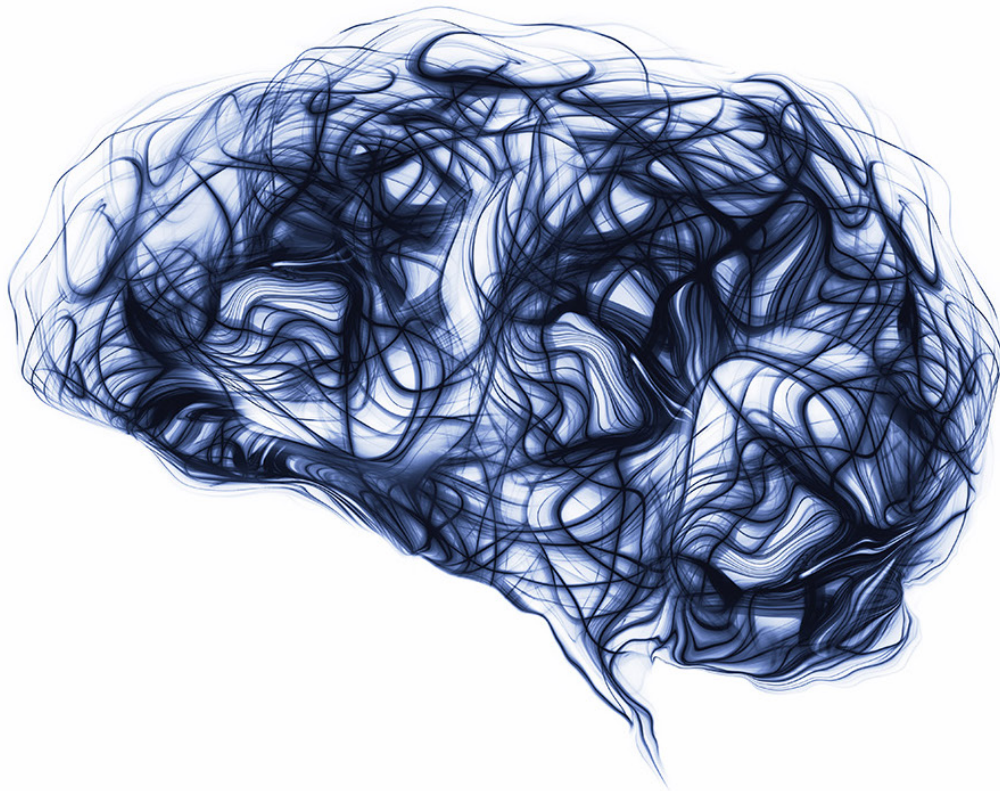


Healthcare Systems & Services

National surveys reveal disconnect between employees and employers around mental health need

National surveys of employers and employees provide insights into mental health needs of the US workforce and how employers can best address them.

This article is a collaborative effort between Erica Coe, Jenny Cordina, Kana Enomoto, Alex Mandel, and Jeris Stueland.



McKinsey's recent publications, [National employer survey reveals behavioral health in a COVID-19 era as a major concern](#) and [Mental health in the workplace: The coming revolution](#), highlighted employee mental health (including substance use) as a major concern for employers in light of COVID-19. Even as the pandemic's end may be in sight, the workforce continues to struggle, with many perceiving gaps in support. Mental health will continue to be a key priority as employers plan for a return to the workplace.

In this article, we use data from two national surveys that [McKinsey's Center for Societal Benefit through Healthcare](#) ran in late 2020: one of 791 full-time employees and the other of 528 benefits decision makers. Our survey results indicate there is continued opportunity for employers to support workforce mental health by taking five actions: make mental wellness a priority, enhance available mental health support, communicate available mental health support, create an inclusive work culture, and measure and meet the need.

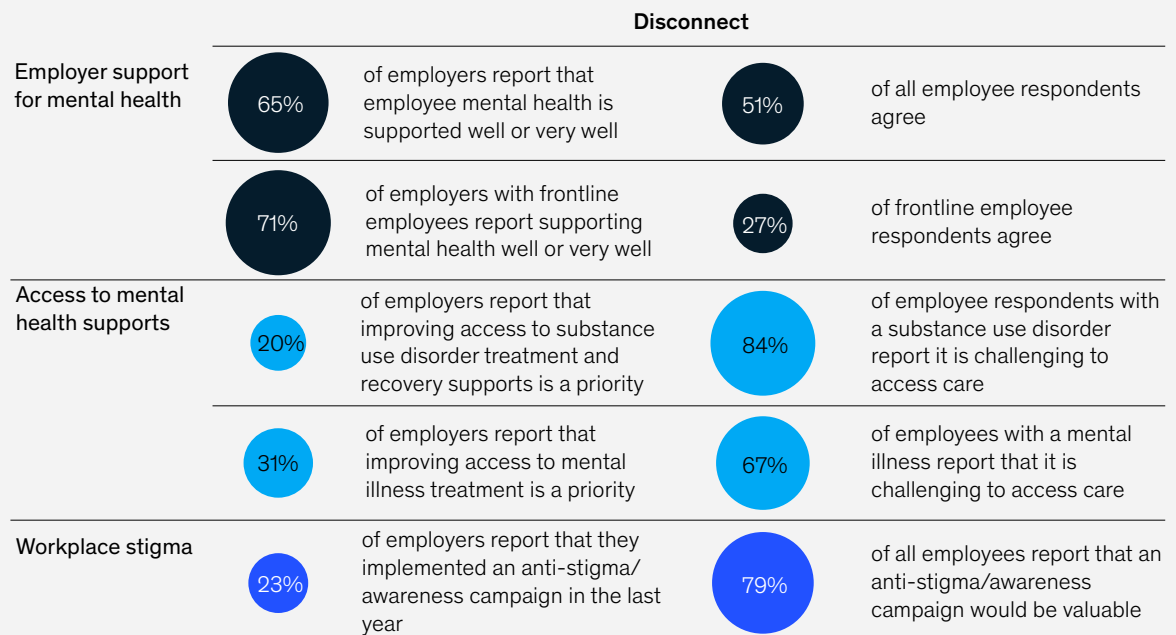
Please note: Throughout this article, the term mental health is inclusive of substance use.



There are several points of disconnect between employer and employee perspectives on workplace mental health

Our national survey findings reveal differing perspectives between employers and employees across three areas: level of **employer support for mental health**, employee **access to mental illness and substance use disorder treatment**, and **workplace stigma** (level of shame, prejudice or discrimination toward people with mental illness and substance use disorders perceived in the workplace).

The disconnect is most pronounced when it comes to perceived benefits for **frontline employees** and access to care for employees with a **substance use disorder**.



Employers can take five actions to support workforce mental health



Employers can make mental wellness a priority by dedicating organizational leadership and expanding resources for employees

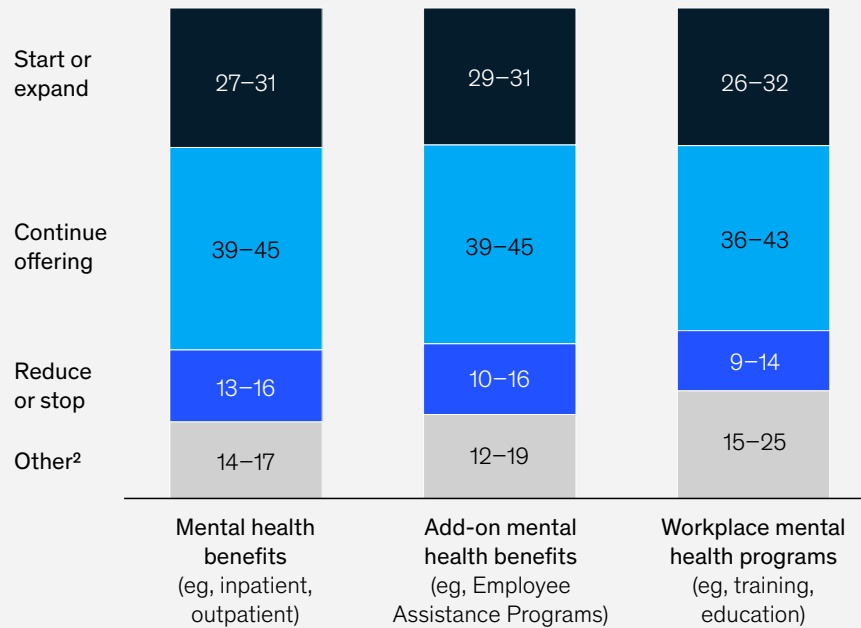
Nearly 80 percent of employers surveyed report at least some concern¹ about employee mental health overall, and about two-thirds report concern about substance use disorder. About half of employer respondents indicate that mental health is a top organizational/CEO priority for them. Employers can prioritize mental health by appointing leaders responsible for mental health at an organizational level, as well as expanding benefits, policies, and programs.

Organizational leadership: About three-quarters of employers surveyed report that they have appointed a mental health leader, with a smaller subset (about 40 percent) appointing a leader(s) in executive roles. Leaders' responsibilities may include monitoring employee well-being and mental health needs, examining benefits and ensuring access to treatment, and overseeing mental health-related workplace programs.

Expanding resources: A majority of employers (about 70 percent) report they plan to invest in mental health resources by starting, continuing, or expanding benefits in 2021. The most common reasons reported for expanding support are to promote employee productivity, increase satisfaction, and attract/compete for talent. The most common reasons reported for reducing or stopping support (reported by about 10 to 15 percent of employers) are cost, complexity to manage resources, and low employee utilization of resources.

Employer planned changes to mental health resources in 2021

% of respondents¹



¹Employer responses are shown as ranges as employers were asked about individual types of benefits and programs, and the chart reflects a summary of employer responses across benefits.

²Do not offer or unsure.

Enhancing and tailoring support can help employers address employees' persistent challenges in access to mental healthcare

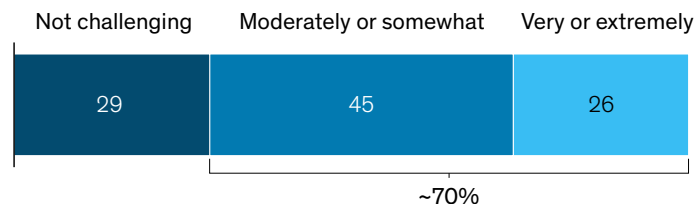
A majority of employees report challenges accessing mental healthcare. The most commonly reported barriers are lack of insurance coverage, difficulty determining covered services, not knowing which resources are available, difficulty finding providers, and long wait times to get appointments.

Certain groups of employees were more likely to report challenges in our survey, especially when trying to access counseling or similar services:

- **Gen Z.** Providing mental health support for Gen Z is critical for employers from a workforce recruitment and retention perspective, as 60 percent of Gen Z employees surveyed report that mental health resources are important in selecting an employer, and 57 percent say they are important when deciding to stay at an employer.
- **Those with unmet social needs.** Employee respondents with two or more unmet social needs are about 30 percentage points more likely to report challenges accessing counseling or similar services. Unmet social needs are associated with poor mental health more broadly.² Employers can address unmet social needs by offering resources such as transportation or childcare/caregiving support when employees seek care.
- **Hispanic/Latinx.** As part of a commitment to advancing health equity, employers can evaluate and address barriers in access to mental healthcare that vary by race and ethnicity.

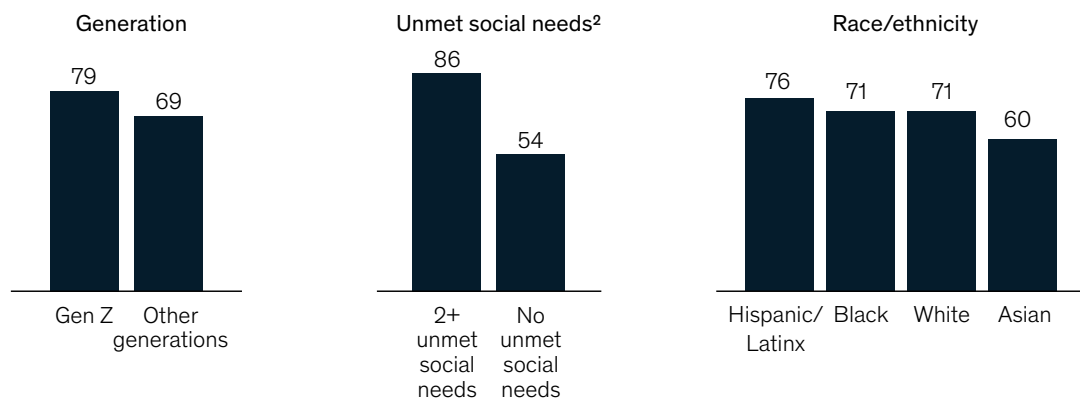
Level of challenge accessing counseling or similar services

% of full-time employees¹



Challenge accessing counseling or similar services

% of employees by demographic characteristic



¹Excludes employees selecting "I don't know."

²An unmet social need is defined as the lack of a basic resource such as food, safe housing, or transportation. An unmet social need may or may not have an adverse effect on a person's health. For example, an individual may not have reliable transportation, but that lack of transportation may or may not impact their existing health conditions or ability to receive needed healthcare.

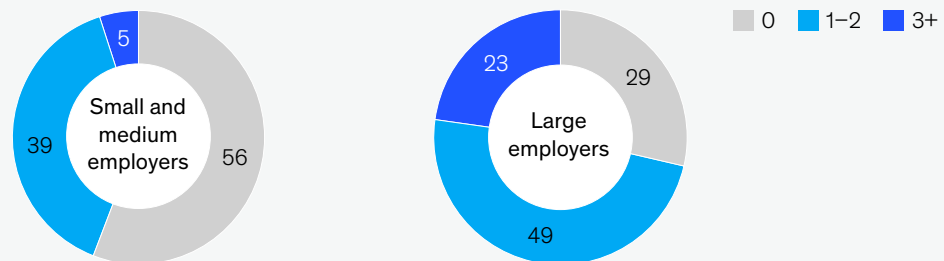
Employers can communicate about available mental health support through a range of channels

About three in four large employers and two in four small/medium employers report that they offer at least one type of mental health support for employees. Supplemental mental health programs that employers report offering may include digital and/or in-person programs to connect employees to care (for example, virtual counselling, digital recovery support, care navigation). Digital wellness apps offered by employers may include subscriptions to mindfulness and medication tools, or other personalized mental and physical well-being solutions (for example, app-based self-directed behavior change programs).

To communicate with employees about these resources, employers report using a range of communication tools, most commonly their health benefits website and manager-led communications. Still, there is an opportunity to improve employee awareness of mental health resources—for example, about half of employers report that lack of awareness contributes to low Employee Assistance Program (EAP) utilization. Also, while C-suite-led communications can be an effective tool to raise awareness of support and reduce mental health stigma, only a quarter of employers report using this channel. Employers can consider the timing/frequency, content, and personalization of mental health-related communications to improve awareness of resources.

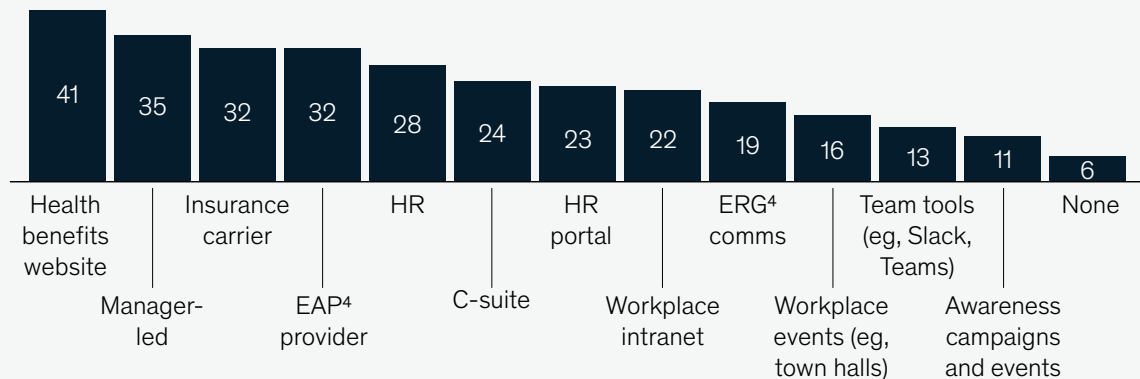
Number of mental health offerings¹ by employer size²

% of respondents³



Channels employers use to communicate about mental health

% of respondents



¹Includes Employee Assistance Programs, telehealth, supplemental mental health programs, and digital wellness apps.

²Small- and medium-sized employers have fewer than 500 employees; large employers have more than 500 employees.

³Figures may not sum to 100%, because of rounding.

⁴EAP, Employee Assistance Program; ERG, Employee Resource Group.

Creating an inclusive work culture—free from mental health stigma—is critical to supporting workforce well-being

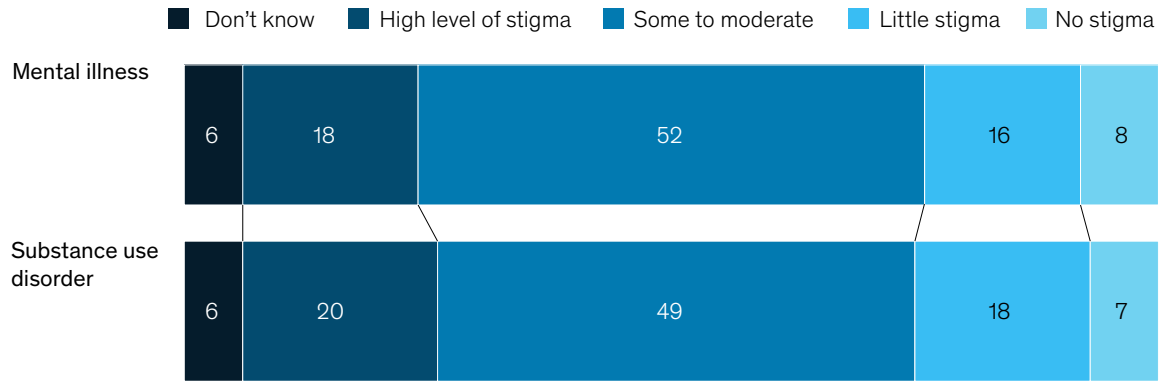
A majority of employers we surveyed report there is workplace stigma for mental illness and substance use disorder today. And employees agree—about 80 percent report mental health stigma in the workplace. Stigma is a pervasive barrier that can inhibit ability to access care, and eliminating it is key to building an inclusive culture to mental health.

Anti-stigma campaigns are one tool employers can use to reduce stigma—among employers we surveyed, however, less than a quarter have conducted an anti-stigma campaign. Only 6 percent of employees surveyed reported being aware of an anti-stigma campaign at work, though about 80 said it would be valuable. This highlights the opportunity for anti-stigma efforts to be more visible and accessible.

Other actions employers can take to create an inclusive work culture include: ensuring that workplace norms support mental well-being, role-modeling by leaders talking about their own mental health challenges, investing in trainings to equip all employees with tools to support each other (for example, recognizing signs of distress), and fostering workplace community and connectivity.

What best describes the level of stigma for the following in your workplace?

% of employers



Employers have an opportunity to deepen measurement and accountability for mental health outcomes

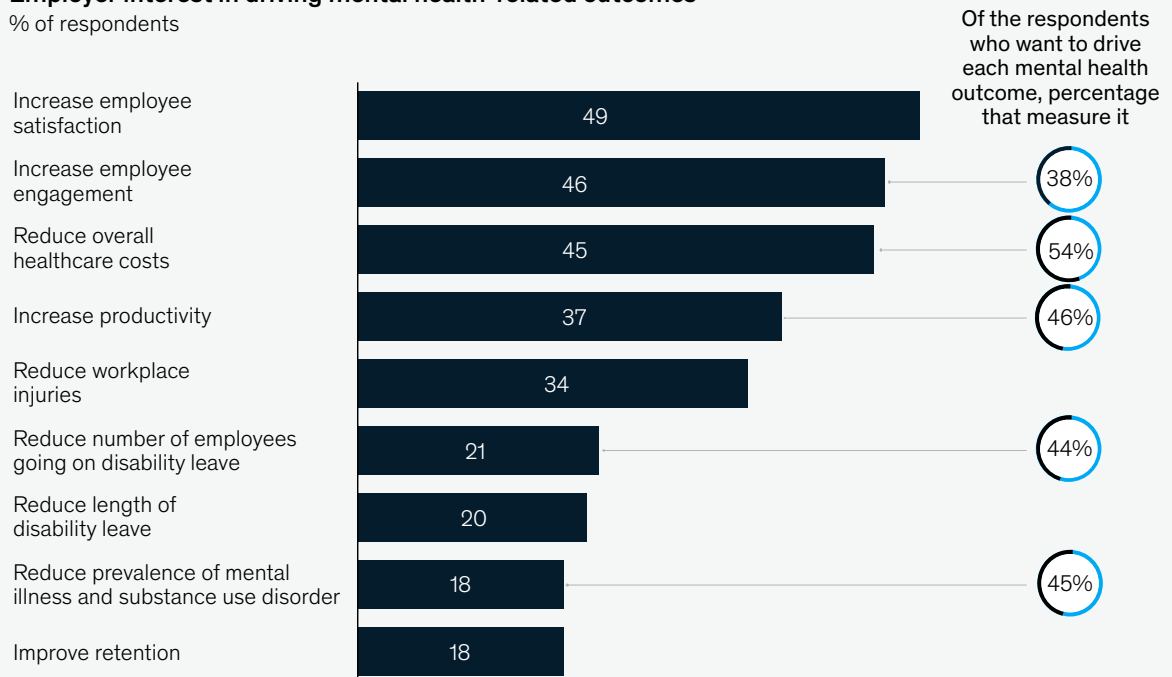
By offering mental health support, employers report aiming to increase employee satisfaction/engagement and reduce healthcare costs. Employers may consider broadening their target outcomes to include uptake of mental health support, employee experience and satisfaction with support, and the impact of support has on health, productivity, engagement, and equity.

For employers already striving to achieve a robust set of outcomes, there may be an opportunity to improve measurement: for example, across employers that report wanting to increase engagement (close to half), only 38 percent report actually tracking engagement.

Available measurement tools for employers include, but are not limited to: claims or clinical analysis, employee surveys, focus groups, lived experience panels, as well as holistic workplace mental health assessment tools to evaluate benefits and programs.

Employer interest in driving mental health-related outcomes

% of respondents



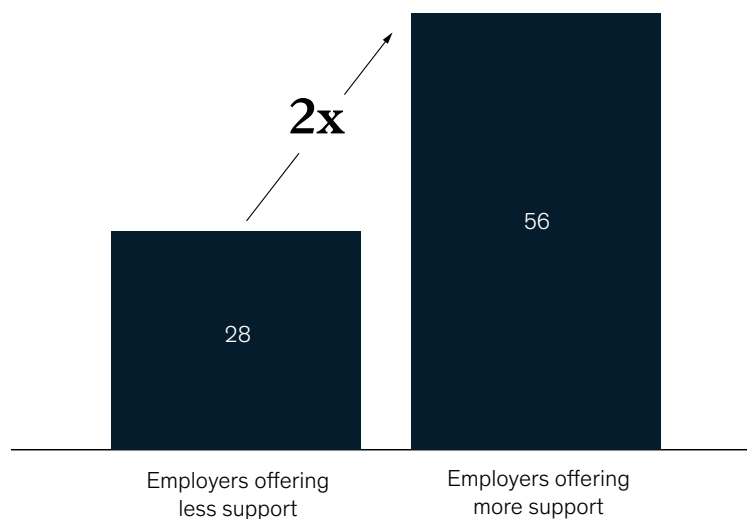
Potential measurable effects of enhanced mental health supports include fewer missed work days and increased return to work rates

Among employees surveyed, those with anxiety or depression report missing, on average, roughly 6 times more work days per year than individuals without a mental health condition. Employers have the opportunity to improve these outcomes. For example, depression management as part of primary care has been demonstrated to reduce missed work days by 30 percent.³ In parallel, employers can evaluate and address workplace norms and/or environments that contribute to stress and burnout.

Our survey showed that better workplace mental health support is associated with higher employee return to work rates after mental health-related disability leave. As context, mental illness has been estimated to account for roughly one-third of disability claims and 70 percent of workplace disability costs.⁴ Return-to-work rates are critical for employee engagement and loyalty, productivity, and reducing indirect costs (for example, finding and training new employees). Employers that self-reported offering more support⁵ were about twice as likely to report a greater than 50 percent return-to-work rate after mental health-related disability leave than employers that reported less support.

Employer self-reported employee return-to-work rates after mental health-related disability leave

Percent that report a 51% or higher return-to-work rate¹



¹Does not show employers that responded "not sure" or "lower than 50% return-to-work rate." Among employers offering less supports, about 30% were not sure what their return-to-work rate was, and among those offering more supports, 5% were not sure.

Employers that want to support employee mental health can consider the following questions as a starting point



Research methodology: Findings in this infographic are based on responses to the 2020 McKinsey Mental Health Employer Survey and the 2020 McKinsey Mental Health Consumer Survey, launched by McKinsey’s Center for Societal Benefit through Healthcare. The two surveys were fielded from November to December 2020. Employer respondents included 528 individuals who are primary or secondary decision makers for mental health benefits and related workplace programs. The survey sample was weighted to match the profile of employers at the national level using the number of employers in each employer size and industry type (based on the North American Industry Classification System (NAICS)), and the number of employees in each employer size and industry type. Consumer (employee) respondents included a nationally representative subset of 1,523 individuals ages 18–84, including full- and part-time employees; adults not employed full-time were excluded from findings in this article. Of the 1,523 respondents, 791 were full-time employees. The sample was weighted to reflect national demographics. Both employer and employee samples were sourced separately, and employee responses were not tied to specific employers in the analysis.

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¹ Defined as respondents selecting "moderately concerned," "very concerned," or "extremely concerned."

² "Insights on mental health from a 2019 McKinsey Consumer survey," February 14, 2020, McKinsey.com.

³ Kathryn Rost, Jeffrey Smith, and Miriam Dickinson, "The effect of improving primary care depression management on employee absenteeism and productivity. A randomized trial." *Medical Care*, 2004, Volume 42, Number 12, pp. 1202–10, journals.lww.com.

⁴ Sarah Chapman et al., "The ROI in workplace mental health programs: Good for people, good for business," Deloitte, 2019, deloitte.com.

⁵ We define "more supports" as a combination of robustness of mental health benefits and actions supportive of employee mental health. Robustness of benefits reflects number of benefits offered (for example, medical insurance, EAP, telehealth), and self-reported parity between mental health and medical/surgical benefits. Actions supportive of employee mental health reflect the following: frequent company-wide communication about mental health, mental health as a stated C-suite priority, a dedicated mental health leader, perception of how well the company supports employee mental health, and perception of how mental health offerings compare to other employers.