



2021 CIGNA 360 WELL-BEING SURVEY

THE STATE OF WORK

OCTOBER 2021 | EUROPE

Disruption and uncertainty have defined the months since the beginning of the COVID-19 pandemic. As businesses and workers around the globe scrambled to adjust to new ways of working and adapt to the realities of working from home (WFH), it was difficult to predict how significant and how long these measures might be.

Looking ahead, with many companies already implementing return-to-work strategies, it's clear that we cannot simply return to pre-pandemic working norms. Listening to employees to understand more about their evolved needs and demands will be crucial to success as businesses navigate the road to recovery.

In the latest **Cigna 360 Well-Being Survey** we spoke to people around the world and this report provides insights for both companies and workers alike about where change is needed and how we best navigate that change to ensure the health and well-being of all.



ABOUT THIS REPORT

To monitor and track the annual evolution of well-being, the **2021 Cigna 360 Well-Being Survey - On the Road to Recovery** looked at five key components- family, financial, physical, social, and work. In partnership with Kantar, a leading data, insights and consulting

company, Cigna International has analyzed the findings to uncover the latest trends and challenges for health and well-being.

We surveyed 18,043 people aged 18 or above, in 21 markets around the world, including 3,014 in Europe, asking them to complete an anonymous 20-minute online survey covering our key themes. European markets covered included the United Kingdom (n=1002), Spain (n=1004), Germany (n=404), The Netherlands (n=203), and Belgium (n=203).

The fieldwork for this survey was completed in April 2021.



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WFH WILL CONTINUE TO BE A FEATURE OF POST-PANDEMIC WORLD OF WORK

The pandemic has been a catalyst for change in many ways, not least of which has been the WFH revolution and accompanying digital transformation for companies around the world.

Strict lockdowns in many markets meant that companies and employees had no option other than WFH but, what started out as necessity, is now evolving into a genuine preference for many.

Although 20% of people in Europe are keen to return to the office full-time when it's safe to do so, many are happy to continue to work from home for at least part of the working week. For employers looking to attract and retain top talent, this indicates that allowing hybrid working will be important for many candidates, and could potentially set their business apart from less flexible competitors.

2/3



of the European workforce prefer some WFH component – either full-time or part-time – beyond the pandemic



78%

OF EXPAT WORKERS IN

EUROPE PREFER HAVING THE OPTION TO WFH COMPARED TO

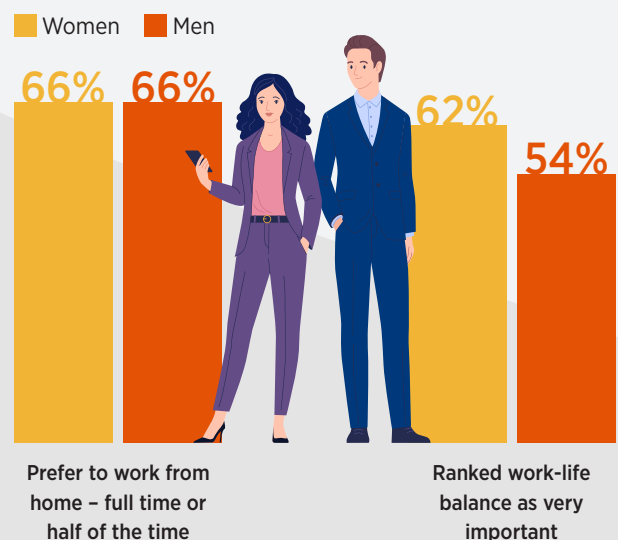
64%

OF LOCAL EMPLOYEES

MIDDLE MANAGEMENT MOST LIKELY TO PREFER FULL-TIME WFH



DESPITE SIMILAR WFH PREFERENCES, WOMEN RANK WORK-LIFE BALANCE AS MORE IMPORTANT THAN MEN



ENSURING BALANCE WILL BE KEY FOR HYBRID WORKING



85%

OF EUROPEAN
RESPONDENTS GIVEN
OPTION TO WFH
DURING PANDEMIC

BENEFITS OF WFH



53%

save time on daily commute



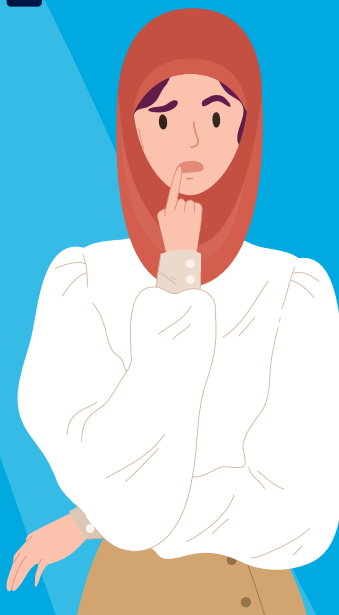
36%

better work/life balance



32%

money savings



DISADVANTAGES OF WFH

38%

less opportunity to bond
with colleagues



36%

less effective communication
vs. face-to-face



33%

lack of physical movement



The shift to WFH was something many companies were unprepared for and the logistics of ensuring hundreds, or even thousands, of people were able to complete their work remotely tested HR and IT departments worldwide.

Now that the teething troubles of those early days have mostly been overcome, many employees are reaping the benefits of less time spent commuting, greater work-life balance and money savings due to being at home. However, WFH is not without its challenges as many employees struggle to work effectively remotely, are suffering from lack of physical movement and miss socializing with colleagues. It is important for businesses and employees to strike the right balance when it comes to WFH to ensure that both sides benefit from the flexibility it offers while avoiding the pitfalls.



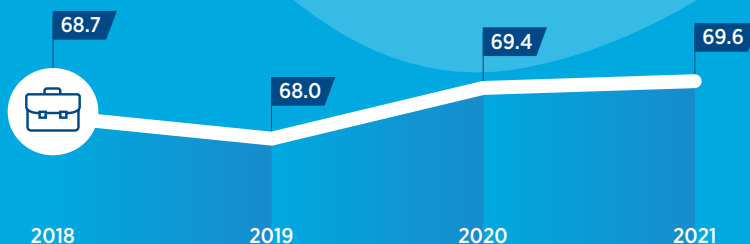
2 in 5 are working longer hours because they **no longer commute** (34%), have an **excessive workload** (28%) and **lack routine** (22%)

Virtual meetings with colleagues and clients took their toll with **16%** reporting virtual meeting fatigue.



WORK WELLNESS IMPROVING IN EUROPE

Since the lows of 2019, Europe has experienced increasing optimism around work well-being despite ongoing restrictions and changes due to the pandemic.



STRESS GOES BEYOND THE DEMANDS OF WORK

Stress is often associated directly with work. However, while some of the stress that the European workforce experienced during the last year was related to jobs and career, understandably many triggers were more personal in nature.

In particular, expat employees are suffering from a higher level of stress than their local colleagues, perhaps a reflection on the strains of being separated from family and friends in their home countries.

Stronger connections with family, friends, colleagues and the wider community give people greater resilience. By allowing employees the flexibility to spend more time with family and friends and creating opportunities for colleagues to build bonds in the workplace, employers can play their part in building a more resilient, and healthier workforce.

EXPATS IN EUROPE HAVE HIGHER LEVELS OF STRESS COMPARED TO LOCAL EMPLOYEES



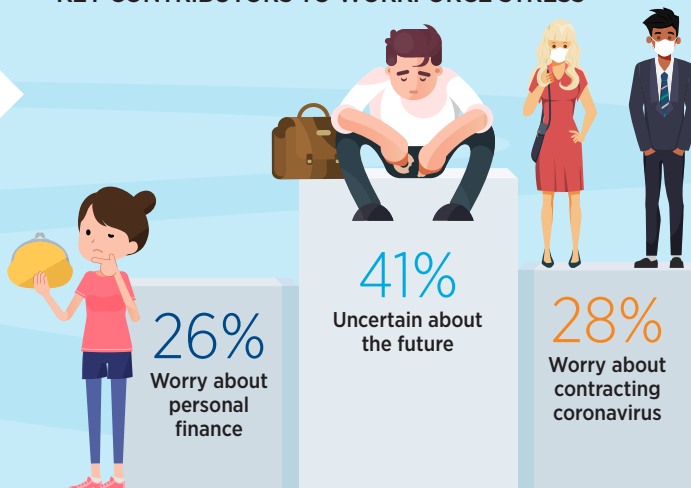
RESILIENCE HIGHER FOR EUROPEAN WORKERS

Work can **strengthen overall resilience** by **bringing people together** and creates a **sense of purpose** as well as **financial stability**.



For the purpose of the *Cigna 360 Well-Being Survey*, high resilience was defined as those with a strong connection with family and community and with a strong support system. Those employees with high resilience have the ability to quickly recover from challenges and manage stress.

KEY CONTRIBUTORS TO WORKFORCE STRESS



THOSE WHO REPORTED TOO MUCH WORK, ARE ALMOST **3x** MORE LIKELY TO CLAIM THEY ARE EXPERIENCING **STRESS**

47% of parents reported high resilience compared to **39%** for those with no kids

Working parents are **7%** less likely than those working without kids, to be worried about an uncertain future

Stressed working parents are **4%** less likely to feel depressed compared to those without kids.



SUPPORT FOR WHOLE HEALTH

More employees are looking for an enhanced health insurance package that offers them peace of mind. This has potential to move from being a “nice-to-have” for many employees, to a “must have” that may well influence career decisions.



With health and well-being thrust into the limelight during the pandemic, people have been reassessing their priorities and what they expect from their employer.

From holistic support and resources to manage work-life balance to financial education and enhanced health insurance, employees feel there are gaps in the type of support offered by their employer. Women in particular are seeking greater support from employers than their male counterparts.

Businesses must be prepared to look at their employee benefits to ensure they address the well-being concerns of their workforce. Not only can this have benefits for the health and productivity of employees, but it will also help with talent attraction and retention.

GAP BETWEEN PREFERRED EMPLOYER SUPPORT VS MEASURES PUT IN PLACE

	Expectation	vs	Reality
Holistic support and resources to help me manage my work-life balance	41%	vs	20%
Financial education, coaching and planning	41%	vs	17%
Health insurance that allows virtual health consultations	43%	vs	19%
Enhanced health insurance cover	45%	vs	17%

WOMEN PLACE MORE FOCUS ON EMPLOYERS' SUPPORT

When looking at gender differences, women ranked all categories of preferred employer support marginally higher than men.



The pandemic has changed the workplace landscape around the world creating new challenges and opportunities for employers.

Employees are more aware of the pros and cons of remote working and how this impacts their physical and mental health. Many now regard flexible work arrangements, as well as better well-being support from their employers, as a crucial part of work life in the future.

Therefore, maintaining the pre-pandemic status quo is unlikely to be enough. Senior management and HR teams need to understand the needs and desires of their employees and ensure that they are taking these into consideration as part of any return-to-work strategy. Businesses looking to attract and retain talent also need to reassess their employee benefits and support programs if they are to remain competitive.

Firms that prioritize their people's well-being will be successful in tapping into the potential of their workforce and achieving a healthier, happier state of work for everyone as the world continues on the road to recovery.



ABOUT CIGNA INTERNATIONAL

Cigna's mission is to improve the health, well-being, and peace of mind of those we serve by making health care simple, affordable, and predictable.

We make it easy to get care – letting you choose how, when, and where you want it – from virtual health, to specialist consultants.

We make health care more affordable by partnering with providers who provide quality, cost-effective care.

Our goal is to provide you with health care coverage that is predictable – every step of the way.

A NOTE ON METHODOLOGY

Online sampling used respondents recruited from panels that undergo rigorous quality control. The panel composition is representative of the adult population in each of the surveyed markets. Depending on population size and complexity, a sample size of either 500, 1,000 or 1,500 respondents was surveyed to provide statistically significant findings which can be extrapolated to the general population. In addition, age and gender quotas were set based on their respective proportion of the population.



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