Keep Thriving

BRITISH SAFETY COUNCIL | Because Experience Counts

Keep Thriving: Future of Workplace Wellbeing

Survey Report 2025

Contents

Profile

Since our foundation in 1957, British Safety Council has campaigned tirelessly to protect workers from accidents, hazards and unsafe conditions, and played a decisive role in the political process that has led to adoption of landmark safety legislation in the UK. Our members in more than 60 countries are committed to protecting and improving the wellbeing of workers believing that a healthy and safe work environment is also good for business. As part of our charitable work, British Safety Council leads health, safety and wellbeing networking forums for several sectors and facilitates and promotes best practice in Britain and overseas.

We also offer a range of services and products, including training, qualifications, publications, audits, consultancy, awards, events and a wellbeing programme. British Safety Council works closely with organisations, charities and individuals who share our vision of ensuring that every worker goes home at the end of the day as healthy as they were when they went to work.

Authors

The Impact & Influencing team at British Safety Council produced this report, with Janine Heim, Research Officer, leading the research. She develops and manages research projects on workplace health, safety and wellbeing in the UK and internationally, producing evidence-based insights to inform policy and practice.

YouGov

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2009 employers and 2008 employees. Fieldwork was undertaken between 10 and 21 July 2025. The survey was carried out online.

Executive summary

Workplace wellbeing plays a critical role in how people experience their jobs and how organisations function. It influences not only health and safety, but also productivity, engagement, and retention. Yet despite its growing prominence, wellbeing remains an area without a consistent definition, measurement framework, or shared understanding of what good looks like.

This is something that British Safety Council has been examining through our Keep Thriving campaign. Our earlier research with the Institute of Occupational Medicine, Being Well in a Changing World, showed that approaches to wellbeing are often fragmented, with no universal definition and wide variation in how employers measure or support it. That research underlined the need for holistic strategies, grounded in health and safety, which adapt to diverse worker needs and respond to rapid social and economic change.

Building on those findings, this latest survey with YouGov turns the focus to how wellbeing is currently understood and experienced in the workplace, from both the employer's and the employee's perspective. By surveying more than 2,000 employees and 2,000 employers across Great Britain, we set out to capture how wellbeing is prioritised, what initiatives are in place, and, crucially, where there are gaps between employer provision and employee experience.

The state of workplace wellbeing today

Employees who responded to the survey most often described their overall wellbeing and their wellbeing at work as moderate. Almost half (47%) rated their workplace wellbeing at this level, with a third rating it high (32%) and only 3% very high. At the other end of the spectrum, almost one in five employees reported low (14%) or very low (4%) wellbeing at work.

Surveyed employers, by contrast, strongly affirm the importance of workplace wellbeing: six in ten (60%) say it is either "important" or "very important" to their organisation, and fewer than one in ten (9%) say it is "not important at all." This contrast, between moderate employee experiences and high employer-stated priority sets the scene for a central finding of this research.

The perception gap

Across the survey, we found consistent gaps between how employers describe their approach to wellbeing and how employees experience it. For example:

- **Strategy maturity:** Employers are more likely to say their wellbeing strategy is embedded (27% vs 20% of employees), while employees are more likely to say there is no strategy at all (21% vs 16% of employers). Where strategies are embedded, employees report far higher wellbeing (8% very high; 61% high), but these best-case conditions remain the minority.

- **Offer vs access:** Employers consistently report offering more wellbeing measures than employees say they can access. Flexible or remote working, for example, is cited by 49% of employers but only 40% of employees. Burnout prevention shows a somewhat starker gap: 26% of employers report providing measures, compared with just 14% of employees who say they have access.

- **Definitions and importance:** Among organisations that consider wellbeing very important, nearly two-thirds (65%) have a formal definition in place. Where wellbeing is only seen as moderately important, just 19% have a definition. For employees, the absence of a clear strategy or definition often translates into lower reported wellbeing.

Structural drivers and patterns

Some differences can be explained by organisation size and sector. Large organisations are more likely to have embedded strategies and to rate wellbeing as very important, while microbusinesses are more likely to say it is "not important at all." Industry patterns tend to follow size: for instance, IT & telecoms employers are more likely to have embedded strategies, while retail has the highest proportion of employers reporting no strategy (36%). Regional contrasts also appear, with London showing relatively high wellbeing and alignment between employers and employees, while the North East shows the widest gaps between the two perspectives.

Implications for the future

Employees and employers do agree on some fundamentals. Both groups see mental health support, flexible work, and personal safety as core elements of wellbeing strategies, and both prioritise enforceable policy levers over voluntary initiatives. When asked what would make the biggest difference:

- **Legally binding obligations** such as minimum leave or workload limits were the top choice for both employers (29%) and employees (40%).

- **A legal duty to assess risks to wellbeing** also received significant support (23% of employers, 28% of employees).

- **Voluntary certification or accreditation** scored lower (15% employers; 12% employees).

Where views diverge, employers are more likely to call for voluntary guidelines or best-practice standards (23%) than employees (11%).

Introduction

Workplace wellbeing plays an important role in shaping how people experience their jobs and how organisations function, yet it remains an area without a consistent definition, measurement approach, or framework. To better understand the realities of wellbeing at work, British Safety Council commissioned YouGov to conduct an online survey among both employers and employees across Great Britain.

The survey set out to capture how wellbeing is currently understood and supported in workplaces of different sizes, sectors, and demographics. It explores the extent to which wellbeing is prioritised, the initiatives in place to support it, and where gaps remain between employee experience and employer provision. By comparing perspectives from both sides, the research highlights areas of alignment, as well as points of divergence, that can inform future policy and progress.

Findings from this survey offer valuable insights into the current state of workplace wellbeing in Great Britain. They provide an evidence base for identifying what works, where improvements are most needed, and how shared challenges can be addressed. More broadly, the results aim to contribute to the ongoing national and international conversation on how wellbeing at work can be better defined, supported, and embedded into organisational practice and policy.

The surveys were designed to capture both sides of the workplace wellbeing picture. Employers were asked about their perception of wellbeing within their organisation, the importance given to it, whether a clear definition exists, and what initiatives or strategies are currently in place.

Employees, in turn, were asked about how they experience wellbeing at their workplace, including how supported they feel, and which measures have the greatest impact on their day-to-day lives.

To ensure everyone responded from a shared foundation, workplace wellbeing was defined broadly as:
"Workplace wellbeing includes someone's physical, mental, and emotional health in and around work."
This inclusive definition allowed participants to consider the many different ways wellbeing is shaped, from organisational policies and workplace culture to personal support and broader life circumstances.

This survey was conducted as part of British Safety Council's 'Keep Thriving' campaign, which seeks to raise awareness of workplace and worker wellbeing, as part of British Safety Council's wider work to support occupational health and safety around the globe.

In understanding that happier workers are often safer too, owing to their awareness, perception and mitigation of risk, worker wellbeing has a direct impact on individual and collective occupational health and safety.

Since its launch in 2022, Keep Thriving has worked to improve worker wellbeing, inside and outside of the workplace, so that all workers can thrive.

More information about Keep Thriving, its aims and asks, can be found here.

Demographics – employees

The employee survey received responses from 2,008 participants across Great Britain.

Most respondents work in long-established organisations, with 24% employed in companies trading for 5-20 years and 55% in organisations trading for over 20 years.

The age profile is younger, with 55% aged under 45.

The gender split is balanced, with 52% identifying as male and 48% as female.
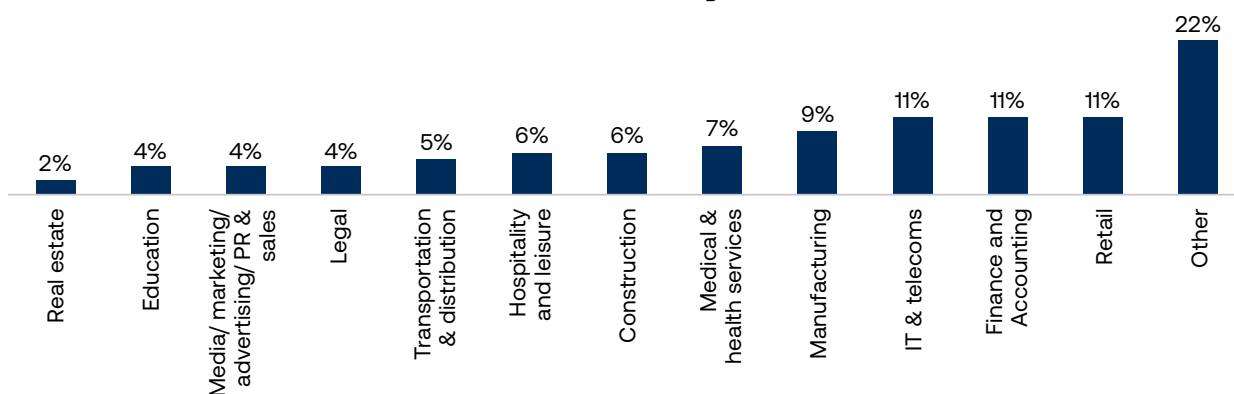
The majority of employees (51%) work in large organisations with 250 or more employees, followed by 24% in small organisations (10 to 49 employees), 13% in microbusinesses (fewer than 10 employees), and 12% in medium-sized organisations (50 to 249 employees).

Most respondents work in the private sector (79%), with 17% in the public sector and 3% in the third or voluntary sector.
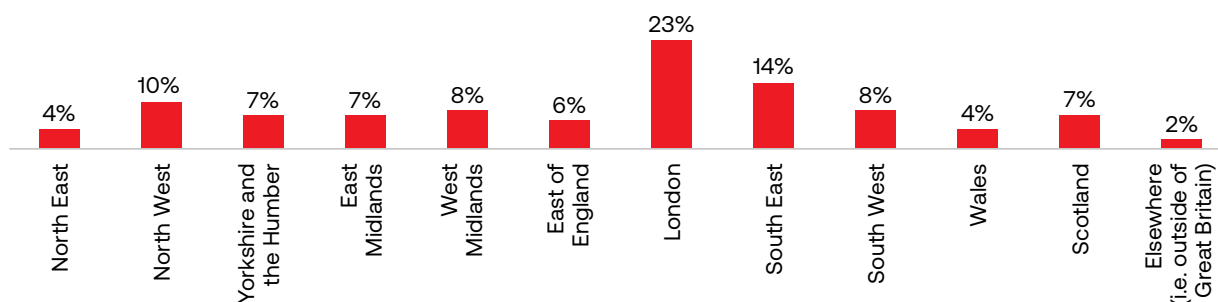
Industry representation is broad, with the largest proportions in retail, finance and accounting, and IT & telecoms (each 11%). Manufacturing accounts for 9% of responses, medical and health services for 7%, and construction, hospitality and leisure each for 6%.

Geographically, the largest proportion is based in London (23%), followed by the South East (14%), and the North West (10%). All GB regions and nations are represented.

Industry

Real estate	Education	Media/ marketing/ advertising/ PR & sales	Legal	Transportation & distribution	Hospitality and leisure	Construction	Medical & health services	Manufacturing	IT & telecoms	Finance and Accounting	Retail	Other
2%	4%	4%	4%	5%	6%	6%	7%	9%	11%	11%	11%	22%

Location

North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
4%	10%	7%	7%	8%	6%	23%	14%	8%	4%	7%	2%

Demographics – employers

The employers' survey drew responses from 2,009 participants across Great Britain.

Most came from long-established businesses, with 74% trading for over 10 years.

This experience base was also reflected in the age profile, with 64% aged 45 or older. The gender split was 63% male and 37% female.
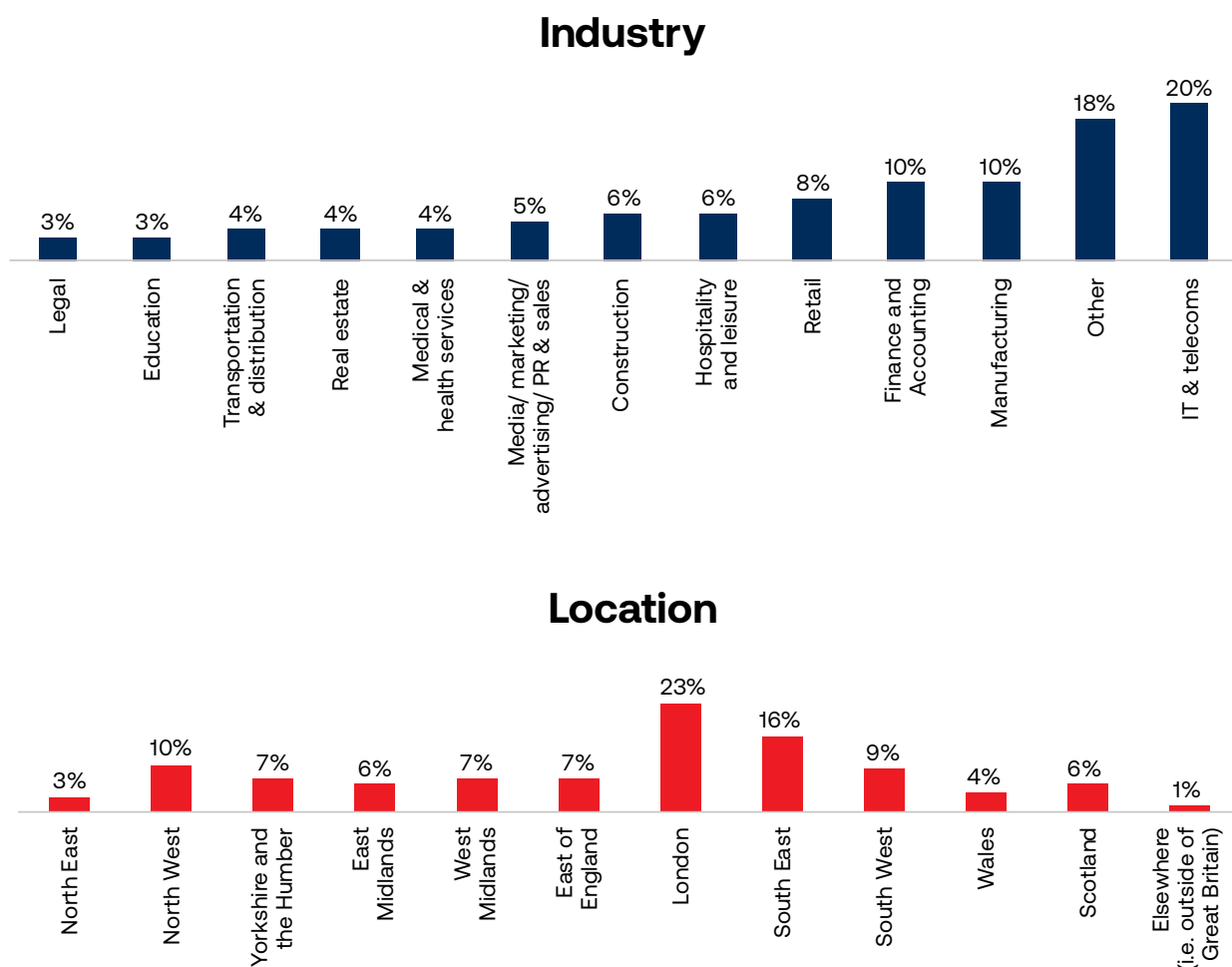
In terms of roles, 41% of respondents manage their entire organisation, while 37% manage a department and 19% manage a team. Only a small proportion reports no management responsibility (4%).

Organisation size was balanced: 32% came from microbusinesses (fewer than 10 employees), 18% from small organisations (10–49 employees), 16% from medium-sized businesses (50–249 employees), and 34% from large organisations (250+ employees).

The sample was heavily weighted towards the private sector (81%), with smaller representation from the public sector (15%) and third/voluntary sector (3%).

A wide spread of industries was represented. The largest single group was IT & telecoms (20%), followed by manufacturing and finance/accounting (both 10%). Retail made up 8%, hospitality and leisure 6%, and construction also 6%.

Geographically, the highest concentration of respondents was in London (23%), followed by the South East (16%) and North West (10%). All GB regions and nations are represented.

Industry

Legal	Education	Transportation & distribution	Real estate	Medical & health services	Media/ marketing/ advertising/ PR & sales	Construction	Hospitality and leisure	Retail	Finance and Accounting	Manufacturing	Other	IT & telecoms
3%	3%	4%	4%	4%	5%	6%	6%	8%	10%	10%	18%	20%

Location

North East	North West	Yorkshire and the Humber	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Elsewhere (i.e. outside of Great Britain)
3%	10%	7%	6%	7%	7%	23%	16%	9%	4%	6%	1%

How employees feel at work – and how employers see wellbeing

To build a clearer picture of workplace wellbeing, employees were asked to rate both their overall wellbeing and their wellbeing specifically at work. Responses were guided by an adapted version of Cantril's ladder, using a scale from 1 (very low) to 5 (very high). The question explained: "Picture a parallel ladder for work wellbeing, with 1 'Very Low' at the bottom, representing the worst possible experience of work today, to 5 'Very High' at the top, representing the best possible experience of work today. Based on a typical day, which of the following best describes your overall wellbeing at work?"
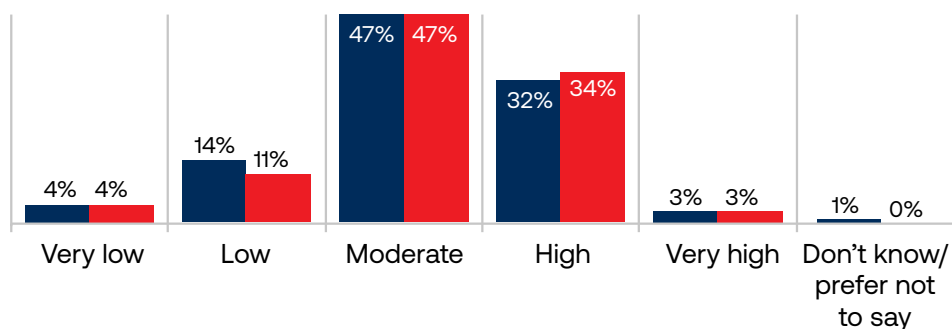
Most employees placed themselves in the middle of the scale. For overall wellbeing, 47% selected moderate, 34% selected high and 3% selected very high. At the lower end, 11% rated their overall wellbeing as low and 4% as very low. The picture was very similar when asked about wellbeing at work. Again, 47% rated their wellbeing as moderate, 32% chose high and 3% chose very high. A further 14% reported low wellbeing at work and 4% reported very low wellbeing.

> **The results indicate an interconnection between workplace and overall wellbeing: high workplace wellbeing often aligns with high overall wellbeing, while low levels in one typically coincide with low levels in the other.**

Employers were asked a different question, focusing on how important they consider workplace wellbeing within their organisation. Six in ten employers (60%) said it is either important, meaning wellbeing features in plans and regular initiatives, or very important, meaning wellbeing is fully embedded and drives strategic decisions. Another 30% described wellbeing as moderately important, meaning that wellbeing is addressed periodically but is not tied to broader organisational goals. Only 9% of employers said that wellbeing is not important at all, meaning it is not actively considered or discussed.

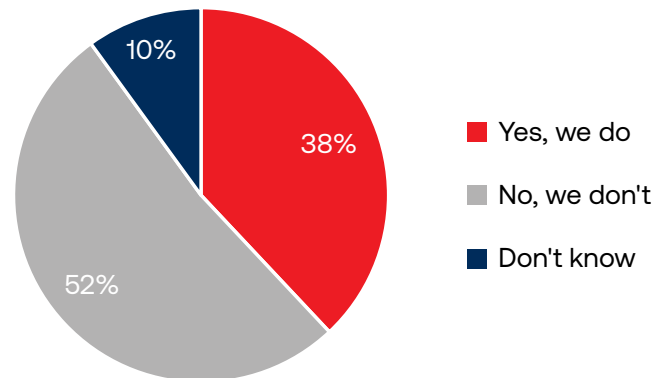## Employee wellbeing

■ Wellbeing At Work   ■ Overall Wellbeing

	Very low	Low	Moderate	High	Very high	Don't know/prefer not to say
Wellbeing At Work	4%	14%	47%	32%	3%	1%
Overall Wellbeing	4%	11%	47%	34%	3%	0%

Employer perception of importance of wellbeing at work

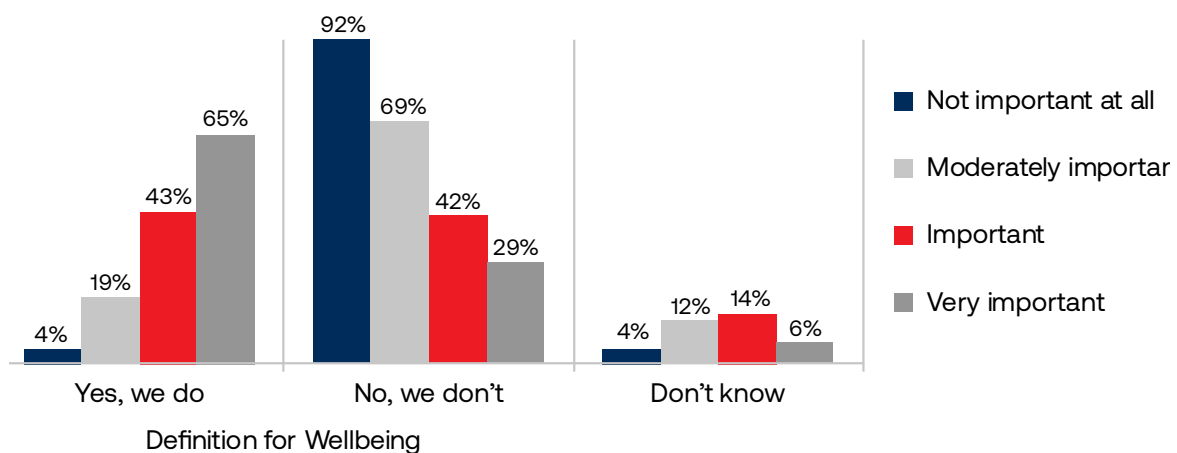| Not important at all	Moderately important	Important	Very important	Don't know
9%	30%	32%	28%	1%
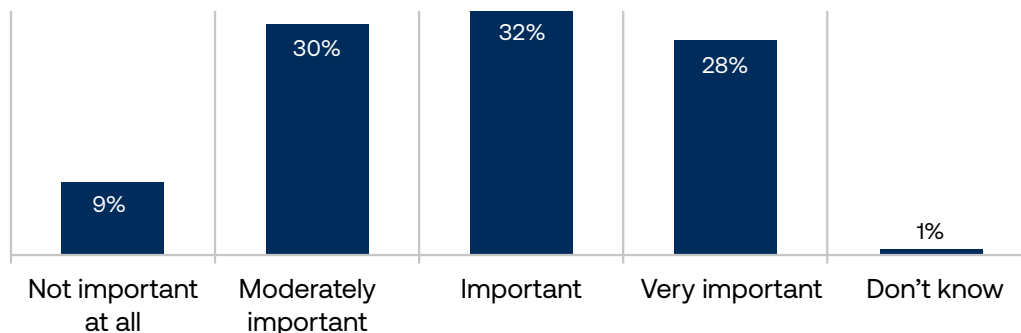
Taken together, these findings highlight an important pattern. Employees are most likely to describe their wellbeing as moderate, while most employers say they already treat wellbeing as a significant organisational priority. This raises further questions about whether the efforts employers believe they are making are being experienced and felt by employees in their daily working lives. It also points to a possible lack of engagement with wellbeing initiatives, and a need for greater involvement of workers in the design and development of workplace wellbeing initiatives so that interventions respond to real world needs.

Employers: Does your organisation have a definition of 'workplace wellbeing'?

Yes, we do: 38%
No, we don't: 52%
Don't know: 10%

When asked about their organisation's approach to workplace wellbeing, the largest share of employees (30%) described it as operational, meaning initiatives are in place and communicated. One in five (20%) said their strategy is embedded, while 14% said it is crisis-driven and 10% said it is emerging. A further 21% reported no strategy or wellbeing initiatives at all.

Employers definition for wellbeing x importance of wellbeing

Definition for Wellbeing

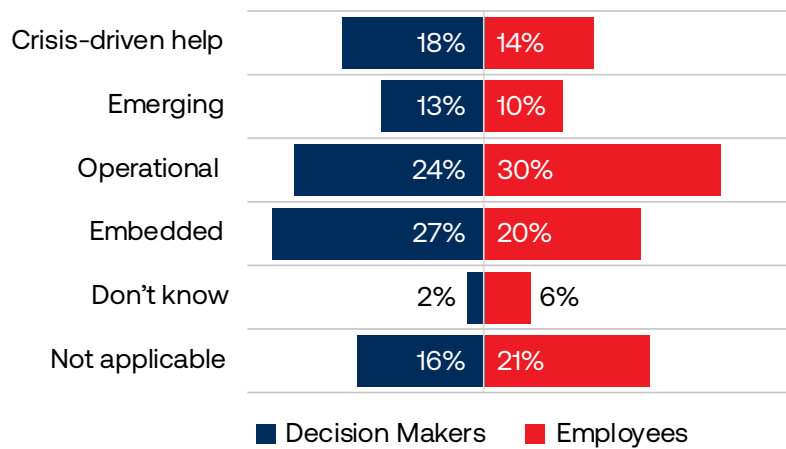|	Not important at all	Moderately important	Important	Very important
Yes, we do	4%	19%	43%	65%
No, we don't	92%	69%	42%	29%
Don't know	4%	12%	14%	6%

Employees are slightly more likely than employers to say their organisation's approach to wellbeing is operational (30% vs 24%) and more likely to say there is no strategy (21% vs 16%). Employers, by contrast, are more likely to describe their approach as embedded (27% vs 20%).

Though not drawn from the same organisations, these differences, which we will outline across a range of categories, nonetheless suggest there may be some bias in how mature employers perceive the provision of wellbeing support to be, compared with how employers view it.
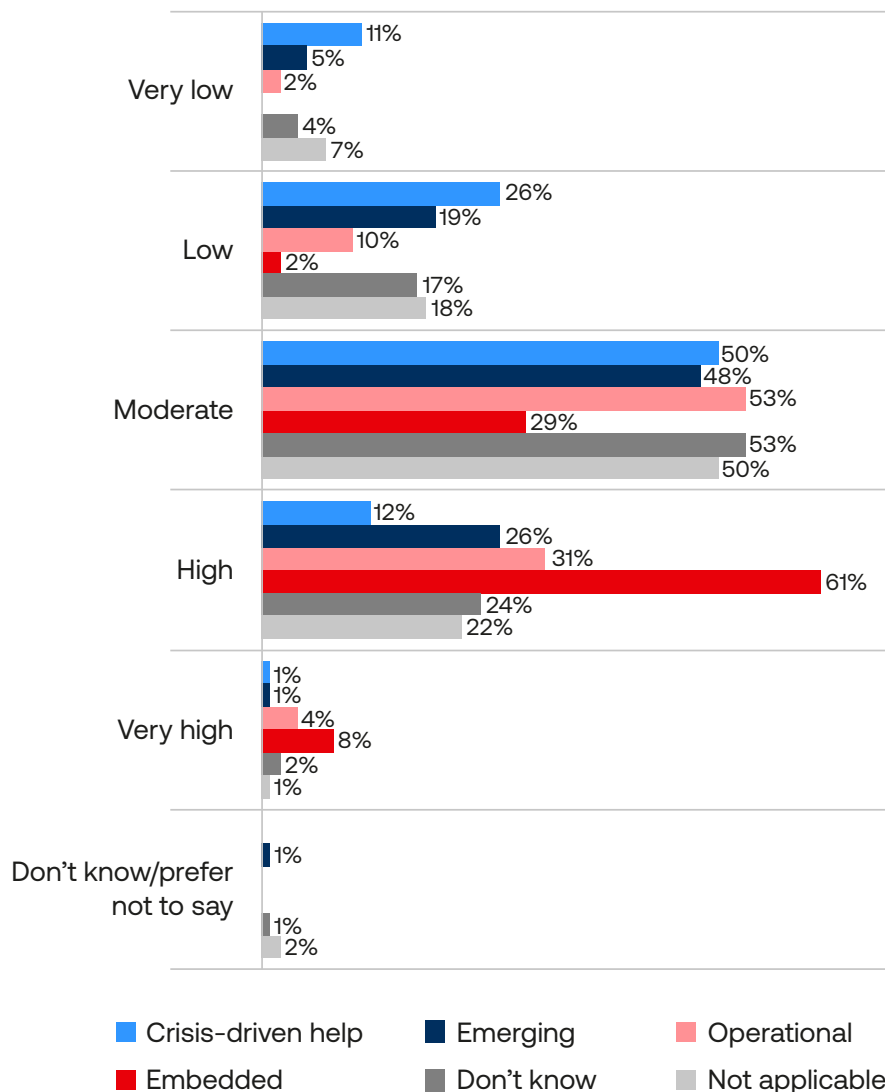
There is also a pattern between workplaces having a definition of wellbeing and how important it is considered to be. Among those rating wellbeing to be very important, 65% reported having a definition compared with 29% without. For those rating it important, 43% reported having a definition, while 19% of those rating it moderately important had one (compared with 69% without). Among those saying wellbeing is not important at all, only 4% reported having a definition.

A further pattern emerges when comparing how employees rate their own wellbeing with how mature they perceive their organisation's wellbeing strategy to be. Among those who said their organisation had an embedded strategy, 8% rated their wellbeing at work as very high and 61% as high. In organisations with an operational strategy, wellbeing ratings were more mixed, but still leaned towards the positive, with 4% reporting very high wellbeing and 31% high.

Maturity of wellbeing strategy

	Decision Makers	Employees
Crisis-driven help	18%	14%
Emerging	13%	10%
Operational	24%	30%
Embedded	27%	20%
Don't know	2%	6%
Not applicable	16%	21%

Workplace wellbeing x strategy maturity

Very low
- Crisis-driven help: 11%
- Emerging: 5%
- Operational: 2%
- Don't know: 4%
- Not applicable: 7%

Low
- Crisis-driven help: 26%
- Emerging: 19%
- Operational: 10%
- Embedded: 2%
- Don't know: 17%
- Not applicable: 18%

Moderate
- Crisis-driven help: 50%
- Emerging: 48%
- Operational: 53%
- Embedded: 29%
- Don't know: 53%
- Not applicable: 50%

High
- Crisis-driven help: 12%
- Emerging: 26%
- Operational: 31%
- Embedded: 61%
- Don't know: 24%
- Not applicable: 22%

Very high
- Crisis-driven help: 1%
- Emerging: 1%
- Operational: 4%
- Embedded: 8%
- Don't know: 2%
- Not applicable: 1%

Don't know/prefer not to say
- Emerging: 1%
- Don't know: 1%
- Not applicable: 2%

Legend: Crisis-driven help, Emerging, Operational, Embedded, Don't know, Not applicable

By contrast, employees in organisations with crisis-driven approaches or no strategy at all were more likely to place themselves at the lower end of the scale. These groups showed higher proportions of low and very low wellbeing compared with those in embedded or operational settings.
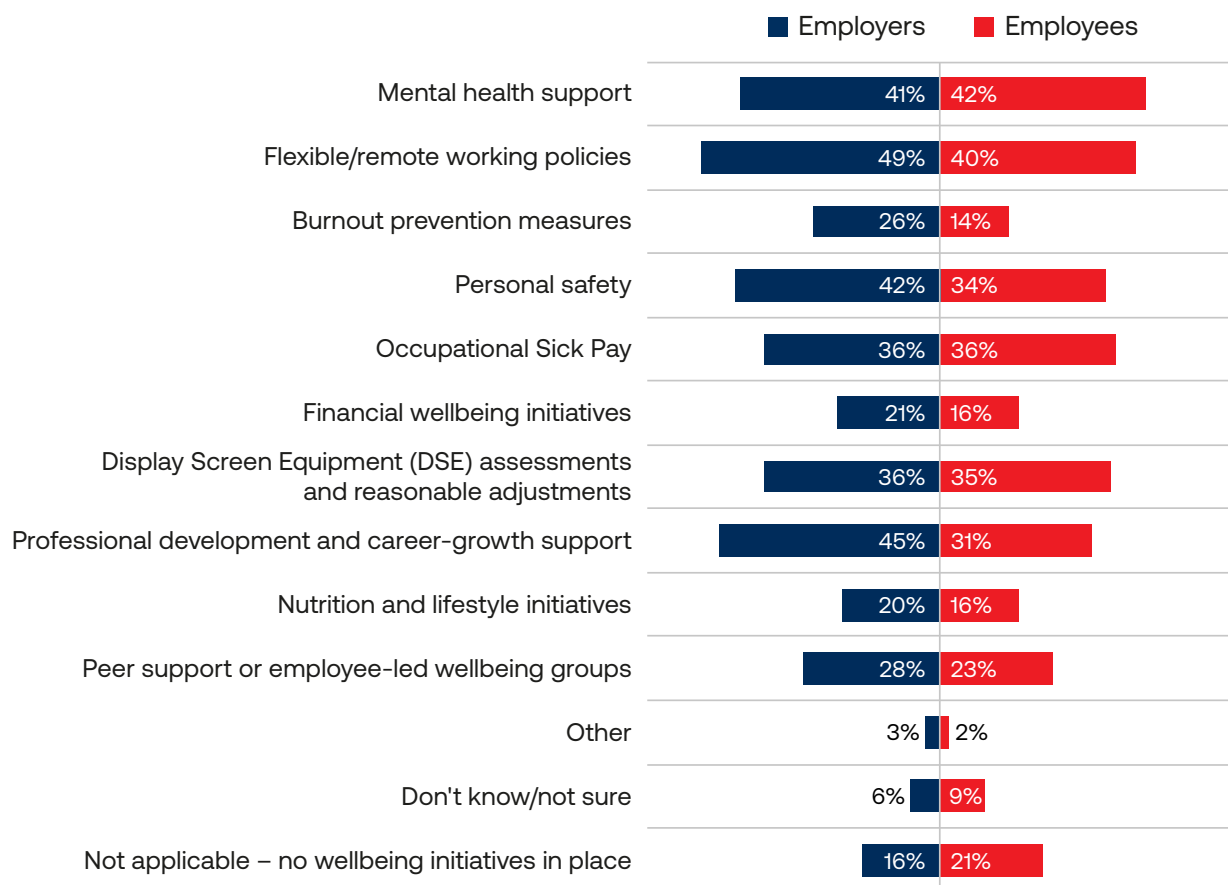
Taken together, these observations suggest that the maturity of an organisation's wellbeing approach is reflected in how employees feel about their own day-to-day wellbeing at work.

When asked to say which wellbeing initiatives are currently available in their workplace, there is a noticeable gap between what employers say they provide and what employees report being able to access. Both groups most often mentioned mental health support, flexible or remote working policies, and measures to support personal safety.

However, across nearly every category, employers reported higher levels of provision than employees reported access. For example, 49% of employers said they offer flexible or remote working, while only 40% of employees said they have access to this. A similar difference can be seen in relation to burnout prevention measures such as workload limits or rest periods, where 26% of employers said these are available compared with just 14% of employees.

This kind of divergence runs through many of the initiatives covered by the survey. It suggests that while organisations may have policies or resources in place, employees do not always see them, know how to access them, or feel that they are available in practice. In some cases, initiatives may be unevenly communicated or applied, leading to a different experience depending on role, department, or location.

Available wellbeing initiatives

Legend: ■ Employers ■ Employees

| Initiative	Employers	Employees
Mental health support	41%	42%
Flexible/remote working policies	49%	40%
Burnout prevention measures	26%	14%
Personal safety	42%	34%
Occupational Sick Pay	36%	36%
Financial wellbeing initiatives	21%	16%
Display Screen Equipment (DSE) assessments and reasonable adjustments	36%	35%
Professional development and career-growth support	45%	31%
Nutrition and lifestyle initiatives	20%	16%
Peer support or employee-led wellbeing groups	28%	23%
Other	3%	2%
Don't know/not sure	6%	9%
Not applicable – no wellbeing initiatives in place	16%	21%

Industries: mixed pictures, different priorities

To capture broader trends in wellbeing at work, responses on the five-point scale are grouped into three categories. Employees who rated their wellbeing at work as 4 or 5 are described as being in the net-high group, reflecting broadly positive experiences. Those who rated it as 1 or 2 fall into the net-low group, reflecting more negative experiences. A rating of 3 is treated as a moderate or neutral response, sitting between the two extremes.

Using this measure, the retail sector has one of the least positive profiles. Nearly a quarter of retail employees (24%) fall into the net-low group, one of the highest proportions across all industries, while only a third (33%) are in the net-high group, among the lowest shares. Employers in the sector are also less likely to actively prioritise wellbeing: around 31% describe it as only moderately important, 16% say it is not important at all, just 16% report having a definition of wellbeing, and over a third (36%) say they have no wellbeing strategy or initiatives in place, the highest "no strategy" rate across all industries.

These findings echo wider concerns highlighted in the 2024 report by The Union of Shop, Distributive and Allied Workers (USDAW), which found that 77% of retail staff have experienced verbal abuse (70%), 53% were threatened by a customer and 10% were assaulted. Yet, in our survey only 30% of retail employees reported having access to personal safety initiatives.

Hospitality and leisure show a more mixed picture. Employee ratings are relatively high, with 39% reporting net high wellbeing, but the share of net low is similar to the overall average at 16%. Employers in this sector often rely on less developed approaches, with only 24% reporting a definition and 30% describing their approach as crisis-driven.
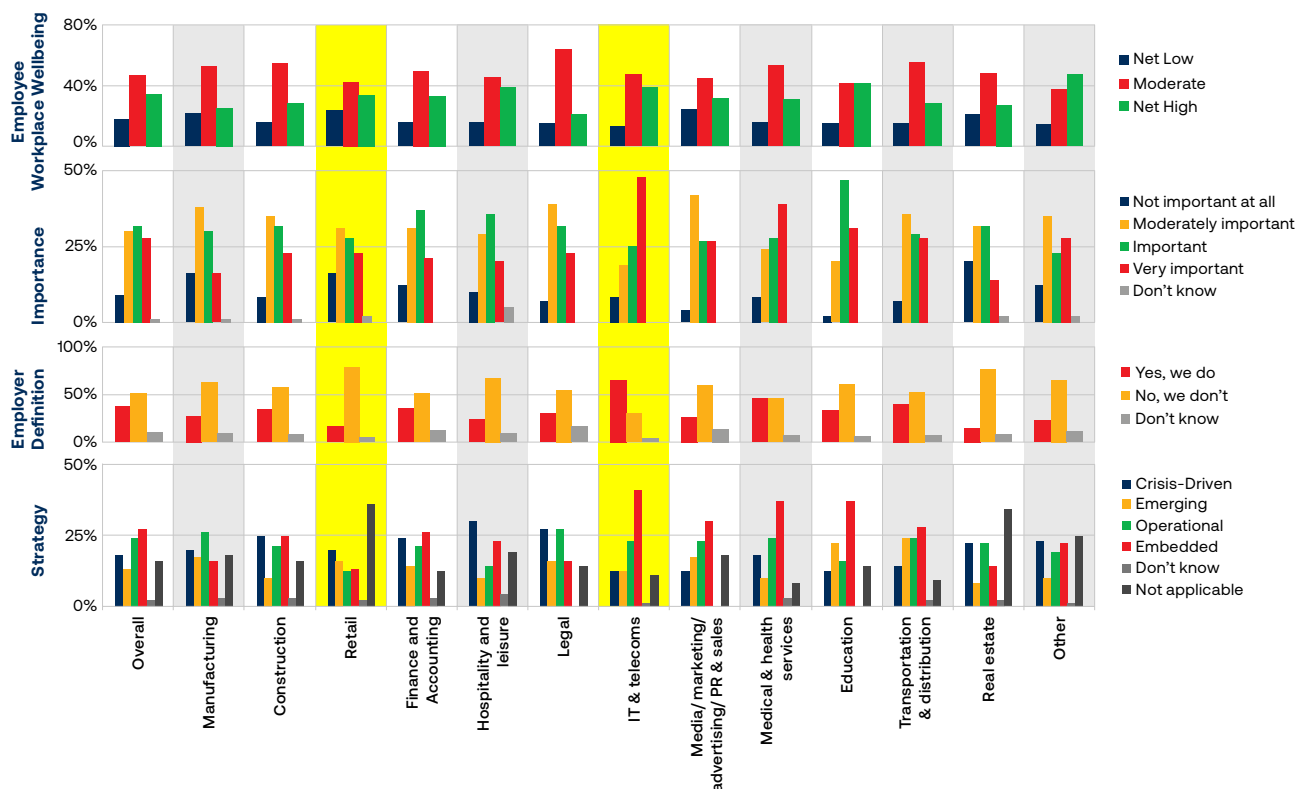
IT & telecoms stands at the other end of the spectrum. Employees in this sector report one of the highest net high scores at 39% and one of the lowest net low scores at 13%. Employers here are also more advanced in their approach. Almost half (48%) say wellbeing is very important, 66% report having a definition, and 41% describe their strategy as embedded.

Medical and health services also show relatively strong results. Among employers, 39% say wellbeing is very important, and 37% report having an embedded strategy, both higher than average.

Other industries present more mixed profiles. Finance and accounting combine high importance ratings, with 37% saying important and 21% very important, alongside moderate rates of embedded strategies (26%) and definitions (36%). Media, marketing, advertising, PR and sales, by contrast, have one of the lowest shares rating wellbeing as very important at 27%, but a mid-range rate of embedded strategies at 30%.

Overall, while industries differ in their approach and outcomes, the data indicates that industry itself may not be the strongest driver of workplace wellbeing. Other factors, such as region and organisation size, which often shape the industry profile, appear to play an even more significant role.

Organisation size: the biggest dividing line

Organisation size appears to have the strongest influence on wellbeing outcomes. Patterns seen across industries often reflect the size profile of the businesses within them. Sectors such as retail, real estate, and media/marketing, which rate wellbeing as less important and report less mature strategies, are dominated by microbusinesses. By contrast, sectors such as IT & telecoms, finance, and medical and health services, which tend to place greater importance on wellbeing and adopt more mature approaches, are more likely to consist of large organisations.

Large organisations stand out for their prioritisation of wellbeing. Among employers in these businesses, 34% rated wellbeing as very important, 36% as important, and only 4% dismissed it as not important at all. They are also more likely to have advanced strategies, with 39% reporting an embedded approach and 37% describing theirs as operational.

Microbusinesses show a different pattern. Only 24% rated wellbeing as very important, while 17% said it was not important at all. Their strategies are less likely to be embedded and more likely to be reactive or absent, reflecting the resource constraints these organisations often face.
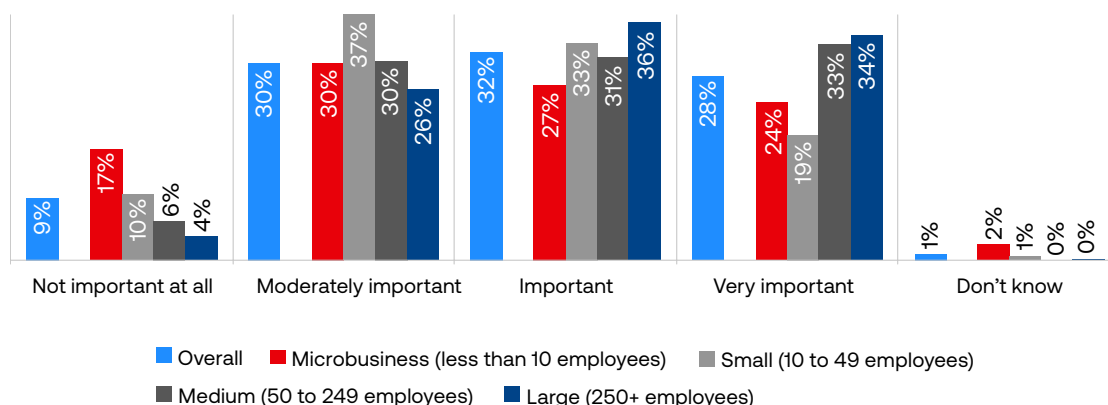
These patterns are also reflected in how employees experience their own wellbeing. Employees tend to report higher wellbeing when they perceive their organisation's strategy to be more mature, a situation more common in larger organisations. Smaller businesses, on the other hand, are more often associated with crisis-driven or ad-hoc support, which may not translate into consistently positive employee experiences.

Overall, the data suggests that organisation size is a key factor shaping how wellbeing is prioritised, defined, and experienced. Larger employers appear better resourced to embed wellbeing into their culture and operations. At the same time, smaller firms may face greater challenges moving from reactive measures to structured strategies due to more constrained financial and organisational resources.

Employers: maturity of wellbeing strategy x organisation size
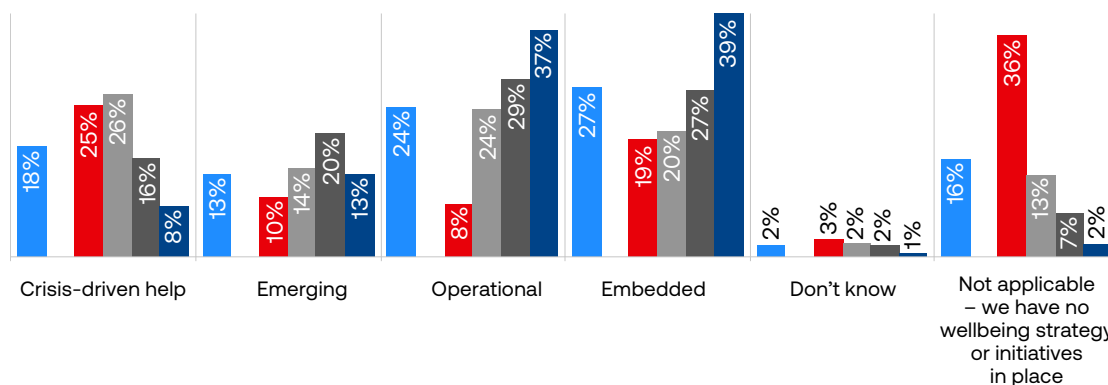
Employers: importance of wellbeing x organisation size

Legend: Overall | Microbusiness (less than 10 employees) | Small (10 to 49 employees) | Medium (50 to 249 employees) | Large (250+ employees)

Regions: alignments and gaps between employers and employees

Regional results show that the presence of formal wellbeing strategies or definitions does not always translate into positive employee experiences. This is important because, while national results suggest a fairly consistent picture, the regional data reveals sharper contrasts.

At a regional level, London stands out as having the highest proportion of employees in the net high category (42%) and the lowest net low share (14%). This aligns with employers reporting mature workplace wellbeing strategies.

The North East differs in that, while employers in this region largely report having operational or embedded strategies and place a high importance on wellbeing, employees here report the highest share of net low wellbeing (27%) and one of the lowest net high scores (27%).

Other regions fall into a more central band. The North West, Yorkshire and the Humber, and South West all have net high shares of around one-third, while net low responses are between 17% and 20%. Looking at the nations, England reports that 27% of employers have an embedded strategy, with 15% of employees in the net low category and 38% in the net high category. Scotland and Wales both report slightly higher proportions of embedded strategies (29%), though employee experiences are somewhat less positive: in Scotland, 18% report net low wellbeing and 33% net high, while in Wales the figures are 18% net low and 30% net high. This places both nations closer to the middle of the range compared to England's national picture.
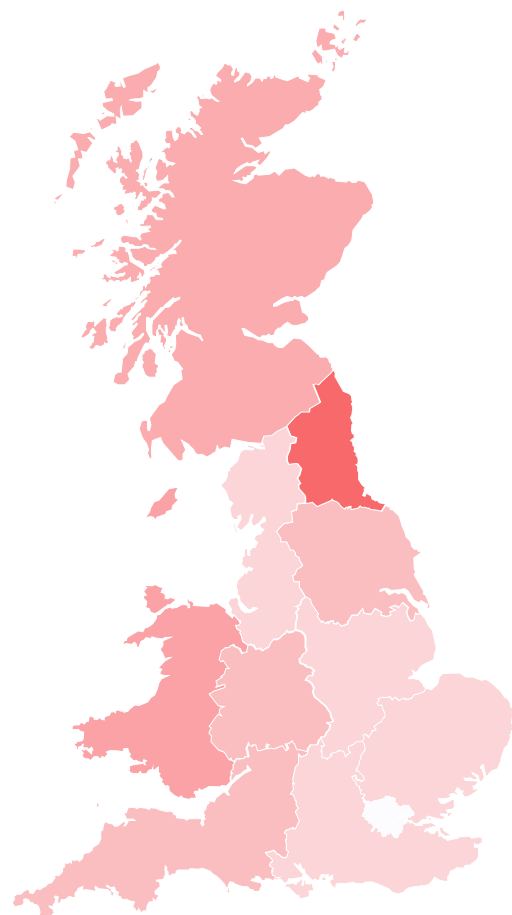
Regional patterns suggest that other factors, such as regional workplace culture, local policy priorities, or economic conditions, may also play a role in shaping wellbeing outcomes.

Employer's perspective: workplace wellbeing strategy
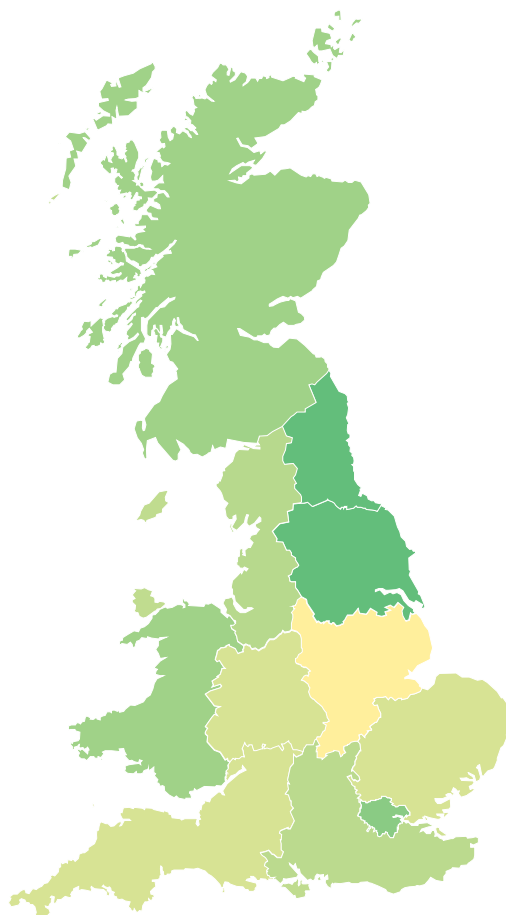
Embedded: 17% - 37%

### Employee experience: workplace wellbeing net low

Net Low: 14% - 27%

This misalignment at a regional level appears to be driving some of the differences in perceptions between employers' and employees' perceptions of strategy maturity and access to workplace wellbeing initiatives.

In the North East, employers are far more likely to rate their strategy as embedded (37%) than employees (18%), while employees are more likely to report no strategy (21% vs 12% of employers). This divergence in perception could relate to several factors, including differences in awareness, accessibility of initiatives, or variation in how strategies are communicated.

By contrast, in London, employees and employers are broadly aligned in their assessments, with similar proportions selecting operational and embedded strategies, and both reporting low rates of crisis-driven approaches. These differences again suggest that there are regional factors impacting differences in how employers perceive their workplace wellbeing strategy and how employees experience it.
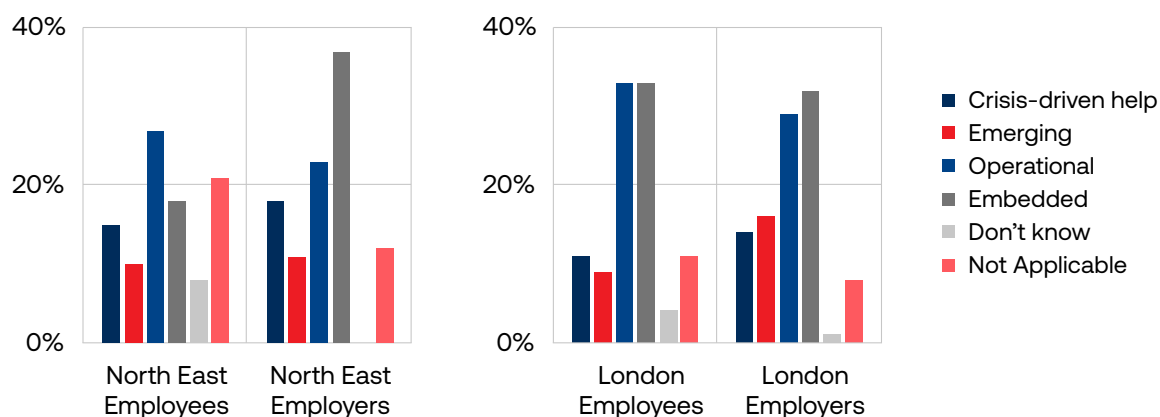
Regional differences are also notable when asked about the workplace wellbeing initiatives currently in place. There is a noticeable gap between what employers say is offered and what employees report having access to. The North East again shows one of the strongest differences between employer and employee responses.

For instance, 58% of employers in the region say they provide personal safety (e.g. policies around work-related violence and aggression), compared with 27% of employees reporting access. Similar gaps appear for professional development and career-growth support (49% of employers vs 31% of employees) and burnout prevention measures (e.g. workload limits, rest periods) (37% vs 15%). While both groups in the North East report relatively high access to mental health support (e.g. therapy, counselling, EAP line) and occupational sick pay (beyond Statutory Sick Pay) compared to other initiatives, the differences in percentages suggest that not all provisions employers consider part of their wellbeing strategy are visible or accessible to employees.
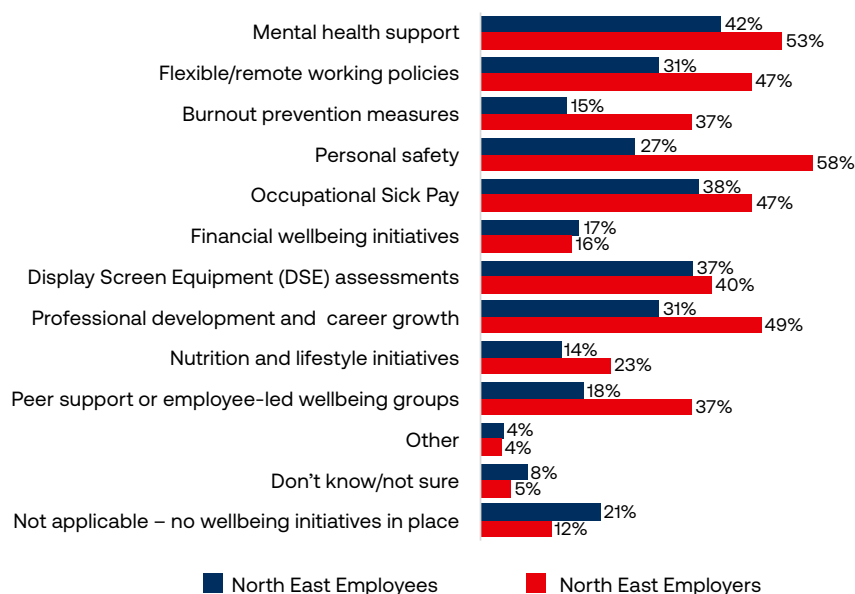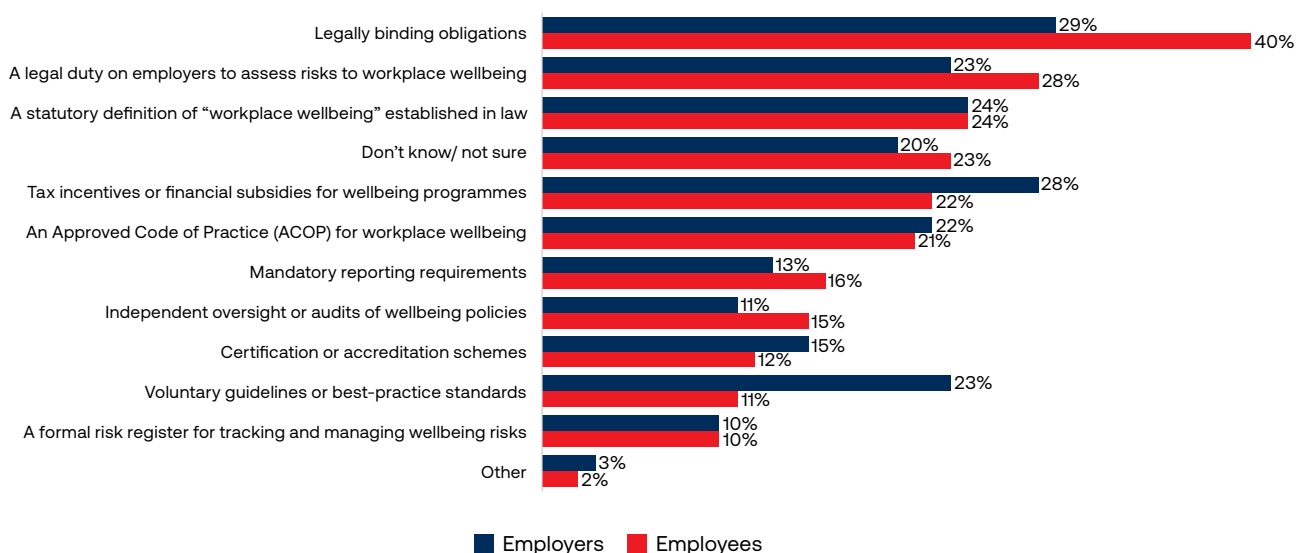
Future policies

Our earlier research in Being Well in a Changing World highlighted one of the biggest gaps in workplace wellbeing: the absence of consistent definitions, measurement standards, or policy frameworks. Employers often want to improve wellbeing but face uncertainty about what is required, how to prioritise, and how progress should be measured. This lack of clarity risks fragmented or short-term approaches, with workers left unsure of what support they can expect.

Against this backdrop, our latest survey asked both employees and employers which measures they believe would make the biggest difference in supporting workplace wellbeing. Their responses reveal a clear appetite for stronger policy levers, but also highlight differences in what each group sees as the most effective way forward.
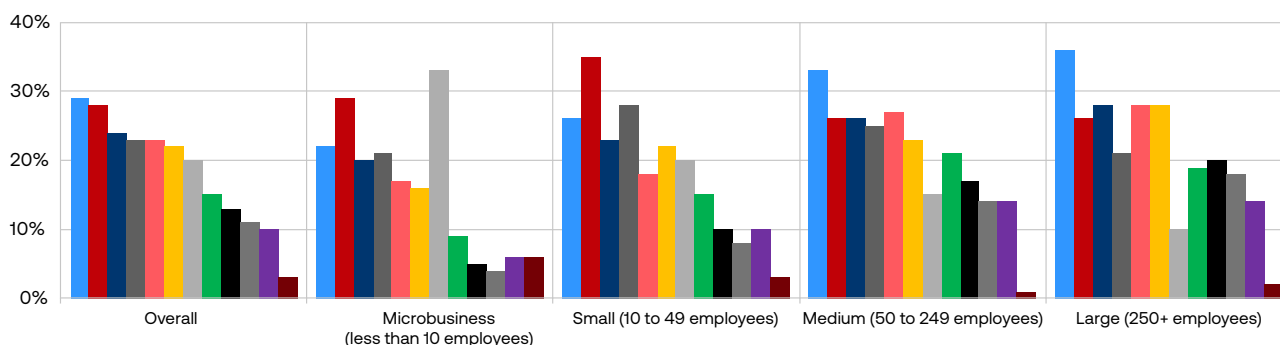
When asked to select the three measures that respondents believed would make the biggest difference in helping organisations support workplace wellbeing, employers and employees showed both notable alignment and clear differences in priorities. Among employers, the most frequently chosen options were legally binding obligations (e.g. minimum leave, maximum workload limits) at 29%, tax incentives or financial subsidies for wellbeing programmes at 28%, and a legal duty on employers to assess risks to workplace wellbeing at 23%.

Employees placed even greater emphasis on legal and regulatory measures. Their top choices were legally binding obligations (e.g. minimum leave, maximum workload limits) at 40%, a legal duty on employers to assess risks to workplace wellbeing at 28%, and a statutory definition of "workplace wellbeing" established in law at 24%. This aligns with employers' views, who ranked a legally binding obligation equally high (24%), but gave somewhat more weight to financial incentives such as tax breaks (28% vs 22%).
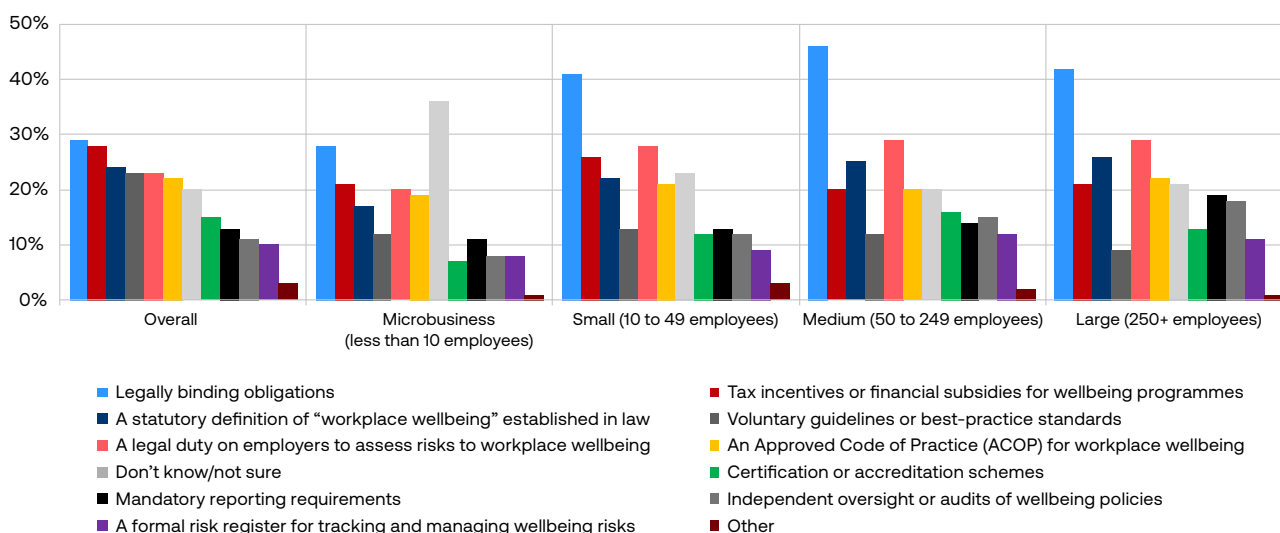
The lowest interest shown by both groups was for certification or accreditation schemes (e.g. ISO-style wellbeing certification, certified wellbeing officers), with 15% of employers and 12% of employees selecting it. While voluntary guidelines or best-practice standards (e.g. industry toolkits, regulator guidance documents) was selected by 23% of employers but just 11% of employees. This suggests a shared preference for enforceable requirements over purely voluntary approaches. Employees, however, were more likely than employers to support independent oversight or audits of wellbeing policies (15% compared to 11%).

	Employers	Employees
Legally binding obligations	29%	40%
A legal duty on employers to assess risks to workplace wellbeing	23%	28%
A statutory definition of "workplace wellbeing" established in law	24%	24%
Don't know/ not sure	20%	23%
Tax incentives or financial subsidies for wellbeing programmes	28%	22%
An Approved Code of Practice (ACOP) for workplace wellbeing	22%	21%
Mandatory reporting requirements	13%	16%
Independent oversight or audits of wellbeing policies	11%	15%
Certification or accreditation schemes	15%	12%
Voluntary guidelines or best-practice standards	23%	11%
A formal risk register for tracking and managing wellbeing risks	10%	10%
Other	3%	2%

■ Employers ■ Employees

Employers

Employees

Legend:
- Legally binding obligations
- A statutory definition of "workplace wellbeing" established in law
- A legal duty on employers to assess risks to workplace wellbeing
- Don't know/not sure
- Mandatory reporting requirements
- A formal risk register for tracking and managing wellbeing risks
- Tax incentives or financial subsidies for wellbeing programmes
- Voluntary guidelines or best-practice standards
- An Approved Code of Practice (ACOP) for workplace wellbeing
- Certification or accreditation schemes
- Independent oversight or audits of wellbeing policies
- Other

Even across organisation sizes, we can see broad alignment with some divergences. Microbusinesses, with fewer than ten employees, were the most uncertain group, with a third (33%) selecting "Don't know." Their highest priority was tax incentives or financial subsidies for wellbeing programmes (29%), underscoring how financial support could help small employers overcome resource constraints. Other measures, such as legally binding obligations (22%) and a statutory definition of "workplace wellbeing" established in law (20%), attracted more modest support.
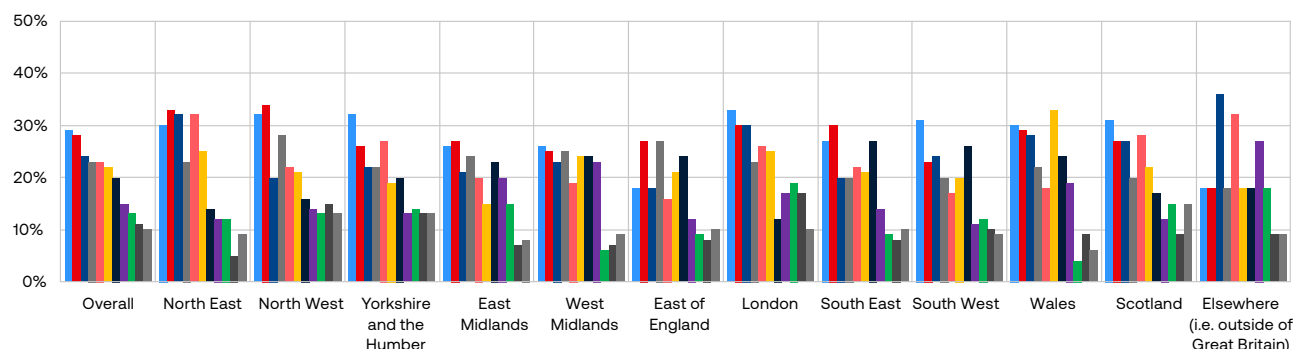
Small organisations, employing ten to forty-nine people, took a markedly different approach. They placed the strongest emphasis on tax incentives (35%), making this their clear top choice. This was followed by legally binding obligations (26%) and voluntary guidelines or best-practice standards (28%). Support for a statutory definition (23%) and an Approved Code of Practice (ACOP) (22%) was also high, suggesting a desire for both clarity and financial assistance, rather than relying solely on enforceable obligations.

Medium-sized organisations, prioritised legally binding obligations (33%) above all else, closely followed by a legal duty to assess risks to workplace wellbeing (27%) and tax incentives (26%). They also showed strong support for a statutory definition (26%) and voluntary guidelines (25%), indicating a preference for combining regulatory requirements with formalised guidance.
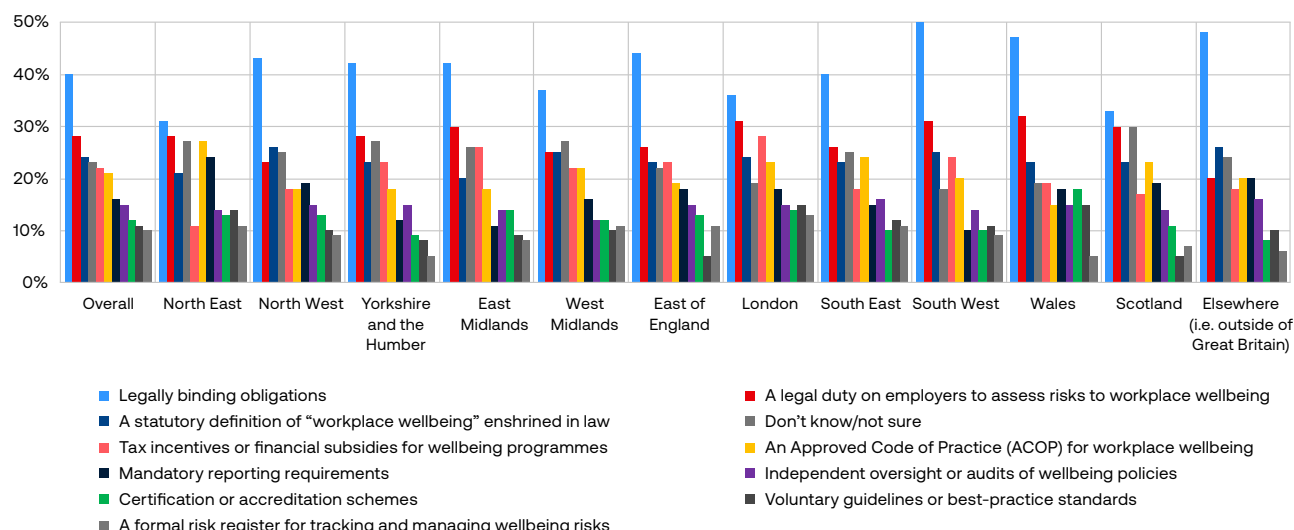
Large organisations, those with 250 or more employees, were the strongest supporters of legally binding obligations (36%), followed by a legal duty to assess risks (28%), tax incentives (26%), and voluntary guidelines (28%). Interest in a statutory definition (28%) and an ACOP (28%) was also relatively high, reflecting a tendency towards comprehensive frameworks that combine enforceable rules with clear standards and best practice.

The data makes clear that smaller organisations are more likely to prioritise financial incentives and display greater uncertainty about policy tools, while larger employers lean towards enforceable measures, often paired with formal definitions and guidelines.

Employers

Employees

Legend:
- Legally binding obligations
- A statutory definition of "workplace wellbeing" enshrined in law
- Tax incentives or financial subsidies for wellbeing programmes
- Mandatory reporting requirements
- Certification or accreditation schemes
- A formal risk register for tracking and managing wellbeing risks
- A legal duty on employers to assess risks to workplace wellbeing
- Don't know/not sure
- An Approved Code of Practice (ACOP) for workplace wellbeing
- Independent oversight or audits of wellbeing policies
- Voluntary guidelines or best-practice standards

Looking at the results by region, employers across Great Britain share some common priorities for improving workplace wellbeing, but the strength of support for specific measures varies noticeably. Legally binding obligations were the single most popular choice overall (29%) and topped the list in most regions. Support was highest in London (33%), the North West (32%), Yorkshire and the Humber (32%), the South West (31%), Scotland (31%), and the North East (30%). In contrast, the East of England (18%) and East Midlands (26%) showed lower enthusiasm for this measure, suggesting regional differences in appetite for enforceable requirements. At a national level, legally binding obligations are supported by 30% of employers in Wales, 31% in Scotland, and 29% in England.

When looking at employees' views across Great Britain, the strongest and most consistent priority is also for legally binding obligations to improve workplace wellbeing. Overall, 40% of employees selected this option, with support ranging from 31% in the North East to a high of 50% in the South West. Other regions with particularly strong backing include the North West (43%), Yorkshire and the Humber (42%), and the East of England (44%). Nationally, support for legally binding obligations by employees is highest in Wales (47%), followed by England (40%) and Scotland (33%). This pattern shows that employees in every region see a clear role for enforceable requirements, though enthusiasm is especially pronounced in the South West, Wales, and certain parts of northern England.

A legal duty on employers to assess risks to workplace wellbeing ranked second overall (28%), with the highest support in Wales (32%), London (31%), and the South West (31%). This indicates that across many regions, employees want employers to take a proactive approach to identifying and managing wellbeing risks.

A statutory definition of "workplace wellbeing" enshrined in law was chosen by nearly a quarter of employees overall (24%), with relatively even support across regions. Peaks were seen in the South West (25%), London (24%), and Scotland (23%), showing that while this measure resonates broadly, it is not the top priority in any single region.

Regional variation was more apparent for tax incentives or financial subsidies for wellbeing programmes, chosen by 22% overall. London employees were the most supportive (28%), followed by the East Midlands (26%), suggesting that while financial incentives are valued, their appeal is more concentrated in certain parts of the country.

Some measures attracted more targeted support in specific regions. For example, an Approved Code of Practice (ACOP) received above-average support in the North East (27%) and the South East (24%), while mandatory reporting requirements were most popular in Wales (18%) and Scotland (19%). "Don't know" responses were highest in the North East (27%) and East Midlands (26%), suggesting uncertainty about the most effective policy levers in these areas.
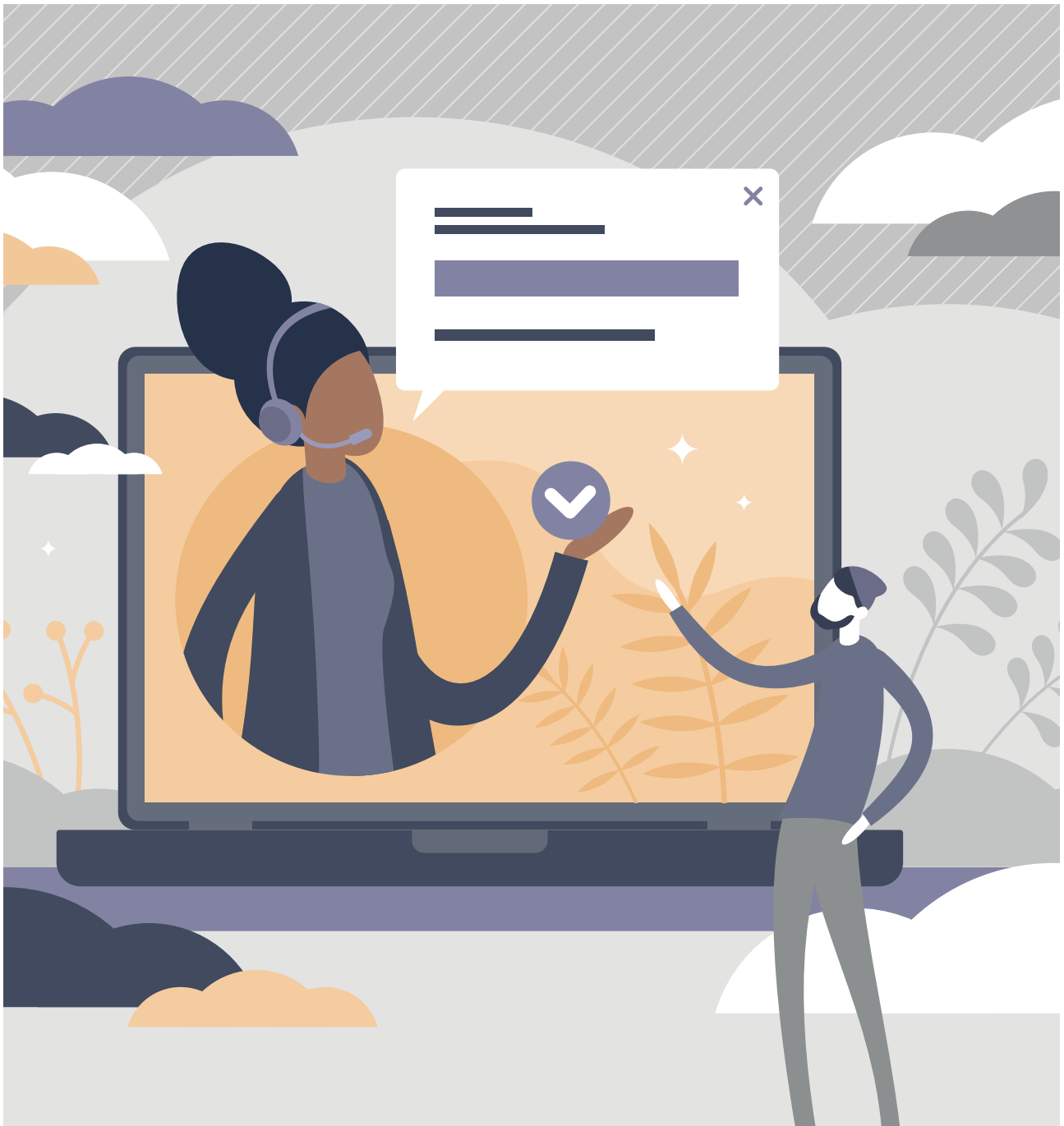
Conclusion: recognised in principle, uneven in practice

The findings of this survey indicate that workplace wellbeing strategies do shape how employees experience their working lives. Where strategies are embedded, employees report much higher levels of wellbeing, with 8% rating their wellbeing at work very high and 61% high. By contrast, in organisations with crisis-driven or absent strategies, employees are more likely to place themselves at the lower end of the scale, with higher proportions reporting low or very low wellbeing.

At the same time, the data consistently highlights a gap between what employers state and what employees experience. Almost six in ten employers describe wellbeing as important or very important, yet nearly half of employees rate their wellbeing as only moderate. Employers report higher levels of provision than employees do access across almost every initiative, from flexible or remote working (49% vs 40%) to burnout prevention measures (26% vs 14%). There is also a gap in how employees and employers perceive the maturity of their workplace wellbeing strategy, with 27% of employers describing their approach as embedded compared with 20% of employees, while 21% of employees say no strategy exists compared with 16% of employers.

These differences cut across industries, organisation sizes, and regions. IT & telecoms shows one of the strongest profiles, with 48% of employers saying wellbeing is very important, 66% reporting a definition, and employees recording one of the lowest net low scores at 13%. Retail shows the opposite, with 16% of employers saying wellbeing is not important, only 16% reporting a definition, and 36% reporting no strategy at all, while 24% of employees fall into the net-low category. Large organisations appear better resourced, with 39% reporting embedded strategies, compared with microbusinesses, where 17% of employers say wellbeing is not important at all. Regional results highlight further divergence: London employees record the highest net high wellbeing at 42%, while the North East records the highest net low at 27%, despite employers there reporting high levels of strategy maturity.

Taken together, the findings underline both the potential and the challenge of workplace wellbeing. Employers largely recognise its importance, and the data shows that more mature strategies are associated with higher employee wellbeing. Yet the gap between what employers say is provided and what employees actually report experiencing complicates the picture. Workplace wellbeing has a clear impact, but the distance between strategy and lived experience remains the central feature of the current landscape.

Key learnings:

1. Wellbeing matters

   While this report highlights inconsistencies in workplace wellbeing offerings and further draws attention to perception gaps between employers and their employees, it clearly sets out the importance of workplace wellbeing to a majority of employers.

   Workplace wellbeing, done well, offers real hopes of supporting people through change (as established in our 'Being Well in a Changing World' report), but inconsistencies in defining, measuring and understanding what best practice looks like lead to fragmented approaches and inconsistent outcomes.

2. Communication is key

   There is a clear disparity between the wellbeing interventions employers offer and what employees want. Further, a perception gap exists between what interventions employers report offering and what employees report being able to access.

   At the core of both findings is the need for clear communication as a way to increase engagement with wellbeing, ensure that wellbeing can work for everyone, and that the voices and needs of all workers are included within workplace wellbeing strategies.

   Using this data and wider anecdotal evidence, we understand the need for employees to be involved in the design and development of workplace wellbeing strategies, ensuring that workplace interventions (and wider support measures) meet the needs of employees and respond to the challenges they face (or may be likely to face) as a result of wider societal changes (such as political, social, and economic developments).

3. Legal frameworks

Interestingly, this research also highlights a common problem with workplace wellbeing: a lack of a legal or regulatory framework, which guides employers and employees on what they should be doing.

This gap creates an environment of ambiguity and leads to a postcode lottery of offerings that differ by employer (and sometimes these approaches can differ among the same employer, such as on a site-by-site or nation-by-nation basis).

While this research does not identify a clear policy pathway, it does indicate a direction of travel wanted by both employers and employees. An appetite for stronger policy levers is clear, but difference arises around which policy levers would best help to bolster workplace wellbeing.

While many policy levers are available, understanding the impact of legal or regulatory intervention on employers (and in turn on workplace wellbeing offerings) is something that requires greater exploration.

Appendix (survey questions)

Employers:

For the following questions, by "workplace wellbeing" we mean an individual's physical, mental, and emotional health in and around the workplace.

1. To the best of your knowledge, how would you rate the level of importance given to workplace wellbeing where you work?

    1. Not important at all (Wellbeing isn't actively considered or discussed)

    2. Moderately important (Periodic wellbeing efforts, though not tied to broader goals)

    3. Important (Wellbeing features in plans and regular initiatives)

    4. Very important (Wellbeing is fully embedded and drives strategic decisions)

    5. Don't know

2. Which one of the following statements best describe your organisation's current approach to employee wellbeing? (Please select the option that best applies)

    a. Not Applicable (We have no wellbeing strategy or initiatives in place)

    b. Crisis-Driven Help (Addressing wellbeing needs as they arise, without a formal framework)

    c. Emerging (Gathering input and defining our key priorities; starting programmes)

    d. Operational (Launching formal initiatives and communicating them to the team)

    e. Embedded (Wellbeing strategy is fully embedded, guiding our culture and decision-making)

    f. Don't Know

3. Does your organisation have a definition of 'workplace wellbeing'?

    a. Yes

    b. No

    c. Don't know

4. To the best of your knowledge, which, if any, of the following initiatives are part of your organisation's approach to wellbeing? (Please select all that apply.)

    a. Mental health support (e.g., therapy, counselling, EAP line)

    b. Flexible/remote working policies

    c. Burnout prevention measures (e.g., workload limits, rest periods)

    d. Personal safety (e.g., policies around work-related violence and aggression)

    e. Occupational Sick Pay (beyond Statutory Sick Pay)

    f. Financial wellbeing initiatives (e.g., hardship grants, budgeting support)

    g. Display Screen Equipment (DSE) assessments and reasonable adjustments

    h. Professional development and career-growth support

    i. Nutrition and lifestyle initiatives (e.g., healthy snacks, fitness subsidies)

    j. Peer support or employee-led wellbeing groups

    k. Other (Please specify:)

    l. Don't know

5. In your view, which three of the following would make the biggest difference to employers supporting workplace wellbeing? (Select up to three.)

   a. A statutory definition of "workplace wellbeing" enshrined in law

   b. Voluntary guidelines or best-practice standards (e.g. industry toolkits, regulator guidance documents)

   c. Mandatory reporting requirements (e.g. annual wellbeing disclosures to a regulator)

   d. An Approved Code of Practice (ACOP) for workplace wellbeing

   e. Certification or accreditation schemes (e.g. ISO-style wellbeing certification, certified wellbeing officers)

   f. Tax incentives or financial subsidies for wellbeing programmes

   g. Legally binding obligations (e.g. minimum leave, maximum workload limits)

   h. A legal duty on employers to assess risks to workplace wellbeing

   i. A formal risk register for tracking and managing wellbeing risks

   j. Independent oversight or audits of wellbeing policies

   k. Others (please specify)

   l. Don't Know

Employees:

For the following questions, by "workplace wellbeing" we mean an individual's physical, mental, and emotional health in and around the workplace.

1. Imagine a ladder with steps numbered 1 'Very Low' at the bottom (the worst possible life for you today) and 5 'Very High' at the top (the best possible life for you today). Based on how you currently feel, which of the following best describes your overall wellbeing?

   1. Very low (I often feel overwhelmed, distressed, or disconnected in life)

   2. Low (I have more challenging days than good ones and struggle to cope at times in life)

   3. Moderate (I'm generally okay, some positive moments, but also regular ups and downs in life)

   4. High (Most days I feel healthy, supported, and engaged in life)

   5. Very high (I consistently feel fulfilled, motivated, and resilient in life)

   6. Don't Know

2. Although your overall wellbeing and wellbeing at work overlap, please focus on your experience **at work** for this question. Picture a parallel ladder for work wellbeing, with 1 'Very low' and 5 'Very high': based on a typical day, which of the following best describes your overall wellbeing at work?

   a. Very low (I often feel overwhelmed, distressed, or disconnected at work)

   b. Low (I have more challenging days than good ones and struggle to cope at times at work)

   c. Moderate (I'm generally okay, some positive moments, but also regular ups and downs at work)

   d. High (Most days I feel healthy, supported, and engaged at work)

   e. Very high (I consistently feel fulfilled, motivated, and resilient at work)

   f. Don't Know

3. Which one of the following statements best describe your organisation's wellbeing support for employees?

   a. Not Applicable (I'm not aware of any initiatives or messaging on wellbeing)

   b. Crisis-Driven Help (Support given, but only reactive and in response to wellbeing crises, but there's no consistent approach)

   c. Emerging (I see trial programmes or early conversations, but no structure or strategy)

   d. Operational (I've received communications about official wellbeing initiatives and know how to get involved and access resources)

   e. Embedded (Wellbeing is constant and continuously improving; we have clear policies, access to resources, employee feedback on wellbeing is taken on, and it shapes how we work)

   f. Don't Know

4. Looking back on the past year, which of these workplace wellbeing initiatives, if available to you, have played an important role in your overall wellbeing at work? (Select all that apply.)

   a. Mental health support (e.g., therapy, counselling, EAP line)

   b. Flexible/remote working policies

   c. Burnout prevention measures (e.g., workload limits, rest periods)

   d. Personal safety (e.g., policies around work-related violence and aggression)

   e. Occupational Sick Pay (beyond Statutory Sick Pay)

   f. Financial wellbeing initiatives (e.g., hardship grants, budgeting support)

   g. Display Screen Equipment (DSE) assessments and reasonable adjustments

   h. Professional development and career-growth support

   i. Nutrition and lifestyle initiatives (e.g., healthy snacks, fitness subsidies)

   j. Peer support or employee-led wellbeing groups

   k. Other (Please specify:)

   l. Don't Know

5. In your view, which three of the following would make the biggest difference to employers supporting workplace wellbeing? (Select up to three.)

   a. A statutory definition of "workplace wellbeing" enshrined in law

   b. Voluntary guidelines or best-practice standards (e.g. industry toolkits, regulator guidance documents)

   c. Mandatory reporting requirements (e.g. annual wellbeing disclosures to a regulator)

   d. An Approved Code of Practice (ACOP) for workplace wellbeing

   e. Certification or accreditation schemes (e.g. ISO-style wellbeing certification, certified wellbeing officers)

   f. Tax incentives or financial subsidies for wellbeing programmes

   g. Legally binding obligations (e.g. minimum leave, maximum workload limits)

   h. A legal duty on employers to assess risks to workplace wellbeing

   i. A formal risk register for tracking and managing wellbeing risks

   j. Independent oversight or audits of wellbeing policies

   k. Other

   l. Don't Know

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