

# UBS Workplace Voice

## Benefits take center stage

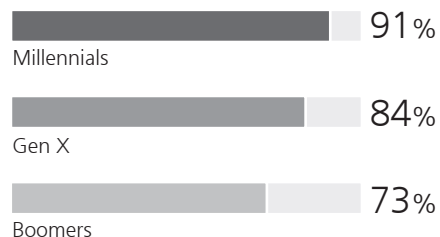
The pandemic spotlights the importance of employee benefits now more than ever



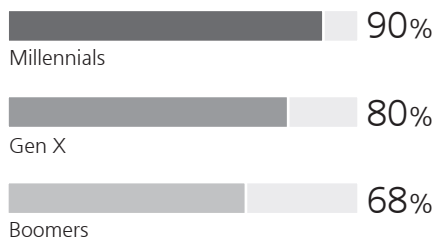
Employees have a different set of needs and expectations in the wake of the pandemic, from continuing to work remotely to retiring early to seeking more wellness resources—giving employers an opportunity to reshape workplace norms.

Employees—particularly millennials—say they expect mental, physical and financial wellness support

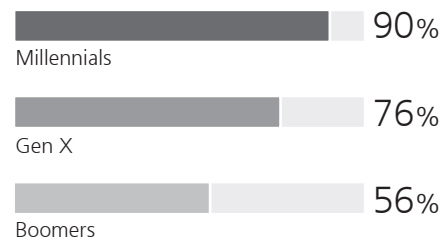
### Mental health



### Physical wellness



### Financial wellness



Here's what employees put at the top of their list



52%

Mental health services



51%

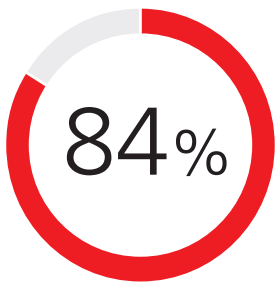
Financial planning



43%

Health/fitness coaching

Thanks to better financial habits, two-thirds of employees look to retire early and 84% expect their companies to help



84%

"My company should do more to help me reach my retirement goals."

Employees look for

52% Retirement planning resources

48% Financial planning

47% Access to financial specialists

Those who participate in their company's equity compensation plan see equity awards as more attractive



66%

"I'm more open to equity compensation."

By Advisor relationship

75%

Those who work with an advisor

vs.

32%

Those who don't

By generation

81%

Millennials

60%

Gen X

22%

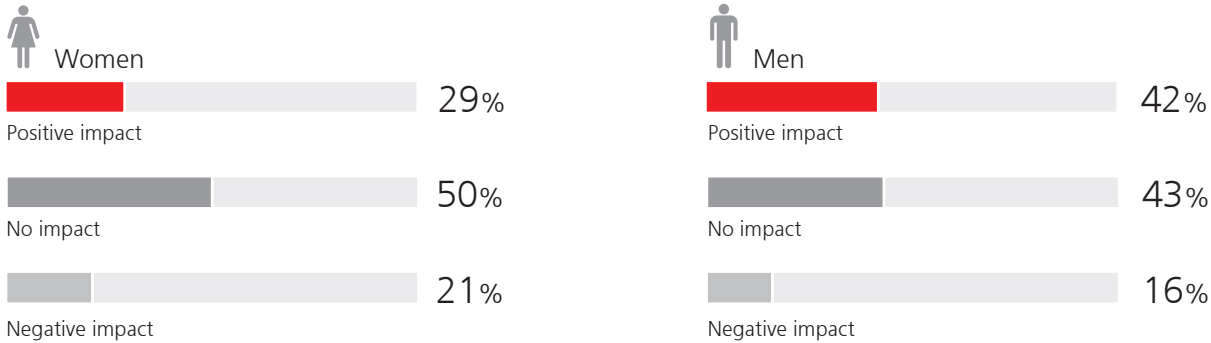
Boomers

34%

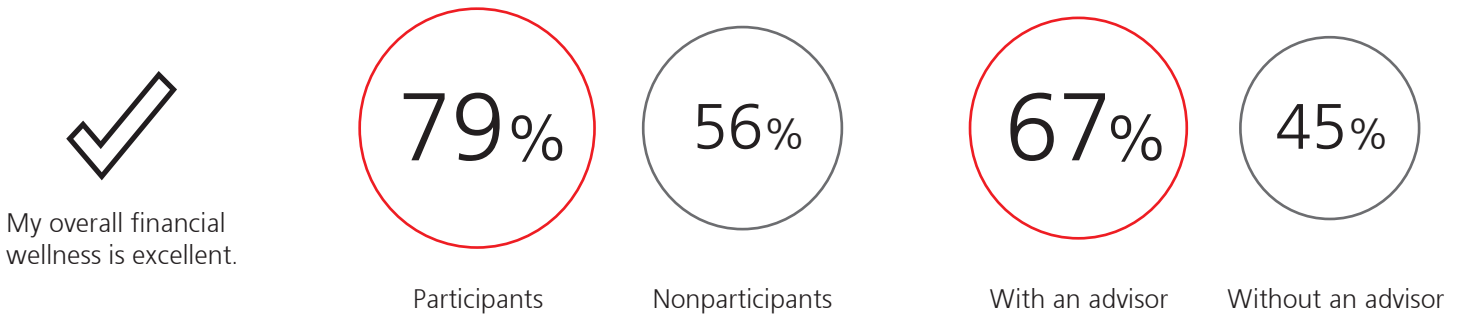
No change or less open

## Gender spotlight

COVID-19 had a less positive impact on women's financial lives compared to men



Women benefited from financial wellness programs during the pandemic



We welcome your questions about how we can help you create a more rewarding workplace through UBS Workplace Wealth Solutions and the services we offer. Please contact us via e-mail at [UBSWorkplaceSolutions@ubs.com](mailto:UBSWorkplaceSolutions@ubs.com) or visit us at [ubs.com/workplacesolutions](https://ubs.com/workplacesolutions).

\*Changes since 1Q21

## **About UBS Workplace Wealth Solutions**

UBS Workplace Wealth Solutions collaborates with corporate clients to deliver customized solutions across a range of programs for the workplace, including financial wellness, retirement, equity plans and institutional consulting. We currently provide more than 10,000 employers and their two million employees in over 150 countries with access to financial knowledge, benefits programs that prepare them for retirement, and an integrated experience that combines the right mix of people and technology. We work side-by-side with our clients so that everyone feels rewarded at work and optimistic about realizing their long-term financial goals.

## **About the survey**

UBS Workplace Voice is an industry-wide online survey of employee benefit participants. It is designed to generate insights employers can use to help participants maximize the value they receive from their company benefits such as equity awards, financial wellness and retirement. The responses represent a cross-section of companies, industries and service providers. For this edition of UBS Workplace Voice, we surveyed 1,200 employees across various industries, ages and asset levels in April of 2021.