

Employee well-being:

Trends in an international employer approach to health and wellness



For global employers evaluating their health and wellness strategies, it can be useful to compare their approach with other international leaders. Year-over-year comparisons yield valuable insight as do regional commonalities and differences. This white paper highlights seven insights that illuminate those comparisons and insights based on the following regions:



APAC
(Asia-Pacific)



EMEA
(U.K. + other
European countries +
United Arab Emirates)



LatAm
(Latin America)

The insights provided in this white paper are based on findings from the 2018 Optum® "International Wellness in the Workplace Benchmark Study" of global health management programs. This research enables employers to:

- Understand how international employers are approaching health and wellness in 2018 compared to 2017
- Highlight regional differences
- Consider thought starters that can help drive greater program success

The seven key insights

	1 Programs: Website/portal and relationship with a near-site clinic are being considered more than before.
	2 Incentives: More than half expect to expand the scope of their incentive strategy over the next three years. Very few expect to reduce it.
	3 Program success: Virtually all measure program return on investment (ROI), with increased productivity and increased engagement scores being the most common means.
	4 Strategy and budget: Three-quarters expect their health and wellness program spending to increase within three years.
	5 Engagement: The use of activity tracking devices and health-related mobile apps is on the rise. And, it appears that more substantial growth in the use of engagement tools is yet to come.
	6 Physical work environment: Roughly half have recently made physical work environment changes.
	7 Employee well-being and culture of health: More than half believe their company has firmly established a culture of health ownership. This has increased since 2017.

Survey description

The Optum "International Wellness in the Workplace Benchmark Study" is a research survey of large or jumbo employers (3,000+ employees) located in APAC, EMEA or LatAm that offer two or more health and wellness programs.

The following pages provide support for each of the seven key insights.

1

Programs

The number of health and wellness program offerings continues to rise. In 2018, 30 percent had eight or more programs vs. 22 percent in 2017. Compared to 2017, roughly a quarter to a third of employees continue to participate in programs.

On average, roughly a quarter to a third of employees continue to participate in programs. Compared to last year, a few programs are more common, as indicated below.

Health and wellness programs offered

■ 2018



Virtually all offer on-site health services. The most common is health promotion/wellness coordinator. Many are considering offering more.

On-site health services

■ 2018



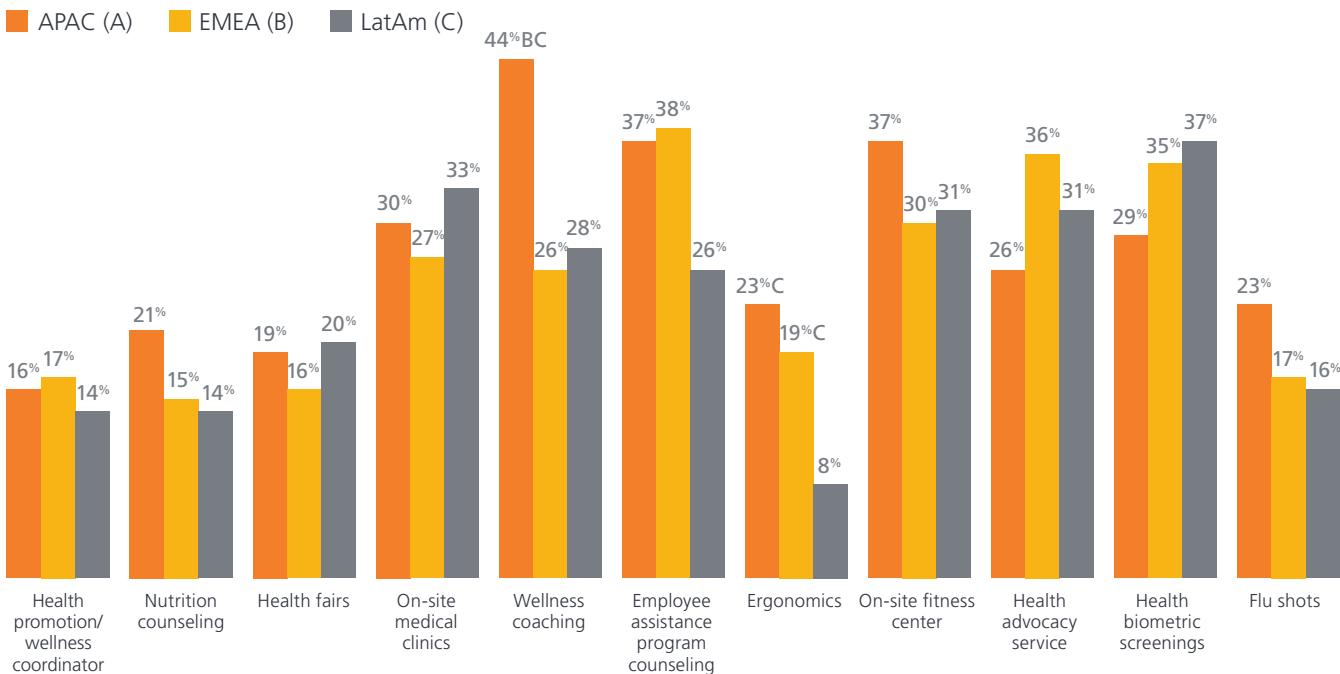
Under consideration (among those not offering)



Wellness coaching still most commonly focuses on exercise. This focus is up 8 percent (76 percent in 2018 vs. 68 percent in 2017).

The top on-site health services are the same across regions. However, LatAm is less likely to offer some others, such as wellness coaching and health biometric screenings. Those under consideration differ somewhat by region.

On-site health services — under consideration (among those not offering)

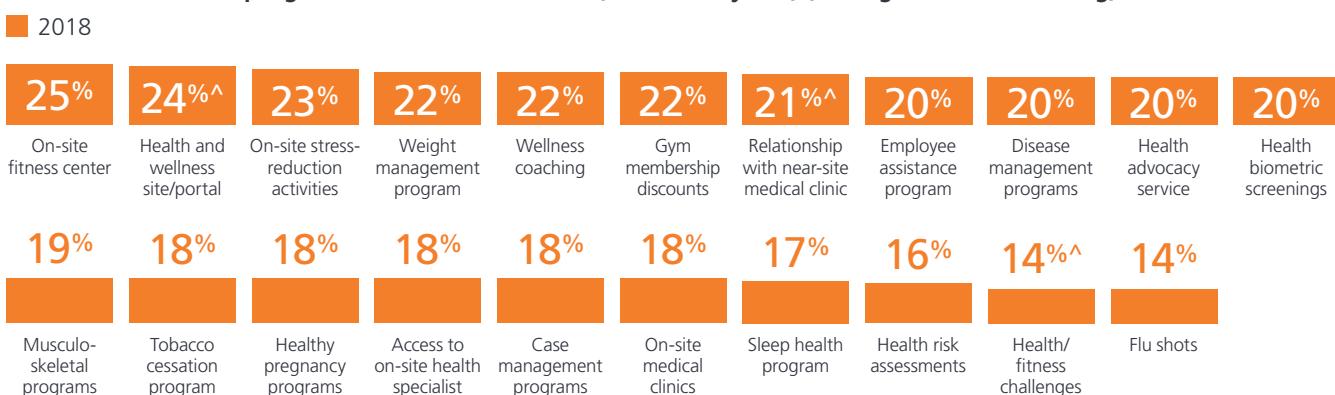


Across all regions:

- A majority of employers feel their programs address multiple well-being dimensions — physical, social and mental health.
- Only half believe financial health is supported.
- Health and wellness programs have been offered for six years, on average.
- About two-thirds offer health and wellness programs to family members — this is up slightly from 2017.

Programs not currently being offered are under near-term consideration by notable numbers. Website/portal and relationship with a near-site clinic are more likely being considered than before.

Health and wellness programs under consideration (next three years) (among those not offering)



Thought starter

Are you among the employers considering a website/portal or near-site clinic? How could that expanded, convenient access benefit your employees?

2

Incentives

Globally, incentive offerings are down somewhat but are still part of the strategy for 90+ percent of employers. Generally, all regions approach incentives similarly. With the exception of days off and points-based rewards (ranked second and third in 2017), the incentives match last year.

Ninety-three percent offer incentives compared to 98 percent that offered in 2017

■ 2018 ■ 2017



50% Gift cards

50% Points-based rewards

48% Days off

37% Non-financial rewards

37% Cash

34% Giveaways/merchandise

30% Charitable donations

30% Subscriptions to services

Opinions continue to vary on which incentive is most effective.

Most effective incentive (among those offering 2+ incentives)

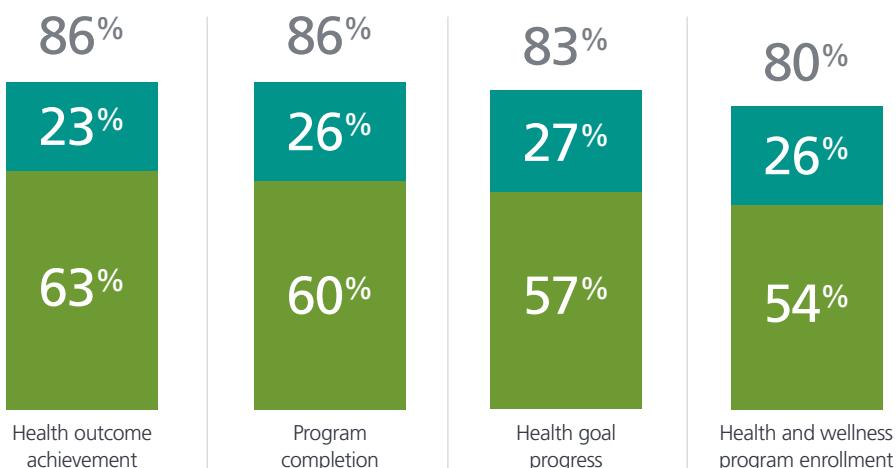
■ 2018



More than half reward various actions with incentives, and many more are interested in doing so. All actions are up 1–2 percent from 2017.

2018 actions/results rewarded with incentives (among those offering incentives)

█ Currently rewarding █ Interested in rewarding

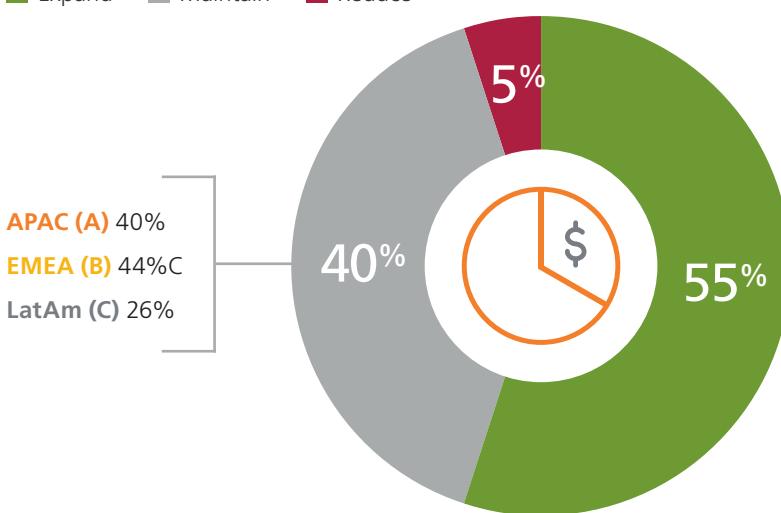


Compared to 2017 overall, the average potential per-participant incentive value is up slightly, at roughly \$500 annually. What's more, LatAm companies are less likely than others to reward program completion.

If not already offering incentives, companies are considering doing so in many cases. More than half expect to expand the scope of their incentive strategy over the next three years. Very few expect to reduce it.

Plans for scope of incentive strategy (next 1–3 years) (among those offering incentives)

█ Expand █ Maintain █ Reduce



Thought starter

Incentives continue to be highly valued by employers and employees across all regions. What could you do to adjust your offering to drive even more action and results?

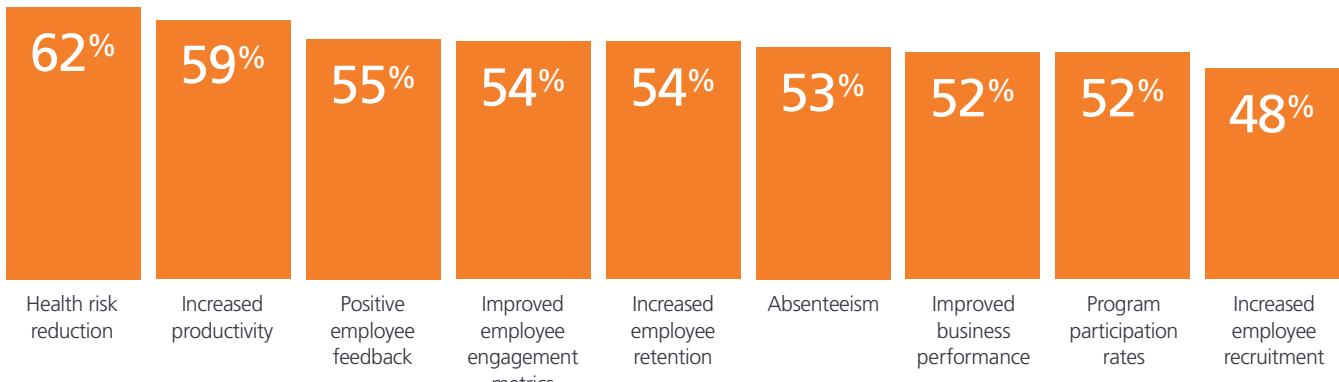
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Program success

Many aspects are important in determining program success, especially health risk reduction and increased productivity. Health risk reduction and participation rates are more important than in 2017.

Determining success of health and wellness programs (percentage very important)

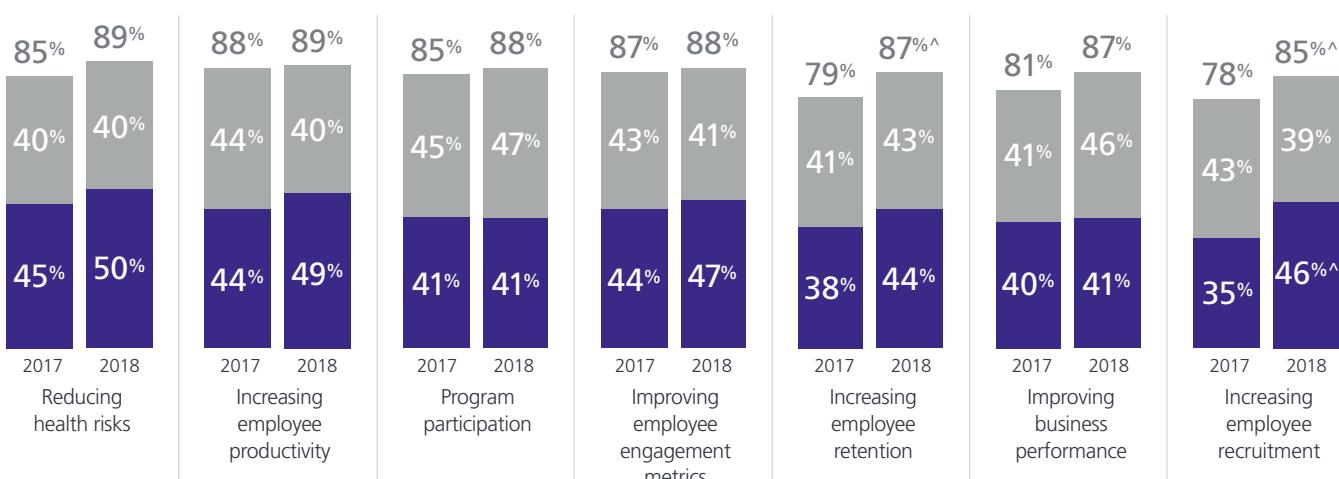
■ 2018



Nearly nine in 10 find their programs to be successful. More consider their programs are successful in terms of increasing employee retention and recruitment than before.

Success of health and wellness programs

■ Highly successful ■ Somewhat successful

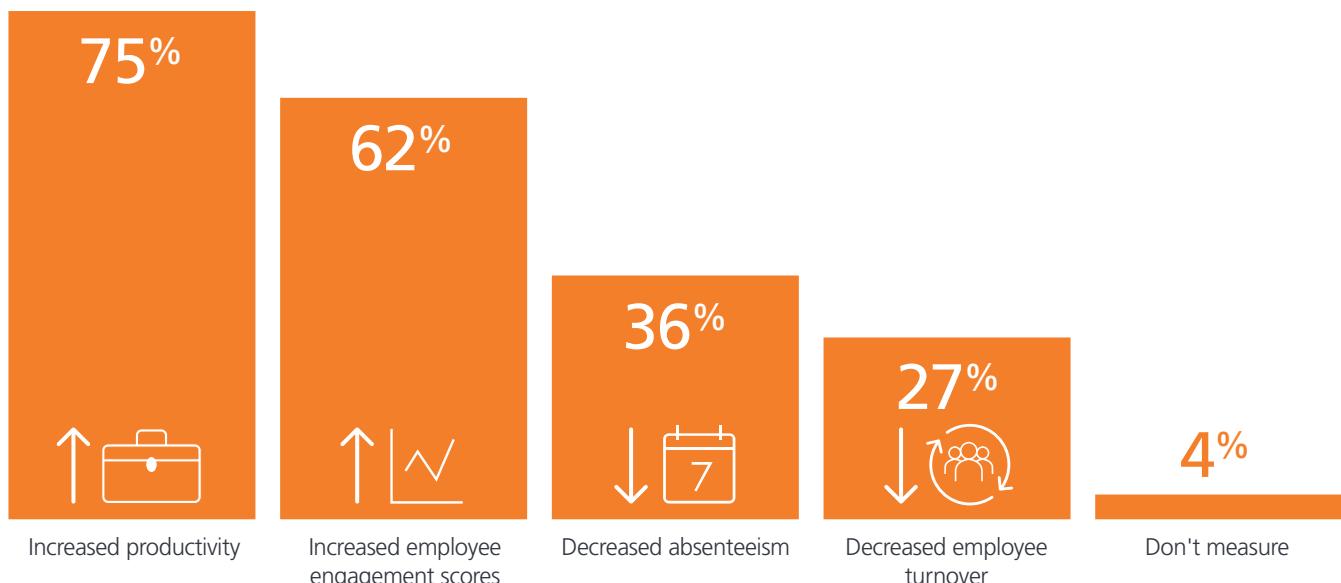


LatAm companies find their programs less successful in *increasing employee retention* than others — 77 percent successful vs. 89 percent for APAC and 90 percent for EMEA. The same can be said for *increasing employee recruitment* — 75 percent successful vs. 86 percent for APAC and 88 percent for EMEA.

Virtually all measure program ROI, with increased productivity and increased engagement scores being the most common means.

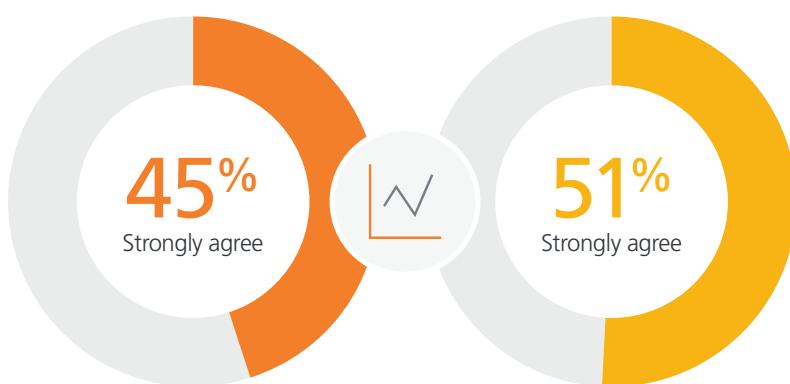
Means of measuring ROI

■ 2018



"Company is able to effectively track program metrics used to evaluate program performance"

■ 2018 ■ 2017



Thought starter

Consider the ways you measure program success: What changes could you make to better evaluate the contributions your program is making?

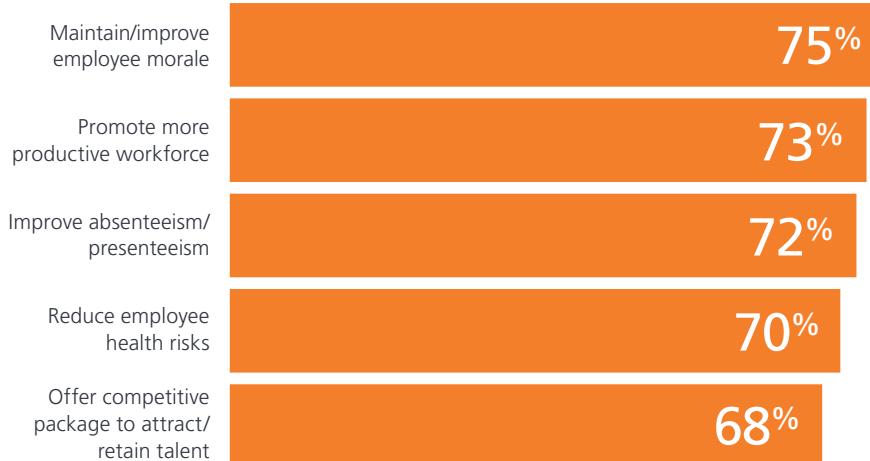
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Strategy and budget

Reasons for offering health and wellness programs have remained relatively consistent year over year.

Reasons for offering health and wellness programs (percentage important)

■ 2018



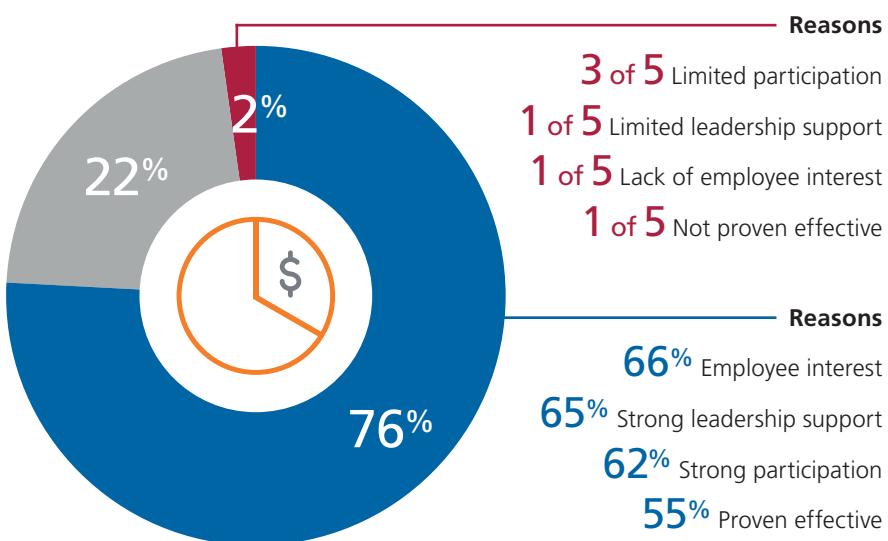
Most employers agree even more with the following statements:

- My company believes that health and wellness programs help us retain/attract employees.
- My company sets specific participation goals for programs.
- My company connects manager performance objectives to team well-being targets.
- My company makes healthy choices the path of least resistance.
- Senior management values/supports programs.

Three-quarters of the global employers surveyed expect their health and wellness program spending to increase within three years.

Change in health and wellness program spending (next three years)

■ Increase ■ Stay the same ■ Decrease



Compared to 2017, the majority of organizations have a person dedicated to promoting health and wellness management. Also, the allocation of financial resources to support the health and wellness strategy continues to be distributed equally across expenditure categories.



Thought starter

If you are considering an increase in your program budget over the next three years, where do you believe your resources are best spent to achieve your strategic objectives?

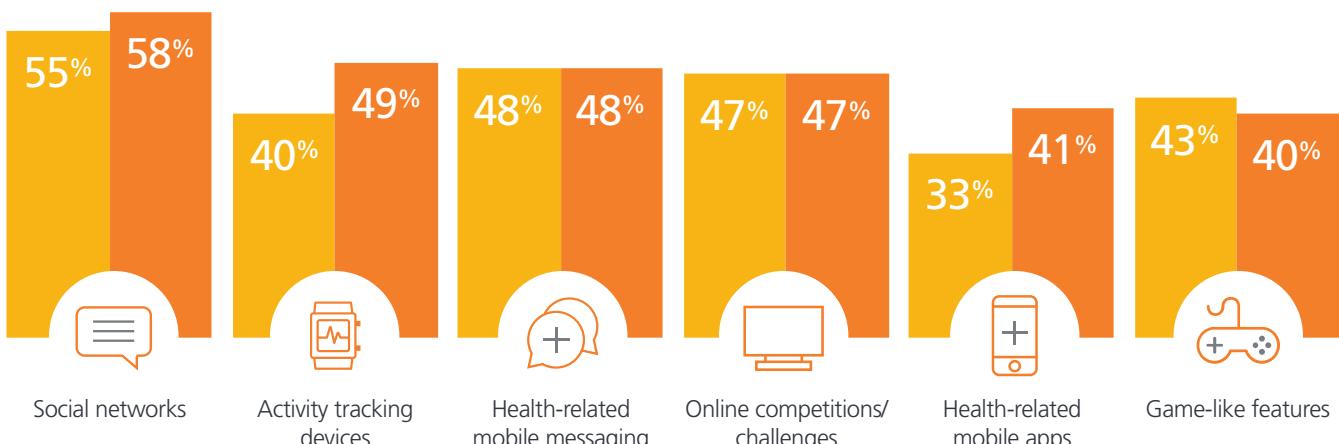
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Engagement

The use of activity tracking devices and health-related mobile apps is on the rise. All reported intent to use these strategies more in the future.

Engagement strategies currently used

■ 2018 ■ 2017



Perceptions surrounding the best means of driving employee engagement vary by environment.

Top three most effective means of driving employee engagement

Environment	1	2	3	4	5	6
Office-based	Emails	Brochures*	Posters	Emails	Emails	Emails
Manufacturing/production	Company intranet	Emails	Emails	Mobile app	On-site meetings	Mobile app
Warehouse	On-site meetings	Posters	Brochures	Company intranet	Wallet cards	Digital engagement/brochures

*eNewsletters are a top mention for LatAm only.

Across all regions:

- Health and wellness programs are most often promoted via email or internal meetings.
- When it comes to program communication with family, direct mail to employees is most preferred. This focus is up 9 percent (50 percent in 2018 vs. 41 percent in 2017).

Other methods include web banners on the company's intranet, posters/fliers, word of mouth, on-site health fairs, newsletters, webinars, home mailers and wallet cards.

**Thought starter**

With engagement tools going digital more than ever before, what could you add or adjust to drive greater results?

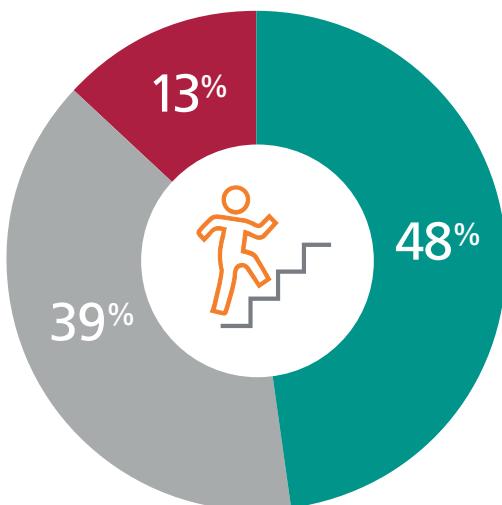
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Physical work environment

Since 2017, more employers (roughly half) have recently made physical work environment changes.

Changes to physical work environment

Made changes Considered changes No changes/consideration

**2018 top five changes**

- 1 On-site fitness center
- 2 Healthy entrées in cafeteria
- 3 Healthier catering options for meetings
- 4 Improved access to water
- 5 Healthier vending machine options

**Thought starter**

Considering the top five changes other global leaders have made or are considering, which are your priorities and why do you think they will yield the most benefit?

7

Employee well-being and culture of health

What's more, half of the employers believe their company has a firmly established culture of health ownership. This has increased since 2017.

2018 culture of health

Established Neutral Not established

**Thought starter**

Globally, even more companies believe they have a well-established culture of health. How does your organization align with that belief? How important is this to you?

Survey methodology

- Web-based surveys with respondents who were members of an online panel in 2017: n=273; 2018: n=283.
- Surveys were conducted from February 28 through April 10, 2017, and April 23 through May 14, 2018.
- Statistically significant differences are reported at the 95 percent confidence level.
- Maximum margin of error for 2017 is ± 5.9 percentage points and ± 5.8 percentage points for 2018.
- Percentages in charts and tables may not sum to 100 percent due to rounding.

All respondents were:

- Employed at a large or jumbo UK employer (3,000+ employees) that offered 2+ health and wellness programs.
- Functioning in a human resource or executive, management or administration role.
- Involved in health benefits decision-making/instituting employee wellness programs for his or her company.

Employers can work with Optum to leverage the insights captured in this study to evolve their health and wellness practices.

Contact us:

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