



TACKLING
THE BIGGEST
CHALLENGES
IN HEALTH CARE

Global Wellness in the Workplace

How does your company stack up?

Marc Ver Straate | 6 February 2018



OPTUM[®]

HOW WELL GETS DONE

Global health company

UNITEDHEALTH GROUP

Ranked 6th
Fortune 500

\$201.2B
FY17 revenue



Health Benefits

A diversified enterprise with
complementary but distinct
business platforms



OPTUM®

Health Services



OPTUM®

**147 Countries
with service
capability**



Optum Health's approach

DRIVING HEALTH IMPROVEMENT GLOBALLY



Survey background



Who Responded?

270+ companies with > 3,000 employees

Criteria

- Multinational employer offering two or more health/wellness programmes
- Human resource or executive, management or administration function
- Involved in decision making/instituting employee wellness programmes

Purpose

- Compare with regional peers and insight into evolving global health management practice
- Create thoughts that can help drive greater programme success

Seven key insights gained from survey

1 PROGRAMMES: Average of 6 offered by companies surveyed

2 INCENTIVES: 98 per cent surveyed offer incentives

3 SUCCESS: Programmes successful in terms of improved productivity, business performance and other key metrics.

4 STRATEGY AND BUDGET: Most have resource dedicated to promoting health and wellness.

5 ENGAGEMENT: Substantial growth in using emerging engagement strategies.

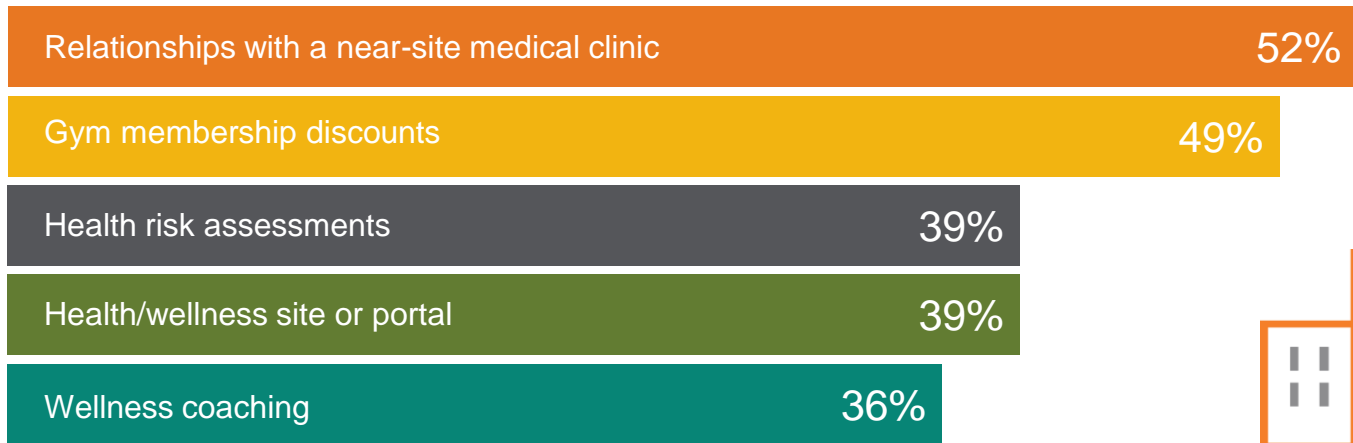
6 PHYSICAL WORK ENVIRONMENT: Employers improving environment to help employees make healthy decisions.

7 EMPLOYEE WELLBEING AND CULTURE OF HEALTH: About half surveyed believe they are contributing to wellbeing improvement.



PROGRAMMES

Top 5 programmes offered



Approximately one-quarter to one-third of employees participate in programmes.

Close to two-thirds offer health and wellness programmes to employees' family members.

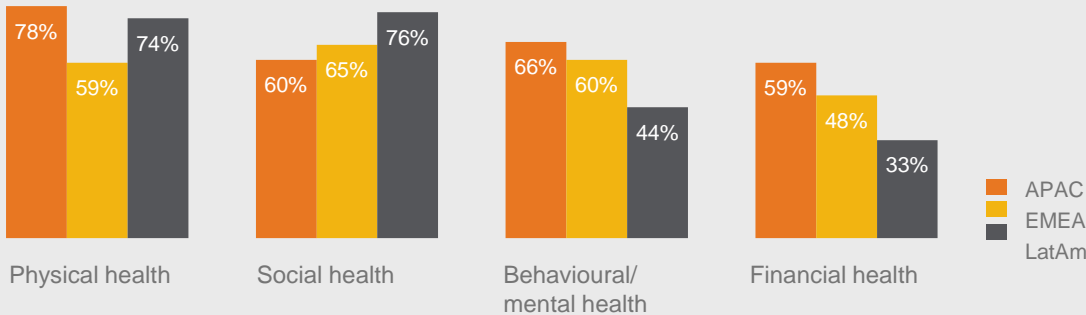
QA1 Which of the following types of wellness and health management programmes/activities do you currently offer? Letter indicates significantly higher value over group denoted.

QD3a Please indicate what percentage of your eligible workforce participates in the program.

QD4 Do you offer wellness and health management programmes to family members of employees? Letter indicates significantly higher value over group denoted.

Perceived ability addressing multiple dimensions

Aspects of employees' wellbeing addressed by health and wellness strategy



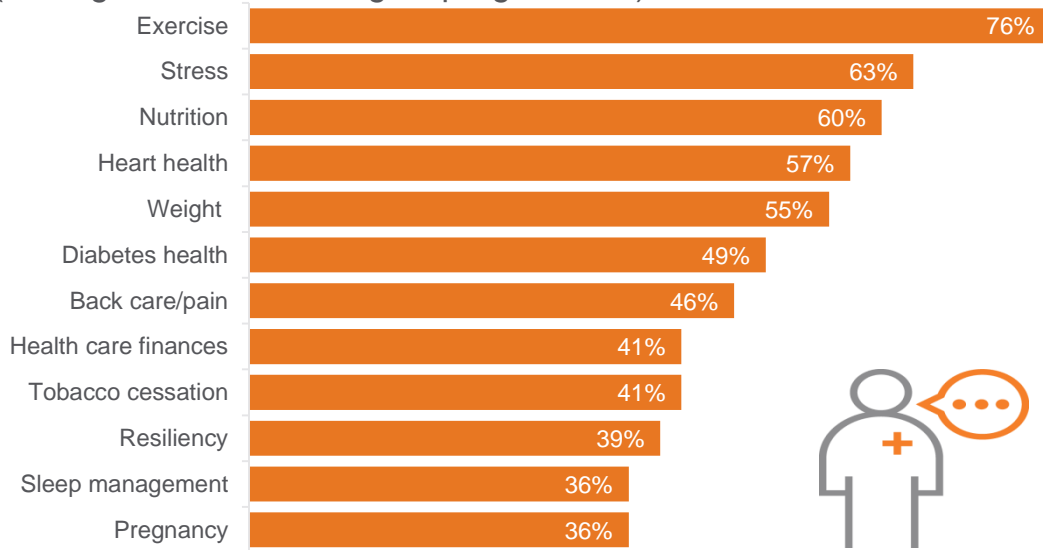
Most feel their programmes address multiple employee wellbeing dimensions (physical, social and behavioural) *other than* financial.

This is particularly true for Latin American employers.

QD7a What aspects of employees' wellbeing do you feel your company's health and wellness strategy addresses? Letter indicates significantly higher value over group denoted.

Areas addressed by wellness coaching

Areas most commonly addressed by wellness coaching (among those not offering all programmes)



Top eight programmes that may be added:

Health/fitness challenges	26%
Weight management programme	22%
Tobacco cessation programme	22%
Employee assistance programme	21%
Healthy pregnancy programmes	21%
Sleep health programme	21%
Flu vaccines	20%
Disease/condition management programmes	20%

QA8 What areas does your coaching address? Letter indicates significantly higher value over group denoted. * Caution: Small base size.

QA5 Which would your company consider offering in the next 3 years?

2 INCENTIVES

Virtually all employers surveyed offer incentives

Average value of incentives offered:



APAC
\$522 USD



EMEA
\$523 USD



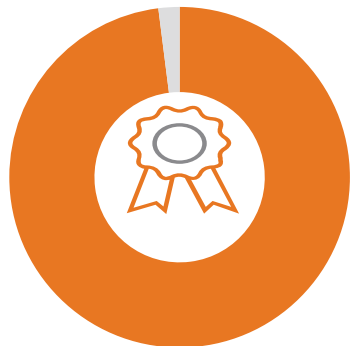
LatAm
\$448 USD



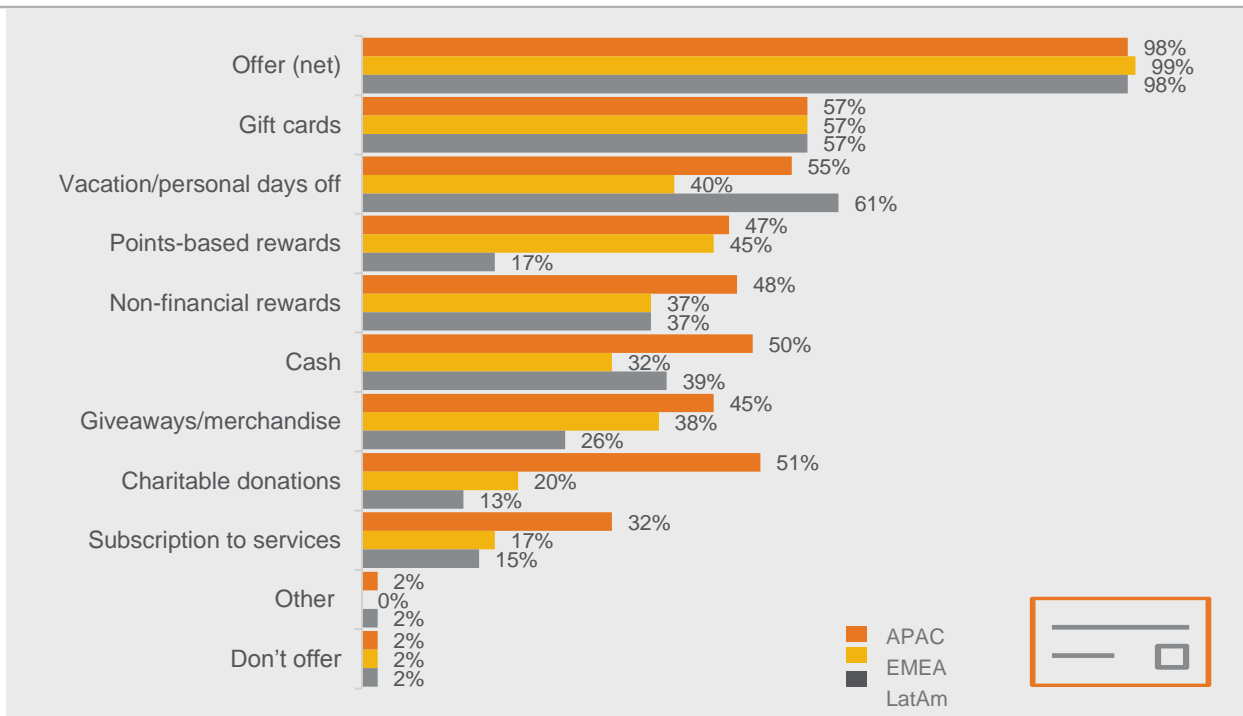
QB2 What types of health and wellness incentives do you currently offer your workforce?

QB6 Please give your best estimate of the total possible monetary value that could be earned by each participant per year, across all programmes. Letter indicates significantly higher value over group denoted.

What types of incentives offered?



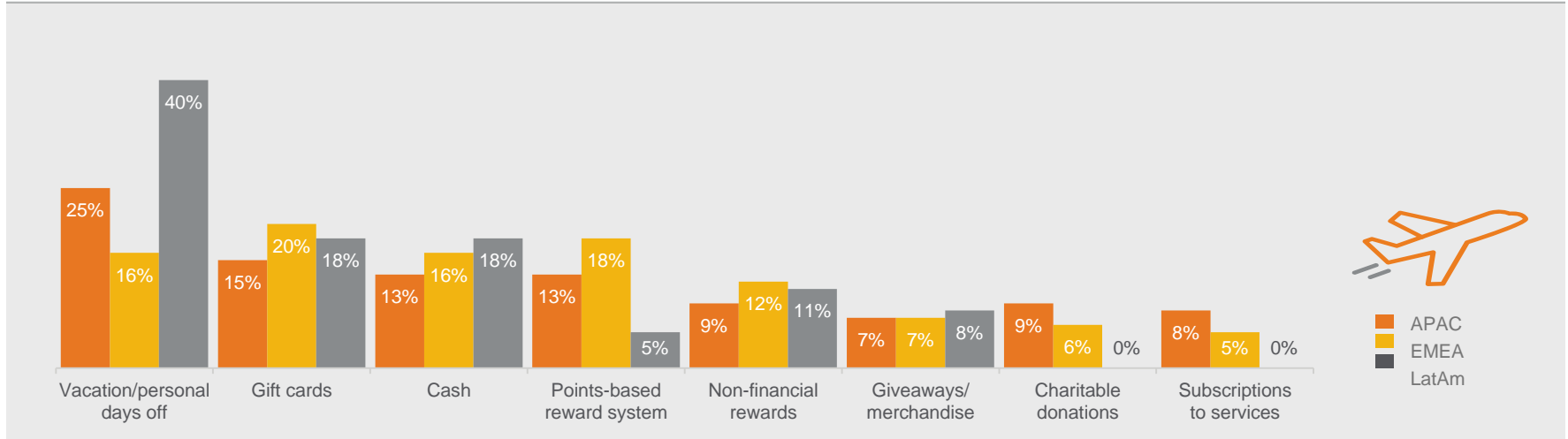
Globally,
98%
of the employees surveyed offer health and wellness incentives



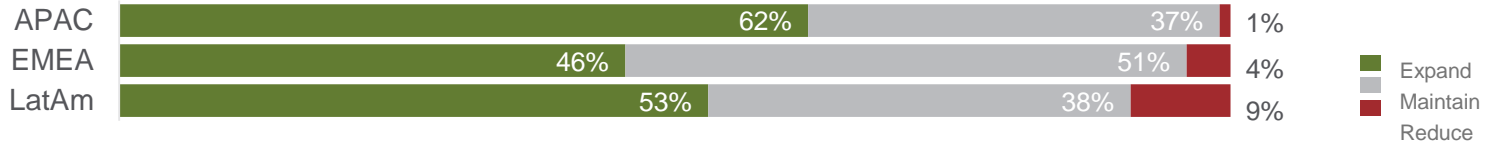
QB2 What types of health and wellness incentives do you currently offer your workforce?

QB6 Please give your best estimate of the total possible monetary value that could be earned by each participant per year, across all programmes. Letter indicates significantly higher value over group denoted.

Most effective: Vacation or gift cards



Employers expect to maintain or expand their incentive strategy over the next three years.



QB3 Which type of health and wellness incentive has been the most effective in terms of encouraging participation? Letter indicates significantly higher value over group denoted.

QB10 Which of the following best describes your company's plan for the scope of its incentive strategy over the next 1 to 3 years? Letter indicates significantly higher value over group denoted.

Defining a successful programme



Percentage very/somewhat Important



4 in 5 employers

deemed their programmes
to be successful



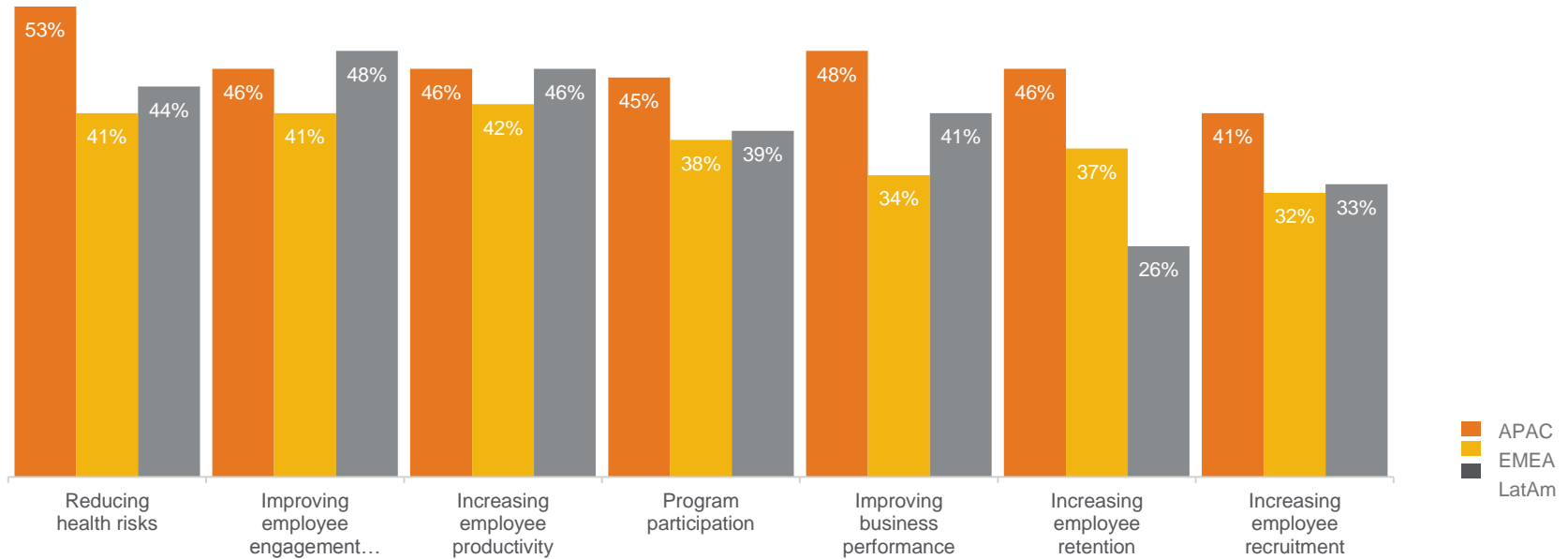
Overall, all regions consider their programmes equally successful.

QC2 How important is each of the following in how you determine the success of your wellness and health management programmes? Letter indicates significantly higher value over group denoted.

QC1b Overall, how successful have your company's wellness and health management programmes been in terms of...?

Generally, all regions find their programmes equally successful

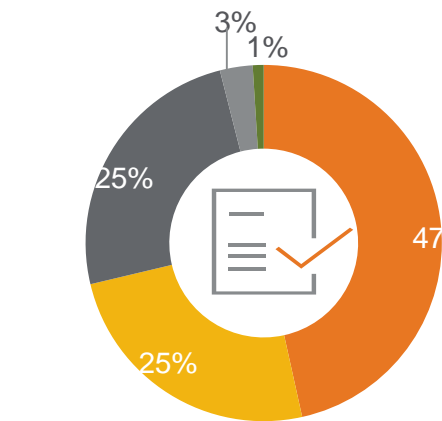
Success of wellness and health programmes by region



QC1b Overall, how successful have your company's wellness and health management programmes been in terms of...? Letter indicates significantly higher value over group denoted.

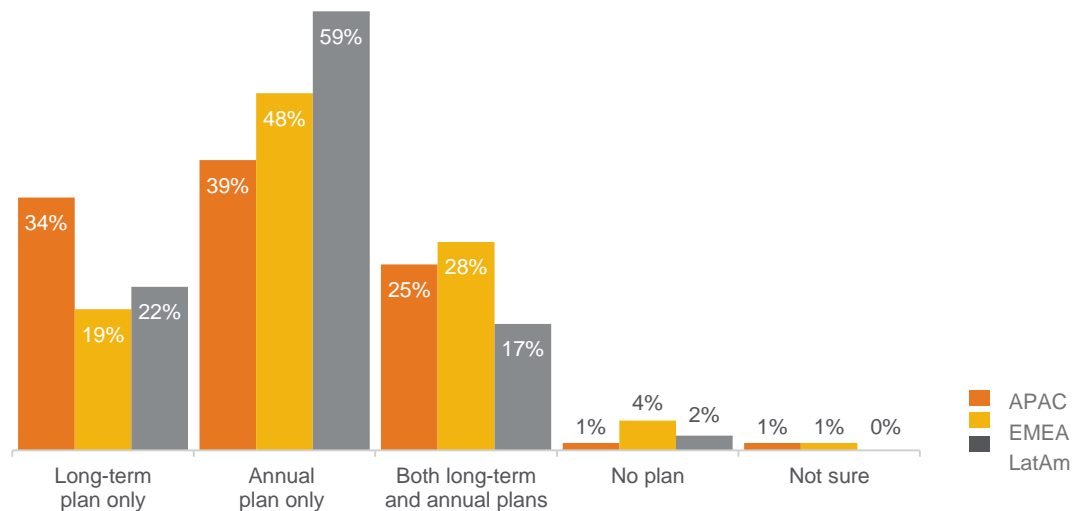
Most companies have formal wellness plan

Of the handful with no plan (n=8), three are considering them, three are not and two are not sure.



- Annual plan only
- Long-term plan only
- Both long-term and annual plans
- No plan
- Not sure

Formal plan for employee wellness



QD5 Does your company have a formal, written, strategic plan for employee wellness?

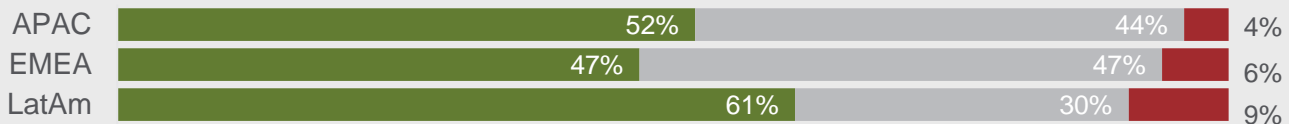
QD5a Is your company considering implementing a formal, written, strategic plan for employee wellness? Letter indicates significantly higher value over group denoted.

Importance as part of overall business strategy and benefits mix

Overall business strategy



Benefits mix



■ Very important
■ Somewhat important
■ Not important

The five reasons for offering health and wellness programmes are following, ranked highest to lowest:

1

Maintain/improve employee morale

2

Reduce employee health risks

3

Promote a more productive workforce

4

Improve absenteeism/presenteeism

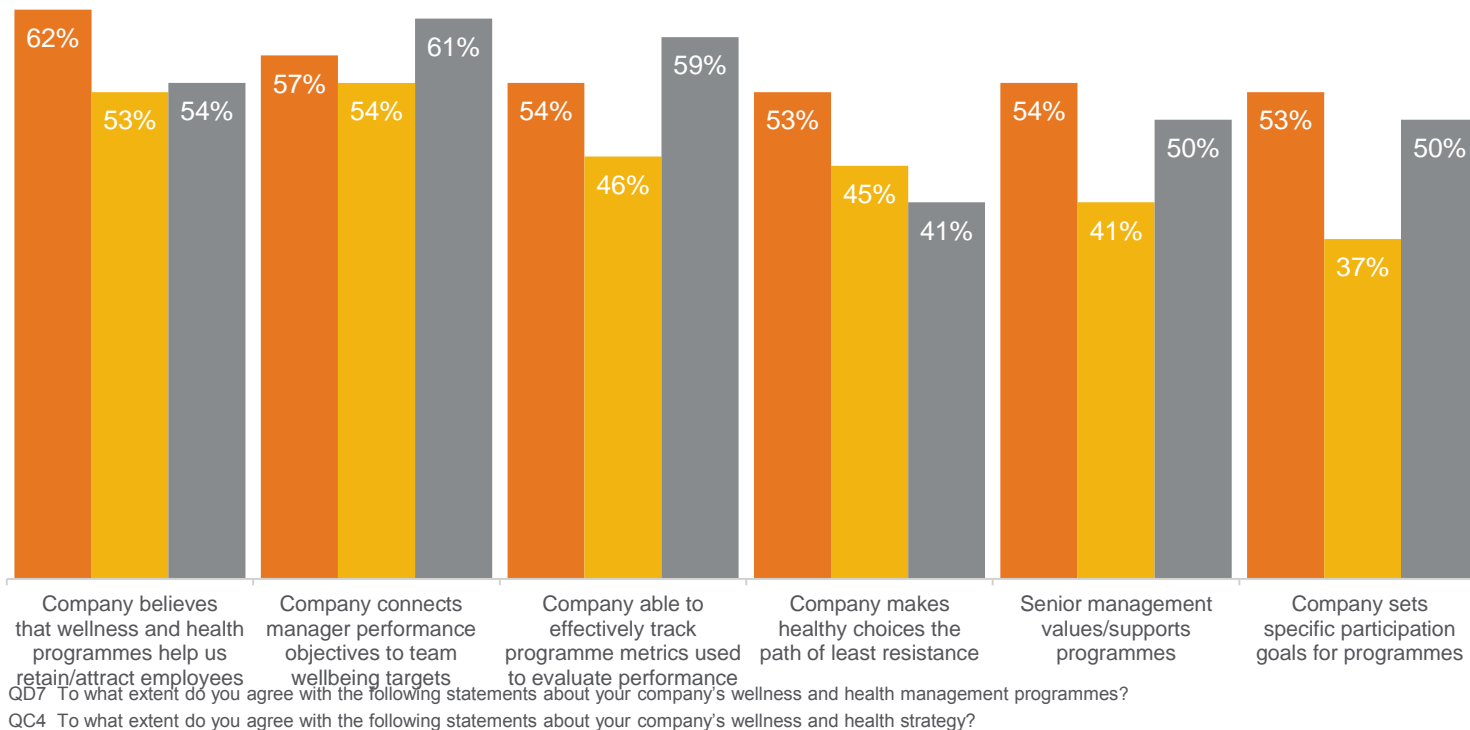
5

Offer a competitive package to attract/retain talent

QE2 How important are wellness and health management solutions to the following? Letter indicates significantly higher value over group denoted

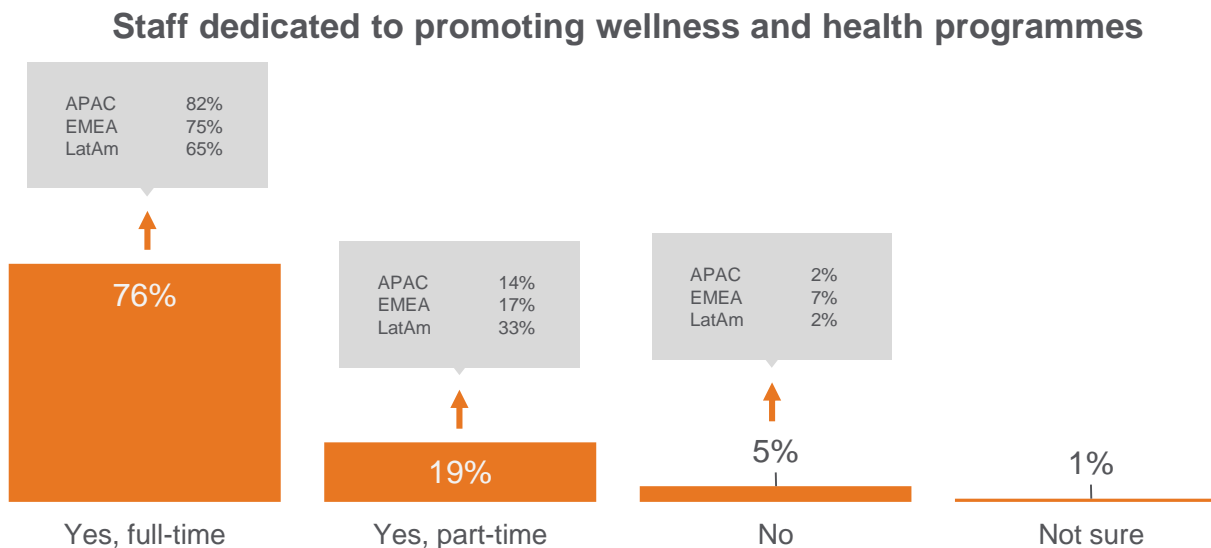
QD6 How important are each of the following in terms of your company's reasons for offering wellness and health management programmes to employees? Letter indicates significantly higher value over group denoted.

Similar strategies and beliefs



■ APAC
■ EMEA
■ LatAm

Most have a resource dedicated to promoting health and wellness



Of the handful with no dedicated staff (n=13), seven are considering hiring, five are not and one is not sure.

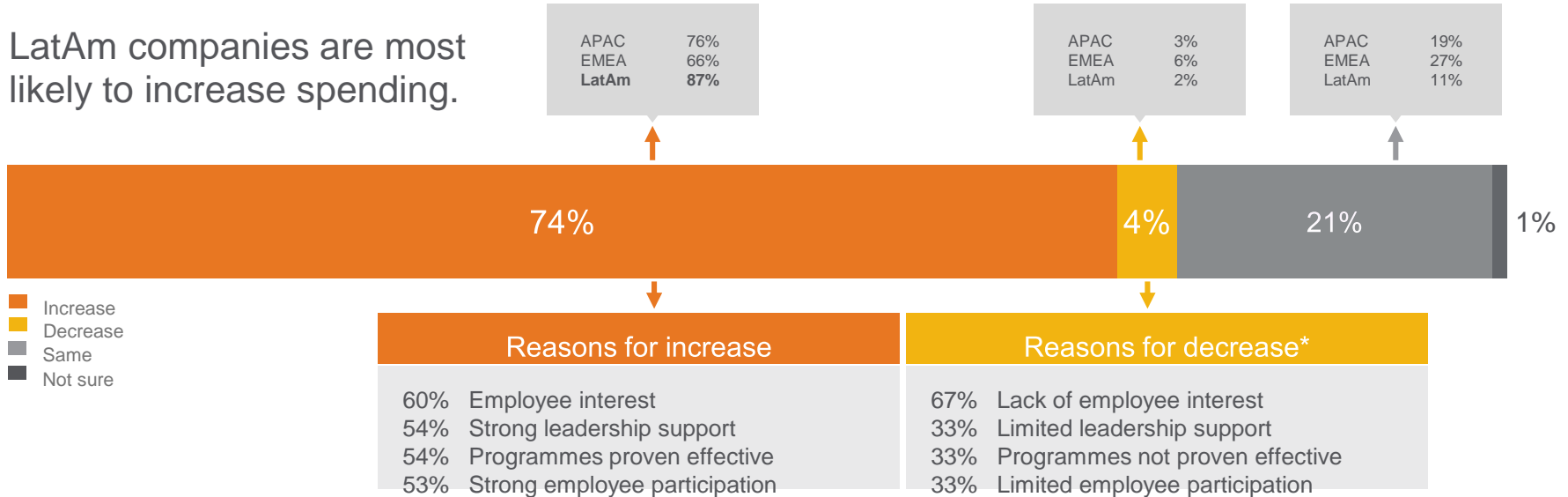
QD2 Does your company currently have a person or persons whose sole responsibility is promoting wellness and health management?

QD2a Is your company considering hiring a person or persons whose sole responsibility is promoting wellness and health management? Letter indicates significantly higher value over group denoted.

Most expect programme spending to increase

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

LatAm companies are most likely to increase spending.

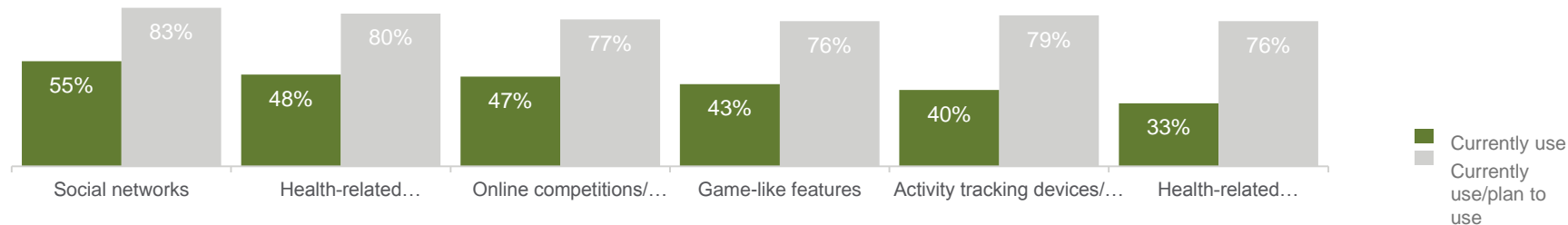


QE3 Do you think your company's proportionate spending on wellness and health management programmes will increase, decrease or stay the same in the next three years?

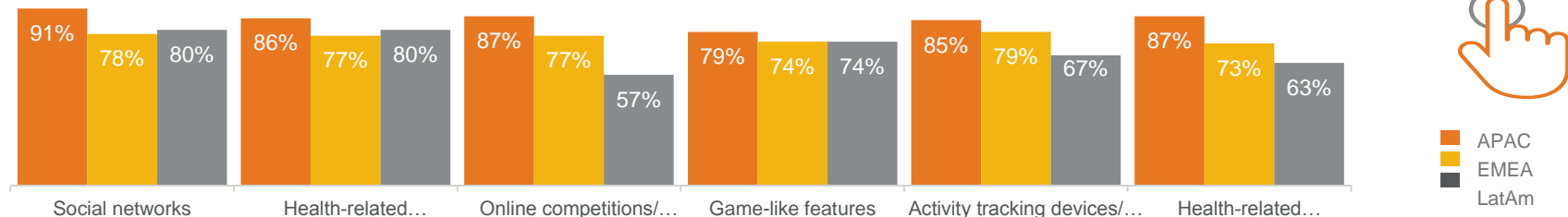
QE3a/b Why do you think your company's proportionate spending on wellness and health management programmes will increase/decrease in the next 3 years? ** Caution: Small base size. Letter indicates significantly higher value over group denoted.

Most successful engagement strategies

Emerging engagement strategies used



Currently use/plan to use

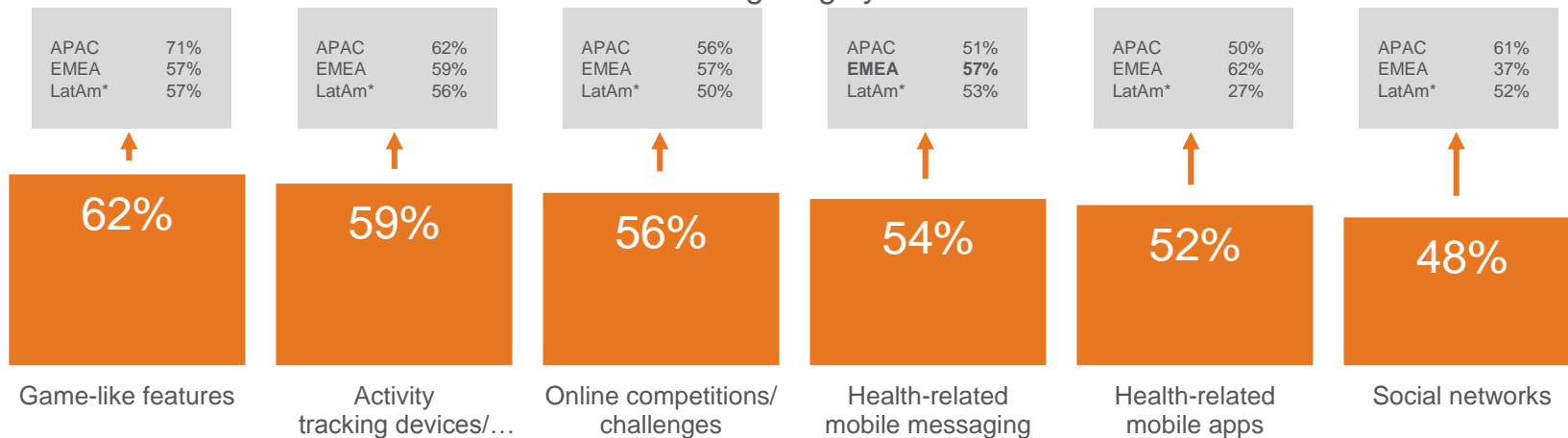


Q11 Does your company use any of these? Letter indicates significantly higher value over group denoted.

Q12 How successful has each practice or technology been in terms of participation and engagement? * Caution: Small base sizes. Letter indicates significantly higher value over group denoted.

Game-like features and activity tracking devices seen as most successful engagement strategies

Successfulness of emerging engagement strategies (among those currently using) Percentage highly successful



Q12 How successful has each practice or technology been in terms of participation and engagement? ** Caution: Small base sizes. Letter indicates significantly higher value over group denoted.

The best means of driving employee engagement varies by environment

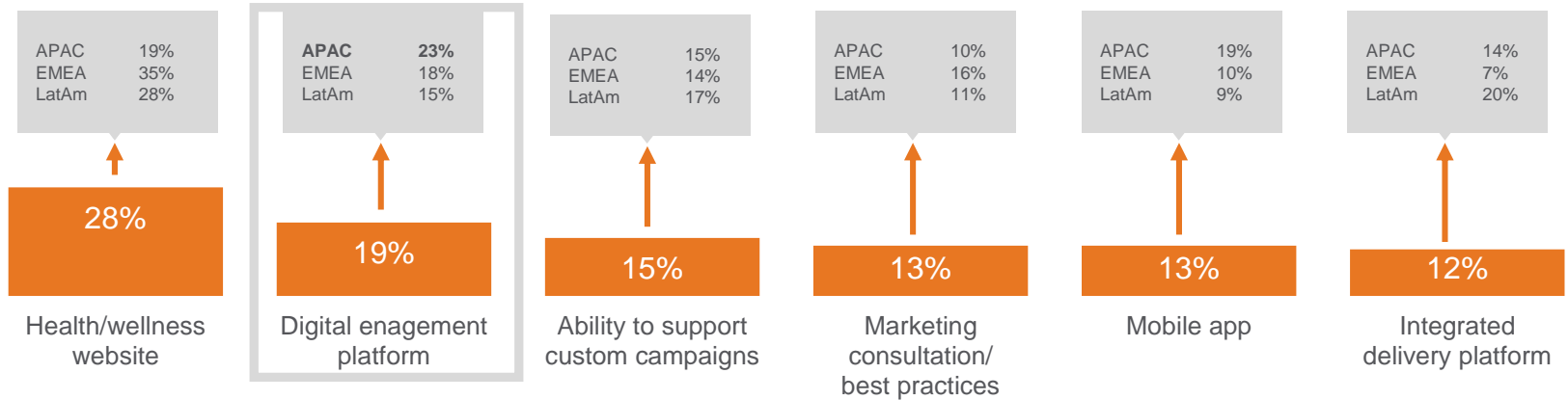
Top five most effective means of driving employee engagement based on environment

Office-based	Manufacturing/production	Warehouse	Telecommuting
<ol style="list-style-type: none"> 1. Emails 2. Company intranet 3. On-site meetings 4. Electronic newsletters 5. Posters 	<ol style="list-style-type: none"> 1. Posters 2. Hardcopy brochures 3. Digital engagement 4. Emails 5. Webinars 	<ol style="list-style-type: none"> 1. Posters 2. Hardcopy brochures 3. Company intranet 4. Wallet cards 5. Digital engagement/webinars 	<ol style="list-style-type: none"> 1. Mobile app 2. Emails 3. Company intranet 4. Electronic newsletters 5. Digital engagement
Business travel	Transportation		
<ol style="list-style-type: none"> 1. Emails 2. Digital engagement 3. Wallet cards 4. Mobile app 5. Hardcopy brochures 	<ol style="list-style-type: none"> 1. Emails 2. Digital engagement 3. Hardcopy brochures 4. Wallet cards 5. Mobile app/posters 		

Q13 Which modality do you feel is or would be most effective in driving employee engagement in health and wellness programmes?

When selecting a health and wellness partner, a *website* is most important

Importance of engagement tools when selecting vendor (#1 rank – most important)

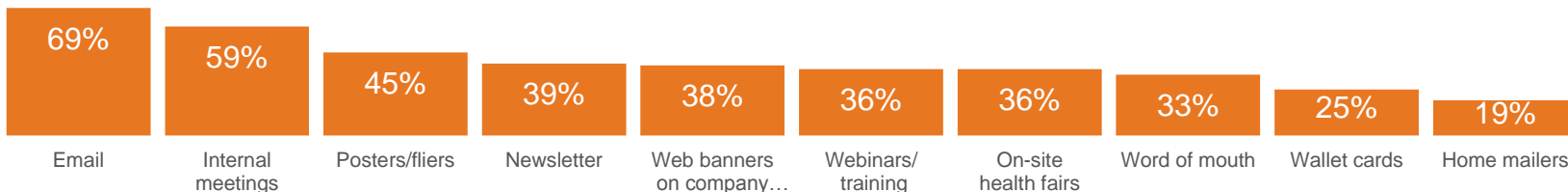


Digital engagement platform
is on top for APAC companies.

QV1b Please rank the following engagement tools in terms of how important they are when selecting a wellness and health management vendor. Letter indicates significantly higher value over group denoted.

Email and internal meetings most popular promotional tools

Wellness and health programme promotion methods



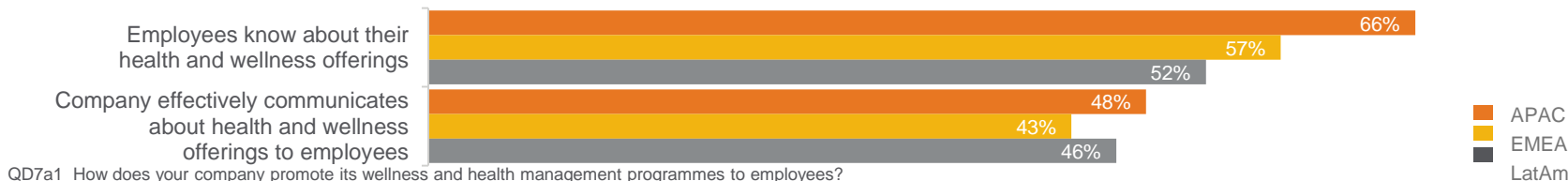
TOP THREE BY REGION

APAC: Email, internal meetings, web banners on company intranet

EMEA: Email, internal meetings, posters/fliers

LatAM: Email, internal meetings, posters/fliers or newsletters

Percentage strongly agree

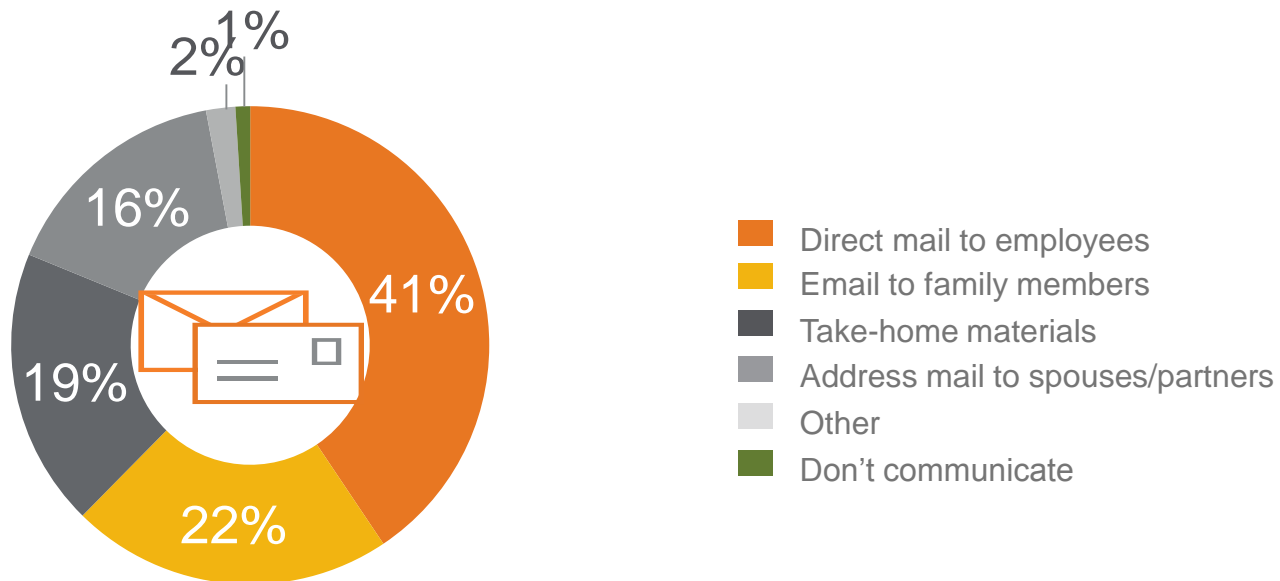


QD7a1 How does your company promote its wellness and health management programmes to employees?

QD7 To what extent do you agree with the following statements about your company's wellness and health management programmes?

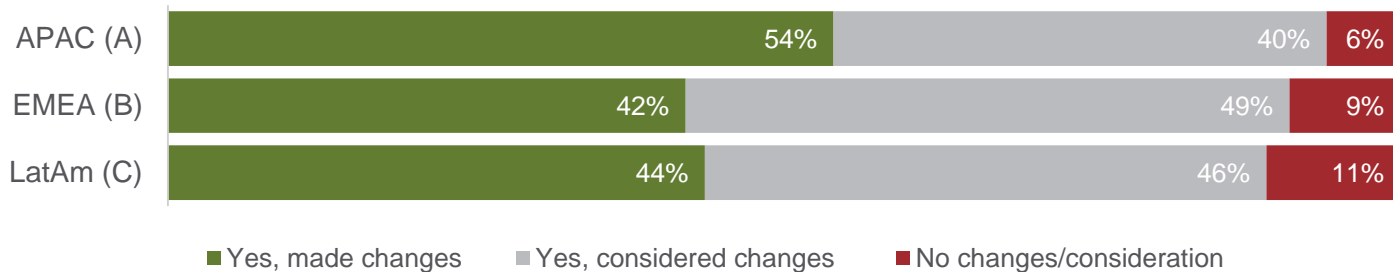
QC4 To what extent do you agree with the following statements about your company's wellness and health strategy? Letter indicates significantly higher value over group denoted.

Promoting to family members



QD4a What is your preferred method of communicating about wellness and health management programmes with family members of employees? * Caution: Small base sizes. Letter indicates significantly higher value over group denoted.

Work environment changes vary by region



Top five changes:

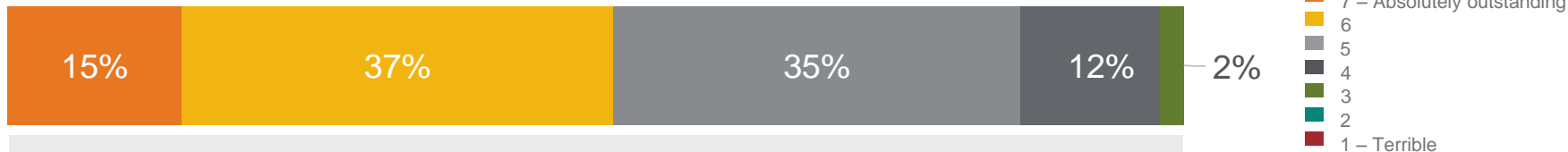
APAC	EMEA	LatAm
<ol style="list-style-type: none"> 1. Healthy entrées in cafeteria 2. On-site gym/fitness center 3. Healthier vending machine options 4. Bike-friendly initiatives 5. Indoor/outdoor walking paths 	<ol style="list-style-type: none"> 1. On-site gym/fitness center 2. Healthy entrées in cafeteria 3. Improved access to water 4. Price breaks on healthy food/drinks 5. Healthier vending machine options 	<ol style="list-style-type: none"> 1. Ergonomic/standing desks 2. Smoke/tobacco-free campus 3. Healthy entrées in cafeteria 4. Healthy options for meetings 5. Bike-friendly initiatives

G3 (last year) and recently made (or considered making) any changes to their physical work environment that help employees make healthy decisions at work?
 QG3a What types of changes to the physical work environment has your company made/considered making to help employees make healthy decisions at work? Letter indicates significantly higher value over group denoted.

7 WELLBEING AND CULTURE OF HEALTH

Half believe employees' wellbeing is outstanding

Employees' overall wellbeing



48% strongly agree, 43% somewhat agree and 9% disagree that *their company takes a genuine interest in employee wellbeing.*

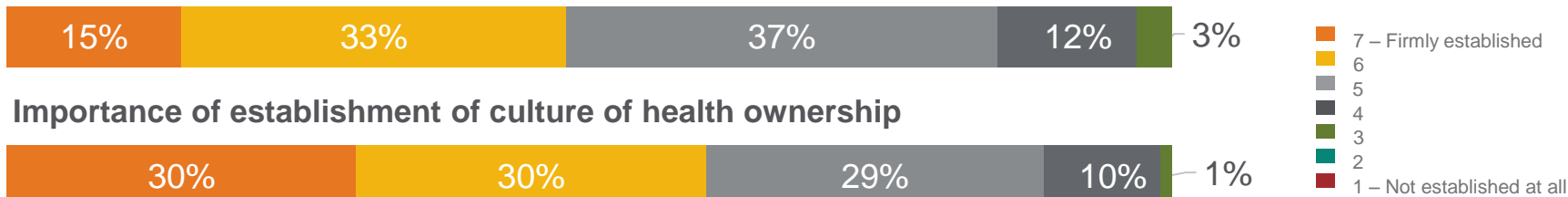


QE3 Do you think your company's proportionate spending on wellness and health management programmes will increase, decrease or stay the same in the next three years?

QE3a/b Why do you think your company's proportionate spending on wellness and health management programmes will increase/decrease in the next 3 years? * Caution: Small base size. Letter indicates significantly higher value over group denoted.

Half believe a culture of health ownership established with employees

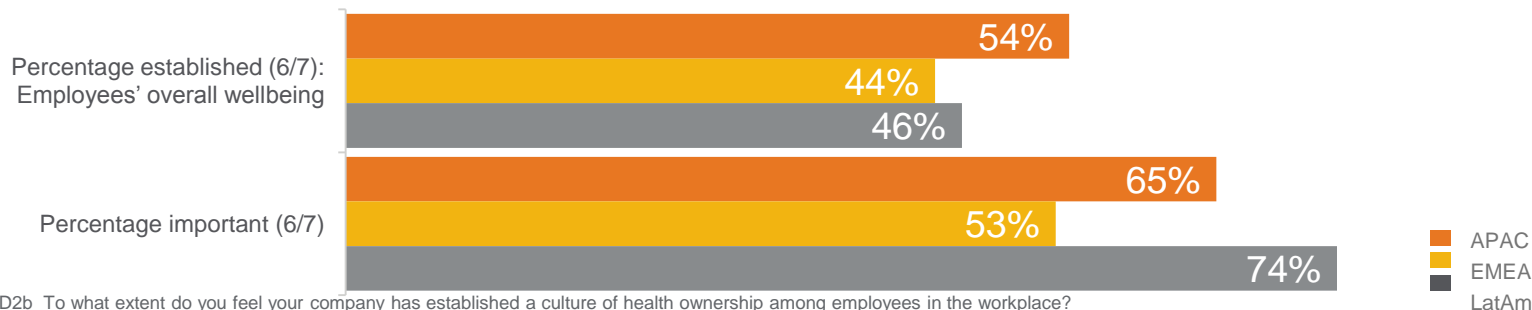
Establishment of culture of health ownership



Importance of establishment of culture of health ownership



Culture of health ownership




QD2b To what extent do you feel your company has established a culture of health ownership among employees in the workplace?


QD2c How important is it for you to create a culture of health ownership in your company? Letter indicates significantly higher value over group denoted.

Review - key insights

 **1 PROGRAMMES:** Average of 6 offered by companies surveyed

 **2 INCENTIVES:** 98 per cent surveyed offer incentives

 **3 SUCCESS:** Programmes successful in terms of improved productivity, business performance and other key metrics.

 **4 STRATEGY AND BUDGET:** Most have resource dedicated to promoting health and wellness.

 **5 ENGAGEMENT:** Substantial growth in using emerging engagement strategies.

 **6 PHYSICAL WORK ENVIRONMENT:** Employers improving environment to help employees make healthy decisions.

 **7 EMPLOYEE WELLBEING AND CULTURE OF HEALTH:** About half surveyed believe they are contributing to wellbeing improvement.

Some things to think about...



PROGRAMMES: What programmes are most valuable to your employees? What might you add or replace to better drive engagement?



INCENTIVES: Consider what your employees value. What will motivate them to achieve or maintain a desired behaviour?



SUCCESS: How do you define success? How does your evaluation compare with some regional averages?



STRATEGY AND BUDGET: How do your strategies compare to employers in your region? Where might you recalibrate your programme offering to better align with those strategies and beliefs?



ENGAGEMENT: Consider your engagement strategies: which is most effective to attract your employees? Are there strategies you hadn't considered that are effective for others in your region?



PHYSICAL WORK ENVIRONMENT: Considering changes other employers have made or are considering, which do you think would help your employees achieve a healthier lifestyle?



EMPLOYEE WELLBEING AND CULTURE OF HEALTH: How would you rate your employees' wellbeing and culture of health ownership? How does that compare with others in your region? What could you do to improve it, if desired?

Thank you.

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