2015/2016 Global Staying@Work Survey

Key Global and Canada Highlights

Presented by Emmanuelle Gaudette

April 2016
### About the survey

**Staying@Work Survey**

- **Canada**
  - Employers (with at least 250 employees): 111
  - Respondents employ over 750K full-time employees

- **Global**
  - Employers completed the survey between North America, Latin America, Europe and Asia Pacific: 1,669
  - Countries/markets surveyed: 34

**Global Benefits Attitudes Survey**

- **Global and Canada**
  - Employees around the world: 30,000
  - Employees in Canada: 2,013

*Source: 2015/2016 Global Staying@Work Survey*  
*Source: 2015/2016 Global Benefits Attitudes Survey – Canada*  
© 2016 Willis Towers Watson. All rights reserved. Proprietary and Confidential. For Willis Towers Watson and Willis Towers Watson client use only.
# The financial and health advantage (Canada)

Companies with the most effective H&P programs have:

### Health Risks/Engagement
- **44%** Fewer obese employees with high BMI (\( \geq 30\text{kg/m}^2 \))
- **31%** Fewer High Glucose Risk/Diabetics
- **14%** Fewer users of Tobacco

### Financial/Productivity
- **1.0** Fewer days of unplanned absence per year
- **1.1** Fewer new LTD cases per 1,000 covered employees
- **$150** Lower annual medical and pharmacy plan costs PEPY
- **1.2** percentage points lower medical/Rx trend

*Source: 2015/2016 Global Staying@Work Survey*
Executive summary – Canada

Health and productivity is a global priority

Top lifestyle risks are: stress, sedentary lifestyles and unplanned absences

Organizations are taking a broader view of wellness by connecting health, financial well-being and the workplace experience

 Biggest challenges Canadian employers face are fragmented program delivery, lack of evidence of returns and inadequate program budget

Program participation is low, but increases with the use of targeted incentives

Following the lead of highly effective organizations

- Build a strategy that guides your wellness program design across the health & productivity continuum
- Focus on creating a culture of health
- Leverage new technologies
- Deliver an integrated wellness program that addresses your employee health risks
- Know your numbers – based on your strategy, apply continuous measurement to inform program changes and track your ROI in wellness

Top lifestyle risks are: stress, sedentary lifestyles and unplanned absences
Organizations use an array of health and well-being programs

**Program Offering**

- **Most offered:** EAP, onsite/near-site vaccinations, worksite diet/exercise activities
- **Emerging:** Companies planning to adopt by 2018:

  - **39%** Mental health assessment
  - **31%** Chronic condition mgmt.
  - **27%** Worksite biometric screening
  - **26%** Health risk assessment

**Are you getting the most out of your programs?**

*Source: 2015/2016 Global Staying@Work Survey, Canada*
Program participation remains low

31% Employees who participated in any well-being activity or health-related management program in the last year

Average Participation Rates*

<table>
<thead>
<tr>
<th>Program</th>
<th>Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biometric screening</td>
<td>29%</td>
</tr>
<tr>
<td>Well-being fairs</td>
<td>29%</td>
</tr>
<tr>
<td>Health risk assessment</td>
<td>26%</td>
</tr>
<tr>
<td>Onsite vaccination</td>
<td>26%</td>
</tr>
<tr>
<td>Onsite health kiosks</td>
<td>23%</td>
</tr>
<tr>
<td>Worksite diet/exercise activities</td>
<td>22%</td>
</tr>
<tr>
<td>EAP</td>
<td>17%</td>
</tr>
<tr>
<td>Online information</td>
<td>16%</td>
</tr>
<tr>
<td>Mental health risk assessment</td>
<td>16%</td>
</tr>
<tr>
<td>Telemedicine</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: 2015/2016 Global Staying@Work Survey, Canada
* Participation rates are based on companies that offer the program.
Most employees prefer to manage their health on their own

<table>
<thead>
<tr>
<th>Statement</th>
<th>Global</th>
<th>US</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer to manage my health on my own</td>
<td>71%</td>
<td>71%</td>
<td>76%</td>
</tr>
<tr>
<td>I don't want my employer to have access to my personal health information</td>
<td>39%</td>
<td>46%</td>
<td>52%</td>
</tr>
<tr>
<td>The initiatives offered by my employer do not meet my needs</td>
<td>34%</td>
<td>32%</td>
<td>38%</td>
</tr>
<tr>
<td>I don’t trust my employer to be involved in my health and well-being</td>
<td>31%</td>
<td>30%</td>
<td>36%</td>
</tr>
<tr>
<td>I am not sure about the activities provided by my employer or how to sign up</td>
<td>26%</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>My manager is not/would not be supportive of my participation</td>
<td>23%</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: 2015/2016 Global Benefits Attitudes Survey
Incentive strategies have evolved – but are they targeting the right audience?

61% Offer some type of wellness incentive to encourage participation – up from 50% in 2013

35% Participation rates in wellness programs for companies using incentives vs. 24% that don’t use incentives

77% Plan to reevaluate their incentive strategy over the next 3 years

30% Percentage of employees who need a financial incentive to participate*

23% Offer contribution to a Wellness Spending Account or to HSA/FSA

Source: 2015/2016 Global Staying@Work Survey, Canada and *2015/2016 Global Staying@Work Survey & 2015/2016 Global Benefits Attitudes Survey, Canada
Building the employee experience is key to success

51% Let's brand our well-being program and communication with unique program name and logo

49% Let's have local health champions and/or committees to promote a healthy workplace

49% Let's use employee testimonials and/or personal stories

45% Let's build health and well-being into the organization's employee value proposition

Source: 2015/2016 Global Staying@Work Survey, Canada

AND OTHER CONSIDERATIONS...

26% Use key influencers and viral messaging to communicate through the social networks of the company

9% Use consumer marketing techniques to develop customized/targeted communication strategy
Companies are warming up to technology for delivering health information and boosting health engagement

62%
Ensure all online tools are available for at-work and at-home access

38%
Have a dedicated portal to deliver health information or health challenges

20%
Support the use of social media tools including profiles, social networking, blogs, etc.

36%
of employers offer or promote use of mobile applications to complement health promotion and well-being programs

50%
of employees report some level of technology use to manage their health

Source: 2015/2016 Global Staying@Work Survey, Canada
Source: 2015/2016 Global Benefits Attitudes Survey, Canada (full-time employees with employer based health care)
Focus on stress and why it matters …

High levels of workplace stress linked to poor health

<table>
<thead>
<tr>
<th></th>
<th>Low workplace stress</th>
<th>High workplace stress</th>
</tr>
</thead>
<tbody>
<tr>
<td>In fair or poor health</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Smoker</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>Poor eating habits</td>
<td>25%</td>
<td>33%</td>
</tr>
<tr>
<td>Drink alcohol frequently</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Exercise regularly</td>
<td>45%</td>
<td>36%</td>
</tr>
<tr>
<td>Sleep at least 7 hours</td>
<td>57%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: 2015/2016 Global Benefits Attitudes Survey, Canada
Sample: Full-time employees with an employer health plan.
Canadian employers are experiencing unprecedented levels of "unplanned time off" due to mental health issues.

Highly stressed workers lose almost twice as many days at work.

Highly stressed workers are over four times as likely to be disengaged.

<table>
<thead>
<tr>
<th></th>
<th>Low workplace stress</th>
<th>High workplace stress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disengaged</td>
<td>8%</td>
<td>35%</td>
</tr>
<tr>
<td>+27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highly engaged</td>
<td>63%</td>
<td>22%</td>
</tr>
<tr>
<td>-41%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: 2015/2016 Global Benefits Attitudes Survey, Canada
Sample: Full-time employees with an employer health plan.
There is disconnect between employer and employee views on the causes of stress in the workplace

To what extent is each of the following a source of stress?

<table>
<thead>
<tr>
<th>Employers</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of work/life balance</td>
<td>Inadequate staffing</td>
</tr>
<tr>
<td>Excessive amount of organizational change</td>
<td>Low pay</td>
</tr>
<tr>
<td>Inadequate staffing</td>
<td>Company culture</td>
</tr>
<tr>
<td>Technologies that expand work day</td>
<td>Excessive amount of organizational change</td>
</tr>
<tr>
<td>Unclear or conflicting job expectations</td>
<td>Lack of supervisor support</td>
</tr>
</tbody>
</table>

Employees want their employer to … 'pay me', 'guide me', 'support me'.

Source: 2015/2016 Global Staying@Work Survey, Canada

Source: 2015/2016 Global Benefits Attitudes Survey, Canada

Sample: Full-time employees with an employer health plan.
What matters for stress?

Money worries strongly linked to high workplace stress and poor work performance

<table>
<thead>
<tr>
<th>Financial worries</th>
<th>Percentage with above average or high work stress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unworried</td>
<td>22%</td>
</tr>
<tr>
<td>Worried for the future</td>
<td>40%</td>
</tr>
<tr>
<td>Short-term concerns</td>
<td>57%</td>
</tr>
<tr>
<td>Struggling</td>
<td>53%</td>
</tr>
</tbody>
</table>

Money concerns keep me from doing my best at my job

- Low workplace stress: 8%
- Moderate workplace stress: 10%
- High workplace stress: 26%

Percentage agree or strongly agree

Source: 2015/2016 Global Benefits Attitudes Survey, Canada
Sample: Full-time employees with an employer health plan.
Can't manage what you don't measure

Use clinical-level medical claim data/benchmarking information to inform decisions or changes to your health and well-being program

Measure active participation or active engagement by employees/spouses in the health and well-being programs

Share health and well-being program performance metrics with the C-suite or regional management on a regular basis

Have an articulated measurement strategy that supports multiyear evaluation of your health and well-being program

Use data to identify specific individuals or subgroups for targeted outreach on relevant health and well-being program(s)

Use a variety of financial and nonfinancial metrics to measure the impact of health and well-being programs (i.e., value-on-investment approach)

Measure demonstrated impact of health and well-being programs on employee productivity (e.g., lost time, employee work engagement)

Use ROI measures to measure the impact of health and well-being programs

Source: 2015/2016 Global Staying@Work Survey, Canada
Where we go from here

1. Let's Get [More Than] Physical
2. Incentives: Small Wins (Not Outcomes)
3. Mobile (and Digital)
4. Change the Environment
5. Personalization
6. Carve out Niche Solutions
7. Measure, Measure, Measure

The financial advantage: Lower health care costs, lower absence rates, reduced chronic conditions, lower lifestyle risks

© 2016 Willis Towers Watson. All rights reserved. Proprietary and Confidential. For Willis Towers Watson and Willis Towers Watson client use only.