

**ECONOMIST  
IMPACT**

# **Gain a global edge**

**Crafting a comprehensive mental health  
strategy for the modern workforce**



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# About this report

*Gain a global edge: crafting a comprehensive mental health strategy for the modern workforce* is a report produced by Economist Impact and supported by Lyra Health. Drawing on a bespoke research program, including an expert panel and a global survey of over 1,800 senior, mid-level and junior/entry-level employees, this report assesses the impact of worker mental health and employer-led mental health programs, with a particular focus on the local and global realities faced by multinational employers.

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# Executive summary

Organizations are powered by people. A mentally healthy workforce is a business imperative—supporting the mental health and well-being of workers improves retention and productivity, ultimately driving the organization forward. In today's fast-paced corporate environment, understanding the interplay between strategic leadership, organizational culture, and employee mental health and well-being is critical. It is essential that organizations are equipped with the tools and resources needed to better understand and take action on employee stress, fatigue and burnout, as well as broader mental health impacts and mental health illnesses, such as anxiety and depression.

The workplace is one of the best settings to drive innovations in mental health, but one size does not fit all. What works well in one context or for one individual may not be effective for another. This is especially true for multinational employers who oversee a global workforce. Such firms must design and tailor their mental health and well-being strategies to the diverse needs and expectations of their employees in different geographical and cultural contexts.

With this in mind, Economist Impact set out to obtain a deeper and more nuanced understanding of the international landscape of workplace mental health and well-being strategies, with a specific focus on approaches taken across geographic and demographic lines by multinational corporations (MNCs).

Our desk research, combined with a panel discussion with human resources (HR) executives from MNCs, and survey responses from 1,800 MNC employees from the United Kingdom (UK), Canada, Mexico, India, Germany, and China, revealed significant individual and organizational benefits to directly addressing workplace mental health. Because of their positive impact on the mental health of individuals, workplace mental health programs provide clear operational benefits—a happier, more mentally safe workforce is a more productive one, which can only be advantageous for employers. In addition, companies can gain significant reputational benefits by being seen both as empathetic, supportive employers and as forward-thinking businesses.

Yet, there are challenges to establishing effective mental health programs in the workplace. For MNCs especially, standardized approaches need to be adapted to meet the range of challenges that they face across the diverse countries and regions where they operate. Legislation, policymaking, infrastructure, individual attitudes and stigmatization, social and cultural norms, demographic specificities and challenges are some of the factors that must be considered when designing a mental health program that is holistic and effective for employees in all situations. Mental health programs must reflect company culture as well as accommodate local culture, attitudes, and norms. They should address stigma and raise awareness without being constrained by organizational resources or changing priorities. Additionally, they require strong support and advocacy from executives and business leaders, and must be sustainable and adaptable to changing contexts.

Drawing on pragmatic literature searches and our discussions with senior HR executives at MNCs headquartered in the United States (US), we arrived at several calls to action aimed at HR executives:

- **Tailor mental health strategies** to specific contexts and local cultures, particularly for global employers managing diverse workforces across multiple regions and countries. As part of this, utilize local resources, partnerships, and expertise, and embrace digital tools to bridge organizational and geographical divides. Also ensure that approaches are tailored to suit all levels and working contexts of the organization.
- **Leverage business resources** and recognize the long-term benefits of investing in workplace mental health as part of a broader recognition of the benefits of employee health, safety, and well-being.
- **Embrace a data-driven and participatory approach** by conducting ongoing psychosocial health and safety assessments to provide critical insights for developing and refining mental health initiatives. To counter potential opportunities for discrimination or misuse of data, it is essential to address privacy and confidentiality concerns early and effectively.
- **Lead from the front** by addressing misperceptions around workplace mental health and enabling HR leaders and people managers to be open about their own mental health, while visibly advocating for mental health initiatives and transforming the culture of mental health in the workplace.

Ultimately, investing in workplace mental health goes beyond corporate responsibility; it paves the way for a healthier, more engaged workforce, and thereby a more productive and resilient organization.



# Introduction

Work and mental health are deeply interconnected. Work provides income, determines one's economic influence and status, and offers opportunities for socialization, achievement, and skill development — all of which can positively impact an individual's well-being and mental health.<sup>12</sup> On the other hand, excessive demands, intense pressure, unrealistic expectations, and long working hours can lead to chronic stress and burnout, and, potentially, anxiety and depression.<sup>3</sup>

Just as employees cannot leave the psychological effects of work behind at the end of their day, issues they face outside of work also affect their mental well-being during working hours. The World Health Organization (WHO) estimates that in 2019, one in eight people, or 970m individuals worldwide, were living with a mental disorder, with anxiety and depressive disorders being the most common. The prevalence of these disorders surged significantly during the covid-19 pandemic, and many continue to experience its mental health effects to this day.<sup>4,5</sup> Given that organizations fundamentally depend on their employees, protecting employee mental health is essential. It is important that all employers take a holistic view of mental health, considering both organizational and employee welfare. They must look beyond addressing mental health within the workplace and actively ensure the overall mental health of their employees.

The economic and social costs of failing to address mental health issues in the workplace are staggering. Mental health issues such as depression and anxiety significantly impact employee well-being, productivity, retention, and organizational performance. According to the WHO, mental health issues cost businesses US\$1trn globally each year, primarily owing to lost productivity, with an estimated 12bn working days lost annually.<sup>6,7</sup>

Mental health issues are the second leading cause of long-term work absence, just behind cancer. Poor mental health is closely linked to decreased productivity and high levels of presenteeism (working while ill).<sup>8,9</sup> The cost of this productivity loss is estimated at US\$2.5trn per year, a figure seen by our expert panel as an underestimate; it is also projected to rise to US\$6.1trn by 2030.<sup>10,11</sup> Lost productivity accounts for 60-90% of the total costs that companies incur due to mental health issues.<sup>12,13</sup>

On the other hand, the evidence suggests that workplace mental health interventions can provide employers with a positive return on investment (ROI). For instance, economic model simulations indicate that comprehensive depression screening programs could yield an ROI of approximately four to one, primarily due to reductions in presenteeism and absenteeism.<sup>14</sup> Put simply, global businesses cannot afford to overlook this opportunity.

## The global challenge and the role of MNCs in shaping workplace mental health

People's attitudes toward the impact of work on their mental health differ greatly, yet a significant number of workers perceive it negatively. A 2021 WHO-commissioned global survey revealed that 40% of respondents see work as having a positive effect on their mental health, while 25% indicated a negative or very negative impact.<sup>15</sup> More recently, the 2024 Gallup State of the Global Workplace Report found that only 34% of the global workforce felt they were thriving at work, with 58% struggling, and 8% suffering.<sup>16</sup> This aligns with our survey of over 1,800 employees from the UK, Canada, Mexico, India, Germany, and China, where 47% reported experiencing stress several times a week, and 9% felt stressed every day.

Work is not the only stressor that impacts employees' mental health. In recent years, people have had to deal with the impact of the covid-19 pandemic, the financial impacts of global events such as Russia's invasion of Ukraine (a driver of food and energy crises, inflation, rising living costs, and tightened debt), and the ongoing climate crisis. Together, these factors have significantly contributed to rising mental health challenges worldwide.<sup>17</sup> It is crucial for employers to recognize this and take action.

As workforce mobility and globalization increase, employers are confronted with the challenge of supporting the diverse mental health needs of their employees across different geographic, cultural, and economic contexts.<sup>18</sup> Wellness programs have become essential in the workplace for managing these challenges and supporting employee well-being, with businesses increasingly acknowledging their role in fostering employee health.<sup>19</sup> The results of our survey further support this move by businesses to actively foster mental health and well-being among their employees. Approximately 72% of respondents reported somewhat positive attitudes toward mental health in their workplace, compared to 52% among their families, 50% within their social groups, and 48% across their countries as a whole. In this sense, the importance of the role played by MNCs in supporting mental wellness cannot be overstated. With their extensive resources and global presence as major employers, they are uniquely positioned to lead in advancing employee mental health. By doing so, they can simultaneously capitalize on the advantages of a thriving, healthy, and productive workforce.

MNCs employ a significant proportion of the global workforce. According to the European Commission, 28% of people employed in the European business community in 2022 worked for MNCs, and 31% of private-sector workers in the US were employed by MNCs in 2020.<sup>20,21,22</sup> A single MNC can employ workers in every corner of the globe, which means they face unique challenges in addressing the mental health of a diverse and multicultural workforce. For example, while 30-

32% of Germany-based respondents to our survey said that the country's culture makes discussing mental health difficult, 61-66% of respondents in China and India said the same.

Additionally, MNCs often relocate employees to different countries with varying cultural and economic environments; this implies that expectations not only differ across geographies, but also follow workers as their work takes them across the world.<sup>23</sup>

The global reach of MNCs, coupled with the need to navigate technological advances and multiple time zones, places pressure on employees to remain perpetually available.<sup>24,25</sup> While this interconnectedness fosters innovation and creative benefits, it can impact employees' psychological resilience, necessitating effective mental health strategies to address the aforementioned stressors. Consequently, MNCs must navigate a complex landscape of mental health-related needs and expectations.

That said, the enormity of the task before MNCs is equaled by the resources at their disposal. MNCs have access to significant human, intellectual, and financial capital, as well as the ability to deploy these resources swiftly and efficiently.<sup>26</sup> Moreover, MNCs have an opportunity to lead globally in this arena, not only by demonstrating how employers can effectively support their employees' mental health, but also by showcasing how a mentally healthy workforce can give companies a competitive edge. The ROI linked to decreases in absenteeism, presenteeism, and productivity is perhaps the most obvious benefit employers can reap. However, cultivating a reputation for safeguarding employees' mental health is also likely to enable firms to attract top talent and retain skilled employees far better than companies that have not made similar investments. There is also a growing sense that global firms are taking notice of the opportunities available to them in this space; our expert panel of HR executives confirmed that improving worker mental health is fast becoming a higher priority for MNCs.

# Steps toward making workforce mental health a priority

## Embracing local context and culture

**Why:** Social and cultural differences can significantly influence the effectiveness of mental health strategies. For global employers, understanding and adapting to the local context and culture is essential for the success of workplace mental health initiatives.

**How:** Design tailored strategies to account for the complexities of local norms, legislation, policy, resources, and infrastructure.

## Cultural beliefs, attitudes, and norms about work

Beliefs and attitudes toward work and its balance with personal life vary significantly across different countries, industries, and contexts. These differences are shaped by historical, social, economic, and cultural factors that are unique to each setting.

Work-life balance, identified by our expert panel as an opportunity for impact on worker mental health, is a key point of difference. Although considered a top

priority worldwide, after salary and benefits, many countries have workplace cultures that encourage long working hours, which can substantially impact workers' psychological health—job strain impacts four out of ten employees worldwide.<sup>27,28</sup> Our employee survey further supports this finding, with 56% of respondents reporting they feel stressed at work often or all of the time. Time spent at work can also vary greatly. Across the OECD countries, the majority of whom are High Income Countries (HICs), time spent at work ranges from 16-25% of an individual's total time each year.<sup>29</sup> In Low- and Middle-income Countries (LMICs), long working hours and significant overtime are common, tipping the balance in favor of work.<sup>30</sup> This is reflected in a 2023 survey of workers in India, where 65% of Gen Z and 68% of Millennials ranked work as the most important factor to their identity.<sup>31</sup>

Attitudes toward work-life balance vary by country and region, and employers should be wary that demanding long hours from employees does not always translate to productivity gains. Even among HICs, there are notable differences in attitudes toward work. For example, in the UK, 65% of workers prioritize work-life balance over pay and benefits, but 12% of employees still work more than 50 hours per week.<sup>32,33</sup> In contrast, just 4% of workers in Germany work beyond their contracted hours.<sup>34</sup> The UK's lower productivity levels suggest that longer working hours and lower commitment to work-life balance do not necessarily translate to productivity gains.<sup>35</sup> While employee commitment to work is beneficial for any employer, MNCs must ensure that local attitudes toward work-life balance do not negatively impact employees' productivity or their ability to live fulfilling lives.



### Survey insight: workload, responsibility, and work-life balance

Our survey revealed a relatively high degree of positivity with regard to employees' perceptions about workload, responsibility, and work-life balance. About two-thirds of workers agreed that their employers meet several important benchmarks:

- **59%** agreed that their workplace creates an environment where employees feel comfortable voicing concerns when the workload is unsustainable.
- **61%** agreed that their workplace discourages people from overworking.
- **62%** agreed that their workplace trusts employees to manage their own time and get their work done.
- **63%** agreed that their workplace provides employees with the opportunity to leverage their unique skills and be creative.
- **65%** agreed that their workplace values output, rather than hours spent working.
- **63%** agreed that their workplace provides adequate opportunities for professional growth.
- **65%** agreed that their workplace encourages personal goal-setting.
- **65%** agreed that their workplace encourages meaningful work.

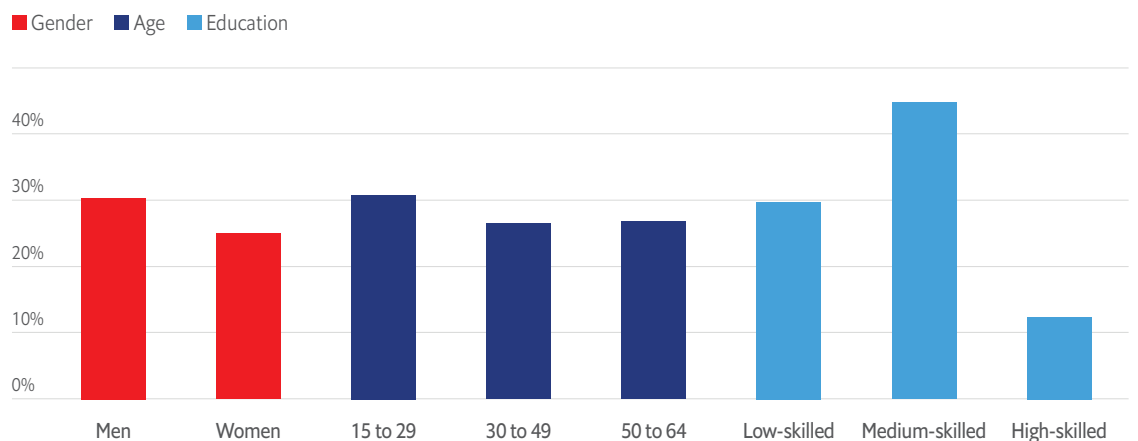
In all cases, agreement was highest in Europe (the UK and Germany), followed by North America (Mexico and Canada) and Asia-Pacific (India and China).

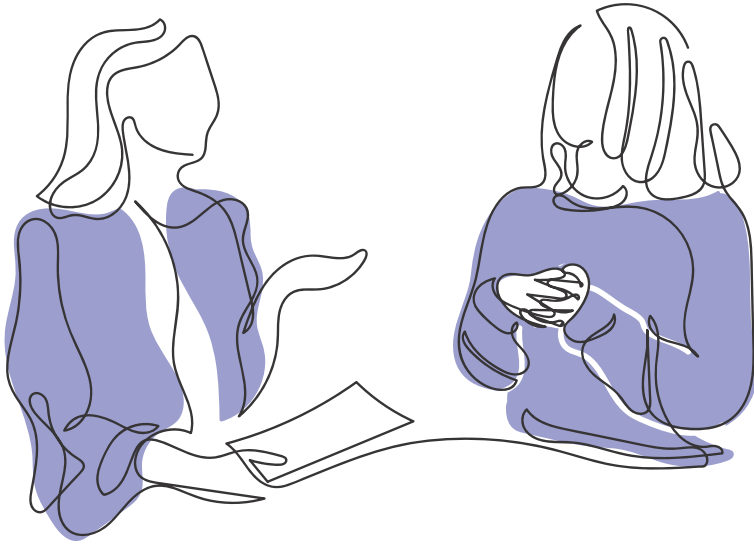
Demographics are another factor that can vary across and within regions and countries in which MNCs operate. The demographic makeup of workforces will vary from country to country, as will the daily realities and attitudes toward various demographic groups, all of which impact the overall mental health landscape. Companies must consider these variations when customizing their support programs.

Our expert panel noted that some MNCs are incorporating local employee resource groups to actively work on diversity, equity and inclusion (DEI) initiatives. These groups have local boards and chapters led by local staff in the different regions of operation. Because they are attuned to the local cultural context, their feedback is essential for creating solutions that are well-suited to the specific cultural environment.

**Figure 1: Job strain affects four out of ten workers across the world<sup>36</sup>**

Incidence of job strain, OECD average, 2015





### Variation in psychosocial risk regulations

Psychosocial risk regulations require businesses to manage risk related to employees' mental health and well-being to ensure their safety; however, in many countries, such regulations are often lacking, and occupational safety and health laws do not explicitly address psychosocial risks.<sup>37</sup> Where legal and regulatory frameworks related to mental health do exist, they vary in their comprehensiveness. Variations span legal protections, including labor laws and data protection legislation, as well as employer obligations, and access to mental healthcare. For example, Germany, Canada, and the UK each have relatively comprehensive legislation, ranging from broad frameworks covering general mental health concerns to those specifically focused on the workplace and employee rights—although Canada lacks laws specifically related to workplace mental health.<sup>38,39,40,41</sup> Meanwhile, in LMICs such as China and India, mental health support in the workplace is still in its infancy, and legal requirements are limited.

In the case of Mexico, recent years have brought pioneering mental health legislation, including a 2018 standard that established guidelines to identify and prevent psychosocial risk factors, thereby fostering a favorable workplace environment.

Companies in Mexico are required to implement, maintain, and disseminate a psychosocial risk prevention policy that addresses risk factors and workplace violence, while promoting a positive environment at work. Furthermore, businesses are urged to identify employees who may have experienced severe traumatic events through periodic evaluations, allowing workers to raise concerns that employers must then address. This structured approach positions Mexico ahead of several other countries in safeguarding employee mental health.<sup>42</sup>

By integrating labor rights legislation into workplace policies, corporations can foster a healthier, more supportive work environment that boosts employee well-being and productivity, and extends beyond mere legal compliance. Mexico aside, LMICs often lack adequate legislation, policies, and resources to prevent discrimination and provide mental health support to their workforce.<sup>43</sup> This gap underscores the necessity for companies working in LMICs to operate beyond statutory requirements and advocate for stronger legislative support. Utilizing local expertise in the form of specialized lawyers and trade commissioners is also crucial to ensuring compliance with local labor and data security laws.<sup>44</sup>

### Local resources and infrastructure

Employers must take into account the availability and accessibility of healthcare resources and infrastructure in different regions and countries if they are to effectively support their employees' well-being and mental health. As with access to other healthcare resources, local mental health infrastructure, including the availability of therapists, counselors and support groups, varies significantly across the globe. The expert panel consulted for this report identified the lack of formal services or adequate attention from stakeholders in certain regions as a challenge for companies seeking to advance mental health initiatives at work. In many places, mental healthcare is regarded as a privilege rather than a standard provision, thereby creating significant inequities in access.

By partnering with local organizations, employers can play a crucial role in addressing gaps left by governments, thereby significantly enhancing the delivery and effectiveness of mental health programs, particularly in LMICs.<sup>45</sup>

At the same time, technological infrastructure—such as high-speed internet access and mobile connectivity, which affects access to digital platforms, health information, and external support—also varies significantly, especially between HICs and LMICs, and often between urban and rural areas. Employers must thus ensure that mental health programs are designed to work in lower bandwidth environments where high-speed internet access is limited.<sup>46</sup> This adaptability is crucial for providing equitable support amid differences in technological infrastructure. Our expert panel also pointed to employee digital literacy as a factor in ensuring that equity of access to mental health support is ensured.

Understanding the full spectrum of localized factors is crucial for tailoring mental health initiatives to meet the specific needs of employees in different regions, and for ensuring equity based on inclusivity and accessibility. To overcome geographic, technological, and demographic barriers, efforts must be made to adapt mental health strategies to the unique context and culture of each workplace, particularly for global employers managing diverse workforces across multiple regions and countries.<sup>47</sup> Therefore, gathering an understanding of the local complexities and leveraging local resources should be top priorities for MNCs seeking to enhance their mental health strategies.

### Tackling stigma and lack of awareness

**Why:** *Stigma and lack of awareness can discourage treatment-seeking and limit the impact of mental health programs, pushing the issue of poor mental health into the background.*

**How:** *Adopt approaches to workplace mental health that are preventive rather than reactive,*

*thereby driving acceptance of mental health (and its maintenance) as a daily reality; work to understand the persistence of stigma and how it varies across geographies and cultures.*

Our expert panel identified stigma as a major barrier to ensuring mental health in the workplace; furthermore, stigma, fear of negative consequences, and personal discomfort or embarrassment were each identified by six out of ten survey respondents as factors preventing open discussion of mental health at work. Stigma surrounding mental health in the workplace can result in discrimination and feelings of isolation, among other negative effects.<sup>48</sup> Addressing it is crucial to the success of mental health programs.

Beliefs and attitudes toward mental health and mental illness within society vary significantly across different countries and contexts. These differences are shaped by unique historical, social, economic, and cultural factors. In some countries, deeply rooted beliefs linked to traditional medicine, local traditions, spirituality, and the supernatural can shape attitudes toward mental health. Certain cultures may place a high emphasis on values such as maintaining reputation and dignity within communities, which can deter help-seeking for mental health issues; spiritual and supernatural beliefs can also significantly impact how mental health problems are viewed.<sup>49</sup> Many of these factors are associated with countries and regions where religious beliefs influence health and health-seeking behaviors—for example, among the nearly 60% of survey respondents who told us that personal discomfort, stigma, or fear of negative consequences prevent them from speaking openly about mental health, those from India and Mexico were most heavily represented.

For example, a 2024 survey revealed that half of UK adults believe there is still significant shame associated with mental health conditions.<sup>50</sup> Meanwhile, a Canada-based survey found that 95% of respondents with mental health or substance use disorders had experienced stigma, with 72% reporting self-stigma (negative attitudes that

individuals with mental illness may hold about their own condition).<sup>51,52</sup> Similarly, 66% of employees responding to a German survey said that they would feel shame for their own mental health problems.<sup>53,54,55,56,57</sup> In our survey, over a quarter (27%) of respondents reported negative attitudes toward mental health in their countries, and less than half (48%) reported positive attitudes. Negative attitudes were most strongly felt amongst Chinese and Mexican employees, with 44% and 43% of respondents, respectively, reporting such attitudes.

Other societal norms and cultural beliefs can also influence attitudes toward mental health. Gender, for example, significantly influences these perceptions, with studies consistently showing that females exhibit greater empathy toward those

with mental health issues as compared to males.<sup>58</sup> In addition, men residing in rural areas have been shown to be more reluctant to seek help owing to masculine ideals such as self-reliance and stoicism.<sup>59</sup> For example, in Mexico, *machismo* culture, which aggressively prioritizes antiquated ideas of masculine strength and dominance, has been found to discourage men from seeking mental healthcare. Moreover, social stigma and discrimination from family members and healthcare personnel often add to the significant barriers to accessing mental healthcare.<sup>60,61</sup> Intersecting factors such as social class and urban/rural divides continue to exacerbate the issue.<sup>62</sup> Women also face the disproportionate burden of unpaid domestic work, such as childcare, eldercare, and housekeeping, which greatly impacts their mental health.<sup>63</sup>

### Survey insight: stigma at work

The top three workplace barriers to discussing mental health identified in our survey are all linked to stigma—they were also all highest in India and Mexico, and among Gen Z employees. The fourth barrier is lack of awareness.

- Personal discomfort or embarrassment (**61%**)
- Fear of negative consequences (**61%**)
- Stigma or fear of being judged (**59%**)
- Lack of awareness or understanding of mental health issues (**57%**)

At the regional level, approximately 64-65% of Asia-Pacific employees agreed that cultural attitudes make it difficult or actively discourage openly discussing or seeking help for mental health issues. In contrast, about half of North American employees and one-third of European employees felt the same way. Specifically, 61-66% of employees in China and India, 57-64% in Mexico, 30-32% in Germany, and 29-38% in the UK shared this sentiment.

Approximately 43% of employees across all business sectors surveyed, including technology, financial services, healthcare, public sector, manufacturing, higher education, retail, and transportation, report the same. Interestingly, when asked separately about the three metrics that we used to assess cultural attitudes in countries—whether they make it difficult to openly discuss mental health issues in the workplace, if they discourage mental health awareness, or if they promote silence and discourage asking for mental health support—there was no consistent pattern for which sectors felt the most strongly about these issues.

Understanding the cultural nuances around mental health stigmatization and awareness is crucial for designing effective mental health programs for employees. The WHO Guidelines on Mental Health at Work recommend that business interventions to support and protect employee mental health should be accompanied by strategies tailored to address and reduce stigma, taking into account the regional and cultural context of the organization.<sup>64</sup> Such cultural and contextual sensitivity is essential as a uniform approach may lead to the rejection or underutilization of services; customized, adaptable approaches, on the other hand, can increase participation and effectiveness.<sup>65,66,67,68</sup> For example, in certain regions, initiatives are branded differently to circumvent the stigma associated with mental health and address employees' reluctance to use mental health services.<sup>69</sup> Our expert panel emphasized the importance of this approach, especially in countries like China and Japan, where mental health is still heavily stigmatized. For example, while Employee Assistance Programs (EAPs) are one option, it can be more effective to frame mental health resources in an alternative context, such as by embedding them within smoking cessation efforts rather than directly identifying them as mental health services. In addition to understanding the persistence and

variation of stigma across different contexts, employers should seek to implement preventive measures that increase acceptance of mental health as a normal aspect of daily life that should be actively maintained and prioritized.

### Overcoming resource limitations and competing priorities

**Why:** *Financial constraints are a major hurdle to prioritizing mental health within organizations, with physical health, financial well-being, and workplace safety often taking precedence.*

**How:** *Demonstrate the economic benefits of good employee mental welfare. Push for a greater focus on mental health alongside physical health, financial well-being, and workplace safety.*

Financial constraints are a major hurdle for companies who are considering prioritizing mental health. Many companies face budgetary constraints and are apprehensive about the costs of mental health programs. This is particularly an issue for small and medium-sized enterprises (SMEs). A 2023 study of SMEs in Europe and Australia found that 20% cited financial implications and budgetary issues as obstacles to



implementing mental health interventions.<sup>70</sup> Many SMEs lack the essential structures and personnel to deliver effective mental health interventions, such as workplace health policies, HR support, and psychological support systems, necessitating a disproportionate investment of time and money compared to larger companies.<sup>71</sup> As such, many SMEs find it challenging to allocate resources for new mental health initiatives, especially when confronted with unrealistic timelines and the pressure to meet other work demands.<sup>72</sup>

Mental health initiatives must contend not only with direct financial and human resource challenges but also with other, often more entrenched, competing priorities related to employee well-being.<sup>73</sup> For example, depression and anxiety often take a backseat to physical health, nutrition, and workplace safety when companies devise well-being strategies.<sup>74,75</sup> Interestingly, stress, physical or mental, remains the primary concern for employers when designing wellness strategies, whereas factors such as depression, anxiety, and the psychosocial work environment are ranked much lower. This suggests limited nuance in employers' approach to mental health.<sup>76</sup>

Fortunately, workplace mental health ticks an important box when it comes to investing in programs because these investments yield major returns, as detailed earlier. Our expert panel was unequivocal in its agreement that investing in mental health is a sound business strategy as better mental health can reduce absenteeism, boost productivity, and improve economic returns. It added that companies have experienced a reduction in disability claims when increasing funding for mental health resources, such as counseling.

The question for employers, then, should not be "*why should we invest?*", but rather "*how do we do it well?*" For companies of all sizes, this means understanding the challenges faced. For MNCs, the main challenges are centered around

implementation across varied local contexts and cultures. For SMEs, although new investment and shifts in company organization may be more demanding than for larger firms, a smaller, less varied, less geographically dispersed workforce means that mental health initiatives are likely to be less complex overall. Furthermore, approaches used by MNCs, such as digital tools and partnerships with organizations like charities, can also be leveraged by smaller firms to reduce costs.

Another point, raised by our expert panel, is that not everything requires a large financial investment. Even where the budget is limited, there are many cost-free mental health support options, such as introducing meeting-free days or no emails after work hours. For example, according to our survey, the most helpful mental health tool identified by employees in nearly all of the industries, generational cohorts, and countries we surveyed was flexible working arrangements (favored by 53% of respondents), followed by peer support groups (46%). Our panel also pointed out that firms are moving away from 'flashy', potentially expensive, initiatives toward tackling the root causes of stress.

A key factor in ensuring that workplace mental health programs benefit both well-being and productivity is that they are holistic and cohesive. While individual interventions can be effective on their own, their impact is greatly amplified when used alongside multimodal strategies. For example, several studies suggest that interventions that integrate standard clinical treatments with targeted workplace approaches, such as exposure therapy and cognitive behavioral therapy (CBT) return-to-work programs, show strong evidence of improving both symptom reduction and occupational outcomes, such as reduced absenteeism.<sup>77</sup> Our panel suggests taking this multimodal approach a step further by offering all benefits to dependents, citing the blurred lines between personal and professional life and the rapid impact that workplace events can have on home environments, and vice versa.

### Survey insight: support offered by employers and used by employees

Our survey revealed variation in the types of support offered by employers, and availability did not always tally with uptake.

A “designated mental health leader” is the most commonly provided support, available to 88% of respondents—although only 20% said they make use of this offering. “A team of people within the organization who serve as mental health resources” is the second most offered (75%) mental health program, but only one-third of our sample had access to this tool and used it.

Overall, employee uptake of tools offered by employers was highest for mental health apps (37%), options for time-off to focus on well-being (33%), and a team of people within the organization who serve as mental health resources (33%).

Only 10% of respondents said that they lack access to designated mental health leaders, the lowest in our survey. Lack of access is highest for onsite counseling (67%), quiet rooms or relaxation spaces (66%), and virtual counseling (60%). Respondents were most likely to cite onsite counseling services (54%), virtual wellness programs (45%), and virtual counseling services (42%) as benefits that they currently lack but would use if offered.

Although it is important to take into account the support that employees feel that they need—and what they lack—the priority must be to adopt prevention-focused, evidence-based services and initiatives that tackle the root causes of stress. Employers must lead by adopting best-practice solutions, and accept that doing so may not always coincide with offerings that are attractive to employees.

When it comes to prioritizing mental health in the workplace, the goal should not be to compete with concurrent organizational efforts focused on improving physical health and workplace safety, but rather to place mental health on equal footing with these measures as essential to ensuring worker well-being and boosting productivity. A truly healthy workplace is one where workers and managers work together to continually improve overall health, safety, and well-being. This includes addressing both the physical and psychosocial aspects of the work environment, providing personal health resources, encouraging career development, and engaging with the community.<sup>78</sup>

At the root of the issue is the financial imperative for companies to take effective action. On the one hand you have the US\$1trn and 12bn working days that the WHO says are lost each year due to mental health issues; on the other, are the four-to-

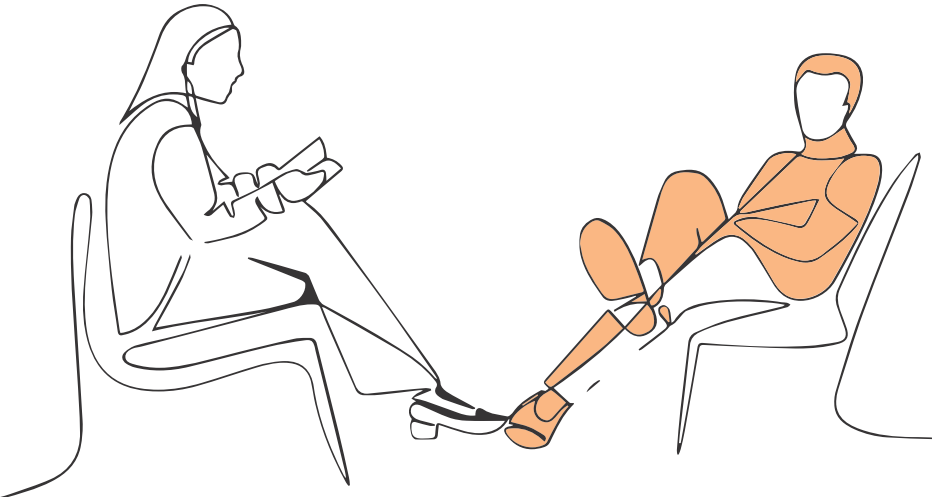
one ROI and the reputational benefits to skilled workforce retention and recruitment that arise from implementing effective mental health initiatives.

### Shifting leadership commitment and company culture

**Why:** *Lack of commitment from leadership is a significant barrier to fostering mental health in the workplace.*

**How:** *Encourage leaders to openly discuss their own mental health challenges, while visibly and consistently advocating for mental health initiatives and the financial investments required to implement and maintain them.*

Beyond organizational resources and prioritization, leadership culture can have a major impact on the mental health and well-being of employees.<sup>79</sup>



Most notably, C-suite executives hold the power to direct funds to mental health initiatives, making their support crucial. Furthermore, people in leadership positions are also key representatives of company culture and set the tone for communication. They influence how employees perceive an employer's stance on the intersectionality of work and mental health, including aspects like work-life balance. A purely results-driven attitude or imbalanced power dynamics, for instance, can discourage employees from feeling comfortable expressing concerns regarding mental health.<sup>80</sup> Conversely, leaders who are open and positive about mental health and well-being can foster similar attitudes among their employees. However, there is a reluctance among many chief executives to openly discuss their own mental health challenges, which can hinder efforts to create a supportive workplace culture.<sup>81</sup>

Leaders of MNCs, whose influence extends across countries and cultures, can serve as powerful examples for smaller organizations within their own industries and should therefore visibly and actively advocate for mental health initiatives. A supportive leadership culture that emphasizes open communication, mutual respect, and empathy—and the importance of mental health programs—can have a significant impact on employee well-being.<sup>82,83</sup> This can then have ripple effects that benefit both the individual company,

as well as the broader industry in which the company operates.

In addition to being open and supportive when it comes to mental health, HR executives, people managers, and team leaders can adopt strategies such as building interpersonal relationships with employees, showing interest in their personal lives, acknowledging their individual and group needs, being flexible, treating each team member according to their operating style and work preferences, and asking new employees about their goals and expectations.<sup>84</sup>

At the organizational level, effective program design involves a multidisciplinary team drawn from various business levels, functions, and geographies.<sup>85,86,87</sup> Including individuals with lived experience of mental health conditions alongside experts like occupational health and safety specialists is crucial for ensuring the programs are relevant and impactful.<sup>88</sup> Consistent and open communication about mental health programs, including video messages from leaders, is one way to make mental health a visible priority and an integral part of organizational culture.<sup>89</sup> Our expert panel also pointed to the utility of employee resource groups for informational purposes, noting that they can educate other employees about available resources and facilitate communication.

Prioritizing and fostering a supportive, respectful, and psychosocially safe workplace helps to improve mental health outcomes for employees and offers significant returns to employers in terms of productivity and employee satisfaction. A key requirement is that executives and other senior figures take the lead as enthusiastic, open advocates and proactive agents of change.<sup>90</sup> For MNCs, this is likely to be more challenging in countries where employees are reluctant to discuss their own mental health. For example, 64% of Asia-Pacific respondents in our survey said that they live in a country that encourages silence when it comes to mental health—in such cases companies may have to contend with an

environment where employees themselves are not talking about mental health, let alone their leaders.

Local cultural sensitivity is vital—our panel recommends making use of locally centered resources such as local employee resource groups who are attuned to the cultural context. But our panel also cautioned that it is critically important for MNCs to implement a strong and consistent approach to mental health promotion in all the regions where they operate, giving special attention to regions where mental health is socially or politically undervalued. In such contexts, leaders should remain proactive advocates, while simultaneously ensuring that they attune

themselves to local attitudes in the process.

More broadly, our panel highlighted a range of key opportunities for MNCs to tackle workplace health effectively. These included educating managers, normalizing mental health conversations, and increasing engagement with employees at all organizational levels. These opportunities become viable when leaders are enabled and equipped to serve as open, enthusiastic advocates for the importance of mental health. The challenge may vary in complexity across different contexts, but leaders in such contexts could have an outsized impact on advancing attitudes toward mental health at work and beyond.

### Survey insight: communication and mental health at work

Slightly over half (55%) of survey respondents reported feeling satisfied with the commitment senior management makes to mental health. This is relatively consistent across generations (54-59%) and location (50-61%). A key element of senior management commitment is how mental health and mental health initiatives are communicated in the workplace. We found some positive trends, albeit with room for improvement.

- **57%** reported feeling satisfied with the level of openness around discussing mental health. Employees in financial services were most likely to be satisfied, followed by employees in IT, and retail/consumer goods.
- **58%** agreed that their workplace encourages senior leadership to support employees with mental health concerns. Employees in financial services were most likely to agree followed by employees in IT, and retail/consumer goods.
- **55%** agreed that their workplace seeks feedback on employer-provided mental health benefits. Employees in financial services (60%) were most likely to agree, followed by employees in manufacturing (56%), and higher education (54%).
- **59%** agreed that their workplace encourages employees to use employer-provided mental health benefits. Employees in higher education (63%), financial services (60%), and manufacturing (60%) were most likely to agree.
- **55%** agreed that their workplace has built support systems and open communication channels. Employees in financial services were most likely to agree, followed by employees in IT, and retail/consumer goods.
- **55%** agreed that their workplace uses non-stigmatizing language when discussing mental health matters. Employees in IT were most likely to agree, followed by employees in higher education, and financial services.

In all instances, Gen Z respondents were marginally more likely to agree than Millennials, Gen X, or Baby Boomers. Similarly, respondents in Europe were more likely to respond positively, followed by those in North America, and Asia-Pacific.

## Using data-driven approaches to monitor employee attitudes and well-being

**Why:** Few companies understand the true impact of well-being programs or the full picture of their risk exposure when it comes to worker mental health.

**How:** Use a broad set of metrics spanning physical, behavioral, and cultural indicators to achieve an ongoing understanding of employee mental health and attitudes. Ensure that privacy and confidentiality are safeguarded and employee concerns are taken seriously.

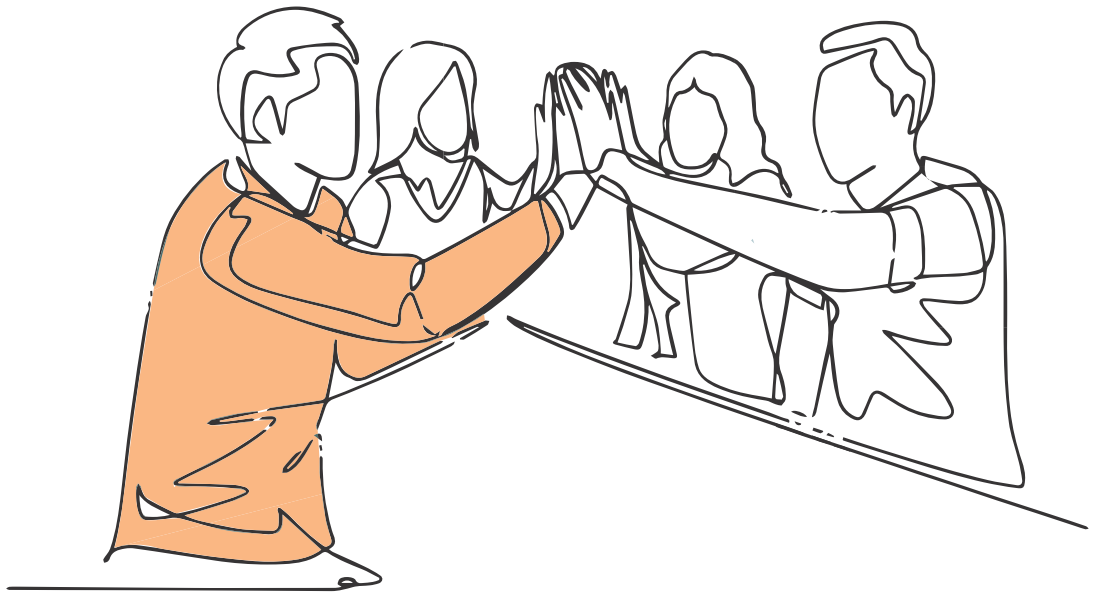
Although most organizations are generally aware of their employee health and well-being risks, far fewer understand the true impact of well-being programs or have a complete view of their risk exposure.<sup>91</sup> To effectively implement tailored approaches—particularly for MNCs—a detailed understanding of psychosocial risk exposure, employee attitudes, and the impact of programs is essential. This means that monitoring and analysis are key at every stage of establishing, tailoring, maintaining, and improving mental health programs.



The WHO Guidelines on Mental Health at Work emphasize that “analyzing the mental health issue” is the first step to improving workplace culture and reducing employee stress.<sup>92</sup> The guidelines recommend that MNCs conduct this analysis across regions to understand the prevalence, incidence, and risk factors of workplace stress, as well as the cost implications of lost productivity.<sup>93</sup> By understanding employees’ unique needs and identifying misalignments in their experiences, such as communication barriers, lack of resource awareness or access, and other obstacles, employers can gain a deeper insight into employees’ day-to-day realities.<sup>94,95,96,97</sup> As one HR spokesperson at the Wellcome Trust, a London-based health research foundation, stated in 2021, “Being led by the evidence means actively looking to understand which approaches work for who, in what context and why.”<sup>98</sup>

The multi-contextual, multicultural nature of MNCs only elevates the need for thorough and continuous monitoring of employee well-being and attitudes, and the effectiveness of programs. MNCs such as BP, HSBC, Toshiba, and Agility adopt this approach, utilizing manager and employee surveys to understand employee needs and inform their mental health strategies, ensuring that they are based on robust data and lived experience.<sup>99,100</sup> Our panel also pointed out that data can be used to build an ever-more compelling business case for worker mental health, thus helping to elevate it as a priority for business leaders.

Employers should use various methods to collect data for monitoring employee mental health and evaluating the impact of mental health programs. This data can be categorized into three types of indicators. The first type is physical, which gives a direct view of the impact of mental health on the workforce. For example, evaluating absenteeism and presenteeism offers good insights into well-being and productivity.<sup>101</sup> Performance-related metrics, such as output per hour and overall performance evaluations, are also crucial indicators of productivity. Meanwhile, healthcare utilization for mental health services can provide direct



indicators of mental health and well-being among employees.<sup>102</sup> This is especially important for assessing the ROI of programs in situations where the cost of healthcare utilization is shared between employers, individuals, and public healthcare.<sup>103</sup>

The second group of metrics consists of cultural indicators. These include employee engagement, which encompasses the level of involvement, commitment, and enthusiasm employees have for their work and their organization and is often linked to better mental health and job satisfaction.<sup>104</sup> Another important cultural indicator is the psychosocial safety climate (PSC) of a workplace. This refers to employees' perceptions of an organization's commitment to their wellness, i.e., to what extent do workers feel that the company listens to them to understand their work-related stressors and take action to improve policies, practices, and procedures.<sup>105</sup> A positive PSC is one in which employees feel that senior management has prioritized their mental well-being by fostering a psychologically healthy workplace.<sup>106</sup>

Finally, employers must monitor behavioral indicators to assess factors such as employee mental health, employee attitudes and stigma, willingness to use and actual use of resources, and warning-sign recognition to anticipate deterioration in mental health among individuals and the wider workforce. Clinical indicators of mental illness, such as depression or anxiety, can be measured to provide quantitative assessments of employees' mental

health status. Surveys can measure changes in stigma levels toward mental health, assessing individuals' beliefs, attitudes, stereotypes, and behavioral intentions related to mental health, helping organizations to identify areas needing improvement in their cultural approach to mental health.<sup>107,108</sup> A detailed understanding of stigma can help companies to identify whether their workplace environment is conducive to employees seeking and receiving the help they need. Concurrently, recognizing warning signs of deteriorating mental health is crucial for identifying individuals who may need support, ensuring that appropriate services are provided promptly.

An extremely important element when it comes to data-driven approaches is ensuring that confidentiality and privacy are treated with the utmost seriousness. Our panel pointed out that the inherently private and protected nature of health data means that using it to measure impact presents challenges. To effectively understand risk factors, raise awareness, and encourage engagement, it is essential to ensure data security and address employees' concerns about it.

The panel also pointed out that it is critical that companies themselves ensure the security of health data. Partly this is a statutory issue, but it is also one of trust: data is essential for organizations to develop and implement solutions they believe will be effective—they must therefore ensure that employees remain comfortable sharing health data.

## Keeping track: surveys, metrics, and guidelines that employers can use to support worker mental health programs

### Physical indicators

- The *Work Productivity and Activity Impairment (WPAI) questionnaire* is the most common measure of absenteeism, presenteeism, and productivity.<sup>109</sup>
- The *WHO Health and Work Performance Questionnaire (HWPQ)* measures absenteeism and presenteeism.

### Cultural indicators

- The *Gallup Q12 Employee Engagement survey* measures employee engagement. It includes 12 questions centered on the workplace environment and employee involvement, enthusiasm, and commitment to work and the workplace.<sup>110</sup>
- The *PSC-12 scale* is a measure of psychosocial climate that evaluates how well an organization prioritizes the psychological health and safety of its employees.<sup>111</sup>
- The *ISO standard* for managing psychosocial risk. It provides guidelines for managing psychosocial risks and helps organizations prevent work-related injuries and health issues.<sup>112</sup>

### Behavioral indicators

- The *Patient Health Questionnaire (PHQ-9)* screens for depression and the *General Anxiety Disorder (GAD-7) scale* screens for anxiety.<sup>113</sup>
- The *Connor-Davidson Resilience Scale (CD-RISC)* measures employees' ability to cope with stress and recover from adversity.<sup>114</sup>
- The *Opening Minds Scale for Workplace Attitudes (OMS-WA)* and the *Personal Depression Stigma Scale* measure changes in stigma levels toward mental health.
- The *General Help-Seeking Questionnaire* measures employees' willingness to seek out and use mental health resources.<sup>115</sup>
- The *Signs of Struggle (SOS) scale* assesses leaders' ability to observe behavioral warning signs, such as emotional distress, withdrawal, extreme behavior, attendance problems, and performance issues.<sup>116</sup>

## Preparing for the unexpected

**Why:** *Unexpected events can have a destabilizing impact on the lives and mental health of workers.*

**How:** *Use the example (and enduring impact) of covid-19 and the global financial crisis to prepare for, and anticipate, the mental health impact of emerging changes, such as technological advancements in the workplace, and other unforeseen challenges that may arise.*

In recent years, businesses and workers have faced several crises. Since the start of 2020, the covid-19

pandemic and Russia's invasion of Ukraine —along with the resulting food and energy crises, soaring inflation, rising living costs, and tightening debt—have profoundly affected global economies and people's lives.<sup>117</sup> Meanwhile, the climate emergency continues to have increasingly serious and often unexpected impacts. The rapidly shifting economy, coupled with the pandemic's aftermath and increasing uncertainty about the future, has significantly contributed to rising mental health concerns worldwide.<sup>118</sup>

Rather than being anomalies, recent years demonstrate that unexpected events and crises can radically alter our everyday lives. This in

turn reinforces the need for MNCs to remain continuously prepared for unforeseen changes, whether on a global scale or, more frequently, within individual regions or countries where they operate. It is crucial for employers to recognize the ubiquity of crises and take action to address and support the mental health needs of their workforce. The most effective approach is to ensure that robust, proactive policies are effectively implemented that blend standardized approaches with the flexibility to adapt to local culture, infrastructure, regulation, and circumstances.

Major lessons were learned rapidly amid the covid-19 pandemic as employers and employees adjusted to business and office shutdowns, shifts in work patterns, and changes in communication, among others. As companies and workers navigated this new reality, changes were implemented that had lasting positive impacts. One notable development has been the increase in employee mental health programs: in the UK, for example, 81% of workplaces have increased their focus on employee mental health since the pandemic by developing standalone well-being strategies.<sup>119</sup> Yet, despite companies managing to mobilize at short notice, the key lesson is the need to prepare for unexpected crises before they arise— to be proactive rather than reactive in addressing mental health both for employee well-being and business success.



# Conclusion: investing in worker mental health pays dividends

The evidence is clear: a happier, more mentally safe workforce is a more productive one, making investments in employee mental health imperative for MNCs. The ROI spans multiple metrics of productivity, including output, reductions in absenteeism and presenteeism, and staff retention. MNCs face notable complexities in designing and implementing mental health programs, not least because they must design standardized approaches that are dynamic and adaptable to varied local cultures, attitudes, and contexts. On the other hand, they also have the resources and influence to become industry and world leaders not only in safeguarding worker mental health, but also in reaping the immense economic benefits of doing so.

This report aims to provide MNC executives and business leaders with the evidence and the ideas needed to implement effective and adaptable mental health strategies. Our research, along with insights from an expert panel and an employee survey, has led us to a range of actions that employers must take to ensure the success of mental health programs.

- **Tailor mental health strategies to specific contexts and cultures, particularly for global employers managing diverse workforces across multiple regions and countries. Establish a global minimum standard and build from there to achieve equitable access. Utilize local resources, partnerships, and expertise; embrace digital tools to provide accessible assistance that spans organizations and geographical divides.**

*Balancing standardized mental health policies with the flexibility to customize them for individual needs is crucial for creating an effective workplace mental health strategy and combating inequity. Although centralized and standardized policies offer several advantages, such as streamlined processes, consistent messaging, and equitable access to resources, they may often fall short if they do not consider local, cultural, social, demographic, and legal contexts. This is particularly relevant for MNCs and larger organizations, which, despite having greater awareness and resources, might struggle to implement a fully standardized approach owing to the complexity and diversity of their workforce's needs.*

*The expert panel consulted during this research emphasized that employers should adopt a strong and consistent approach to mental health promotion, setting a global minimum standard. At the same time, they must also account for local norms around work and work-life balance, as well as stigma and reluctance surrounding the concept of mental health. Partnering with local organizations is crucial for this. Experts pointed to the need to be mindful of where in the workplace employees are located—is it a desk or a factory floor, for example. Solutions should be accessible regardless of work environment. Employers must also work diligently to understand issues around local psychosocial risk regulations and emerging requirements, policymaking, and infrastructure capacity, including by forging partnerships with local bodies.*



- **Leverage business resources and recognize the long-term benefits of investing in mental health as part of a wider acknowledgement of the benefits of worker health, safety, and well-being.**
- **Embrace a data-driven and participatory approach, putting in place ongoing measurements of employee mental health and attitudes to provide critical insights for developing and refining mental health initiatives.**

Workplace mental health programs are not a perk or a nice-to-have; they have proven positive impacts on worker well-being and, consequently, on individual and organizational productivity measures, such as absenteeism, presenteeism, and overall output. For MNCs, they also offer the opportunity to be acknowledged as world leaders, enhancing their reputation among clients, customers, and potential employees. Mental health strategies should be given equal priority alongside efforts to ensure physical well-being, including being incorporated into wider employee health programs. Efforts to ensure physical and mental health must be holistic and cohesive—individual efforts are significantly enhanced when integrated into multimodal strategies that address the physical and psychosocial aspects of the work environment, offer personal health resources, and engage with local communities. A company's role in supporting mental well-being at work is to cultivate a culture of psychological health and safety. This approach helps to mitigate risks and address many issues before they emerge.

Assessing the mental health of a workforce requires a comprehensive approach involving physical, cultural, and behavioral indicators. Key measures such as absenteeism, presenteeism, productivity, healthcare utilization, and employee engagement provide insights into employee mental health. Assessments of culture and psychological health and safety, along with behavioral indicators like mental health status, resilience and stigma, are crucial for gaining a holistic understanding. Our panel was clear: employers must listen to their workers, making use of tools such as surveys to evaluate what is and is not working and tailor programs accordingly. Doing all three—listening, assessing, and tailoring programs—is vital. This comprehensive strategy underscores the importance of integrating psychosocial risk assessments into the broader framework of workplace health and wellness programs. When handling personal data, employers must ensure that data privacy and confidentiality are safeguarded, both for legal reasons and to ensure that employees feel comfortable and willing to share this crucial information.

- **Lead from the front by addressing misperceptions around workplace mental health and by enabling business leaders and managers to be open about their own mental health or to visibly advocate for mental health initiatives.**

*As working patterns and pressures change rapidly, stigma and reluctance to engage with mental health persist to some extent across the world. Meanwhile, cultural attitudes to work, especially around work-life balance, can amplify the mental health effects of employment on people's lives. Individuals in leadership positions have a unique opportunity to identify issues early and provide guidance before problems escalate. Executives and people managers are also ideally positioned to lead by example when it comes to discussing their own mental well-being and their efforts to improve it. They are crucial in breaking down stigma and encouraging people to share and seek help when needed. Business leaders should be empowered to loudly and consistently champion mental health initiatives, as part of a*

*leadership culture that supports employees by prioritizing open communication, mutual respect, and empathy. Our panel stated that firms must continually assess their ways of working to ensure they reflect the culture the firm aspires to create.*

Investing in workplace mental health is not just about altruism or corporate social responsibility. It is a reliable pathway to a more resilient, engaged, and, ultimately, productive workforce. By bridging the gap between intentions and implementation, organizations can create environments that support mental health through proactive and data-driven strategies. Leadership commitment, cultural sensitivity, and a willingness to adapt standardized policies to diverse contexts will pay off in more ways than one. Embracing this type of leadership not only fosters a healthier workplace, but also positions companies to thrive in an increasingly complex and competitive landscape. Companies that are world leaders in mental well-being can realistically expect to be seen as world leaders in how they run their operations, both globally and locally. Ultimately, they, and their employees, will reap the benefits.



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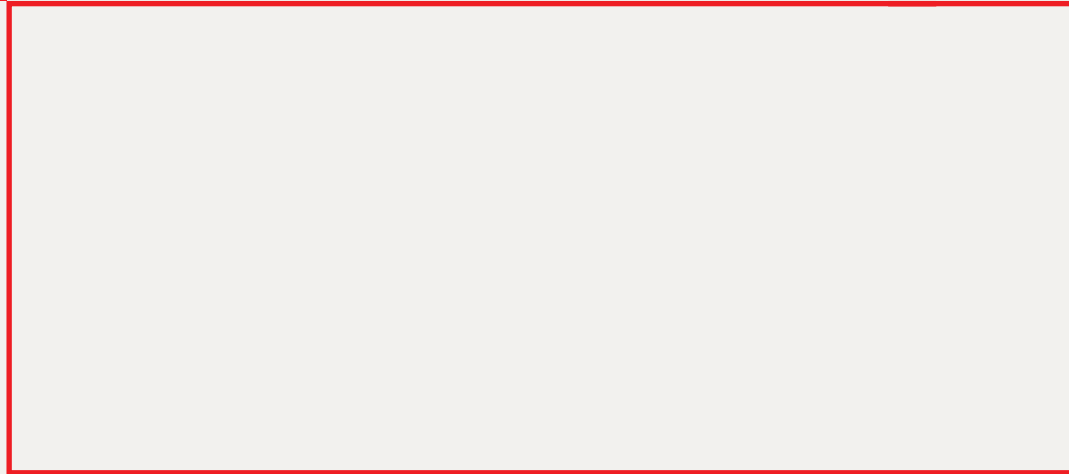
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