

2015/2016 Global Staying@Work Survey

Key Global and Canada Highlights

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About the survey

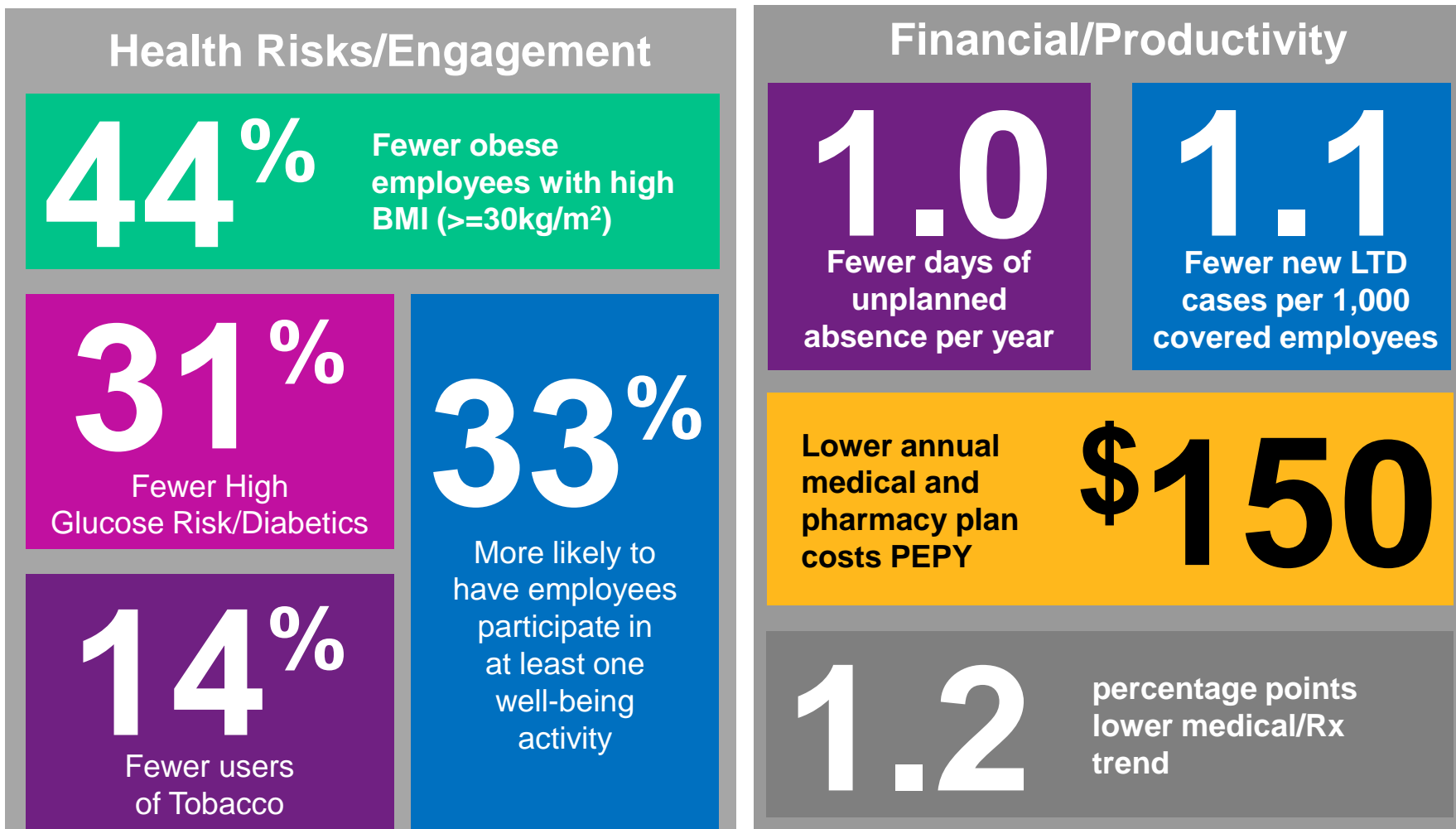


Source: 2015/2016 Global Staying@Work Survey

Source: 2015/2016 Global Benefits Attitudes Survey – Canada

The financial and health advantage (Canada)

Companies with the most effective H&P programs have:



Source: 2015/2016 Global Staying@Work Survey

Executive summary – Canada



Health and productivity is a global priority



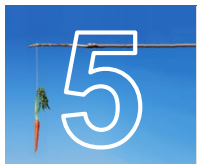
Top lifestyle risks are: stress, sedentary lifestyles and unplanned absences



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

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:

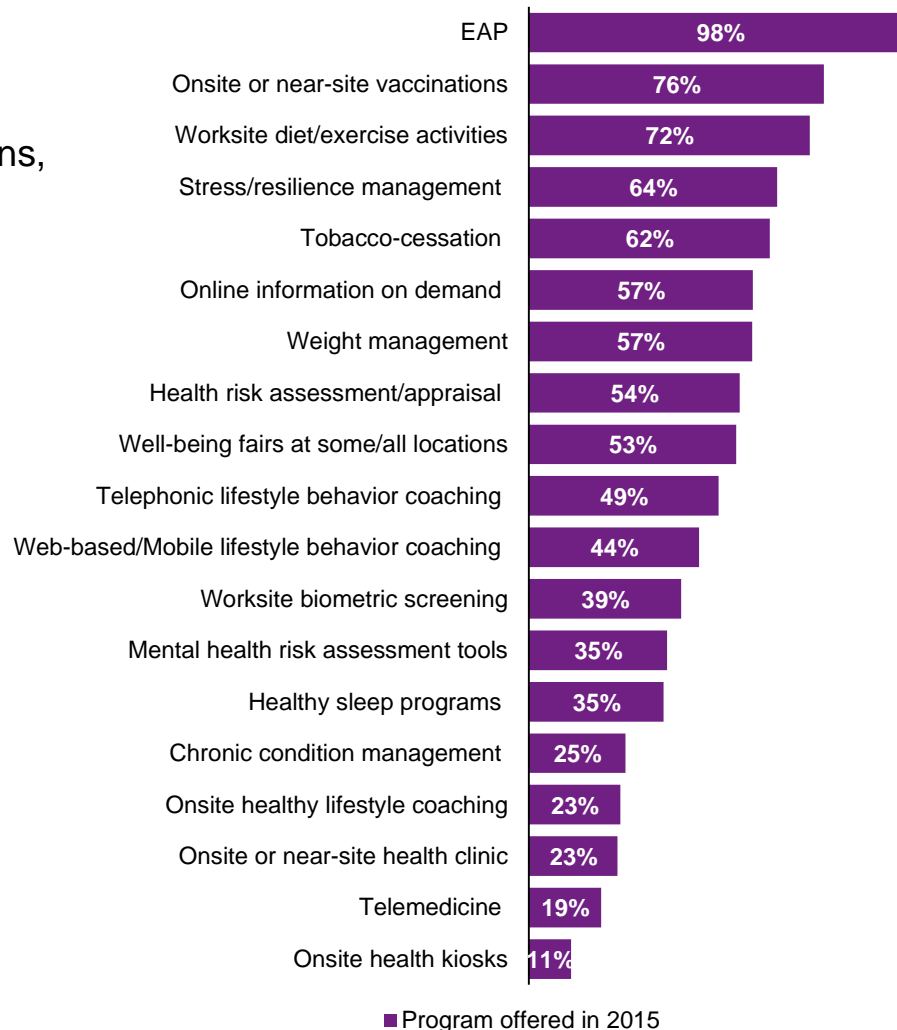
39% Mental health assessment

31% Chronic condition mgmt.

27% Worksite biometric screening

26% Health risk assessment

Are you getting the most out of your programs?



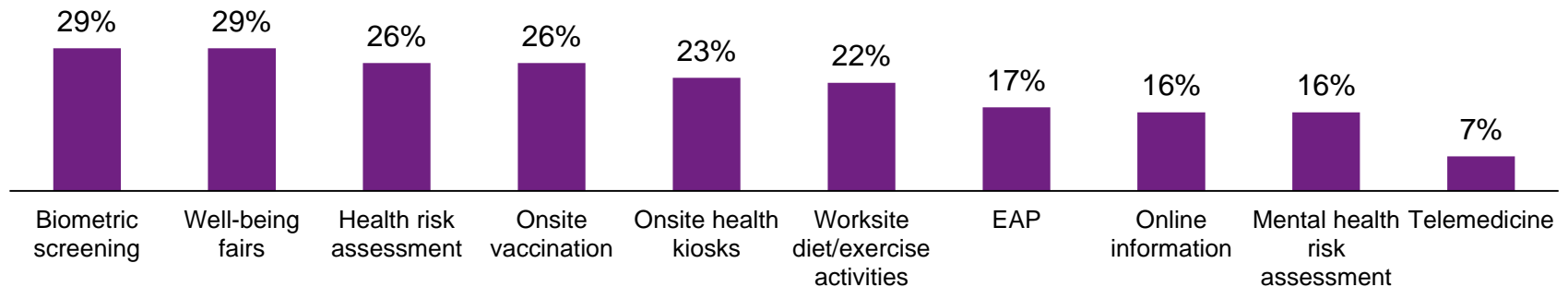
Source: 2015/2016 Global Staying@Work Survey, Canada

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*



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

To what extent do you agree or disagree with the following statements about your employer offering initiatives to help you live a healthy lifestyle?
(% answering "agree" or "strongly agree")

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

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

AND OTHER CONSIDERATIONS...

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

Use consumer marketing techniques to develop customized/targeted communication strategy **9%**

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

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

vs.

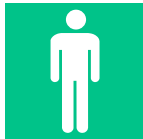

50% of employees report some level of technology use to manage their health

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

	 Low workplace stress	 High workplace stress
In fair or poor health	6%	12%
Smoker	13%	21%
Poor eating habits	25%	33%
Drink alcohol frequently	12%	17%
Exercise regularly	45%	36%
Sleep at least 7 hours	57%	46%

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

	Low workplace stress	High workplace stress	
Disengaged	8%	35%	+27%
Highly engaged	63%	22%	-41%

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?

Employers	
Lack of work/life balance	85%
Excessive amount of organizational change	79%
Inadequate staffing	78%
Technologies that expand work day	78%
Unclear or conflicting job expectations	74%

Employees	
Inadequate staffing	61%
Low pay	58%
Company culture	55%
Excessive amount of organizational change	55%
Lack of supervisor support	52%

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

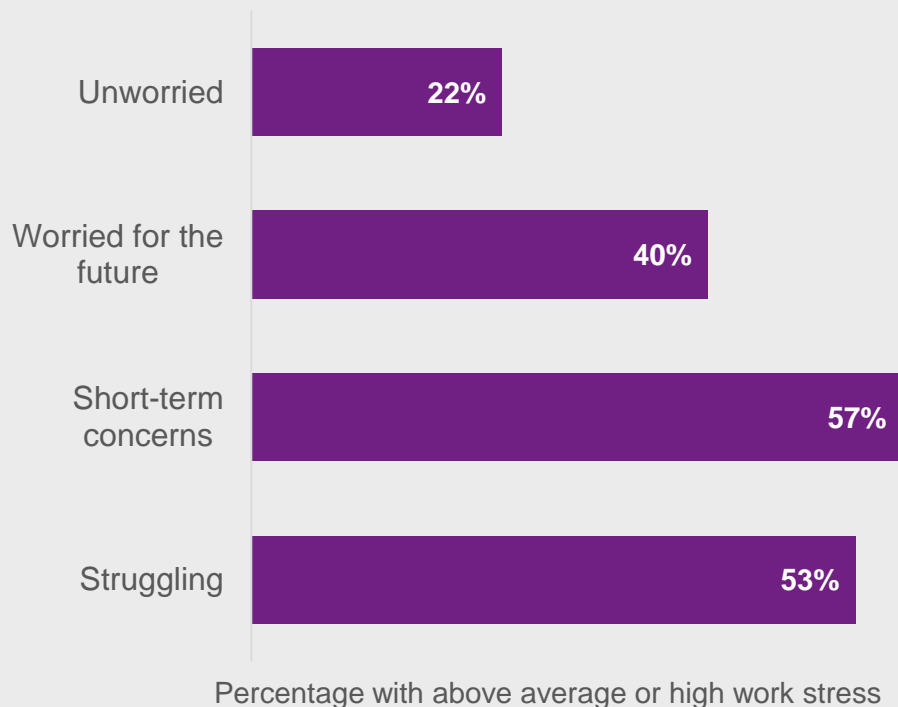
Source: 2015/2016 Global Staying@Work Survey, Canada

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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

Financial worries



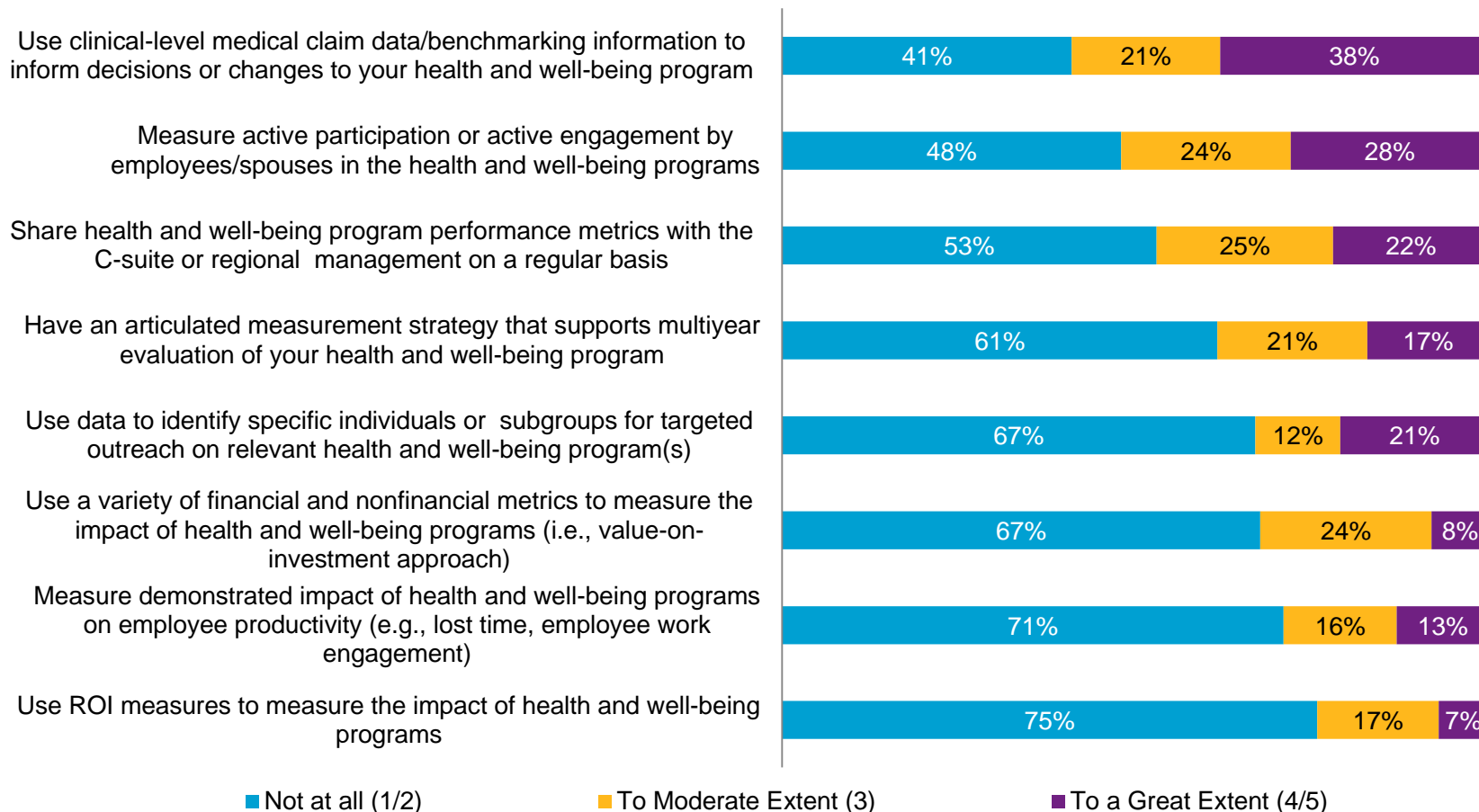
Money concerns keep me from doing my best at my job



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



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

Where we go from here



**Let's Get
[More Than] Physical**



**Incentives: Small Wins
(Not Outcomes)**



Mobile (and Digital)



**Change the
Environment**



Personalization



**Carve out Niche
Solutions**



**Measure, Measure,
Measure**

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