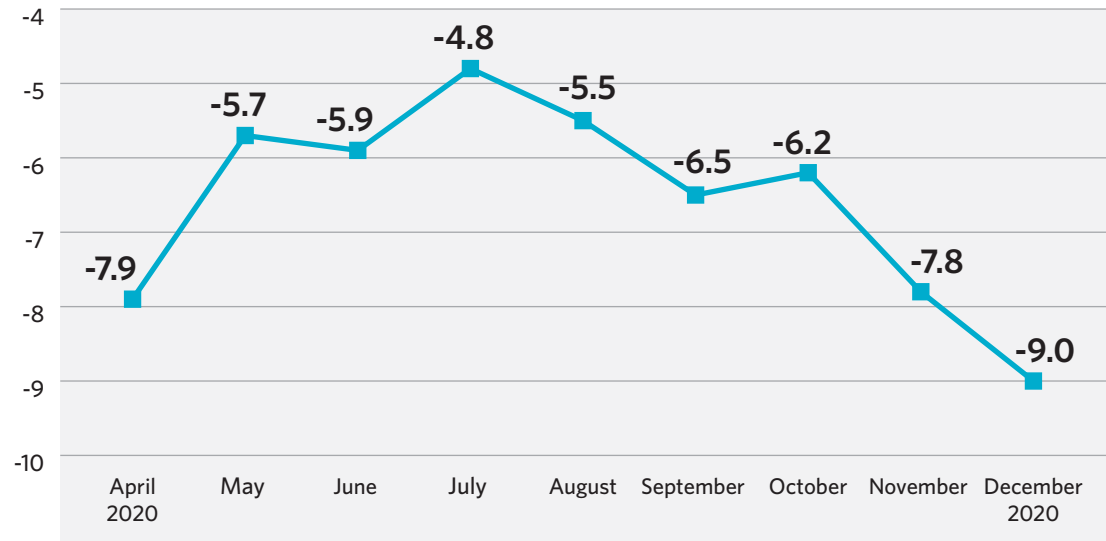
- All mental health sub-scores, except for optimism, declined in December when compared to November.
- The financial risk score has the greatest decrease, declining 1.6 points from the prior month, followed by a decline of 1.3 points for work productivity, and 1.2 points for isolation.
- Despite the decline observed in December, the financial risk score remains the strongest of all sub-scores and is above the pre-2020 benchmark.

MHI sub-scores ²	December 2020	November 2020
Anxiety	-10.2	-9.6
Work productivity	-9.9	-8.6
Depression	-9.7	-9.1
Isolation	-9.0	-7.8
Optimism	-7.7	-7.9
Psychological health	1.2	1.4
Financial risk	5.1	6.7

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



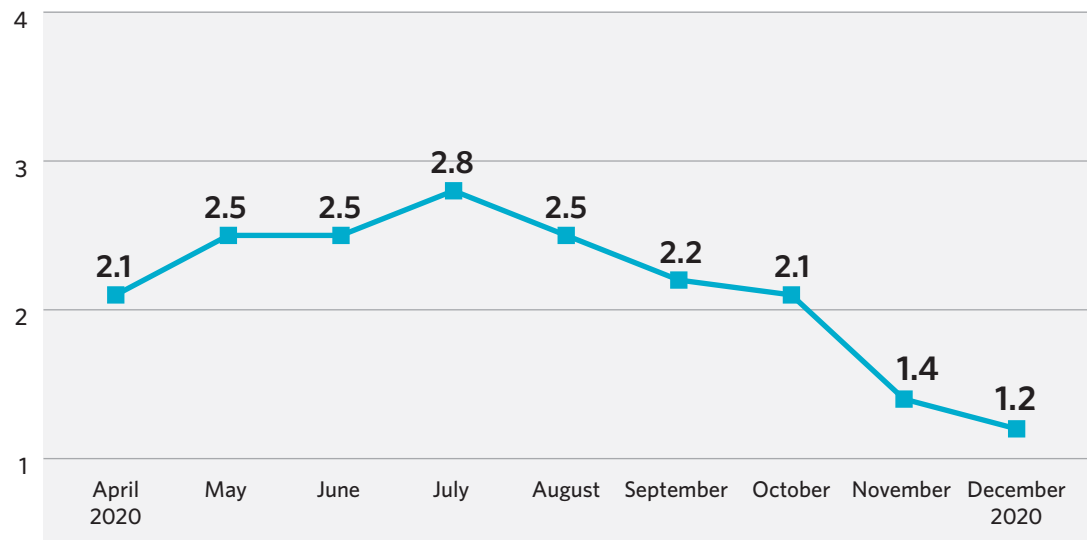
Isolation



Isolation

From April to July 2020, there was an increase to the peak isolation sub-score (-4.8). Since July, the isolation score has been marked by a downward trend. December 2020 marks the lowest isolation score (-9.0) recorded for the United States since the inception of the Mental Health Index™ in April, corresponding with the first wave of the COVID-19 pandemic.

General psychological health

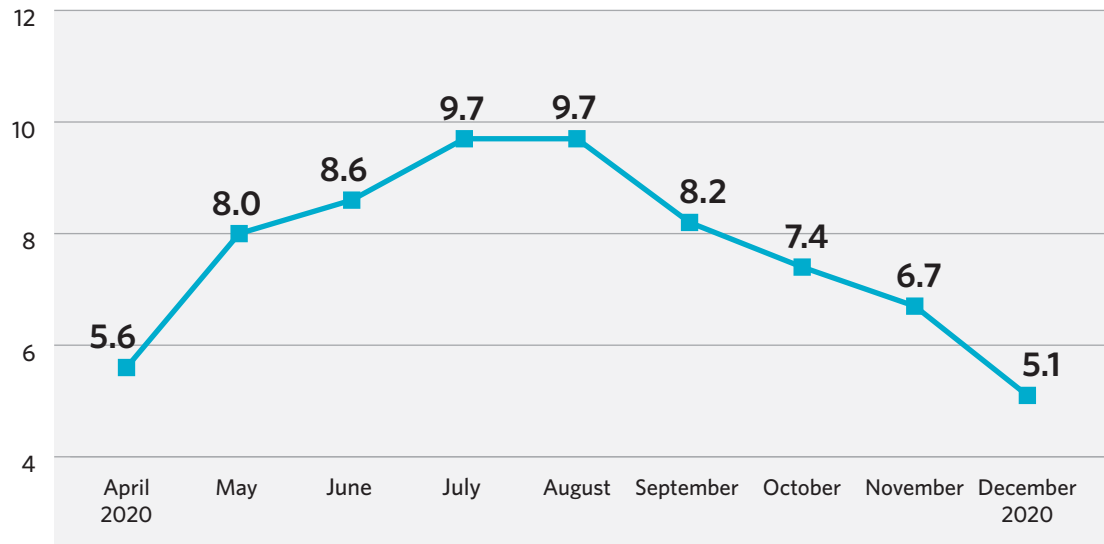


General psychological health

From April to July there was modest improvement in the psychological health of Americans; however, since July, the overall trend in psychological health has deteriorated as the pandemic continues.



Financial Risk



Financial risk

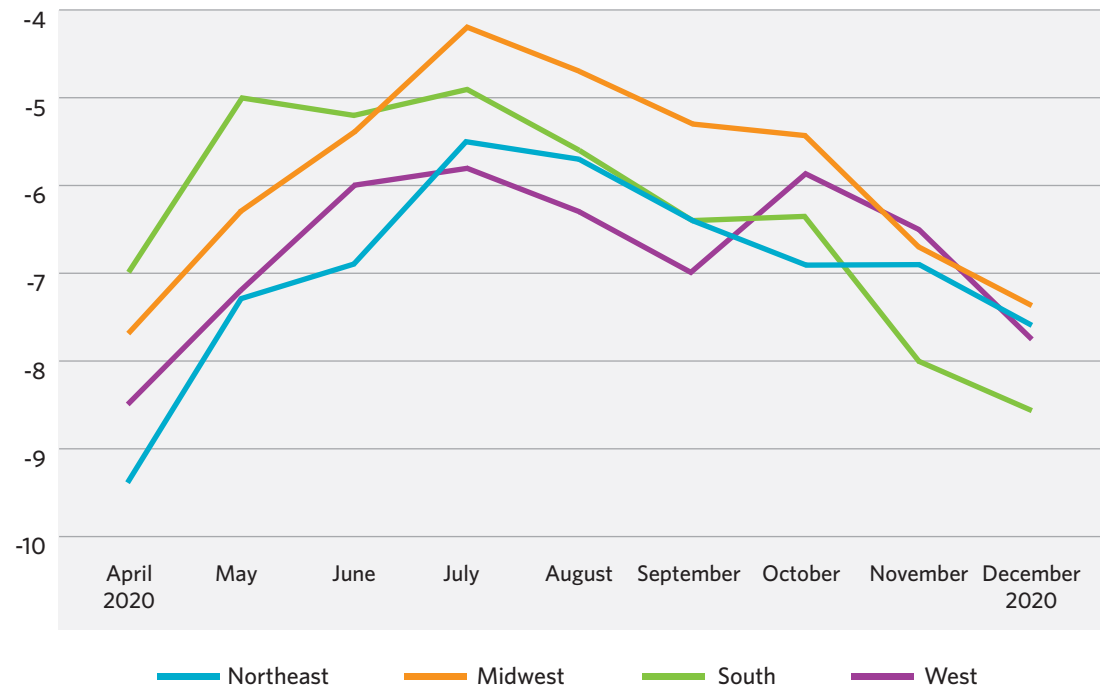
Financial risk continues to be the strongest sub-scale and is above the pre-2020 benchmark; however, the peak financial risk scores occurred in July and August (9.7). Since August, the financial risk score has declined and in December, it is at its lowest point (5.1), suggesting that Americans are depleting their emergency savings as the pandemic continues.



The Mental Health Index™ (regional)

Regional mental health scores since April have shown general improvement until July; however, since July, all regions have shown a declining trend. Since October, all regions have continually declining scores culminating in scores below (South) or nearing the lowest scores since inception of the Index™ in April.

United States regional Mental Health Index™ scores





Demographics

- For nine consecutive months, females (-9.9) have a significantly lower mental health score than males (-5.6); we have also observed that mental health scores improve with age.
- Respondents identifying as Mixed (Black and other) have the lowest mental health score (-18.6), followed by those identifying as Mixed (Other) (-15.4).
- Individuals identifying as South East Asian have the highest mental health score (-4.7), followed by respondents identifying as East Asian (-5.1), and those identifying as White (-7.4).
- 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 (-12.9) when compared to those without children (-5.9).

Employment

- Overall, five percent of respondents are unemployed. While most individuals remain employed, 16 percent report reduced hours or reduced salary since April 2020.
- Individuals reporting reduced salary when compared to the prior month (-19.9) have the lowest mental health score, followed by those who report fewer hours when compared to the prior month (-15.5), and those not currently employed (-11.7).
- Individuals working in organizations with more than 10,000 employees have the highest mental health score -4.3.
- Respondents who report working for companies with 51-100 employees have the lowest mental health score (-11.9).

Emergency savings

- Individuals without emergency savings continue to experience a lower score in mental health (-23.9) than the overall group. Those reporting an emergency fund have an average mental health score of -2.1.



Employment status	December	November
Employed (no change in hours/salary)	-6.0	-5.2
Employed (fewer hours compared to last month)	-15.5	-15.3
Employed (reduced salary compared to last month)	-19.9	-17.6
Not currently employed	-11.7	-12.5

Age group	December	November
Age 20-29	-20.2	-18.5
Age 30-39	-14.1	-13.2
Age 40-49	-9.9	-8.7
Age 50-59	-3.2	-2.8
Age 60-69	1.0	2.6

Number of children	December	November
No children in household	-5.9	-5.2
1 child	-12.9	-13.5
2 children	-12.4	-10.6
3 children or more	-12.0	-11.2

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
Northeast	-7.6	-7.5
Midwest	-7.4	-6.7
South	-8.6	-8.0
West	-7.8	-6.5

Gender	December	November
Male	-5.6	-4.8
Female	-9.9	-9.4

Income	December	November
Household income <\$30K/annum	-17.9	-15.9
\$30K to <\$60K/annum	-11.7	-12.1
\$60K to <\$100K	-6.9	-6.0
\$100K to <\$150K	-5.6	-4.6
\$150K or more	0.5	0.6

Racial identification	December	November
Black	-11.7	-11.7
East Asian	-5.1	-6.5
Indigenous/Aboriginal	-12.6	-17.5
Latin, South or Central American	-9.3	-8.8
South Asian	-9.5	-9.8
South East Asian	-4.7	-6.2
White	-7.4	-6.3
Mixed (Black and other)	-18.6	-9.6
Mixed (Other)	-15.4	-14.4
Prefer not to answer	-10.5	-12.3
Other*	-14.3	-14.4

* Included in this category are Arab/Middle Eastern/West Asian and Pacific Islander, as the minimum threshold for reporting was not met for each group.

Employer size	December	November
Self-employed/sole proprietor	-9.0	-7.2
2-50 employees	-7.2	-6.9
51-100 employees	-11.9	-10.8
101-500 employees	-8.5	-8.0
501-1,000 employees	-9.0	-8.3
1,001-5,000 employees	-7.7	-6.6
5,001-10,000 employees	-5.7	-6.9
More than 10,000 employees	-4.3	-3.7



The Mental Health Index™ (industry)

For the ninth consecutive month, full-time students have the lowest mental health score (-19.8). This continues to be notably lower than the next lowest score, among individuals in Information and Cultural Industries (-17.0), and Food Services (-16.7) industries. The highest mental health scores this month are observed among individuals employed in Public Administration (-1.3), Real Estate, Rental and Leasing (-2.8), and Professional, Scientific and Technical Services (-3.3) industries. Individuals employed in Utilities, Real Estate, Rental and Leasing, and Arts, Entertainment and Recreation 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	-10.2	-15.3	5.2
Real Estate, Rental and Leasing	-2.8	-7.6	4.7
Arts, Entertainment and Recreation	-8.2	-10.6	2.3
Management of Companies and Enterprises	-12.1	-13.9	1.8
Public Administration	-1.3	-2.8	1.5
Finance and Insurance	-4.2	-5.0	0.8
Retail Trade	-9.6	-10.4	0.8
Agriculture, Forestry, Fishing and Hunting	-5.4	-5.8	0.5
Health Care and Social Assistance	-8.7	-9.0	0.4
Food Services	-16.7	-16.8	0.1
Administrative and Support services	-10.9	-10.9	0.0
Professional, Scientific and Technical Services	-3.3	-2.6	-0.6
I am a student	-19.8	-19.1	-0.7
Manufacturing	-5.7	-4.7	-1.0
Educational Services	-6.4	-5.1	-1.4
Transportation and Warehousing	-9.0	-6.9	-2.1
Other	-8.2	-5.5	-2.8
Other services (except Public Administration)	-7.8	-4.8	-3.0
Wholesale Trade	-15.2	-12.1	-3.1
Construction	-10.3	-6.9	-3.4
Accommodation	-10.8	-6.5	-4.3
Information and Cultural Industries	-17.0	-12.4	-4.6

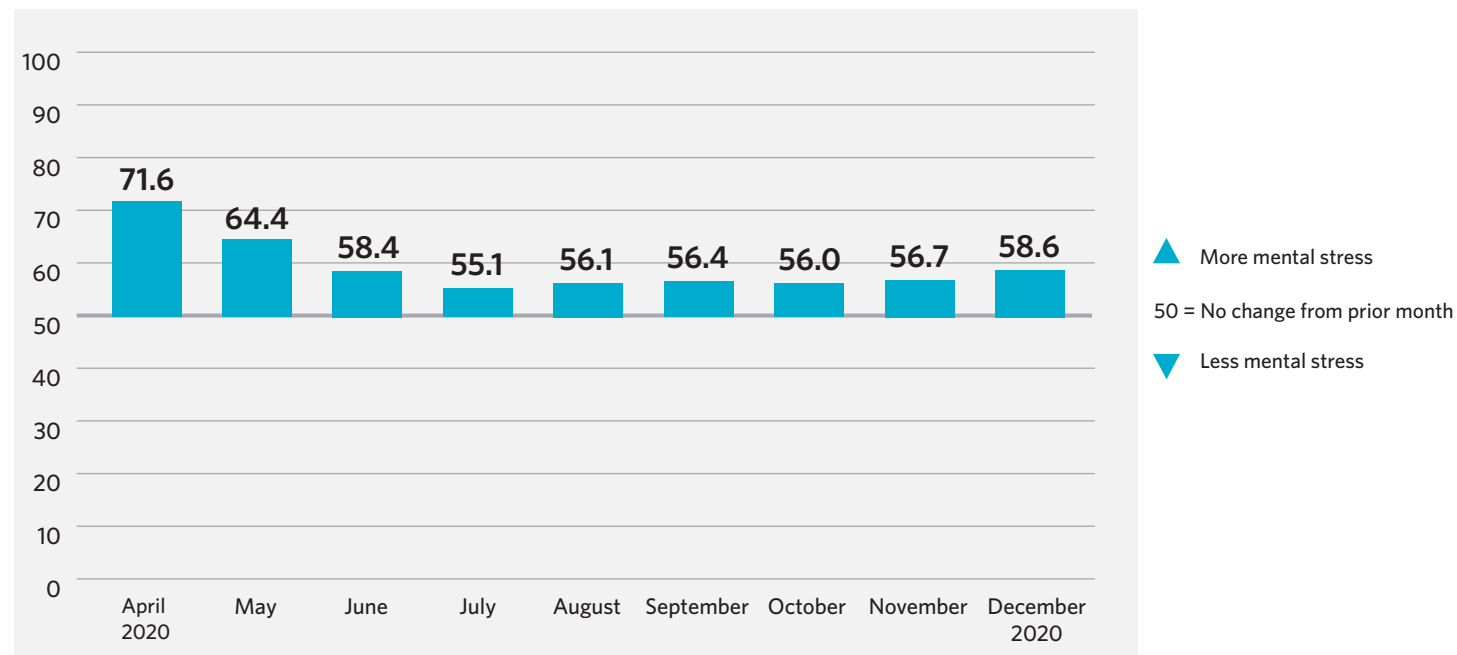


The Mental Stress Change score

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 in December 2020 is 58.6.** This reflects a net increase in mental stress compared to the prior month.

The current score indicates that 25 percent of the population is experiencing more mental stress compared to the prior month, with 8 percent experiencing less. A continued increase in mental stress over the last nine months indicates a significant accumulation of strain in the population.

Current month December 2020:	58.6	November 2020: 56.7
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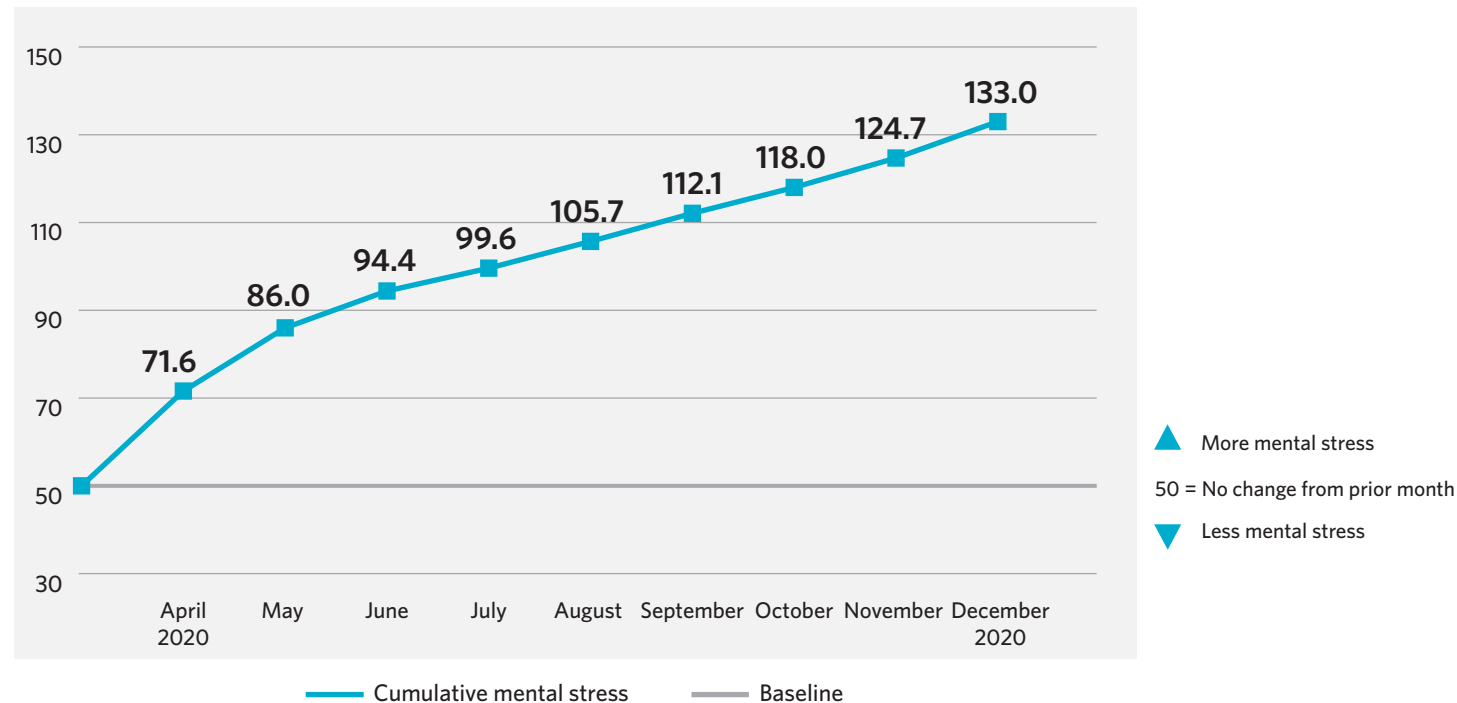


Mental Stress Change (cumulative)

The Mental Stress Change Score (MStressChg) 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 Americans 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





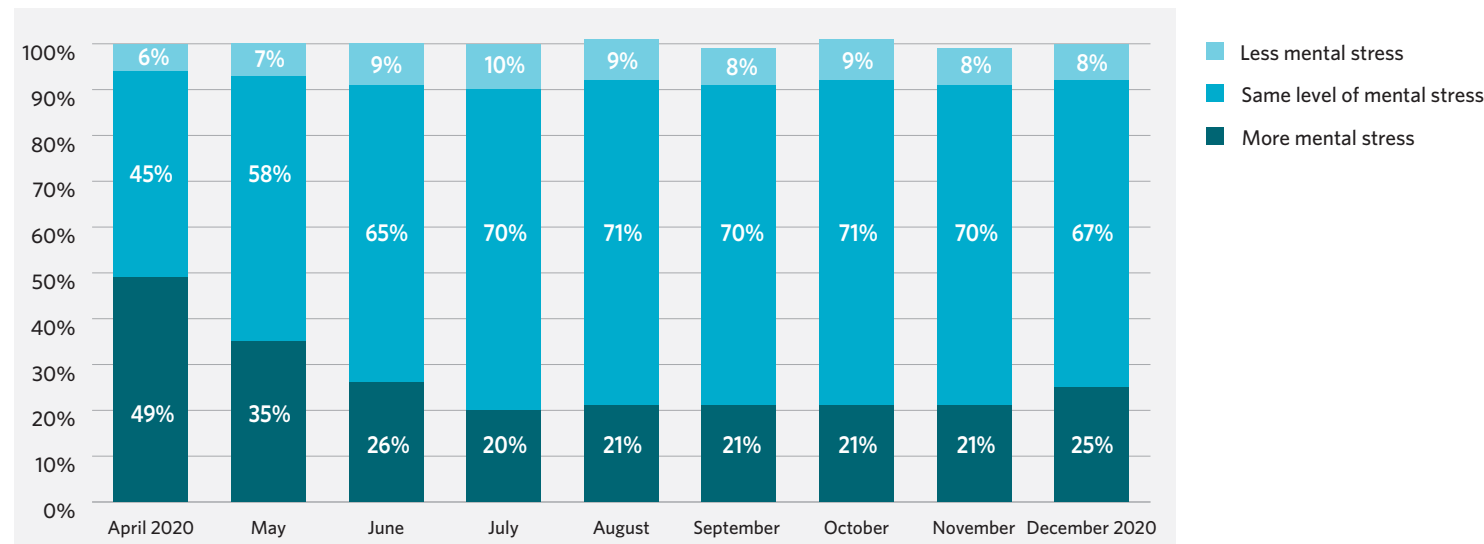
Mental Stress Change (percentages)

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 will not be able to adequately reach a more sustainable and health level of stress.

In April, 49 percent of individuals reported an increase in mental stress. While those reporting increased month-over-month mental stress has decreased to 25 percent in December 2020, 67 percent of respondents report the same level of mental stress and only 8 percent 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 Indigenous/Aboriginal have the most favorable mental stress change score (51.9).
- Individuals identifying as Mixed (Black and other) have the least favorable mental stress change score (61.5), followed by respondents identifying as Latin, South, or Central American (59.9), and those identifying as White (59.2).

Geography

- Considering geography, the greatest increase in stress month-over-month is for respondents living in the Midwest (60.1), followed by the West (59.3), the South (58.2), and the Northeast (57.2).

Employment

- The greatest increase in mental stress is seen in employed people with reduced salary (69.6), followed by employed people with reduced hours (64.4), when compared to unemployed people (63.8) and employed people with no change to salary or hours (56.9).



Employment status	December	November
Employed (no change in hours/salary)	56.9	55.2
Employed (fewer hours compared to last month)	64.4	62.1
Employed (reduced salary compared to last month)	69.6	64.4
Not currently employed	63.8	60.2
Age group	December	November
Age 20-29	65.5	62.5
Age 30-39	61.9	58.6
Age 40-49	58.8	57.2
Age 50-59	57.1	55.2
Age 60-69	53.4	52.3
Number of children	December	November
No children in household	57.0	55.1
1 child	62.2	61.9
2 children	63.3	58.4
3 children or more	61.0	60.1

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
Northeast	57.2	57.7
Midwest	60.1	57.0
South	58.2	56.0
West	59.3	56.3
Gender	December	November
Male	57.6	55.3
Female	59.6	57.9
Income	December	November
Household income <\$30K/annum	61.5	57.2
\$30K to <\$60K/annum	60.2	58.6
\$60K to <\$100K	59.2	56.4
\$100K to <\$150K	58.0	56.9
\$150K or more	55.4	54.3

Racial identification	December	November
Black	57.5	54.7
East Asian	56.7	53.7
Indigenous/Aboriginal	51.9	60.9
Latin, South or Central American	59.9	56.1
South Asian	56.0	48.7
South East Asian	54.2	52.2
White	59.2	57.2
Mixed (Black and other)	61.5	61.1
Mixed (Other)	56.9	62.1
Prefer not to answer	52.0	52.3
Other*	54.2	62.5
* Included in this category are Arab/Middle Eastern/West Asian and Pacific Islander, as the minimum threshold for reporting was not met for each group.		
Employer size	December	November
Self-employed/sole proprietor	57.5	57.2
2-50 employees	57.6	55.9
51-100 employees	59.7	57.7
101-500 employees	58.3	58.2
501-1,000 employees	61.4	58.8
1,001-5,000 employees	59.8	56.3
5,001-10,000 employees	58.1	55.7
More than 10,000 employees	56.4	53.8



The Mental Stress Change (industry)

Mental Stress Change scores for the Mining and Oil and Gas Extraction, Real Estate, Rental and Leasing, and Management of Companies and Enterprises industries are less steep when compared to the prior month.

Students have the most significant increase in Mental Stress Change (68.1) followed by individuals employed in Food Services (66.1), and Information and Cultural Industries (63.8).

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

Industry	December 2020	November 2020
Real Estate, Rental and Leasing	52.3	58.6
Management of Companies and Enterprises	54.4	58.9
Public Administration	55.3	54.5
Professional, Scientific and Technical Services	55.9	54.6
Educational Services	56.9	56.4
Finance and Insurance	57.6	53.5
Manufacturing	57.7	53.6
Other services (except Public Administration)	57.9	56.6
Arts, Entertainment and Recreation	58.3	58.5
Other	58.4	55.1
Administrative and Support services	58.7	57.9
Utilities	59.1	61.3
Wholesale Trade	59.1	56.1
Agriculture, Forestry, Fishing and Hunting	59.2	58.3
Accommodation	59.2	55.6
Retail Trade	59.4	56.3
Construction	59.6	54.8
Transportation and Warehousing	60.5	59.4
Health Care and Social Assistance	61.1	59.6
Information and Cultural Industries	63.8	63.6
Food Services	66.1	61.2
I am a student	68.1	57.3



Spotlight

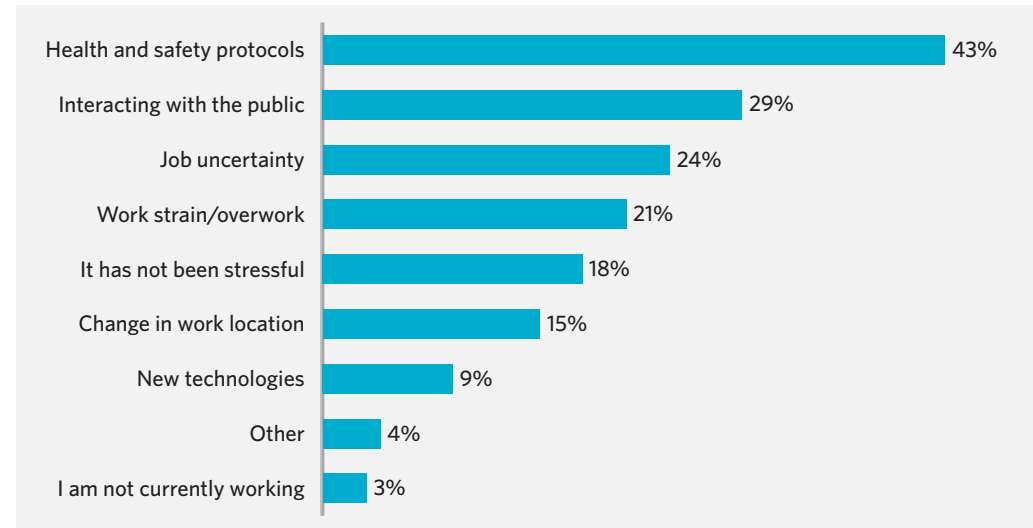
Living during a pandemic

Adaptation

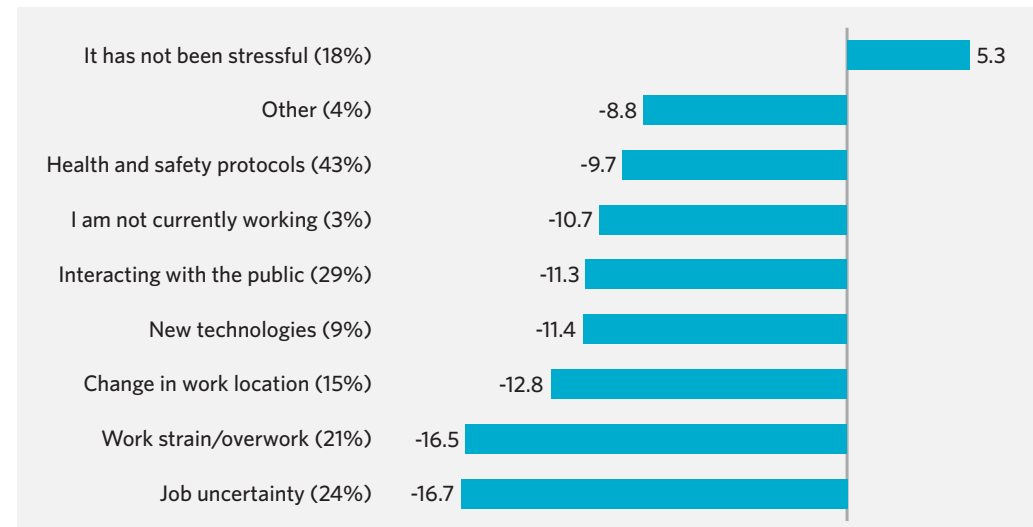
Previous findings (May 2020) show that nearly two-thirds (66 percent) of Americans indicated that the COVID-19 pandemic has had a negative impact on their mental health. For nine months, since significant measures were taken in managing the pandemic, Americans have had to adapt to changing conditions in all aspects of their lives, including at work.

- Individuals report that the most stressful part of adapting at work during the pandemic is the health and safety protocols (43 percent), followed by interacting with the public (29 percent), and job uncertainty (24 percent).
- The lowest mental health score (-16.7) is observed among the twenty-four percent of individuals who report job uncertainty as the most stressful part of adapting at work during the pandemic, followed by twenty-one percent who report work strain/overwork (-16.5), and fifteen percent who report a change in work location (-12.8).
- Among the four percent of respondents that selected 'other,' as the most stressful aspect of adapting at work during the pandemic, the most common responses were finances, home, health, and kids.

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



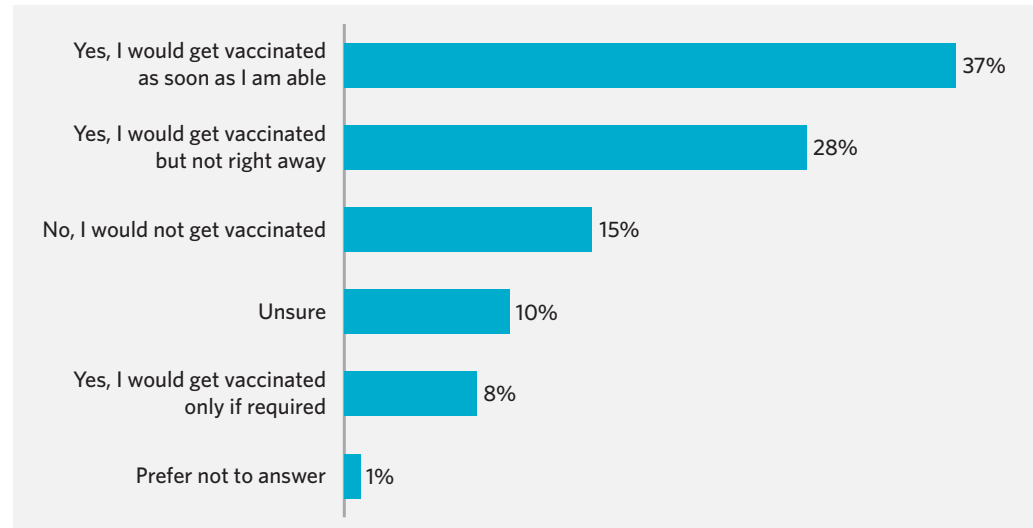


The COVID-19 vaccine

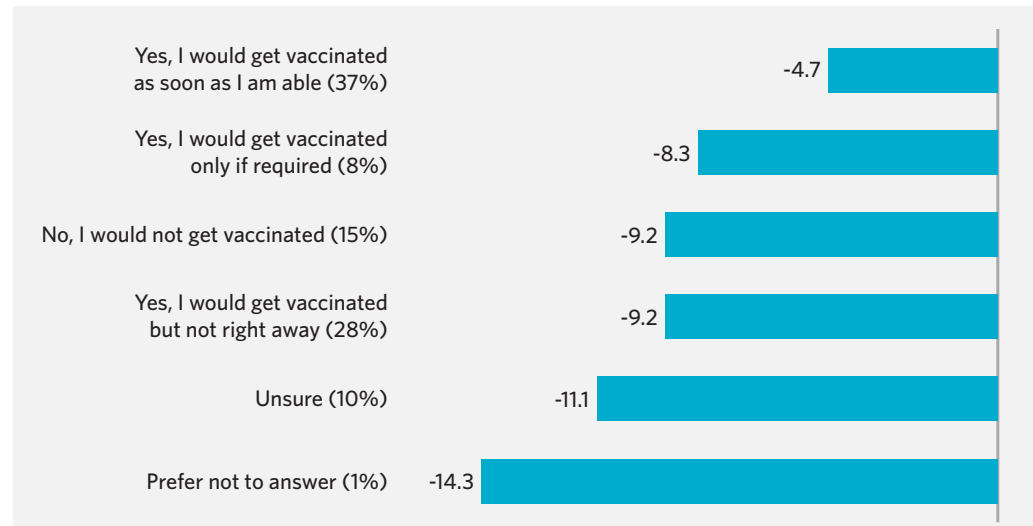
While the COVID-19 pandemic continues to cause restrictions and lockdowns across the country, recent vaccine developments provide some optimism for Americans. Individuals were asked about their willingness to take a COVID-19 vaccine.

- Thirty-seven percent of respondents indicate that they would get vaccinated as soon as they are able. Twenty-eight percent of individuals indicate that they would get vaccinated although not right away.
- Males are more willing to get a COVID-19 vaccination as soon as possible (46 percent) when compared to females (30 percent), and females are nearly twice as likely to report being unsure about the vaccine than males.
- Eighteen percent of individuals between the ages of 20 and 29 report willingness to get the vaccination as soon as possible, whereas fifty-six percent 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 Americans 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.

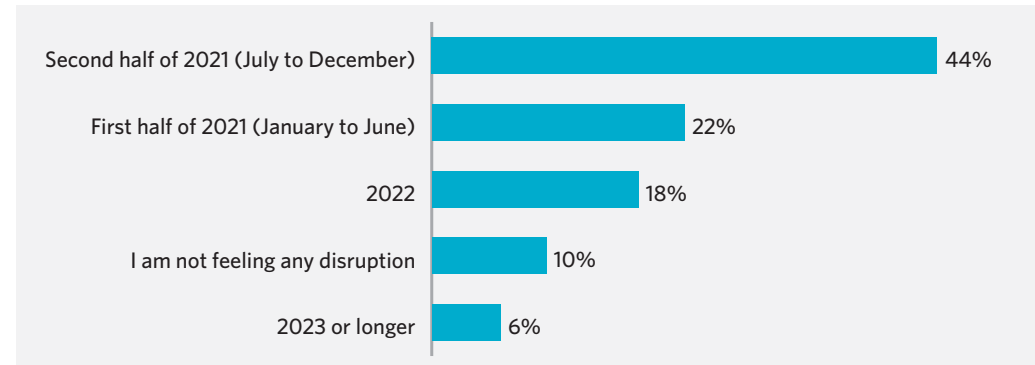
- Forty-four percent of individuals indicate that most of the disruption will end for them personally in the second half of 2021, and this group has the most favorable mental health score (-7.1) other than ten percent of respondents who report not feeling any disruption.
- In general, the longer the disruption is believed to last, the more negative the mental health score.
- Individuals between the ages of 20 and 29 are approximately fifty percent more likely to believe that the pandemic disruption will end in the first half of 2021 when compared to those who are older than 60.

Concern about the mental health of co-workers

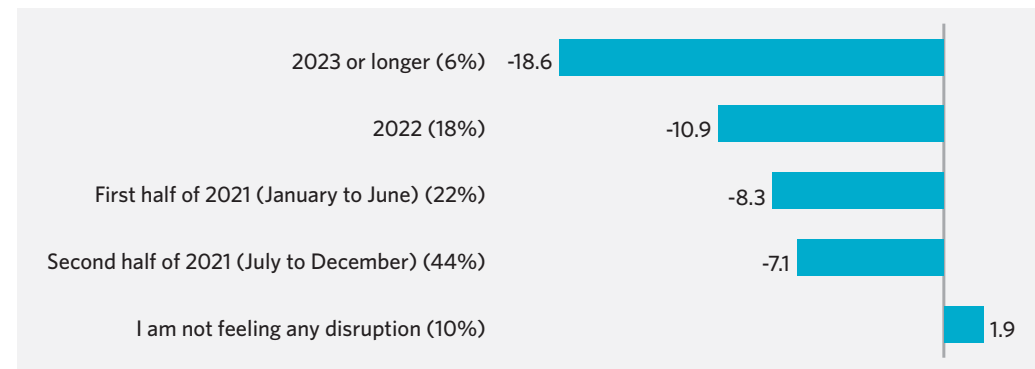
As the pandemic persists into its ninth month, Americans are seeing the impact of the pandemic beyond their personal experience to its effect on others, including their co-workers. Individuals were asked whether they have been concerned about a co-worker's mental health.

- Over one-third of respondents (35 percent) report being concerned about a co-worker's mental health.

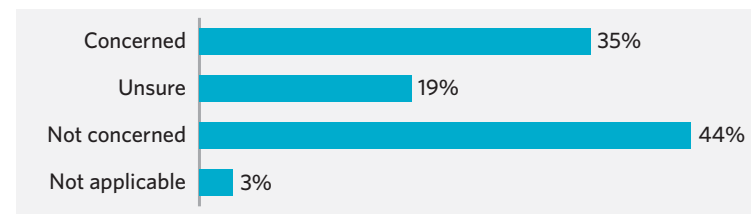
When individuals think the pandemic disruption will end for them personally



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

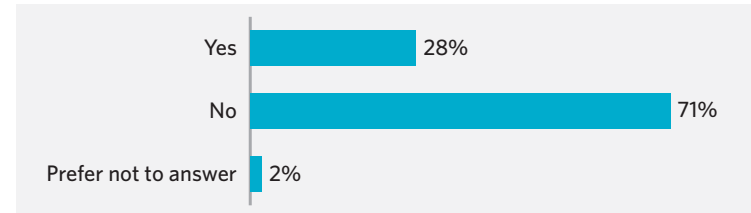
The COVID-19 pandemic has led many Americans to reconsider their personal and professional priorities. Previous findings (November 2020) indicate that nearly one-quarter (24 percent) of Americans have considered a job or career change. In the current month, respondents were asked whether they have considered leaving their jobs since the beginning of 2020, for any reason.

- Over one-quarter (28 percent) of individuals have thought about leaving their job since 2020.

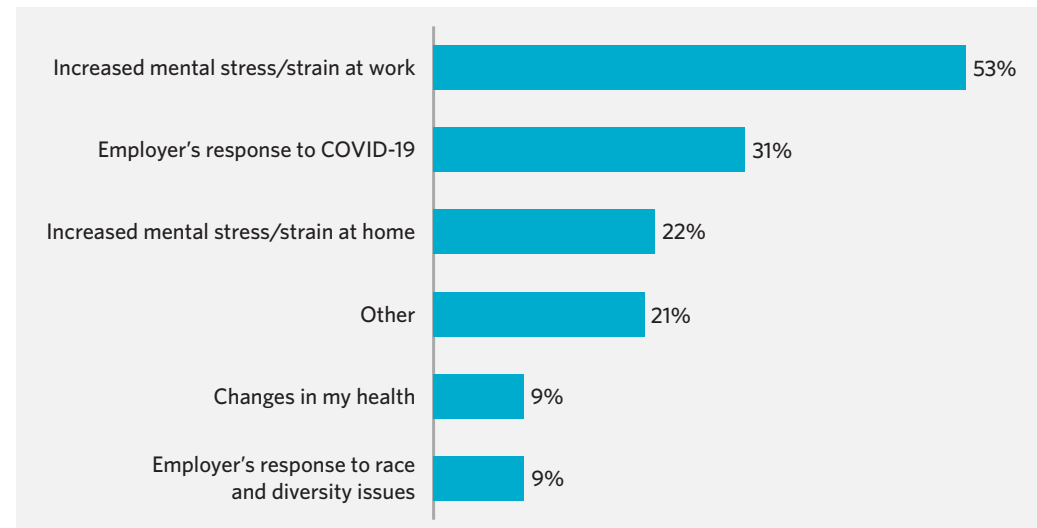
Individuals who indicated that they are thinking about leaving their jobs were asked to provide a reason for considering leaving their positions.

- The most reported reason for considering leaving is increased mental stress/strain at work (53 percent). This group has a mental health score of -21.4, more than two and a half times lower than the overall average for Americans.
- The lowest mental health score (-28.7) is among twenty-two percent of individuals who have considered leaving their jobs due to increased mental stress/strain at home.
- Among the twenty-one percent that selected 'Other' as a consideration for leaving their job, the most reported reason is for retirement.
- Nearly one-third (thirty-one percent) have considered leaving their current job due to their employer's response to COVID-19.

Have individuals thought about leaving their job



Reasons employees are thinking about leaving their jobs





- Individuals working in Health Care and Social Assistance are more likely to consider leaving their jobs (31 percent) when compared to all other industries combined (26 percent).
- Respondents working for organizations with 501-1,000 employees are most likely to consider leaving their jobs (36 percent), while those who are self-employed are least likely (12 percent) to leave their jobs.

People leaders

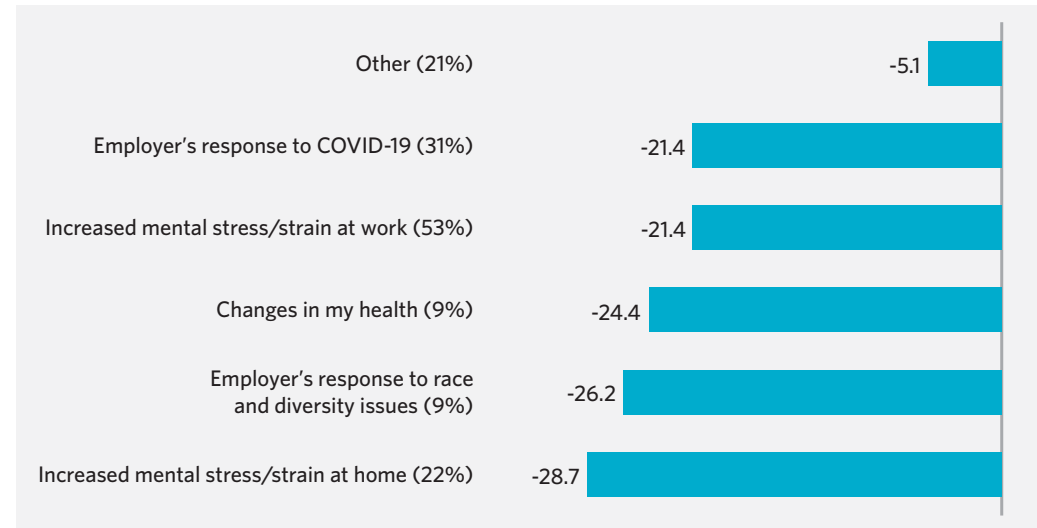
In addition to coping with the personal impact of the pandemic, people leaders are faced with the additional strain of managing a prolonged turbulent period in their workplace. Thirty-five percent of respondents report supervising one or more people at work.

When people leaders were asked whether they have had concerns about the mental health of employees since the onset of the pandemic, thirty-nine percent of supervisors agree and seven percent are unsure.

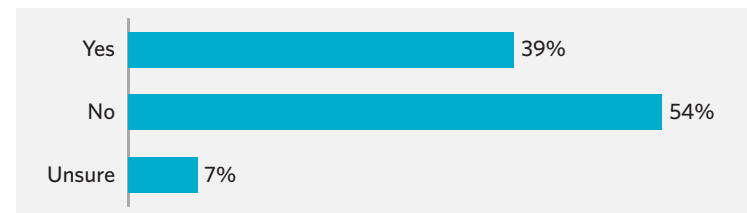
People leaders were asked to rate the productivity of their employees in 2020 when compared to 2019.

- People leaders report that twenty-one percent of their employees are less productive than in 2019, whereas fifty-two percent of employees are as productive in 2020 as they were in 2019.

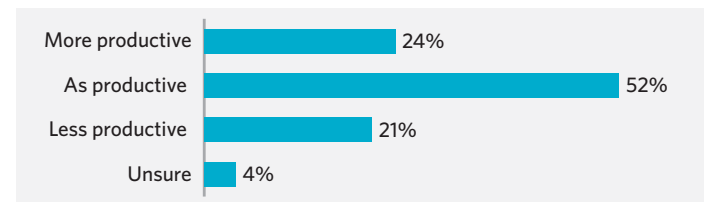
MHI score by reasons employees are thinking about leaving their jobs



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



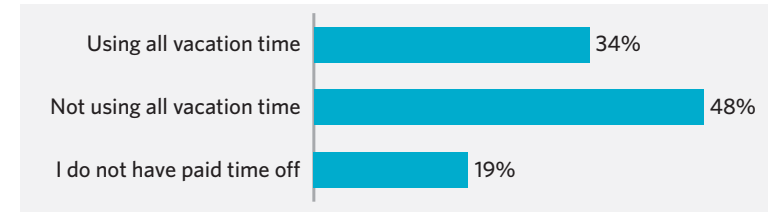


Using employer-paid vacation time

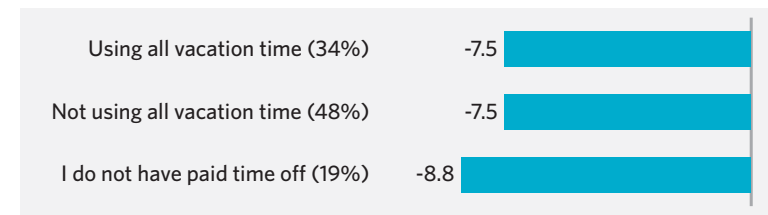
With restrictions on non-essential travel across the globe, taking vacation time involves staying close to home. With travel on hold in 2020, respondents were asked whether they will use their employer-paid vacation allotment.

- Nearly half of respondents (48 percent) report not using all their vacation time in 2020, whereas only thirty-four percent report using all their vacation time.
- Individuals without paid time off have the lowest mental health score (-8.8), when compared to those using all their vacation time (-7.5) and those who are not using all their vacation time (-7.5).
- Males are more likely (37 percent) to take all their vacation time in 2020 when compared to females (28 percent).

Using vacation time in 2020



MHI score by usage of all vacation time in 2020





Expectations for the future

As Americans continue to face the impact of the COVID-19 pandemic, the New Year brings hopes 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.

- Twenty-three percent of respondents expect an improvement in their work situation.
- Ten percent of respondents expect their work situation to worsen.

Changes in social relationships

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

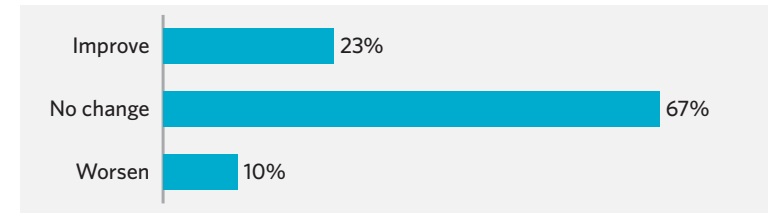
- Twenty-three percent of respondents expect an improvement in their social relationships.
- Nine percent expect their social relationships to worsen.

Changes in the financial situation

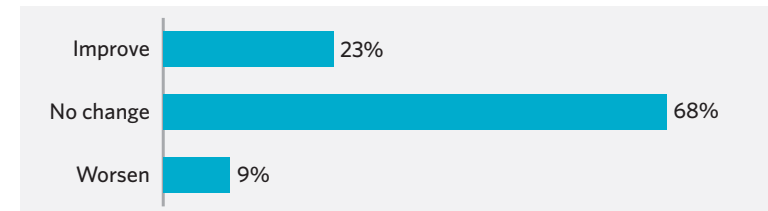
Individuals were asked what change they expect with respect to their financial situation.

- Twenty-five percent of respondents expect an improvement in their financial situation.
- Fourteen percent expect their work situation to worsen.

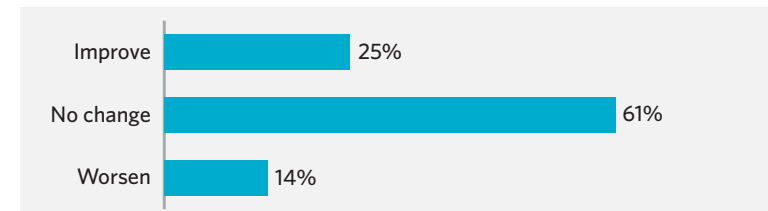
Expected future changes in work situation



Expected future changes in social relationships



Expected future changes in financial situation





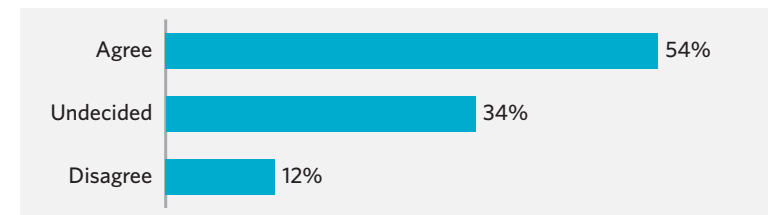
Brand loyalty

In March 2020, Mark Cuban warned, “how companies treat employees during this pandemic will define their brand for decades”.³ 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-four percent 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 (59 percent), compared with those who are employed at their full salary and hours (53 percent).

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



³ Mark Cuban says how companies treat workers during pandemic could define their brand ‘for decades’, CNBC, <https://www.cnbc.com/2020/03/25/coronavirus-mark-cuban-warns-against-rushing-employees-back-to-work.html>, March 25, 2020.



How companies have supported or treated their customers

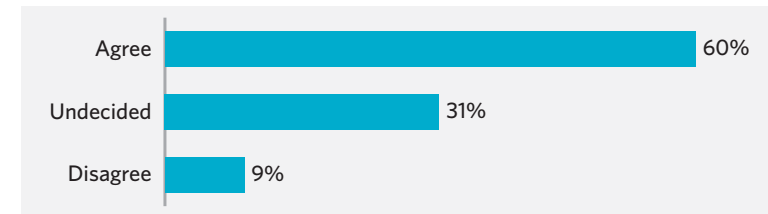
- Sixty percent of respondents agree that the way they think about and interact with brands/companies has been influenced by how they supported or treated their customers during the pandemic.

How companies have responded to social justice issues

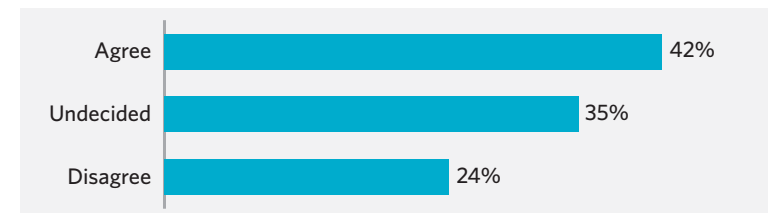
With the high-profile death of Black American, George Floyd, in June 2020, unprecedented awareness of anti-Black racism emerged. Individuals were asked whether the way they think about and interact with brands has been influenced by their response to social justice issues.

- Forty-two percent 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 were significantly more likely to agree that the way they think about and interact with brands/companies has been influenced by how they responded to social justice issues (54 percent) when compared with those 40 and older (35 percent).

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 5,000 Americans who are living in the United States 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 States. 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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