

State of Employee Health and Wellbeing Report



AU | NZ | UK | 2026

Table of contents

Support systems under strain	03
Executive summary	04
Methodology	06
Introducing the Te Whare Tapa Whā model	07
2025 Wellbeing Overview	09
Key findings	
Mental health	12
Physical health in the workplace	16
Belonging & purpose	19
Barriers to care	23
Workplace wellbeing support	27
Looking ahead	30
The new wellbeing leadership mandate	34
Final words	35

Support systems

under strain

The lines between work and life are increasingly blurred. Flexibility and digital connection mean we're always on. Checking emails on the bus, taking calls with kids in the background, or brainstorming while walking the dog. For frontline workers, the experience is different, but social media and digital tools still shape how we connect. This constant connectivity brings opportunities but also pressure. A society that asks us to be always available, always productive, and to appear as healthy, wealthy, and carefree as possible.

And work isn't the only thing changing. The cost of living keeps rising. Technology connects us more than ever, yet often leaves us feeling isolated. Convenience comes at a price, putting pressure on supply chains beyond sustainability. And healthcare systems are under increasing strain. All of this shapes how people experience life — both at home and in the workplace.

Across Australia, the UK, and New Zealand, pressures on individuals and the systems that support them continue to grow. From navigating stigma and long wait times to balancing work, care, and financial demands, seeking support, whether for mental, physical, or social health, has never felt more complex or fragmented.

And given that most of us spend over a third of our lives at work (around 90,000 hours in total), the role organisations play in shaping wellbeing cannot be overstated. Work is not separate from life; it is one of the few consistent environments where people find connection and purpose in an increasingly individualistic world.

This reality reveals both a pressing need and a powerful responsibility for leaders, teams, and wellbeing champions. Your people are seeking authentic care. Everyday choices made around workloads, support, and culture have measurable effects on people and organisational performance.

Employee wellbeing is an investment that strengthens performance. It is not a cost without return. When employees feel supported, they bring motivation, innovation, and loyalty to their work.

While it can feel like wellbeing sits “on the other side of the fence,” in 2025, we know there is no fence. Our minds, bodies, and communities are interconnected. Supporting one strengthens the others.

This report is designed to help leaders flip the script: to move from viewing wellbeing as a necessary cost centre to recognising it as an investment and lever for organisational growth and human sustainability. Intervening early, noticing, and supporting people before they reach crisis prevents burnout, reduces turnover and results in a more engaged, higher-performing workforce.

After all, the cost of inaction far exceeds the cost of care.

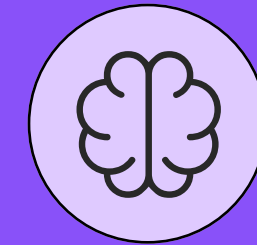
Executive summary

Across the corporate world, investment in workplace wellbeing has never been higher, yet results remain uneven. This is the wellbeing paradox: despite growing awareness, initiatives and good intent, many employees are still struggling in silence.

From mental and physical health pressures to social disconnection and fatigue, the data reveals a workforce stretched thin and systems of care that often feel out of reach or underutilised. Leaders are navigating this reality against the backdrop of post-pandemic recovery, economic uncertainty, global conflict and accelerating technological change. In a world that is always on, employees are under sustained pressure, making prevention, early support and accessible care more critical than ever.



Summary of key findings from the report:



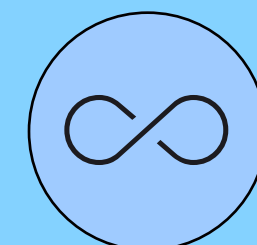
1. Mental health

77% of employees experienced symptoms of poor mental health in the past 12 months, yet 78% do not identify as having a mental health condition. Many rely on self-managed strategies such as physical activity and social connection, while only 13% engage with professional support.



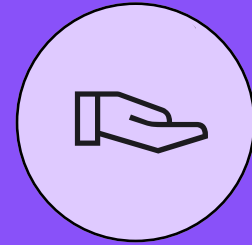
2. Physical health

94% report fatigue or low energy, with 73% experiencing physical symptoms that affect work. Prolonged fatigue impacts safety, engagement and productivity, particularly for frontline and physically demanding roles.



3. Culture and connection

A strong sense of belonging and purpose improves resilience, engagement and performance. While 62% of workers feel supported by their communities, only 26% consistently experience belonging at work. Younger generations lead the way, highlighting opportunities for leaders to strengthen culture across teams.



4. Barriers to care

Around 1 in 3 employees delayed seeking medical support, with 42% believing their symptoms “weren’t serious enough.” Other barriers include long wait times, scheduling constraints, costs and anxiety around treatment, all of which prevent early intervention.



5. Workplace wellbeing support

Awareness of workplace health, safety and wellbeing support services (75%) far exceeds self-reported usage (17%) in the past 12 months. Employees value flexible, accessible, and confidential support, while generational differences and perceived stigma continue to impact uptake. Well-designed programs demonstrably improve wellbeing, productivity and retention when these factors are addressed.

This data reveals a quiet crisis. Individuals are battling significant mental and physical fatigue largely on their own. They avoid professional support because they feel their struggles are not valid enough, or because barriers to care (cost, access) are too high. Furthermore, many lack a feeling of genuine belonging inside the workplace.

Crucially, this report demonstrates that intentional wellbeing support is not a reactive cost or a compliance obligation; it is a strategic enabler. By prioritising accessible, flexible and proactive support, organisations can prevent minor challenges from escalating, strengthen culture and connection, and unlock the full potential of their workforce.

Our aim with this report is to provide an overview on the state of employee health and wellbeing and present a roadmap for the next era of workplace wellbeing. A roadmap defined by early intervention, practical support and a human-centred approach that balances care for the individual with performance for the organisation.



Methodology

This study was conducted by Sonder in collaboration with YouGov using an online survey methodology between 20th August and 1st September 2025.

The survey comprised a nationally representative sample of 6,105 employees (excluding those who are self-employed) aged 18 years and older across Australia (n=2,527), New Zealand (n=518), and the United Kingdom (n=3,060).

Demographic information was collected to ensure a representative sample across various participant characteristics, in line with ABS census methodology. This included gender (Female, Male), and generation (Gen Z, Millennials, Gen X and Baby Boomers). Additionally, data on industry and work type were gathered to provide further context and enable comprehensive analysis across diverse demographic segments. For the purpose of this report, we have redefined traditional industry groupings. What is commonly referred to as 'white collar' is knowledge workers, 'blue collar' is now skilled trades and labour professionals and 'pink collar' is care and service professionals.

For brevity, ANZUK is used throughout this report to refer collectively to the total employed population (excluding those self-employed) across Australia, New Zealand, and the United Kingdom.

Following data collection, results were weighted by age, gender, and region within each country to reflect the latest national population estimates.

YouGov designed the questionnaire in collaboration with Sonder. The study was conducted in accordance with ISO 20252:2019 market, opinion, and social research standards, to which YouGov is accredited.

Introducing the Te Whare Tapa Whā model

At the heart of this report is a simple but powerful idea: wellbeing is multidimensional and interconnected. To explore the experiences of employees across Australia, New Zealand, and the United Kingdom, Sonder has used the Te Whare Tapa Whā model as the guiding framework.

Sonder Insight

Sonder's model of care is grounded in the Te Whare Tapa Whā framework. This approach was introduced to Sonder by **Kimi Powell**, Director of Clinical Services at Sonder. After many years working in emergency care across Australia and New Zealand, Kimi brings a unique perspective to holistic employee support, influenced by the Māori health model Te Whare Tapa Whā.



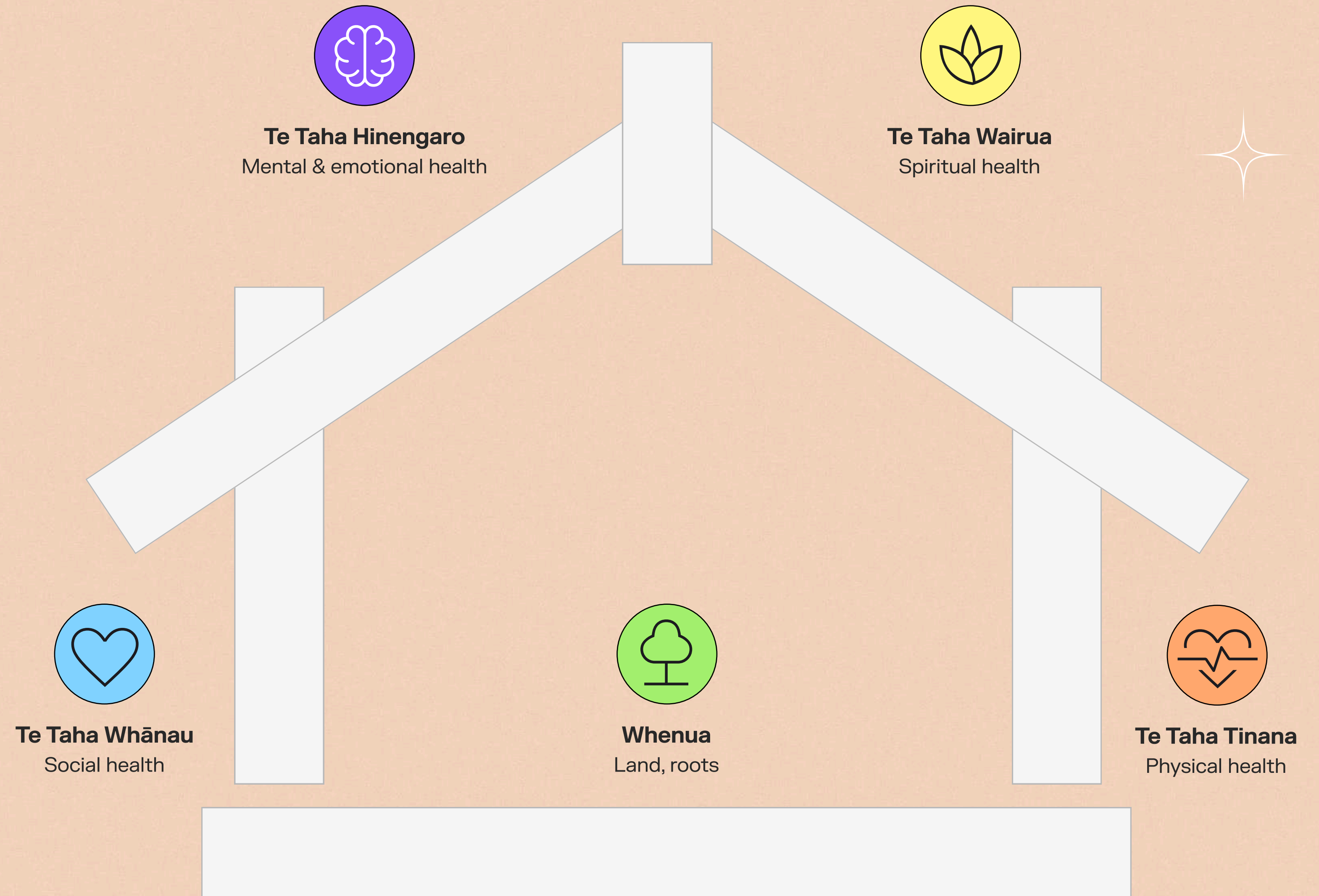
Kimi Powell
Director of Clinical Services, Sonder

Te Whare Tapa Whā conceptualises hauora (health and wellbeing) as a whareniui, or meeting house. The house is supported by four walls, each representing a dimension of wellbeing: mental, physical, social, and spiritual health. The foundation is our connection to the whenua (land), which grounds and supports the structure. When one or more of these walls are out of balance, overall wellbeing is affected. By nurturing and strengthening each area, we can support holistic health, stability, and resilience.

To ensure the research reflected this holistic approach, survey questions were developed for each pillar of the framework, allowing insights in each section to correspond directly to mental, physical, social, and spiritual wellbeing. This structure provides a clear, comprehensive view of how employees experience wellbeing and how these dimensions influence one another and overall performance.

Using this model as a foundation, the Key Findings section presents original research and insights into employee experiences across the four dimensions of wellbeing — mental, physical, social, and spiritual health — as well as the factors that influence access to care, including barriers and the effectiveness of workplace support programs.

We hope you find the following sections helpful in highlighting key trends, challenges, and opportunities for your organisation to take meaningful action.



2025

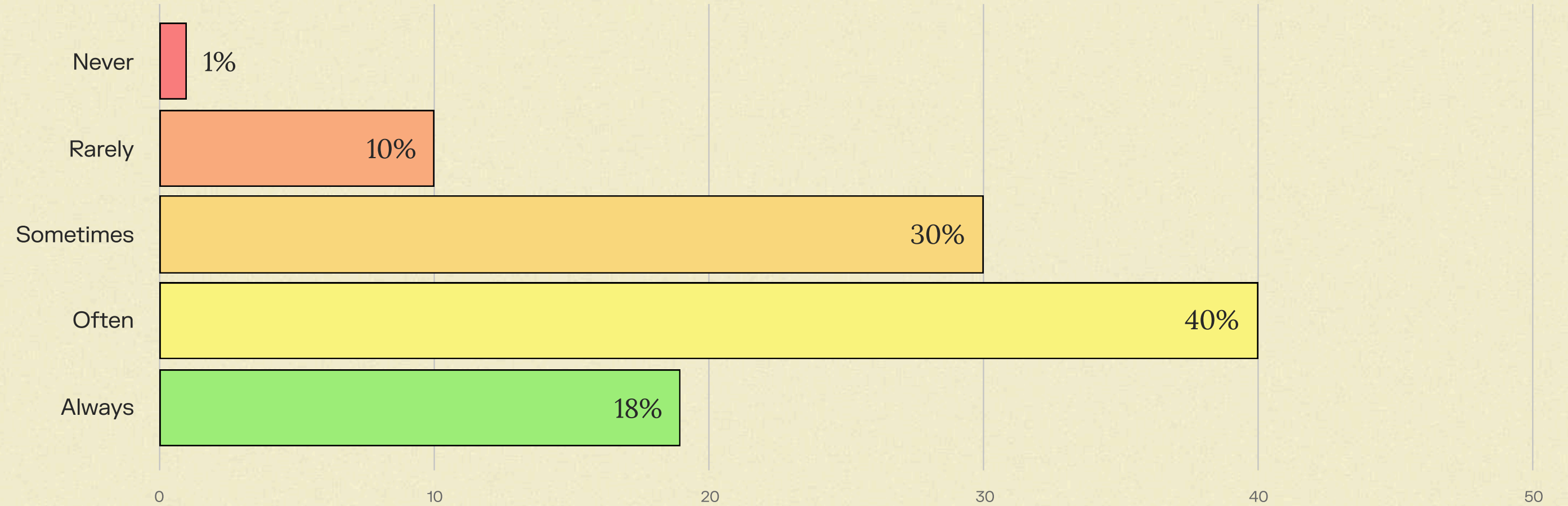
Wellbeing

overview

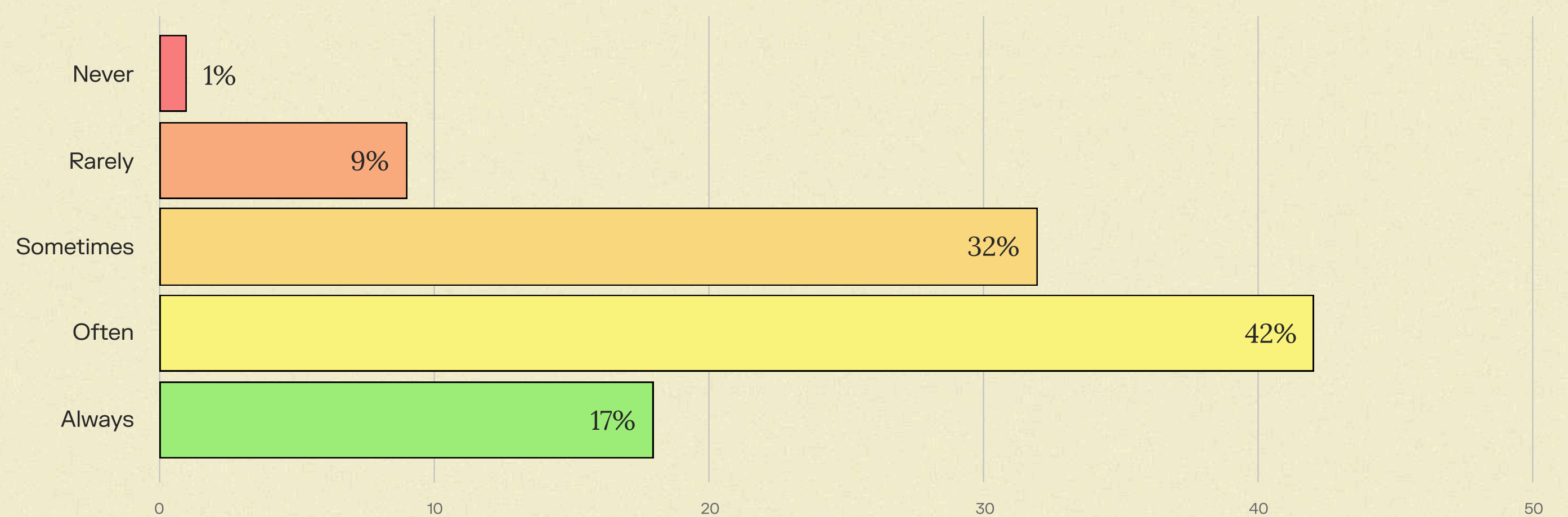
How frequently do you experience or feel each of the following?

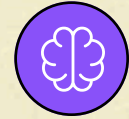


I feel physically strong and have the energy to do what I need to do

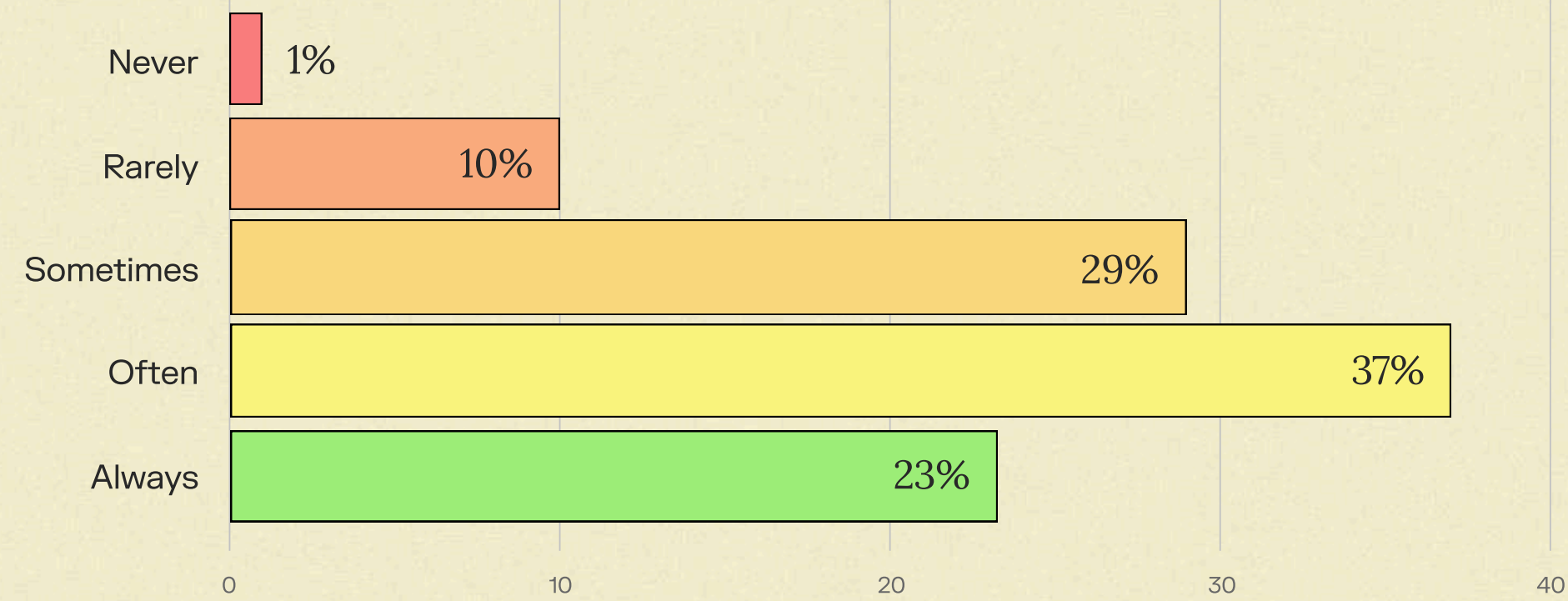


I manage my thoughts and feelings effectively, maintaining a sense of inner calm

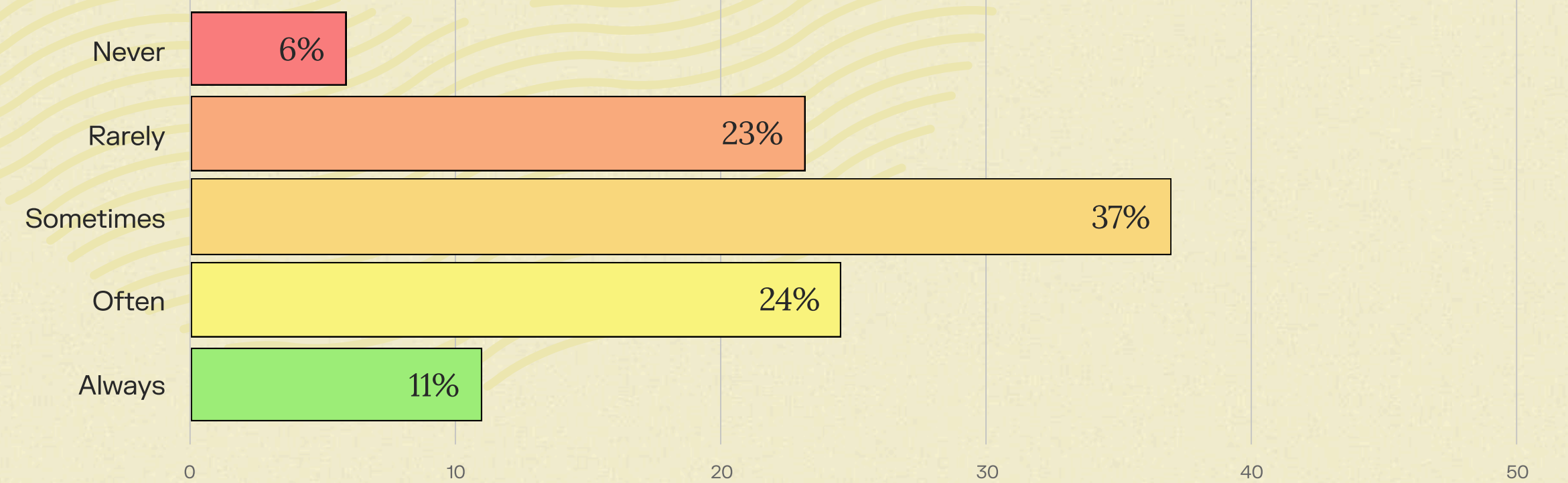




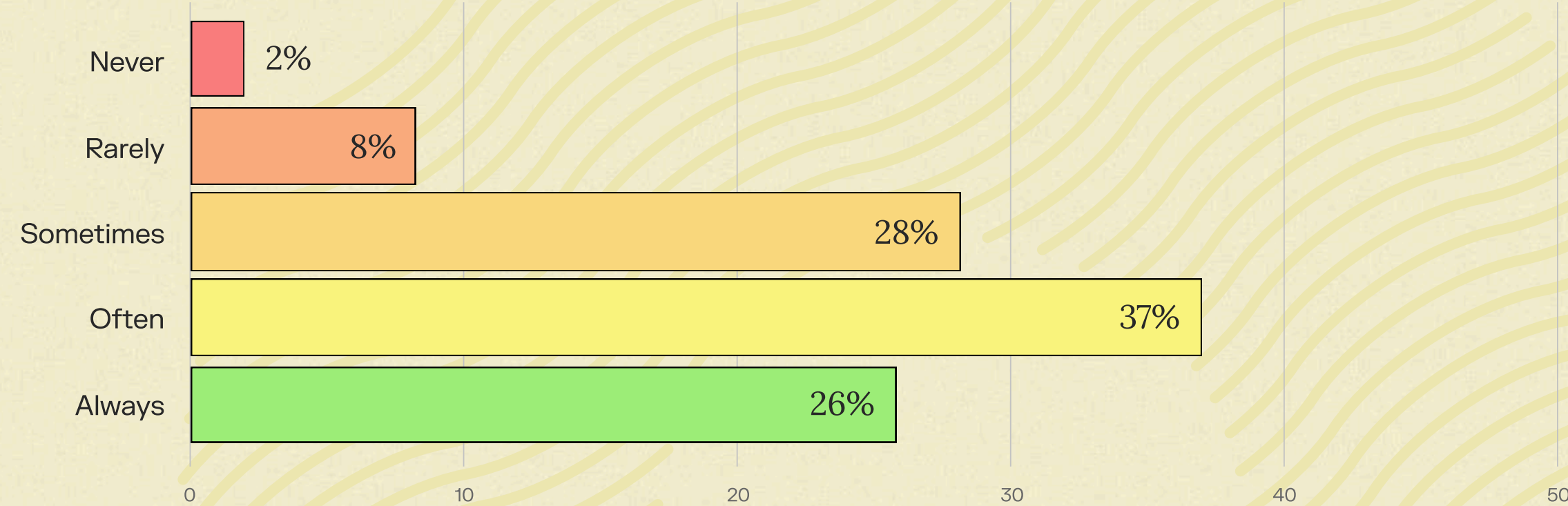
I am able to communicate my thoughts and feelings clearly and openly



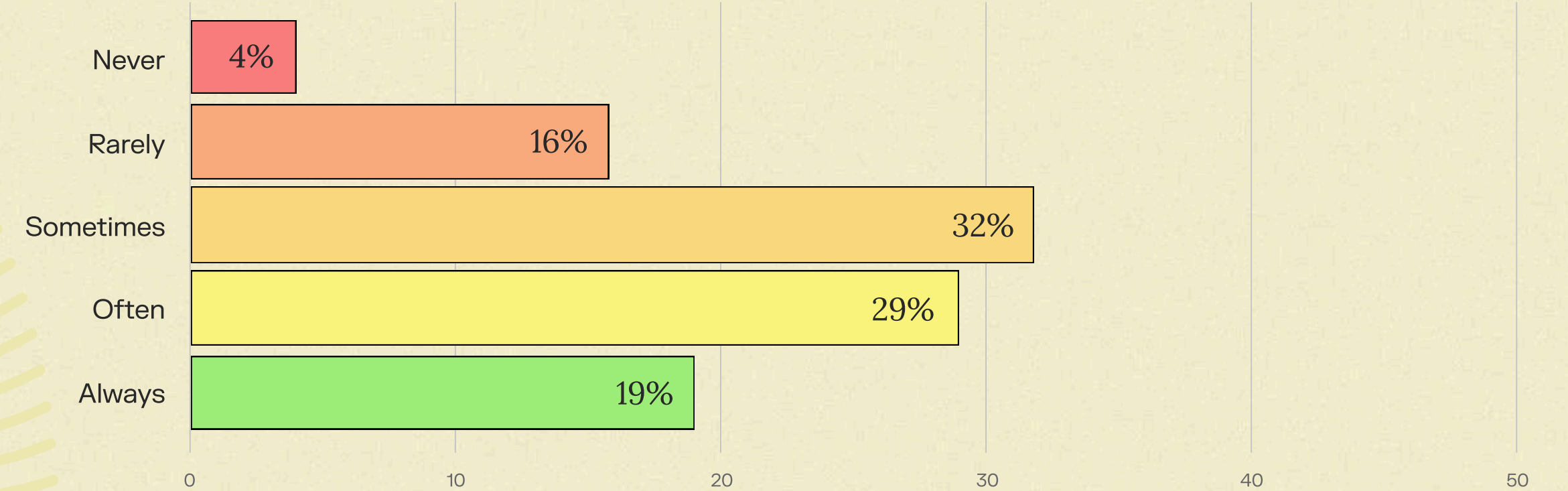
I actively contribute to and feel connected with my wider community



I feel a strong sense of belonging and support from my family, friends, and community

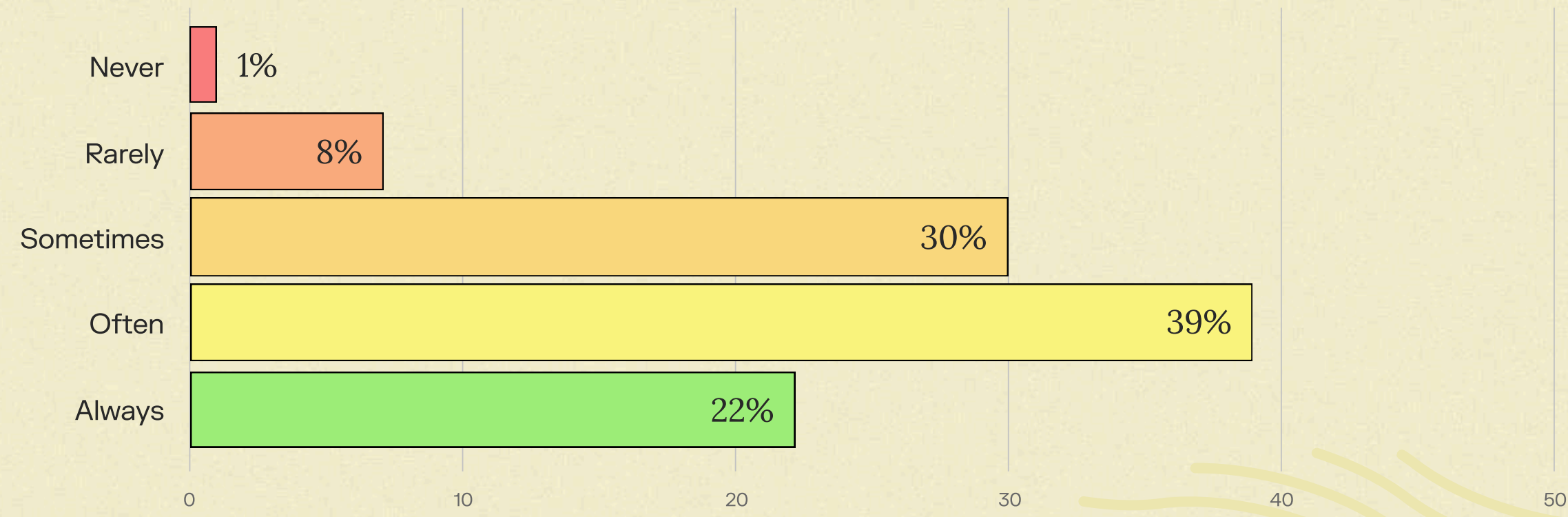


I feel connected to my heritage, or a sense of belonging to a place





I have a sense of purpose and feel connected to my core beliefs




 Key findings

Mental health

in the workplace

The wellbeing paradox

Despite growing awareness and conversation around mental health, many workers are still struggling in silence.

 In the past 12 months, 77% of employees experienced symptoms of poor mental health. Yet 78% do not currently identify as having a mental health condition.

The hidden cost of normalised distress

These findings suggest that while mental health challenges are widespread, they're often not recognised — or not felt — as something worth seeking help for. For many, distress has become normalised as just part of working life.

As one Australian survey participant put it:

“I live by ‘if I’m not dying then don’t waste the doctor’s time.’”

That mindset is more common than we think. Older generations are the least likely to identify with a mental health condition (Baby Boomers: **13%**) and the most likely to feel uncomfortable asking for help (**72%**). Meanwhile, Gen Z workers are leading the shift, with one in four (**25%**) openly identifying with having a mental health condition and fewer barriers to speaking up.

The stigma around mental health challenges that once silenced earlier generations appears to be softening — but not disappearing.

This reluctance to seek help comes at an economic and organisational cost, and has broader consequences for families and communities.

“Mental ill health and suicide cost the economy \$70 billion a year in presenteeism, absenteeism and lost productivity... If we invest in the mental health and well-being of our workforce, that to me is the obvious starting place.”



Georgie Harma
CEO, Beyond Blue



When it comes to managing their thoughts and feelings effectively, nearly three in five (58%) ANZUK workers say they always or often maintain a sense of inner calm – including almost one in five (17%) who say they always feel this way. And men are more likely than women to always feel this way (20% compared to 13%).

Regionally, workers in the UK are more likely than AUNZ workers to have experienced:

- Anxiety (45% compared to 32% and 40% in Australia and New Zealand, respectively)
- Loneliness or isolation (18% compared to 14% and 13% in Australia and New Zealand respectively)

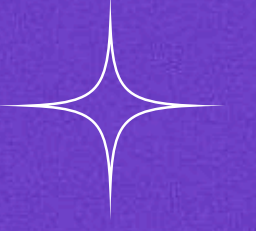
Across industries, knowledge workers and skilled trades and labour professionals are both more likely than care and service professionals to always feel they manage their thoughts and feelings effectively.

- Knowledge workers (24%)
- Skilled trades and labour professionals (17%)
- Care and service professionals (13%)



The story these statistics tell us is that almost every workplace is affected by mental strain. The good news? Leaders have a well-placed opportunity to be a catalyst for change.

Among the 77% of ANZUK workers experiencing mental health challenges, the following struggles were most common over the past 12 months:



Nearly one in two

47%

have experienced stress.

Nearly two in five

39%

have experienced anxiety.

Around one in five

21%

have experienced depression.

18%

have experienced burnout.

18%

have experienced mood swings.

16%

have experienced loneliness or isolation.

6%

have experienced panic attacks.

4%

have experienced symptoms of post-traumatic stress disorder (PTSD) or Complex post-traumatic stress disorder (C-PTSD).

Regionally, things aren't equal. Workers in the UK are experiencing higher levels of stress (49%), anxiety (45%), burnout (19%) and loneliness or isolation (18%).

The biggest reason noted for not seeking medical support was that many felt that their symptoms weren't serious enough (42%).

This 'keep calm and carry on' culture is one of the biggest barriers to people seeking care. To close the gap, workplaces need to make mental health support feel routine, not remedial.

How are workers coping in 2025?

Many employees take steps to protect their mental wellbeing, but most rely on self-managed strategies rather than professional support.

Among the healthy strategies workers do use:



Physical activity tops the list (48%) with movement and time outdoors serving as a simple reset.



Social connection follows closely (46%), reflecting the importance of leaning on friends and family for support.



Healthy habits (40%), including prioritising sleep and nutrition, are also common.



However, not all coping strategies support long-term wellbeing. Some workers may turn to excessive screen time, alcohol, or risky behaviour as a way to self-soothe. Strategies that may offer short-term relief but can be harmful over time.

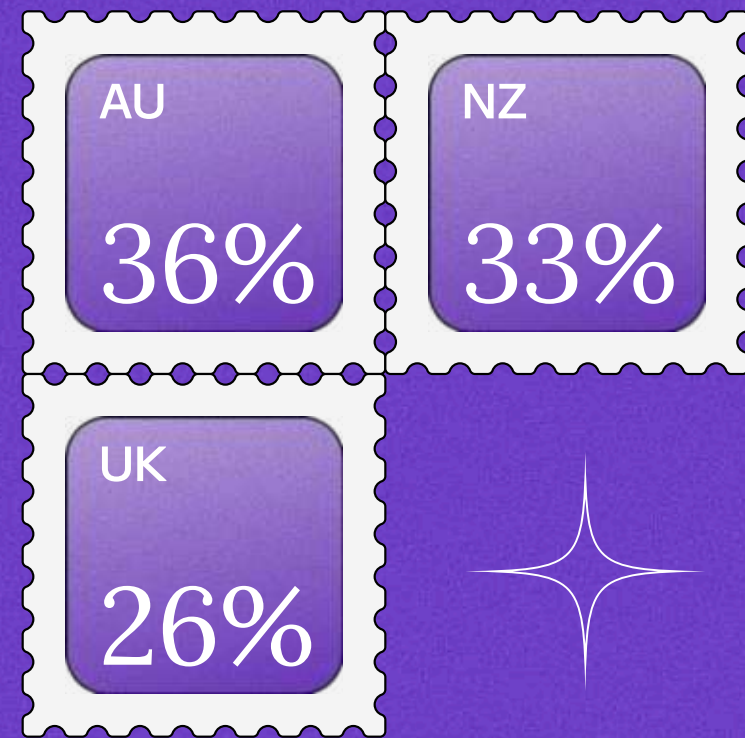
The rise of AI has also created new ways for people to manage their stress and mental health. Some workers are experimenting with AI-powered chatbots or digital therapists. Although AI has enabled some accessibility benefits, there are known risks associated with use. It's vital that humans are still involved when delivering care through a 'Human in the Loop' approach.



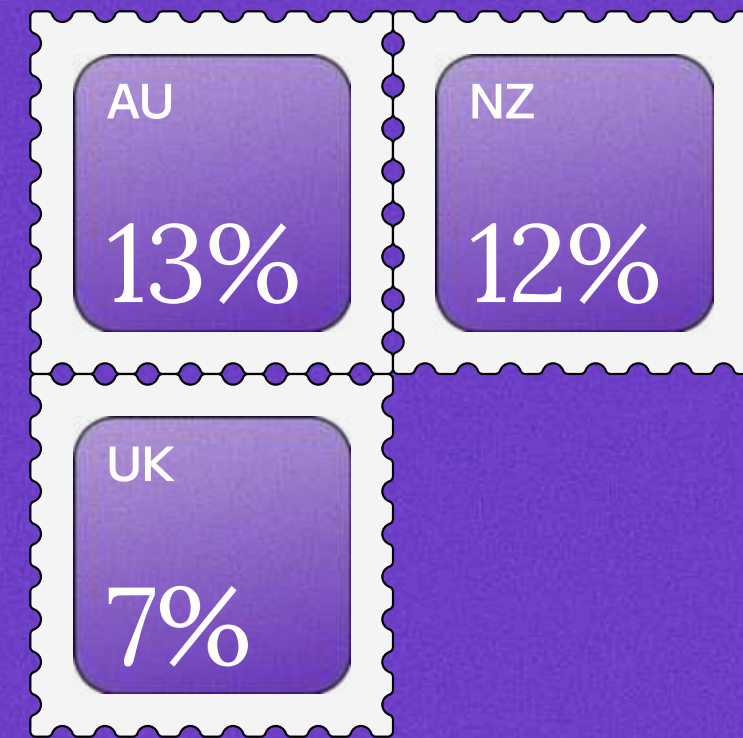
In the context of mental health, **Human-in-the-Loop (HITL)** is a crucial safety and quality assurance strategy for AI tools. It means that a qualified human professional—like a therapist, psychiatrist, or nurse—is kept in the workflow to oversee the AI's output and make all critical, final decisions. You might see the term 'Expert in the Loop' also used to highlight the human is a trained clinical professional.

Regional differences also highlight how people approach coping differently. Workers in AU and NZ are more likely than those in the UK to turn to:

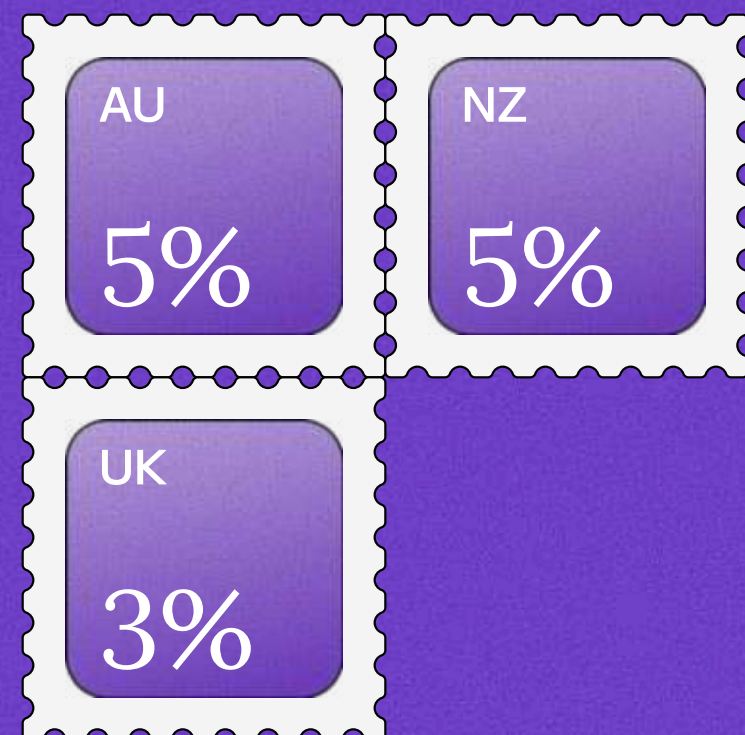
Relaxation and self-care



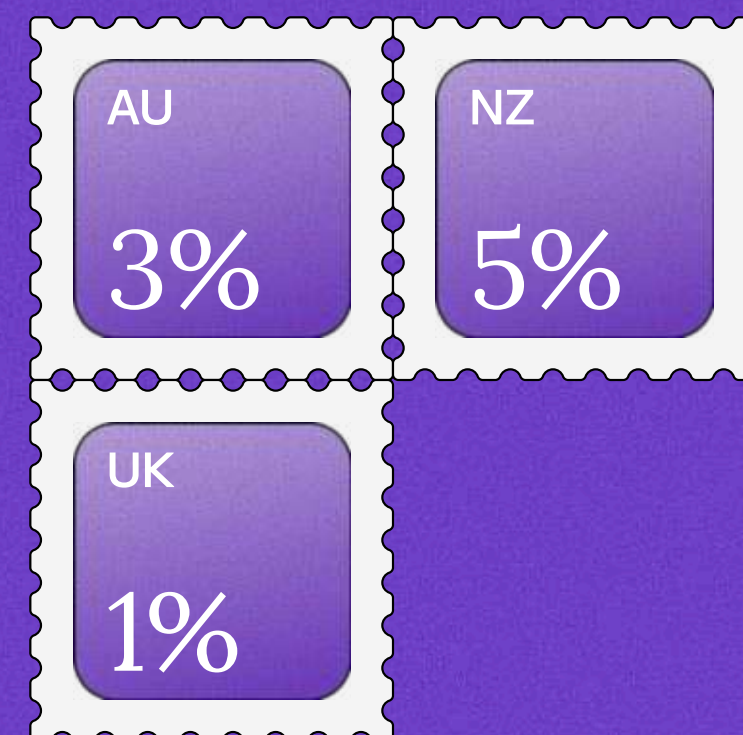
Spiritual or religious activity



Engagement with AI chatbots



Gambling



However those in the UK are more likely to prioritise physical activity, social connection and creative pursuits.

Professional support, including therapy and Employee Assistance Programs (EAPs), remains underutilised. Only 13% of workers include medication or formal mental health support, respectively, as part of their wellbeing strategies, highlighting a gap between what people need and what feels accessible, practical, or comfortable to use.

“There’s a real gap between the challenges people face and the support they actually use. When leaders champion mental health as a visible priority for themselves and the organisation, they create a culture where seeking support is normalised, and that’s a big step in itself.”



Nathan Halliday
Chief of Member Operations, Sonder



 Key findings

Physical health

in the workplace

Running on empty

Persistent tiredness has become the backdrop to daily work life, reflecting high workloads, constant demands, and ongoing pressure.



Over the past 12 months, **73%** of employees experienced physical symptoms that impacted their ability to work



A striking **94%** reported feeling fatigued or lacking energy



And across ANZUK, an average of **15%** of workers feel fatigued daily.

When overwork becomes the norm, energy is the first casualty, and the consequences extend far beyond individual wellbeing. Fatigue affects productivity, engagement, safety, and compliance, increasing the likelihood of errors and workplace accidents.

Energy levels across work types

Not all work affects energy equally. When it comes to 'always feeling physically strong and energised':

- Knowledge workers: **26%**
- Care and service professionals: **15%**
- Skilled trades and labour professionals: **18%**

Even the highest energy group sees only about a quarter consistently energised, showing fatigue affects the workforce widely. For those in frontline roles, physically demanding work and irregular hours make them especially vulnerable.

Fatigue and essential workers

Beyond being exhausting for the worker, fatigue or low levels of feeling ‘physically strong and energised’ can be risky.

Research shows employees who sleep less than six hours are 70% more likely to experience a workplace accident, with shiftworkers facing even higher injury rates.

Care and service professionals, who report the lowest energy levels (15%) and often work irregular hours that disrupt sleep cycles, are particularly vulnerable. These roles — including nurses, care workers, and other essential frontline services — are physically and emotionally demanding and fatigue sets in.

Supporting all workers’ physical health is essential, but care and service workers require particular focus. Safeguarding their energy protects both the workforce and the communities that rely on their critical services. For those in physically demanding roles, these pressures are felt daily, making proactive support, thoughtful workplace design, and targeted interventions vital.

“Fatigue is a hidden danger in many operations. It slows reaction times, impairs memory, and increases the likelihood of errors. When ignored, it leads to near misses—or worse.”

Fatigue Science
(Fatigue analytics & risk management)

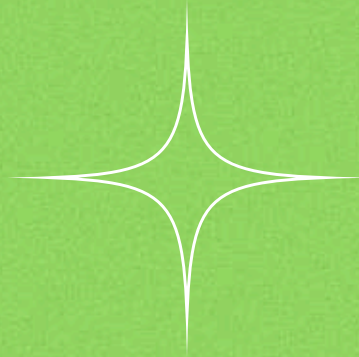


Fatigue nation: Spotlight on Australia

In 2025, Australians are working record-long hours, contributing to a national productivity slump ([Productivity Commission](#)).

Frontline roles, particularly in healthcare and social assistance, carry the heaviest load, reflected in over **18,000** workers’ compensation claims and **1.2 million** lost workdays in the past year. A sharp increase from the previous year’s **17,000** claims and **836,652** days.

These figures highlight the human cost of persistent overwork and the urgent need for supportive workplace practices.



Considering the complexity of health

Fatigue goes so much deeper than what someone is experiencing at work. Caring responsibilities, long commutes, musculoskeletal conditions, and other hidden challenges can all deplete the energy stores.

“There is no magical fence that keeps everything in your home life out this side of the fence and everything in your work life in this side of the fence.”



Jane Bourke
Group Director, Safety, Health & Wellbeing,
Woolworths Group



It’s more than likely you’ve been in the same boat. A sort of creeping exhaustion that comes from a relentless storm of work and personal stress. So how can your organisation create the same understanding and support for the people you lead to support wellbeing and drive sustainable performance?

Life-stage and biological factors

Women’s health factors, including menstrual cycles, endometriosis, and menopause, can contribute to fatigue, sleep disruption, and severe physical pain.

Men also face evolving physical challenges, with cardiovascular risks, musculoskeletal strain, and fatigue increasing from midlife.

Organisations can help all their workers stay strong, resilient, and productive by meeting them exactly where they are. This support covers everyone, from the frontline staff with physically demanding jobs to employees dealing with personal health issues as they get older.

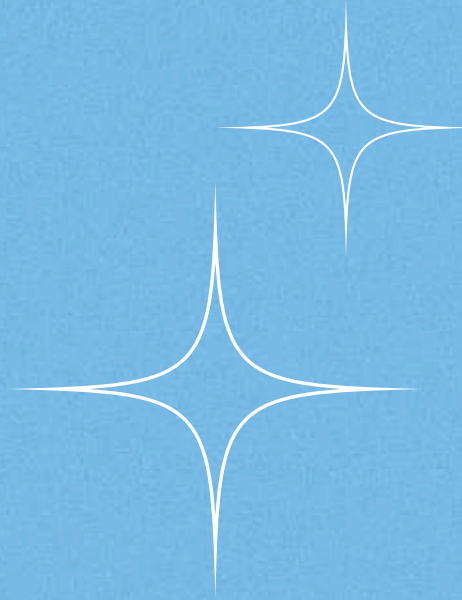


“The fact that this app has tools in place and resources available to help navigate through difficult times is great, and then as well, talking to a real human is so comforting and helpful. I was skeptical about using the app as recommended by my workplace, but last night I found I really did need to reach out as I had no one, and I am so grateful for the support I received.
What a great service; I wish every workplace had this in place”



David*

**name has been changed for confidentiality*



 Key findings

Belonging

& purpose

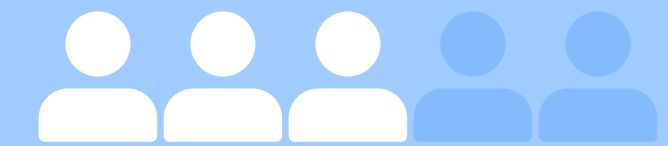
A connected workforce performs better

A strong sense of belonging — feeling part of a team, sharing a common purpose, and being connected to broader communities of family and friends — forms the foundation of organisational culture.

When employees experience these connections, they tend to be more engaged in their work and resilient in the face of challenges.

More than three in five

62%



workers across ANZUK say they always or often feel a strong sense of belonging and support from their family, friends, and community.

Yet, only around one in four

26%



always feel this strong sense of belonging.

One in three

35%



workers report always or often contributing to and feeling connected with their wider community.

Over a decade of scientific research confirms that belonging is a fundamental psychological resource, not just a social nicety. This resource directly impacts how we engage with work.

Younger generations lead the way:



Gen Z (25%) are the most likely to always feel connected to their core beliefs and purpose, while



Gen X (18%) are the least likely.

Belonging builds resilient organisations

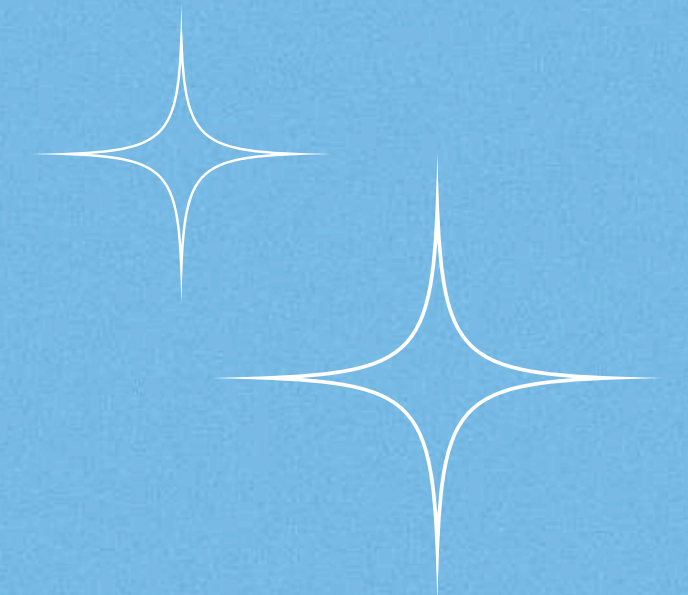
Belonging, purpose, and community connection may sound intangible, but they have very real business outcomes.

During times of uncertainty or economic pressure, research consistently shows that teams with a strong sense of belonging experience higher wellbeing and performance than those without.

A UK report on resilient organisations shows that companies that build a strong sense of belonging handle economic downturns better. Their performance and employee wellbeing dip less.

In New Zealand, **87%** of workers say they perform better when they feel a sense of community with colleagues, and most say it's vital for their health and wellbeing.

According to the **Randstad Workmonitor 2025** report, 83% of Australian workers perform better when they feel they belong, and 62% would leave a job if they didn't.



Why this matters for leaders

Fostering a sense of belonging and shared purpose in everyday work is essential for a strong organisational culture. Employees who feel connected and supported are more engaged and resilient – which drives both team performance and overall business success.

Research shows that belonging is one of the strongest drivers of employee engagement. Employees who feel they belong are more energetic and focused on their work. They perform better and often go beyond their core responsibilities. Engagement is also consistently linked to stronger performance, positive behaviours, and better organisational outcomes.

Investing in belonging as part of your cultural strategy supports:



Lower turnover and higher retention



Stronger team resilience, adaptability, and innovation

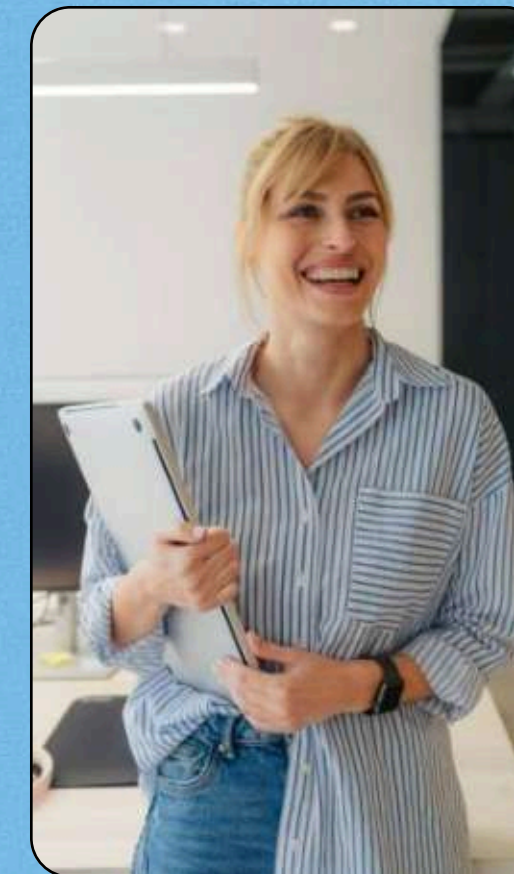


Improved employee performance and productivity



Higher customer satisfaction and overall business results

Actions leaders can take



Support employees through change. Feeling supported by inclusive leaders during organisational changes is one of the top influences on an employee’s sense of belonging. Actively check in, listen, and provide guidance to support teams navigating uncertainty.

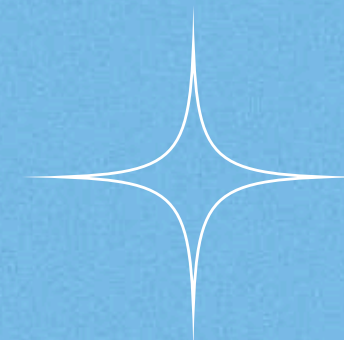
Create shared purpose and connection. Encourage collaboration towards common goals and provide opportunities for team members to connect across the organisation. This builds community, strengthens engagement, and reinforces the culture you want to see.

Recognition is key. It’s one of the most low-cost yet high-impact strategies to improve an employee’s experience. Acknowledge both their achievements and what personally motivates them.

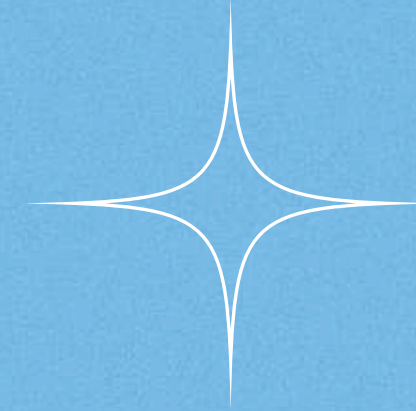
“One of the simplest yet most impactful ways to boost employee wellbeing is through timely recognition”



Kylie Terrell
Director of Consultancy,
Reward Gateway



Belonging and purpose in standards and policy



Regionally, workers in Australia (**31%**) and New Zealand (**26%**) are more likely to feel a strong sense of belonging and support compared to those in the UK (**21%**).

Australia



Psychological safety and inclusion are recognised under workplace health and safety and mental health frameworks ([Safe Work Australia](#)).

New Zealand



Wellbeing and belonging are embedded in New Zealand's social and employment frameworks. [The Public Service Act 2020](#) emphasises integrity, inclusion, and culturally responsive practices that foster meaningful relationships.

United Kingdom



The [Health & Safety Executive](#) and [CIPD](#) wellbeing frameworks highlight belonging, employee voice, and inclusion as critical drivers of engagement, performance, and legal compliance.

🔍 Key findings

Barriers

to care

Why seeking help can be so hard

Even as conversations around wellbeing have become more open, many employees still find it difficult to reach out for help when they need it most.

🔍 In the past 12 months, around 1 in 3 workers (33%) delayed seeking medical support. The most common reason? Feeling their symptoms weren't serious enough (42%).





This mindset reflects a deeper culture of self-reliance, a belief that unless something is “serious,” or at a crisis point, it’s not worth the time or cost to seek support.

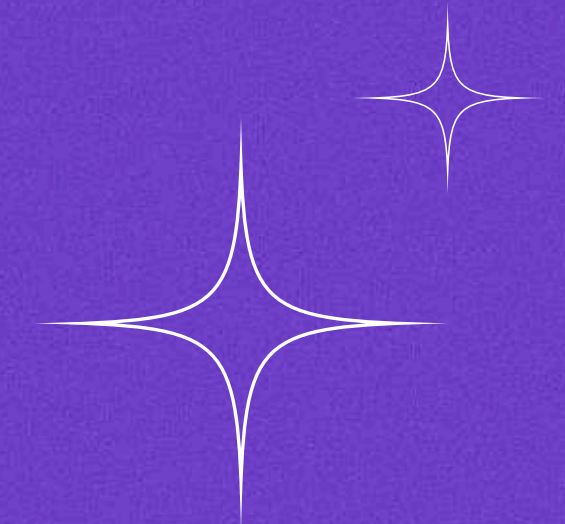


In the UK, similar barriers are reflected in people’s experiences of using health and care services. According to [The King’s Fund](#), many report long wait times due to an overloaded NHS, discrimination, a lack of empathy or genuine listening, poor communication, and inflexible or non-inclusive services as barriers to seeking care. Feelings of powerlessness, shame, stigma, and practical barriers such as travel costs further compound the issue.



At the same time, the health system itself can make it harder to access the right support. **In Australia**, multidisciplinary care — where GPs, psychologists, and other allied health professionals work together to treat the whole person — is considered best practice for holistic wellbeing. Yet many clinicians report significant barriers to delivering this kind of care: 79% of GPs say a lack of government funding limits their ability to collaborate with other professionals, while 69% cite lack of time as another major barrier.

In Aotearoa New Zealand, financial barriers add another layer. Around one in five Māori (compared with 1 in 8 non-Māori) report struggling to afford a GP visit, and 1 in 7 (vs 1 in 20 non-Māori) face trouble paying for prescriptions. For employees, these costs can delay care for stress, illness, or ongoing health issues, affecting both wellbeing and productivity at work.



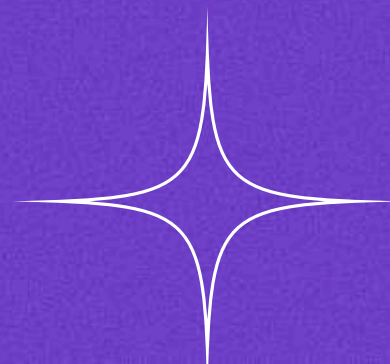
Across ANZUK, practical barriers for employees seeking care include:

- Long wait times (37%)
- Work or personal commitments — not wanting to take leave or unable to fit appointments into busy schedules (36%)
- Anxiety or fear around diagnosis or medical procedures (31%)
- Expensive costs related to appointments, tests, or medication (29%), however this differs greatly between ANZ and the UK. In Australia and New Zealand, cost is the number one barrier to seeking care. **49% of Aussies and 57% of Kiwis report this as their top reason**, compared to just 9% of the UK.
- Lack of trust in the healthcare system (27%)



For some, access itself remains a major obstacle, particularly in regional areas where clinics, specialists, and culturally appropriate services are limited:

- Nearly 1 in 10 workers (9%) report difficulties finding local doctors or communicating with healthcare providers.



“Appointments are too expensive, and I can’t justify the cost.”



“Having to phone for an appointment stops me seeing a doctor as phoning the surgery makes me anxious.”



“I thought I could manage on my own.”



“Such difficulties getting a GP appointment.”



“No local GPs.”



What this means for employers and leaders

When barriers to care go unaddressed, minor health issues can escalate into larger health or mental wellbeing concerns that ultimately affect performance, engagement, and team dynamics.

The good news is that early support and timely intervention allow challenges to be managed before they become crises, protecting people's wellbeing and costs across the business.

Introducing early intervention platforms like Sonder benefits both individuals and organisations, which typically experience a 24% reduction in turnover and 12.5% lower absenteeism when proactive support is provided.

While organisations can't directly fix long waitlists or systemic health inequities, they can play a critical role in reducing workplace-specific barriers:

While organisations can't directly fix long waitlists or systemic health inequities, they can play a critical role in reducing workplace-specific barriers:

1. Support flexibility with trust and communication

Encouraging employees to attend appointments without penalty or guilt sends a clear message that health comes first. Across ANZUK workers, two in three (66%) find flexible work arrangements extremely or very important.

2. Provide access to early intervention platforms

Comprehensive wellbeing platforms or 24/7 alternative EAPs (like Sonder) can bridge the gap by offering on-demand support to a wide range of healthcare professionals, including nurses, for when traditional care feels out of reach. This helps provide an average reduction in absenteeism by 12.5%.

3. Create a culture of psychological safety in the workplace

By addressing stigma, normalising care-seeking, and demonstrating these behaviours from leadership, organisations can shift a culture of self-reliance toward one of genuine wellbeing.

Knowing that support is available doesn't always translate to feeling able to reach out. For organisational leaders, this highlights a tangible opportunity to make "access" mean more than awareness. Access can be socialised to make it attainable, acceptable, and encouraged.

Psychological safety?

A concept highlighted by researchers like Amy Edmondson, concerns whether a team feels secure enough to take interpersonal risks. This means individuals feel comfortable to speak up, ask questions, admit mistakes, and even challenge leadership without fear of negative repercussions. It's a powerful force of good for teams to foster learning, drive innovation, and build resilience.

“True flexibility isn't just about work hours, it's about being able to access support whenever and wherever it's needed. It's incredible that we've been able to scale a model offering round-the-clock support, from nurses to counsellors, so people can be at their best without having to choose between work and health.”



Raechel Gavin
Chief People Officer, Sonder

Key findings

Workplace wellbeing support

Awareness doesn't always translate to use

Even the best-intentioned wellbeing programs can fail to make an impact if they don't address the realities of the workforce.

Across ANZUK, three in four workers (75%) are aware of health, safety or wellbeing support services. So, why have only 17% actually used them in the past 12 months?

This gap between awareness and action highlights a critical challenge for organisations: availability doesn't automatically translate to uptake.

Survey data reveals multiple drivers behind low engagement:

- Many employees simply didn't feel they needed support (**63%**)
- Others didn't feel comfortable asking (**15%**) or didn't trust it would help (**13%**)
- Privacy concerns remain significant — nearly **10%** worried managers would know, and others feared embarrassment or colleague awareness (**6%**)

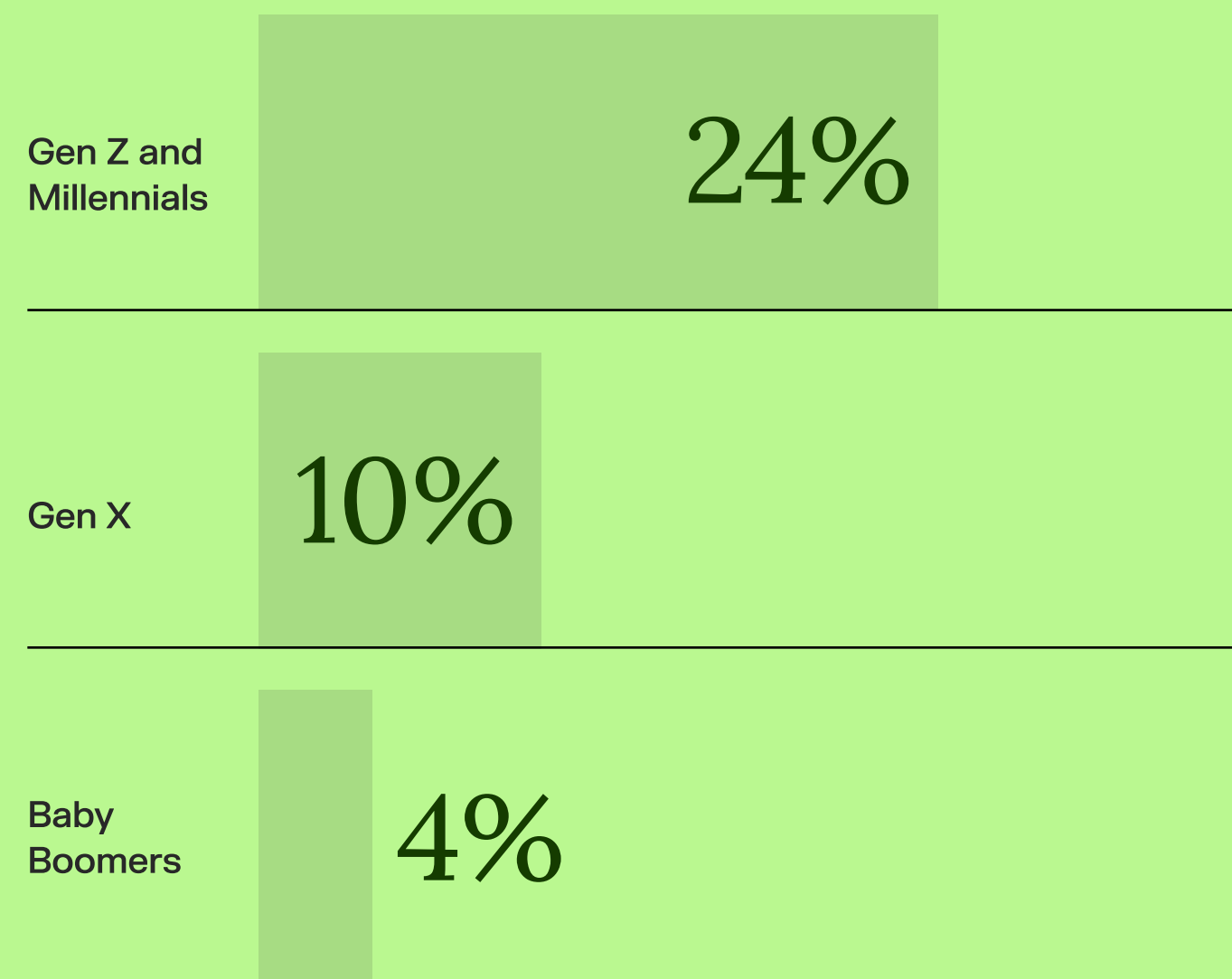
Generational differences exacerbate this: older workers are far more likely to feel uncomfortable seeking help, while younger employees are more willing to engage.



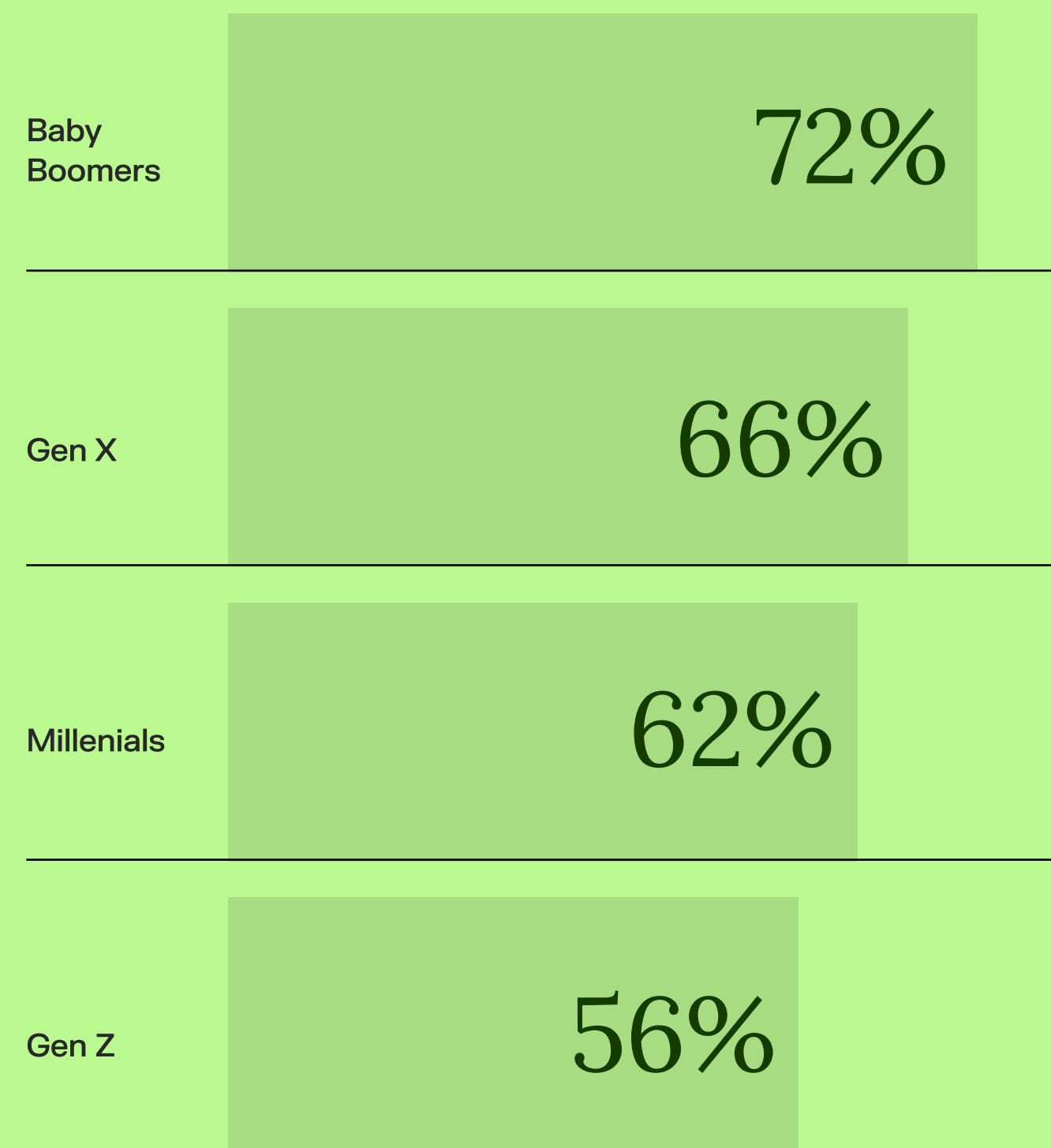
Who's using workplace support?



Younger generations are more likely to have accessed services in the past year:



Older generations report higher levels of discomfort when asking for help:



A misplaced investment

Traditional programs often focus on compliance or superficial engagement rather than meaningful outcomes. Examples from survey feedback illustrate common pitfalls of tick-a-box solutions:

“It feels like a corporate cover rather than genuine support.”



“The support was only 3 sessions long, and I feel that’s not enough time to discuss issues.”



“I don’t like my manager and I don’t want work knowing all my personal stuff.”



Short durations, limited scope, and perceived lack of confidentiality contribute to disengagement, undermining both employee trust and organisational goals.

Evidence that workplace programs can help

Despite barriers, there is evidence that well-designed wellbeing programs deliver measurable benefits.

Three in five (59%) of ANZUK workers reported that their organisation’s wellbeing programs and EAPs positively impacted their overall wellbeing and productivity.

This demonstrates that when programs are comprehensive, accessible, and trusted, they can improve engagement, resilience, and productivity.

What employees actually want from workplace wellbeing support

Your employees want meaningful workplace support that they can trust. Employees value personal, accessible, flexible and confidential support. Programs that fail to meet these criteria are often underutilised, regardless of the resources invested.

Top priorities employees implicitly signal:

1. Trust and privacy: Confidentiality cannot be optional. Without it, employees won’t engage out of distrust, leaving even well-resourced programs unused.

2. Comprehensive support: Short-term or superficial interventions often feel like ‘tick-the-box’ exercises and fail to meet real needs. Lasting change requires multi-touch support that adapts to diverse and evolving challenges.

3. Ease of access: Programs that aren’t flexible in timing, location, or delivery can create friction and reduce participation, undermining investment and outcomes.

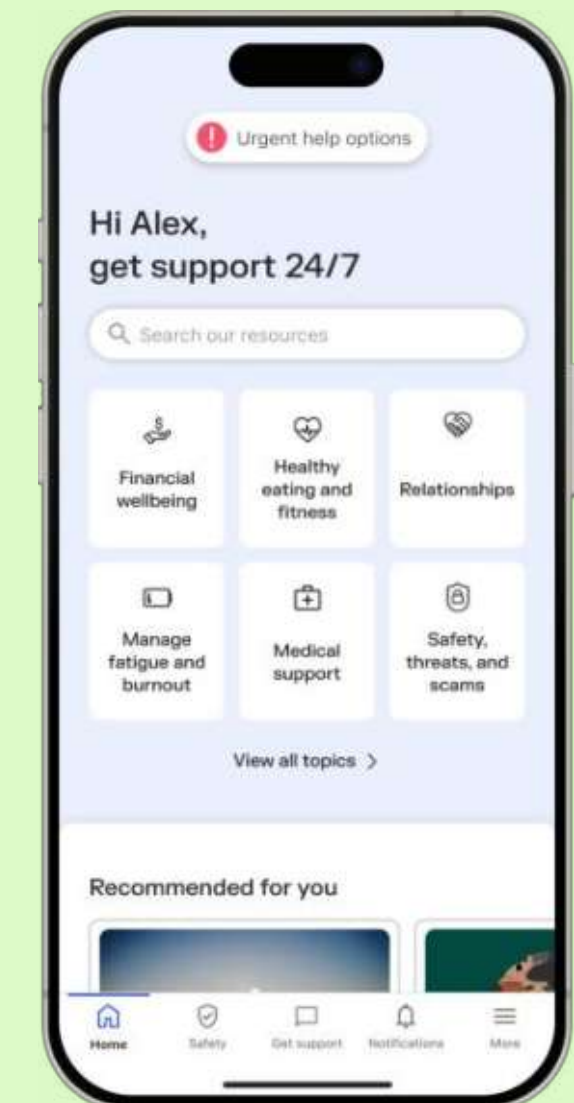
4. Generational nuance: Older employees face higher stigma and need targeted reassurance; failing to address these differences leaves significant segments disengaged.

“The fact that this app has tools in place and resources available to help navigate through difficult times is great, and then as well, talking to a real human is so comforting and helpful. I was skeptical about using the app as recommended by my workplace, but last night I found I really did need to reach out as I had no one, and I am so grateful for the support I received. What a great service; I wish every workplace had this in place”



Sonya*

**name has been changed for confidentiality*



Looking ahead:

2026 & beyond

From reactive support to proactive wellbeing

The future of workforce wellbeing will be defined not by how quickly organisations respond to issues, but by how effectively they prevent them. As workforces evolve, leaders have a chance to move from reactive, box-ticking programs to proactive strategies that address wellbeing before crisis points are reached.

In 2026, workplace wellbeing will continue to evolve where:



Organisations are shifting to always-on early intervention platforms, where employees can access confidential support at any time, in ways that fit their lives.



Wellbeing is embedded into policies, leadership practices, and communications, with stigma actively being dismantled so seeking help is normal, not exceptional.



Flexibility becomes a tool for trust. Employees are empowered to take time for appointments, mental health breaks, or self-care, confident that the organisation supports their choice through ongoing communication.



Technology and real-time data make it possible for external teams to anticipate stress points, personalise support, and tend to needs before problems escalate.

“Across hundreds of companies in our dataset – including many of the fastest-growing organisations on the Inc. 5000 – one pattern is unmistakable: wellbeing and performance rise together. When employees feel supported, clear on expectations, and recognised for their impact, their ability to deliver doesn’t just improve, it becomes sustainable. Our data shows that accountability and recognition are key drivers of growth, but they only work in environments where people feel psychologically safe and well. It’s getting both sides of the feedback equation right. Wellbeing isn’t a perk, it’s a performance system. The companies that understand this are the ones consistently outpacing their peers.”



Justin Angsuwat
Chief People Officer,
Culture Amp



By embedding wellbeing into the bedrock of workplace culture and organisational structure, businesses build resilience, reduce absenteeism, and protect productivity, turning wellbeing into a strategic, measurable advantage for people and organisations.

Investment in employee wellbeing consistently delivers tangible results

For every \$1 invested in workplace mental health, organisations see an average return of \$2.30 through improved productivity, reduced absenteeism, and lower turnover.

The World Health Organization (WHO) emphasises that mental health programs are essential for reducing absenteeism and enhancing employee engagement and retention. They report that depression and anxiety cost the global economy nearly US\$1 trillion each year due to lost productivity, highlighting the significant impact of mental health on organisational performance.

When wellbeing is integrated into strategy, not treated as an add-on, the return is both human and financial.

The ANZUK workforce data reinforces this direction:

Type of support	% of workers who find it extremely or very important
Subsidised or discounted healthcare	67%
Critical incident support	60%
24/7 on-demand mental health support	53%
24/7 on-demand access to nurses or medical support	52%
Personal safety support	52%
Extended family support	50%



The future model of workplace support programs

From physical fatigue to mental health symptoms, from small stresses escalating to urgent crises, employees face challenges that can quickly affect productivity, engagement, and safety. Managers, too, often find themselves navigating these issues without the right tools or guidance, leaving teams at risk.

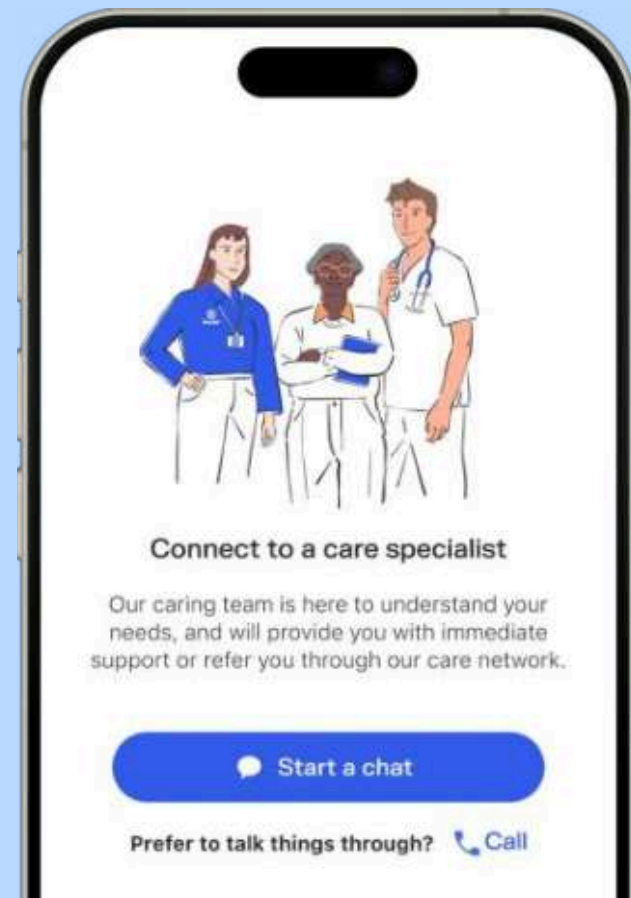
Being a wellbeing champion is about being able to adapt and respond compassionately to the changing needs of your people. Armed with the insights in this report, we hope organisations can chart a roadmap to a future that combines practicality with a genuine focus on people.

As 2026 approaches, our commitment is to back you up with tools, support, and guidance that empower you and your team to flourish.

Here's how Sonder can help your people:

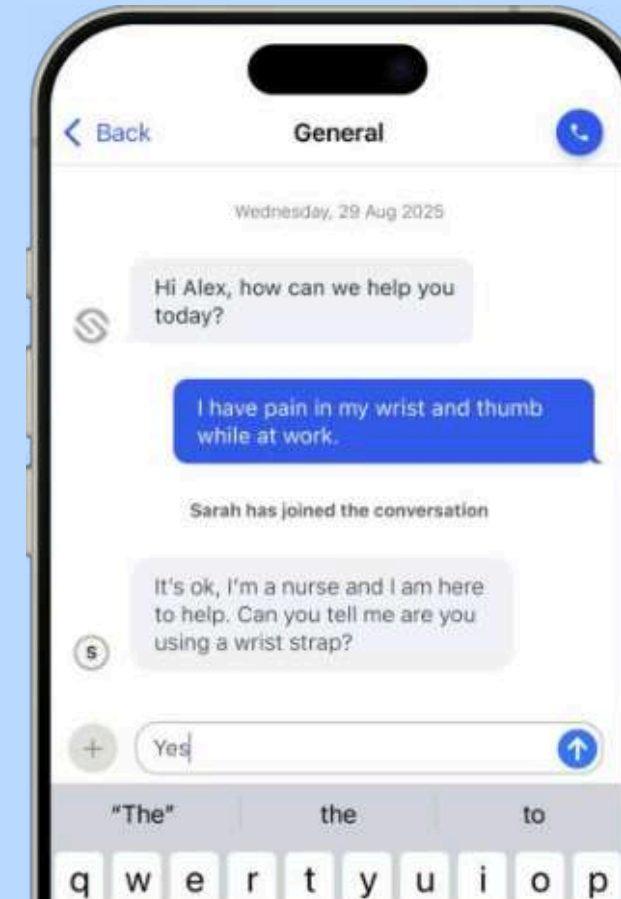
A complete suite of care:

- On-demand medical support for high fatigue or urgent physical health concerns.
- Confidential, 24/7 mental health access to psychologists, counsellors, and wellbeing professionals.
- Family and critical incident support that extends beyond the individual to dependents or impacted teams.



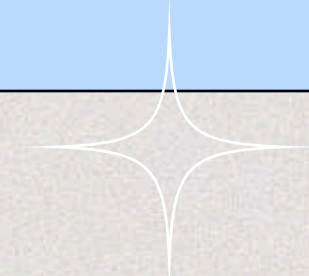
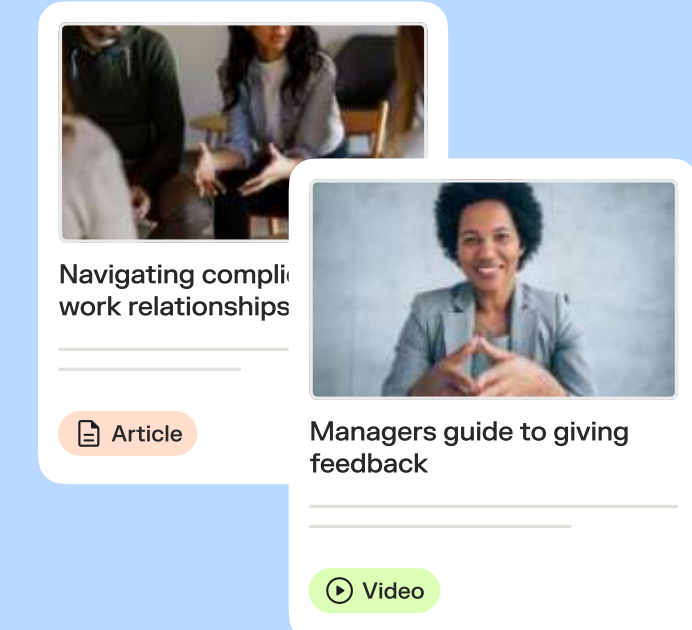
Accessible, flexible options:

- Multiple communication channels — calls, texts, or in-app messaging, so help is available however employees are most comfortable.
- Rapid response by qualified professionals — nurses and clinicians provide timely advice for any health concern, from minor queries to urgent care needs.
- Full confidentiality and compliance — employees and managers can trust that sensitive information is handled securely by an external, independent platform.



Manager support and team resilience:

- Guidance for managers on handling complex team dynamics and wellbeing issues.
- Tools to proactively identify and respond to early warning signs of stress or burnout, reducing escalation and maintaining productivity.



The new leadership wellbeing mandate

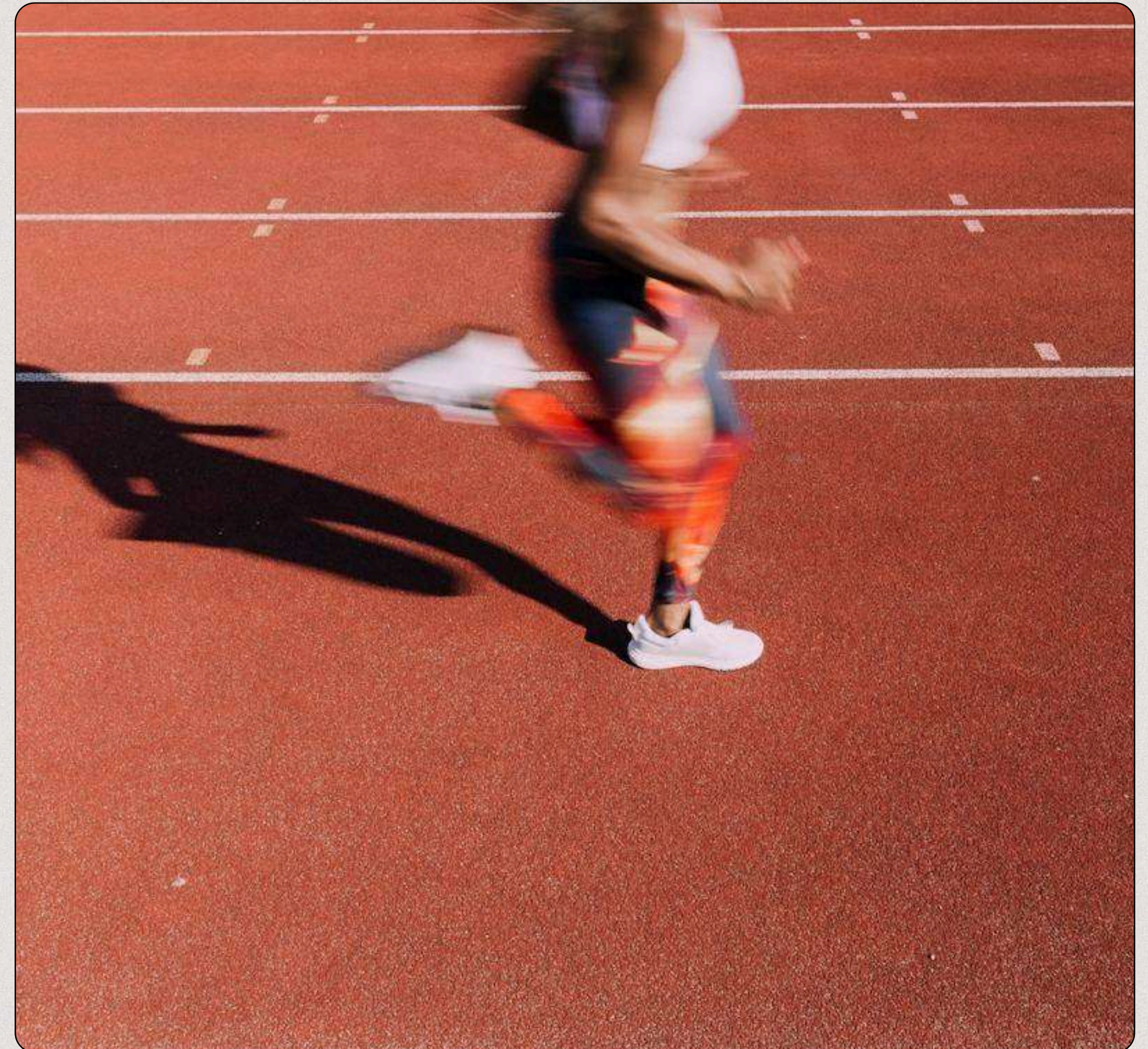
“The new wellbeing leadership mandate shifts the conversation from simply acknowledging the importance of wellbeing to demonstrating its measurable impact on performance.

Like elite sporting teams who balance performance, recovery, and focus to achieve peak results, organisations must embed mental fitness as a core capability at every level. This means equipping leaders and their teams to manage good stress versus bad stress, tailoring wellbeing initiatives to the individual and different life stages, and normalising recovery as a cultural standard.

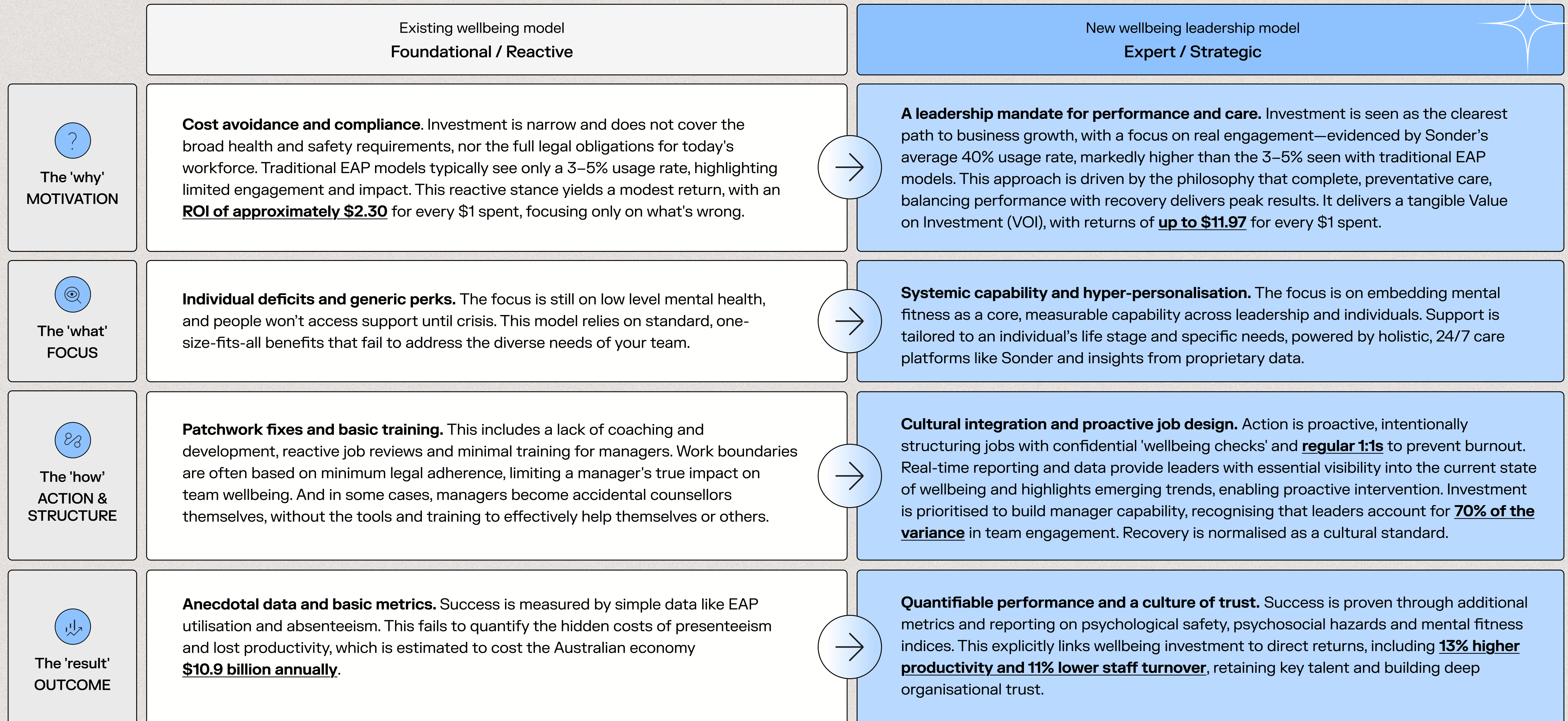
By leveraging proprietary performance data and proactive support models, businesses can explicitly quantify the connection between care and performance, proving that investing in people is the fastest route to a clear ROI and drives tangible outcomes for both people and organisations.”



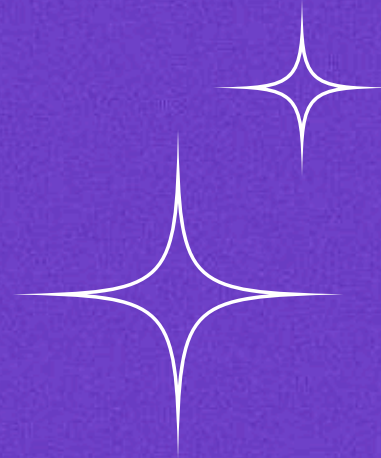
Raechel Gavin
Chief People Officer,
Sonder



The new wellbeing framework



Final words



This report paints a vivid picture of the state of employee wellbeing across Australia, New Zealand, and the United Kingdom in 2025, heading into 2026. Despite growing awareness and investment, many employees continue to experience distress in silence. Mental health challenges are widespread: 77% of employees reported symptoms of poor mental health in the past year, yet 78% do not identify as having a mental health condition. Fatigue, low energy, and physical strain are pervasive, affecting productivity and safety, while social disconnection and a lack of belonging leave many workers feeling isolated.

Employees are aware of workplace support, yet uptake remains low. One in three workers delayed seeking medical support, often because symptoms didn't feel "serious enough." Awareness of workplace support is high, but usage remains low. Employees clearly value support that is meaningful, flexible, confidential, and culturally attuned, yet programs that are short-term, superficial, or poorly communicated are still all too common and fail to engage. Generational differences further influence uptake, with older employees facing higher stigma and discomfort in accessing help.

The data highlights a central wellbeing paradox; **people recognise the need for support but are often unable or unwilling to act**, and the costs of untreated distress ripple through organisations in absenteeism, presenteeism, and lost productivity. At the same time, when programs are comprehensive, trusted, and accessible, they deliver measurable benefits. Early intervention platforms can reduce turnover and absenteeism, while well-designed wellbeing initiatives increase engagement, resilience, and performance.

Modern technology can bridge the gaps that internal teams, managers, and traditional EAPs alone cannot fully address. Sonder was built specifically to do this by connecting employees with the right experts at the right time, in ways that are accessible, confidential, and responsive.

By providing 24/7, holistic support for mental and physical wellbeing (as well as safety support), Sonder enables organisations to meet the diverse needs identified in this report — without placing the entire burden on managers or internal teams.

The future of workplace wellbeing lies in early-intervention support, delivered through a single-entry, always-on approach. This report provides a roadmap for a new era, one that champions proactive solutions, meaningful resources, and a human-centred approach.

However, the balancing act remains, how do we champion individual wellbeing while driving sustainable organisational success? After all, the cost of doing nothing far outweighs the investment in action. Together, we can leave outdated models behind and cultivate a workplace culture that truly values and uplifts your people in 2026 and beyond.

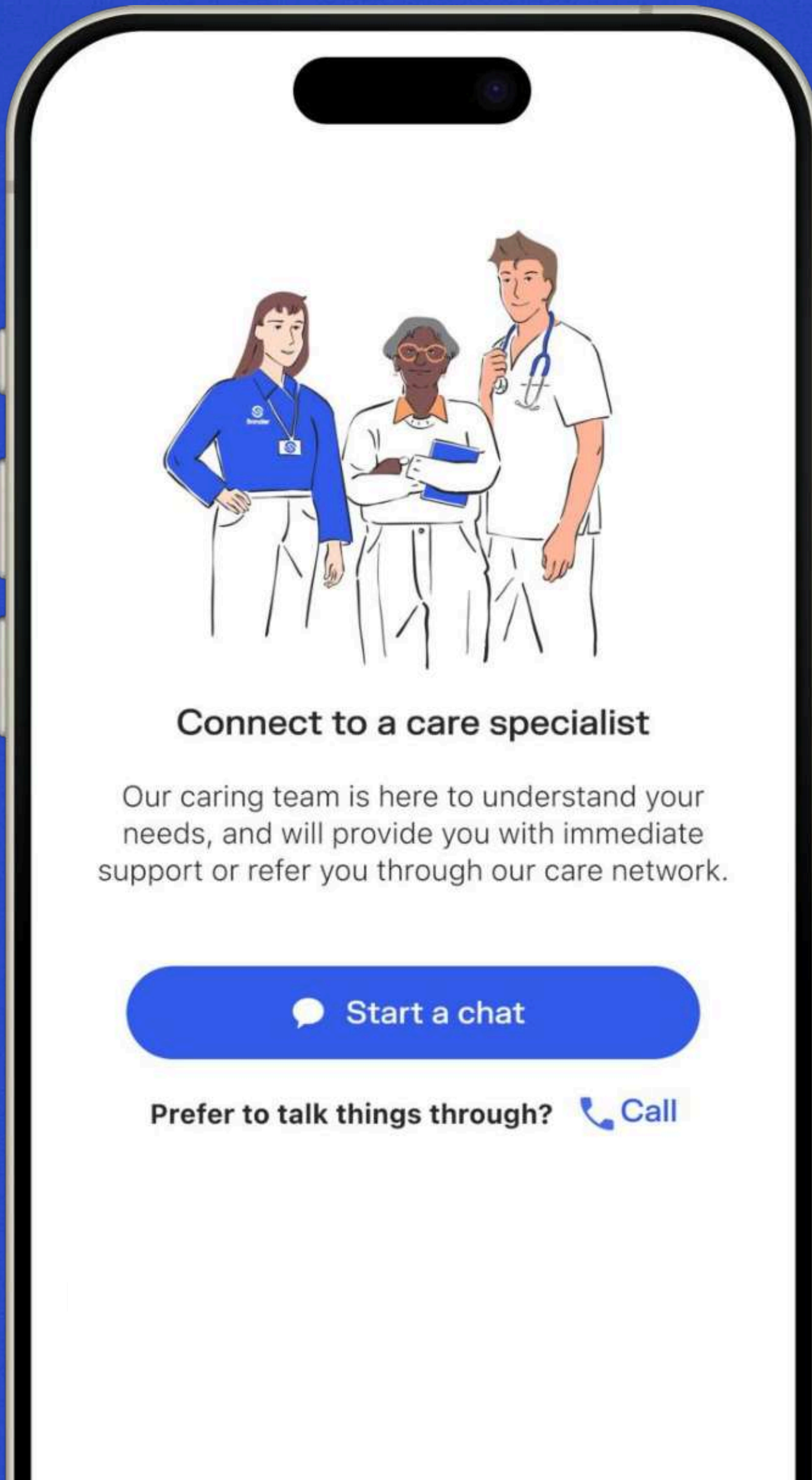
“We don't have a traditional EAP in place. Our engagement levels with Sonder have far surpassed anything we had previously. Over 55% of our employees have used Sonder, whereas previously we had less than 5% of our employees using our previous EAP provider.

It's a great thing that individuals and their family members can reach out and use it. Sometimes the issue isn't with you personally, but it's something going on at home that's worrying you, your child or your partner. So, to have something that enables people to access mental or medical support 24/7 is a great thing to offer.”



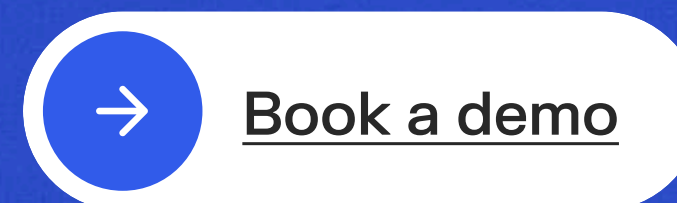
Hannah Pearsall
Head of Diversity, Inclusion & Wellbeing, Hays





Evidence-based support, designed for early intervention and rapid response

Book a demo to see Sonder in action and discover how it can drive early intervention and 24/7 proactive safeguarding of the health, wellbeing, and safety of your people.



or visit sonder.io to learn more

The State of Employee Health and Wellbeing Report 2026

Sonder's State of Employee Health and Wellbeing Report was produced with care by the **Sonder brand team** in collaboration with **YouGov**.

🔍 sonder.io

