



City Mental Health  
Alliance <sup>HK</sup>

In collaboration with  
 OLIVER WYMAN

# Mental Health and Wellbeing in the Workplace: Survey of APAC employees

SEPTEMBER 2020



# Introduction

The need for employers to address and champion mental health and wellbeing in workplaces across Asia is more pressing than ever.

Mental health problems affect many people, at every level of an organisation. Not only do they affect an individual's life and the lives of their families, failure to address mental health problems can also affect workplace productivity, staff turnover and can be a factor affecting the long-term success of companies.

COVID-19 may be a tipping point for employee mental health and wellbeing across APAC, as they experience high stress levels. Organisation leaders are also faced with challenges to look after the mental health and wellbeing of employees as they transition to new ways of working.

As such, coming to the third year of conducting the survey, this report aims to:

1. Understand the current state of APAC employee mental health and wellbeing amidst COVID-19 and other stressors
2. Evaluate the effectiveness and impact of employer efforts in workplace mental health and wellbeing from 2017–2020 [Hong Kong case study]
3. Provide points of reference for employers on mental health and wellbeing measures amidst the “new normal”.

The City Mental Health Alliance Hong Kong (the CMHA HK) is a collaborative venture founded by city businesses. Championed by senior leaders, the Alliance is business led and expert guided and aims to create a culture of good mental health for workers in the city of Hong Kong, share best practice and increase mental health understanding. Following previous survey launches in 2017 and 2018, this year the CMHA HK once

again was joined by Oliver Wyman to launch its third mental health survey.

For the first time, the survey was open to employees based not only in Hong Kong, but also major cities in other parts of Asia Pacific. This gave us a wider snapshot of the mental health and wellbeing landscape in the region and provided valuable benchmarks for dynamics on the ground in Hong Kong. We have also added questions specific to the COVID-19 pandemic to better understand the impact on mental health and wellbeing. At the time of closing, over 1,500 survey responses representing 13 industries were collected.

We would like to note:

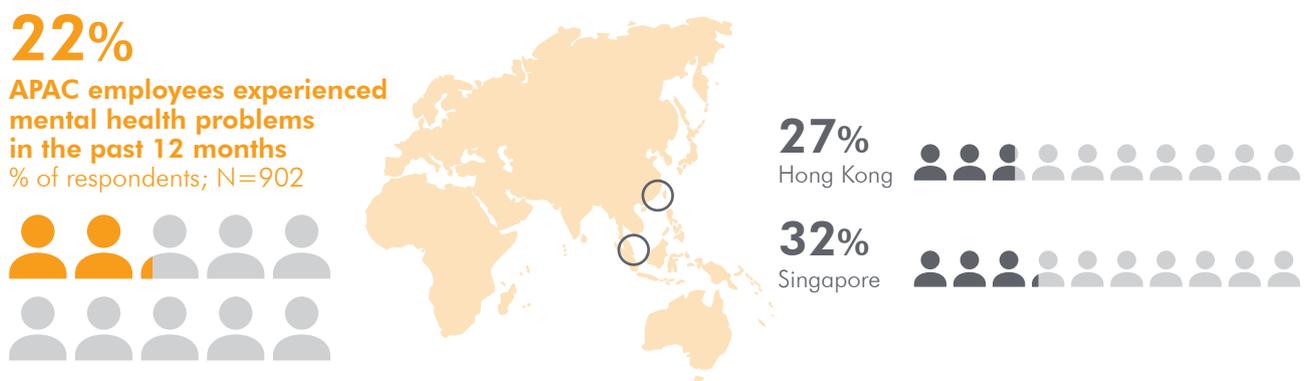
- Participation in this survey is completely voluntary and anonymous
- Analyses referring to participants who experience mental health problems are based on self-report
- The term “mental health problem” was adopted to refer to “mental ill health” in both the survey questions and results as it was felt to encompass a broader range of potential areas of concern and may be more familiar to participants
- Some, but not all, of the organisations that participated in this year's survey participated in those in 2017 and 2018
- Most participating organisations are members of the CMHA HK
- On completing the survey, participants were provided with personalised feedback based on their responses and directed towards sources of support, as appropriate

These factors should be considered when drawing comparisons with past and future studies conducted by the CMHA HK or other institutions.

# #1. Mental health problems in APAC are a widespread issue, exacerbated by COVID-19

## Prevalence of mental health problems

Across the Asia Pacific, close to 1 in 4 employees (22%) reported experiencing mental health problems within the past 12 months. In hubs such as Hong Kong and Singapore, the figures are 27% and 32% respectively.



Note "APAC" includes Hong Kong, Singapore, Tokyo, Shanghai, Beijing, Seoul, Sydney, Bangkok, Jakarta, and Mumbai

Source CMHA HK Survey 2020; Oliver Wyman analysis

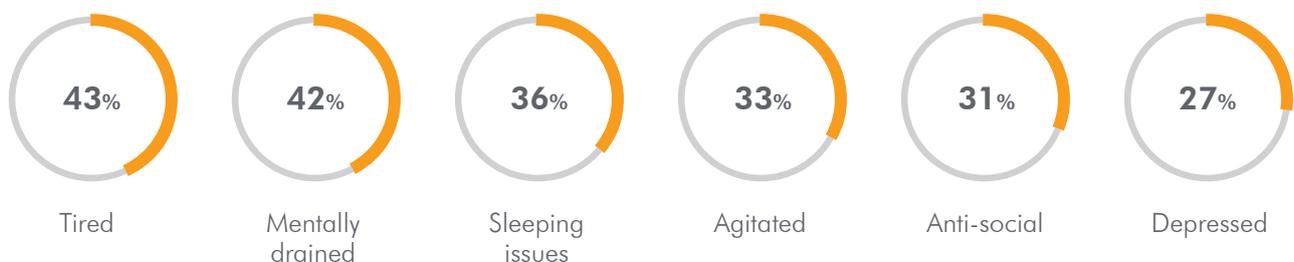
Figure 1

Compared to our survey data of 2018, the prevalence of mental health problems in Hong Kong has risen from 23% to 27%. This may indicate that mental health problems are increasing but could also be a reflection of a growing awareness and recognition of mental ill health in the region.

Many employees indicated they are experiencing symptoms that may be associated with poor mental health. Physical tiredness and feeling mentally drained are those most commonly quoted. The high percentage of the workforce exhibiting these symptoms can be interpreted as a sign that a large population within the workplace are potentially showing signs that may contribute to poor wellbeing.

## Symptoms experienced in APAC, 2020

% respondents (> several days a week); N=952



Source CMHA HK Survey 2020; Oliver Wyman analysis

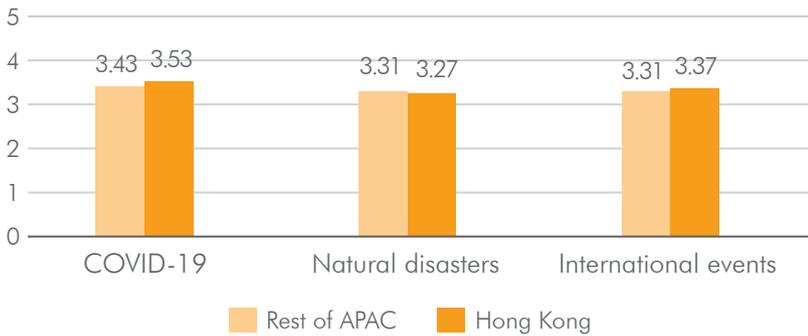
Figure 2

## Key stressors to employee wellbeing in 2020

COVID-19 emerged as the single largest contributing factor to the less than satisfactory state of mental health across the region. However, local dynamics have also been observed. In Hong Kong, international events have caused a strain on the mental health and wellbeing of employees. For survey respondents from Sydney, months of wildfires across parts of Australia may have been the underlying cause that led to “natural disaster” being identified as a factor of stress.

### Impact of various stress factors across APAC, 2020

Average rating (5 as max negative impact); N=220 (Rest of APAC), 732 (Hong Kong)



Note “Rest of APAC” includes Singapore, Tokyo, Shanghai, Beijing, Seoul, Sydney, Bangkok, Jakarta, and Mumbai

Figure 3

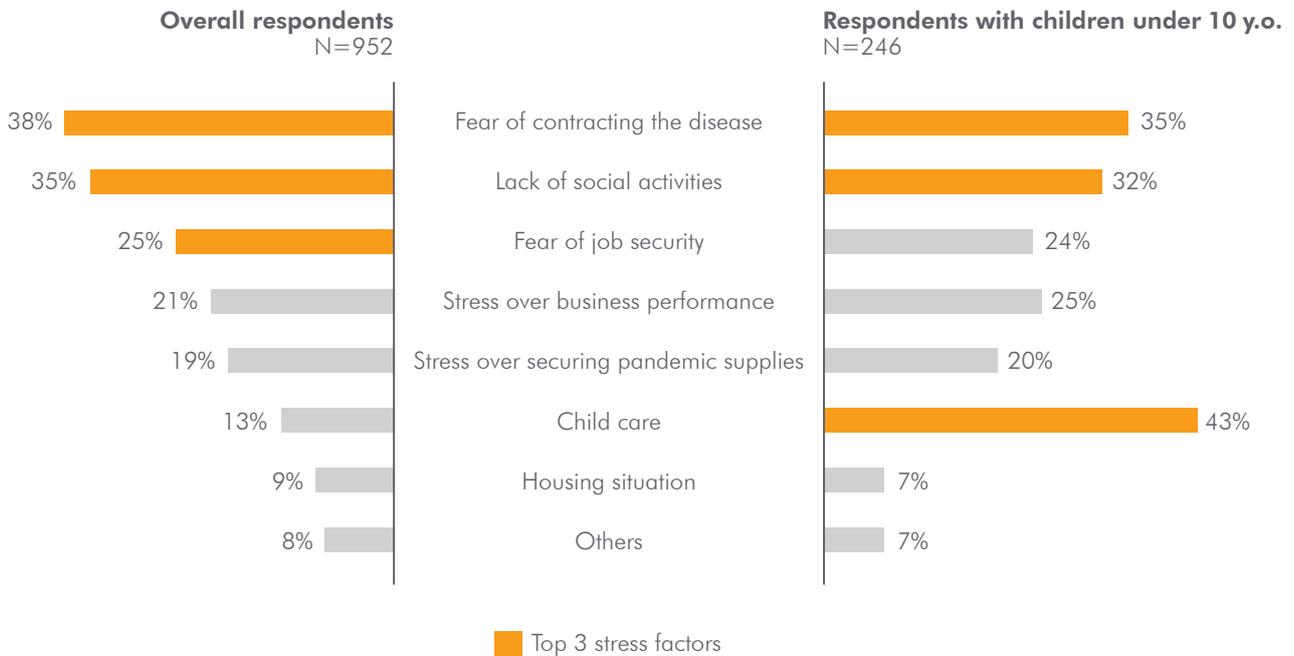
Source CMHA HK Survey 2020; Oliver Wyman analysis

Mental health problems experienced during the COVID-19 outbreak can be linked to a number of factors and circumstances. The top three concerns for employees during the pandemic are fear of contracting the disease, a lack of social activity and fear of job security.

For parents with children under 10 years of age, child care rose above all else as their top cause of mental health problems. Sustained school and day care closures, compounded by work from home arrangements, have confronted parents with unique challenges.

### Reported stress factors during COVID-19 period across APAC, 2020

% of respondents



Note “APAC” includes Hong Kong, Singapore, Tokyo, Shanghai, Beijing, Seoul, Sydney, Bangkok, Jakarta, and Mumbai

Figure 4

Source CMHA HK Survey 2020; Oliver Wyman analysis

# #2. Company investment in resources and cultural change for workplace wellbeing is starting to pay off

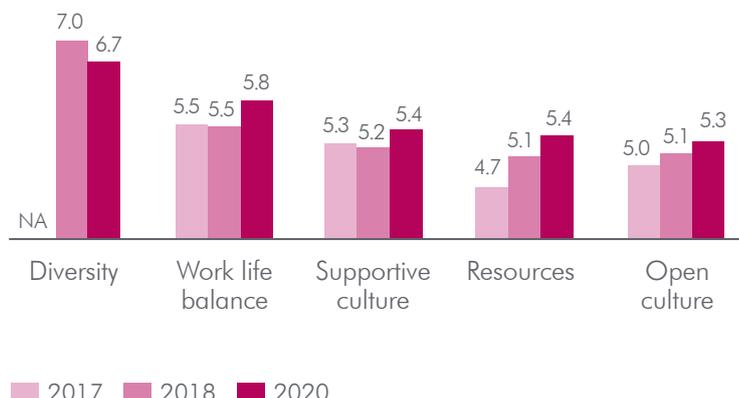
## Employee perception of employers' efforts

In Hong Kong, efforts by employers to improve workplace wellbeing are being recognised even outside of a pandemic. Analysis of survey data over the course of three years shows incremental growth in employees' rating of their organisation's performance in both cultural aspects and availability of resources.

Cultural changes in a workplace require long term commitment. Since our last survey, employees report having observed a general positive change in the culture of their workplace.

### Employers' efforts to support mental health at work

HK 2017–2018, 2020; average rating (10 as max agreement); N=360 (2017), 424 (2018), 732 (2020)



“A lot of positives are already there, but there is a need for continuous top down support so that people feel and know that this is not just lip service.”  
– Sr. mgmt. at law firm

“I believe a lot have been done to ensure that the tools are in place to treat mental health problems. My manager is full of empathy but others may not be so fortunate.”  
– Jr. mgmt. at law firm

“I have been impressed with the flexible working policy and our diversity and inclusion goals and recent actions.”  
– Jr. mgmt. at conglomerate

**Figure 5**  
Source CMHA HK Survey 2020; Oliver Wyman analysis

## The attitude of employees towards mental health

Continuing efforts on the part of employers to foster a mentally healthy workplace culture may also be translating to a positive mindset change among employees.

In 2018, when Hong Kong employees thought of mental health, negative attributes were dominant e.g. “stress”, “depression”, “crazy” and even “suicide”.

In 2020, employees in APAC (mostly in Hong Kong) more commonly reference words that may relate to good mental health and wellbeing such as “happiness”.

### Words employees associate with “mental health”

Font size=frequency of mention



**Figure 6**  
Source CMHA HK Survey 2020; Oliver Wyman analysis

# #3. Issues still to be tackled: stigma, presenteeism, mid-management crunch

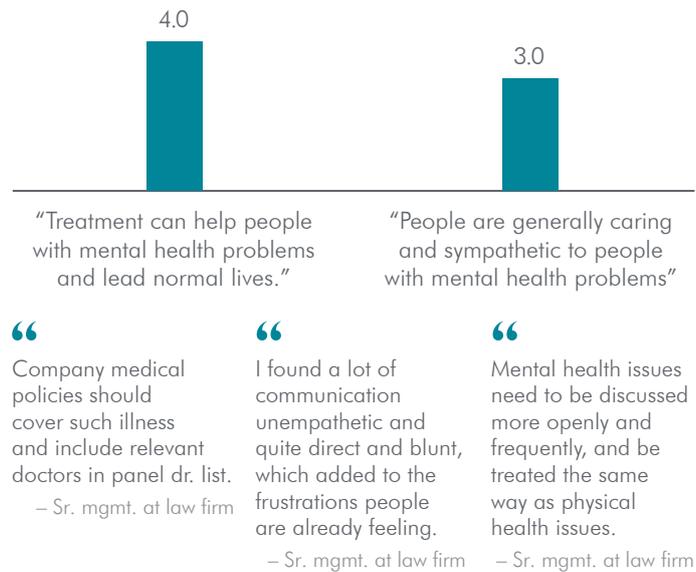
## Issue 1 – Stigma

Combatting stigma around mental health is important in shaping a more inclusive office culture, as stigma can be an inhibitor to people talking about mental health issues and can prevent discussions of such topics within the workplace.

The survey results suggest that 33% of respondents in APAC have either personally experienced stigma due to mental health conditions or know of someone who has within the past 12 months. The 2018 survey reported this figure as 55% for Hong Kong, so while the reduction to 33% in the 2020 survey is welcome, room for improvement remains.

However, employees are reporting positive signs in relation to being able to speak about mental health concerns. A greater proportion of respondents report telling someone about their mental health problem and increasingly they are turning to colleagues. This underlines the importance of raising mental health awareness and understanding at multiple levels across the organisation.

### Attitude of employees towards people with mental health problems HK 2020; average rating (5 as max agreement); N=732



- “ Company medical policies should cover such illness and include relevant doctors in panel dr. list. – Sr. mgmt. at law firm
- “ I found a lot of communication unempathetic and quite direct and blunt, which added to the frustrations people are already feeling. – Sr. mgmt. at law firm
- “ Mental health issues need to be discussed more openly and frequently, and be treated the same way as physical health issues. – Sr. mgmt. at law firm

Figure 7  
Source CMHA HK Survey 2020; Oliver Wyman analysis

### The people respondents spoke with about personal mental health issues APAC 2018, 2020; % of respondents; N=85 (2018), 244 (2020)

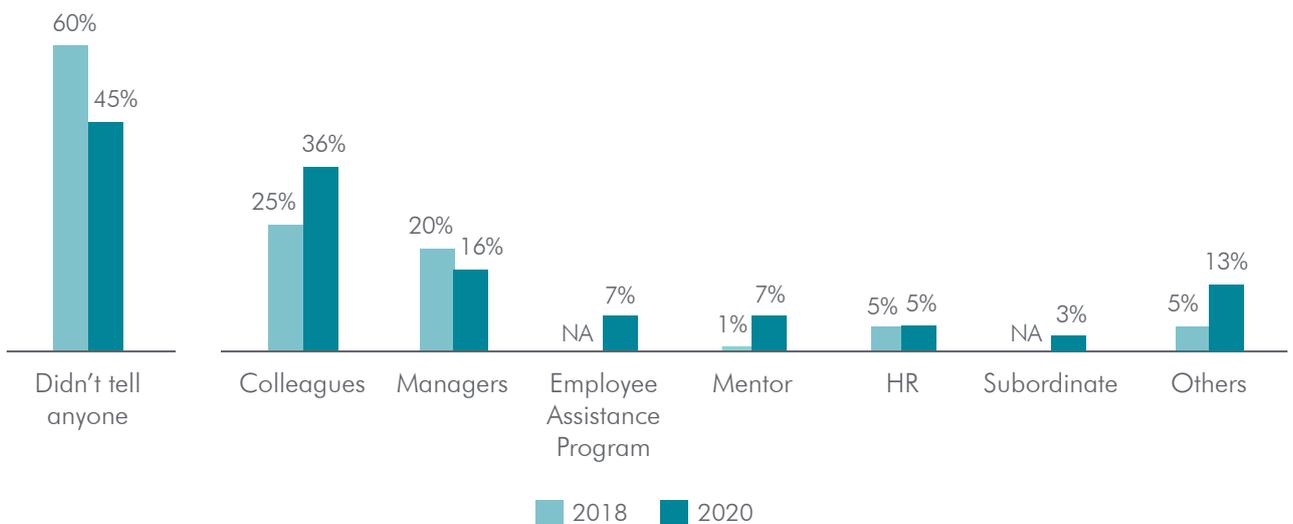


Figure 8  
Source CMHA HK Survey 2020; Oliver Wyman analysis

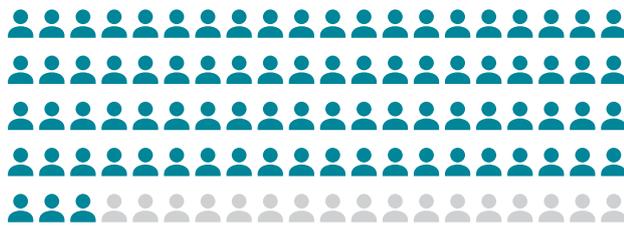
## Issue 2 – Presenteeism

Presenteeism, known as turning up for work whilst experiencing ill health, has implications for employers. It may be a factor in employees not receiving the help and support they need, as well as being related to reduced productivity for an employer.

Of those respondents who reported experiencing mental ill health, 83% stated that they would present for work despite their mental health problems. Of these, 76% reported that their performance on those days was not at the level that was expected of them.

### Frequency of full work attendance despite mental health problems

APAC 2020; % of respondents; N=259



**83%** of employees reported going to work despite poor mental health

### Impact of presenteeism related to mental health problems

APAC 2020; % of respondents; N=225

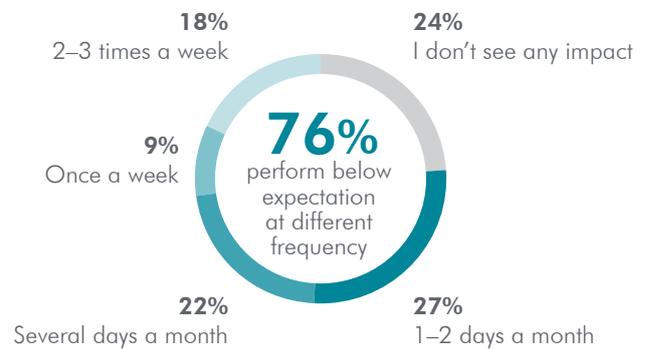


Figure 9

Source CMHA HK Survey 2020; Oliver Wyman analysis

Commonly cited reasons for going to work in a poor state of mental health are related to work ethics, capacity constraints at work, fear of negative performance review, as well as pressure from those around them. Companies can benefit from more candid discussions around these topics to alleviate and tackle employee concerns.

### Commonly cited drivers of presenting at work with mental health problems

APAC 2020; % of respondents; N=259



“

I do not want to have to explain the issue.

– Back/middle office at law firm

“

I need to save the leaves for family commitments. I don't want to take more for my own health issues.

– Admin staff at law firm

“

I feel responsible for my work and would like to keep up with my professionalism.

– Employee at conglomerate

“

I need income and I fear deportation. My visa is tied to my job.

– Sr. mgmt. at consulting firm

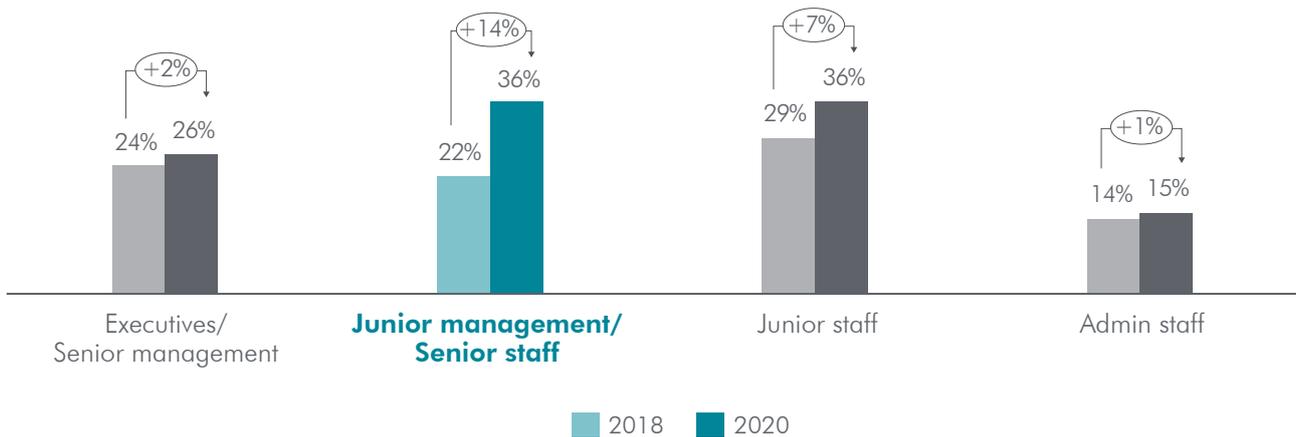
Figure 10

Source CMHA HK Survey 2020; Oliver Wyman analysis

## Issue 3 – Middle management crunch

While all employees have experienced an overall increase in mental health problems over the past year, middle managers are persistently taking the hardest hit, as observed in Hong Kong. In fact, middle management especially senior staff, also have the highest incidence of presenteeism across all ranks.

### Employees who experienced mental health problems in the past 12 months in Hong Kong, 2018, 2020 % of respondents; N=732



#### Middle management

Executives are equivalent of Partner, Regional Head, and Managing Director  
 Senior management is equivalent of Principal, Counsel, Director, Team-lead, and Executive Manager  
 Junior management is equivalent of Project Manager, Manager, and Designer  
 Senior staff are equivalent of Senior Consultant, Legal Assistant, Associate, and Account Executive  
 Junior staff are equivalent of Consultant, Paralegal, Analyst, and Specialist  
 Admin staff are equivalent of Assistant, Specialist, and Receptionist

Figure 11

Source CMHA HK Survey 2020; Oliver Wyman analysis

### Average # of days of presenteeism per month due to mental health problems

APAC 2020; N=225

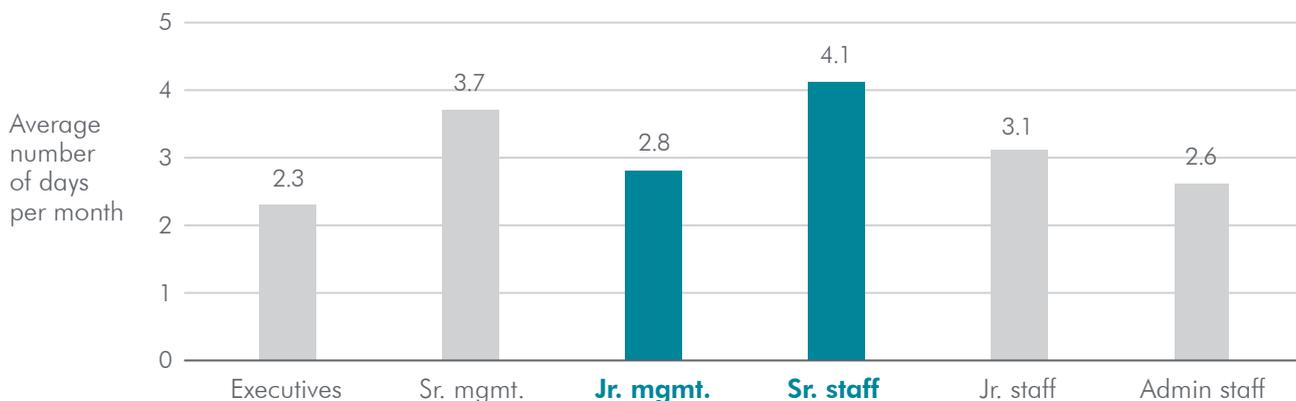


Figure 12

Source CMHA HK Survey 2020; Oliver Wyman analysis

## % of employees with mental health problems finding support resources helpful

APAC 2020; % of respondents; N=255

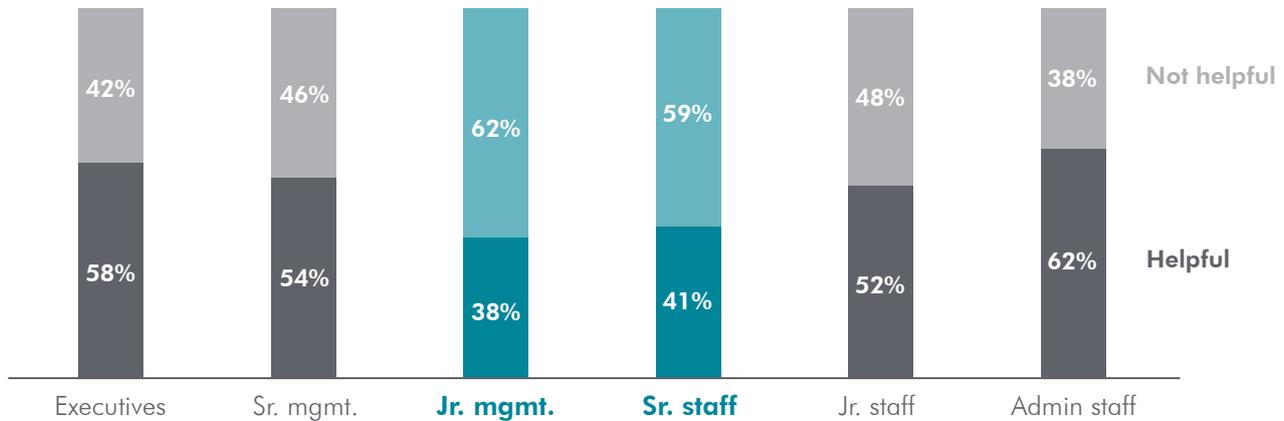


Figure 13

Source CMHA HK Survey 2020; Oliver Wyman analysis

Coincidentally, middle management consistently rates the support provided by the company as least helpful which might have contributed to the high prevalence of mental health problems among this group.

Given new challenges brought by COVID-19, such as business performance pressure and the difficulty of remote team management etc., more middle managers might experience mental health problems as they shoulder increased responsibilities in an unprecedented setting while not having access to the relevant support.

To alleviate mental health problems across employee groups and especially in middle management, companies should recognise the specific needs of individual groups, and address these in forums and channels that are most regularly accessed by them.

If not proactively addressed, mental health problems could challenge an organisation's long-term employee retention, especially among highly-stressed middle managers.

## Employees who have left jobs due to mental health problems

APAC 2020; % of respondents; N=926

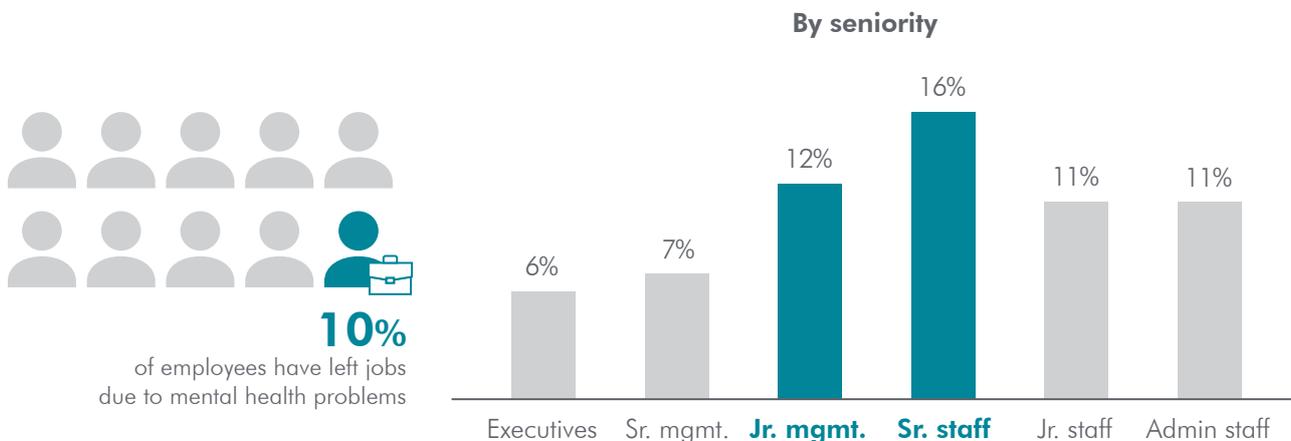


Figure 14

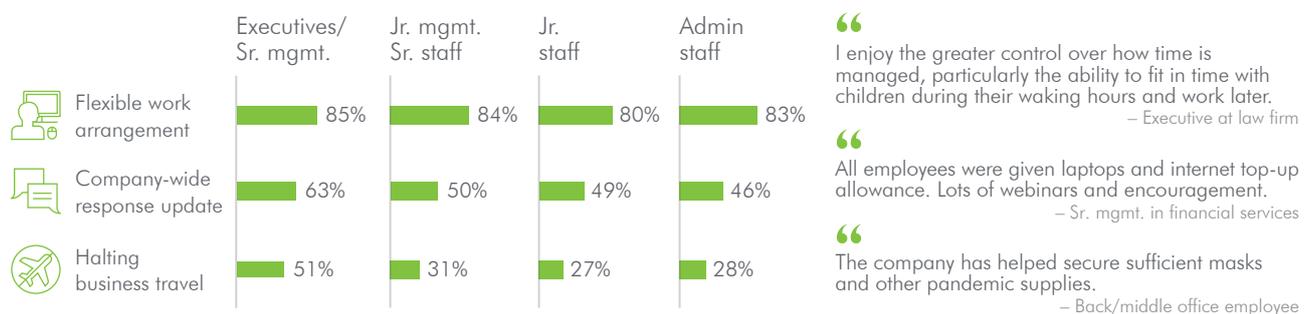
Source CMHA HK Survey 2020; Oliver Wyman analysis

## #4. Companies need to adapt their approach as they transition to new ways of working

### Employers' measures of support should not be "one-size-fits-all"

In response to the pandemic, many employers introduced policies and resources to give priority to employees' wellbeing and mental health. Flexible work arrangements, company-wide response updates, and the suspension of business-related travel have been the most well-received support measures across all employee groups.

#### Top 3 most helpful company support during COVID-19, as ranked by staff and presented by seniority APAC 2020; % of respondents find helpful; N=952



Note "APAC" includes Hong Kong, Singapore, Tokyo, Shanghai, Beijing, Seoul, Sydney, Bangkok, Jakarta, and Mumbai

Figure 15  
Source CMHA HK Survey 2020; Oliver Wyman analysis

However, we noticed that there are material differences in personal circumstances as well as ways policies are executed between employers and across employee groups. These have resulted in different employee experiences. Taking the flexible work arrangement as an example, for employees who are taking care of young children, working from home could cause them greater burden than resolutions. Across companies, some have executed a work from home policy based on trust and confidence in employee compliance whilst others created additional hurdles for employees to navigate.

All these factors may have some impact on employee mental health outcomes.

Effectiveness of employer support during COVID-19, therefore, is hard to compare and should be reviewed by companies on an individual basis. Companies vary widely and there are a large number of variations in these changing circumstances. There is therefore, a clear need for open channels of communication with staff to ensure that company policies can best meet the needs of staff.

### Response to employer support during COVID-19

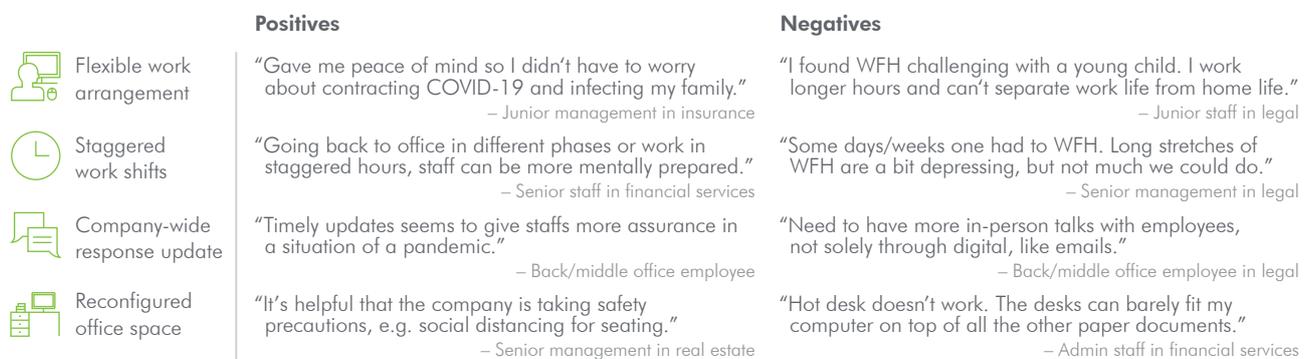


Figure 16  
Source CMHA HK Survey 2020; Oliver Wyman analysis

## Mental health resources are still underutilised; driving adoption requires employers to raise awareness and address concerns over their benefits

This year, we have seen an increase in employees who think resources offered by their employers are sufficient and tailored to their needs.

**Employees who think resources offered are sufficient and tailored to their needs**  
APAC 2018, 2020; % of respondents; N=141

However, the majority of employees who reported experiencing mental health problems in the past 12 months have not used any resources provided by their employers.



The headwind is especially felt among administration staff and middle managers.

**Figure 17**  
Source CMHA HK Survey 2020; Oliver Wyman analysis

### Support resources employees with mental health problems find helpful

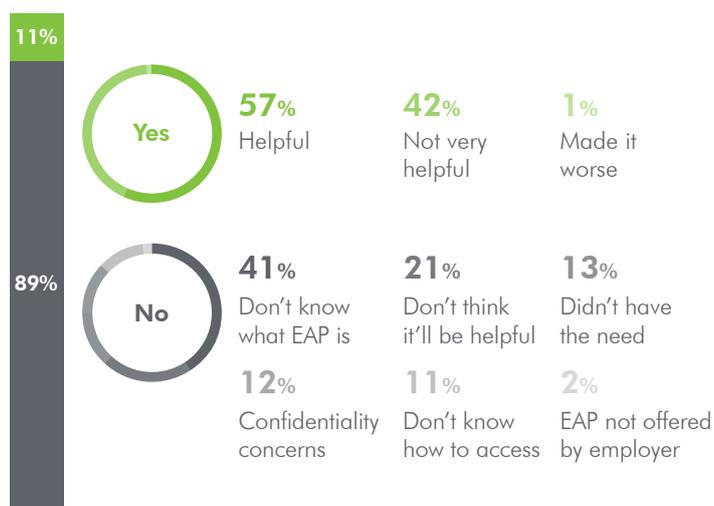
APAC 2020; # of respondents; N=255

	Executives	Sr. mgmt.	Jr. mgmt.	Sr. staff	Jr. staff	Admin staff
Workshops and seminars	20%	3%	4%	12%	15%	22%
Mentorship programs	0%	3%	4%	0%	6%	22%
Mental health first aiders	10%	9%	11%	14%	10%	9%
MH expense reimbursement	20%	20%	15%	10%	13%	13%
Mobile apps	10%	17%	9%	4%	17%	13%
None were helpful	20%	3%	11%	20%	13%	4%
I haven't used any	30%	51%	65%	49%	48%	52%

**Figure 18**  
Source CMHA HK Survey 2020; Oliver Wyman analysis

### Usage of Employee Assistance Program (EAP)

APAC 2020; % of respondents; N=952



**Figure 19**  
Source CMHA HK Survey 2020; Oliver Wyman analysis

We took a closer look at the use of Employee Assistance Programs (EAP) to understand why professional resources are underutilised. Of those who experienced mental health problems over the past year, 11% have chosen to contact their EAP for support. Of the 11% who contacted their company EAP, 57% found the program helpful while 42% stated it was not very helpful, which suggests that there is room to further refine the program.

Among those who did not use the program, doubts over its usefulness and a lack of knowledge of it in the first place stand out as the key reasons for EAP's underutilisation. This suggests that companies, together with third-party providers of mental health resources, should continue to raise awareness for their programs, better manage employees' expectations of their benefits and ensure that programs are best meeting employee needs.

## Employees are expecting their organisations to carry learnings forward from their COVID-19 response

Companies and staff alike have adapted to new ways of working during the pandemic. Many employees have indicated that they are hoping companies embrace these changes and have suggested that greater flexibility, empowerment and support are needed.

### Provide choices

“

Allow employees to work from home at least once or twice a week.

– Jr. mgmt.

Frequent and regular catch ups with Managers. Flexible and staggered work hours.

– Sr. staff in financial services

### Empower employees

“

Employees should not be asked for a reason when applying for flexible working hours. It's just the location of work that is different, the responsibility of the employee should not change and thus shan't be asked for a reason.

– Jr. mgmt.

Senior leaders demonstrating or encouraging employees would be helpful.

– Jr. staff in financial services

### Increase support

“

Get updated with technology and online services which is the future for tomorrow. Also helps in providing a helping hand to family which otherwise is a back burner.

– Sr. mgmt. in financial services

EAP is not enough, nor is the occasional Zoom yoga class or mindfulness app.

Ensure proper access to mental health services – exclusion from health insurance remains a barrier to access and affordability.

– Sr. mgmt. in consulting

Figure 20

Source CMHA HK Survey 2020; Oliver Wyman analysis

## Effective approaches to mental health at a company level should include a clear strategy, a focus on leadership and appropriate support for employees

The data suggests that in 2020, efforts by employers to improve workplace wellbeing are being recognised by employees. The picture of mental health appears to be showing positive signs of change and employees are reaching out to others for support. However, the COVID-19 pandemic has provided unique challenges. As a result, flexibility and listening to staff are valued. Companies are advised to adapt programs and recognise the unique challenges faced by staff at different levels of an organisation both during, and outside of the pandemic. Issues such as stigma, presenteeism and underutilisation of resources remain and need to be addressed. Lessons learned in 2020 provide valuable indicators for not only the prevention of mental ill health, but the promotion of wellbeing and good mental health in the workplace.

### Additional support organisations can provide

APAC 2020; selected text response

“

Check in on people in person rather than sending out EAP emails...

– Executive at conglomerate

Improved tone from senior management regarding WFH, diversity, and inclusion at leadership level.

– Executive at law firm

Include mental health coverage as part of the standard benefits.

– Sr. mgmt. in real estate

“

This should not be sole responsibility of HR, but also senior executives and line managers.

– Jr. mgmt. at conglomerate

Safe avenue for staff to reflect genuine concerns to the management without threat of job security or sanctions.

– Sr. staff at law firm

Allow reverse performance evaluation, allow flexible working hour.

– Jr. mgmt. in financial services

“

Allow employees to work from home at least once or twice a week.

– Jr. mgmt.

Consider to have a peer support team, invite person in recovery to share and provide resources.

– Admin staff at law firm

EAP offered in one's mother tongue. In-house counselor stationed in the office.

– Jr. staff in financial services

Figure 21

Source CMHA HK Survey 2020; Oliver Wyman analysis

# Notes and acknowledgements

## City Mental Health Alliance Hong Kong (CMHA HK)

The City Mental Health Alliance Hong Kong is a collaborative venture founded by city businesses. Championed by senior leaders, the Alliance is business led and expert guided and aims to create a culture of good mental health for workers in the city of Hong Kong, share best practice and increase mental health understanding.

For more information, visit [www.cmhahk.org](http://www.cmhahk.org) or [info@cmhahk.org](mailto:info@cmhahk.org).

## Oliver Wyman

Oliver Wyman is a global leader in management consulting. With offices in 60 cities across 29 countries, Oliver Wyman combines deep industry knowledge with specialised expertise in strategy, operations, risk management, and organisation transformation.

The firm has more than 5,000 professionals around the world who work with clients to optimise their business, improve their operations and risk profile, and accelerate their organisational performance to seize the most attractive opportunities. Oliver Wyman is a business of Marsh & McLennan Companies [NYSE:MMC].

For more information, visit [www.oliverwyman.com](http://www.oliverwyman.com). Follow Oliver Wyman on Twitter [@OliverWyman](https://twitter.com/OliverWyman).

## Acknowledgements

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**Disclaimer** This document is not and should not be considered as clinical advice or support. Anyone who may have a need for such support should seek professional advice.