

Making Well-Being Work

Ninth Annual Employer-Sponsored Health and
Well-Being Survey

April 2018



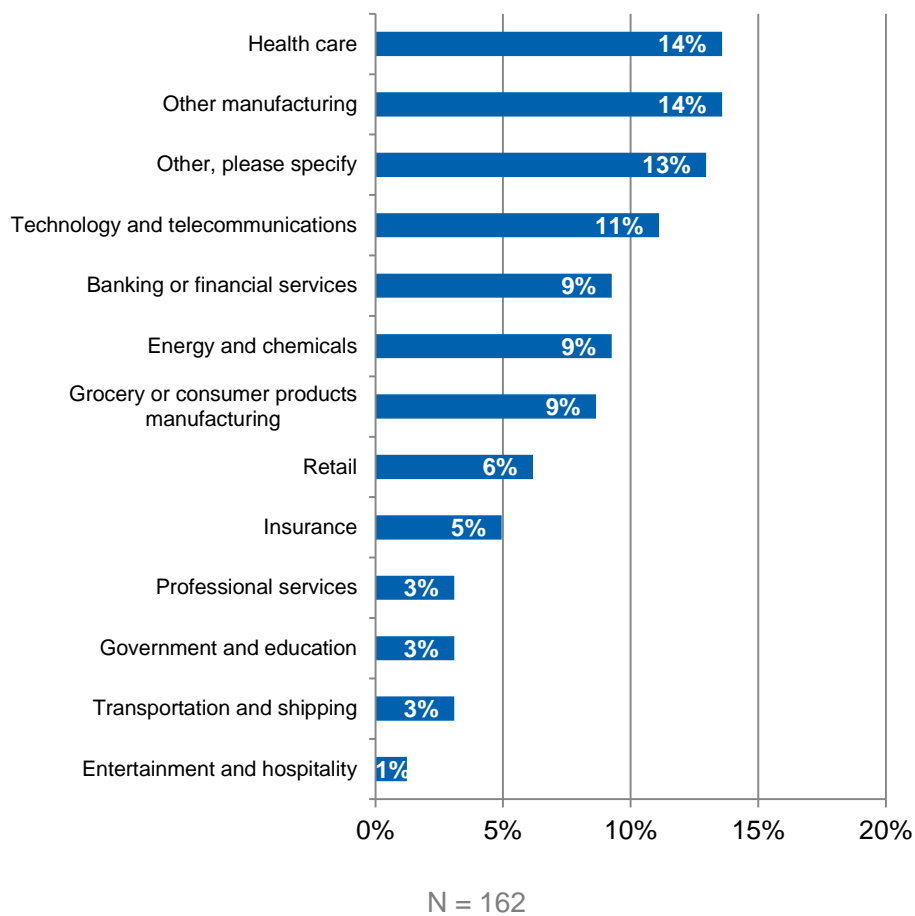
Survey Methodology

- ▶ Online survey was fielded from November 2017 through January 2018 among National Business Group on Health members and clients of Fidelity Investments
- ▶ 163 companies responded to the survey
- ▶ Survey focused on:
 - Defining well-being
 - Types of health and well-being programs offered
 - Levels of incentives to engage employees and spouses/domestic partners
 - Use of outcomes and/or non-financial incentives
 - Measurement tactics and program participation results
 - Strategies for communicating well-being initiatives
 - Future of health improvement investment
 - Global well-being strategy for multinational employers

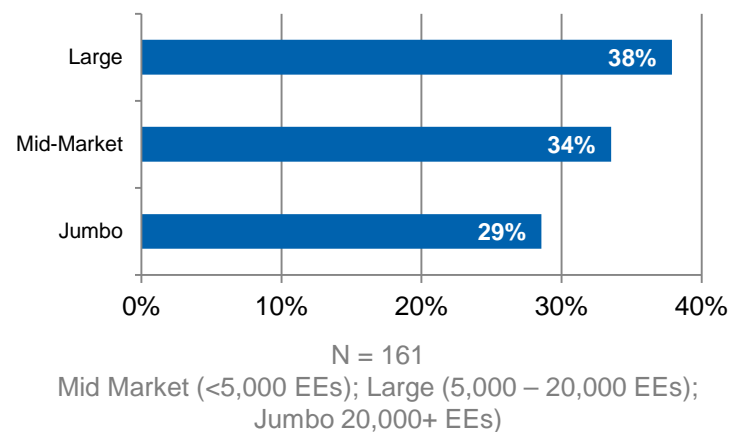
Survey Demographics

163 companies participated in this year's survey

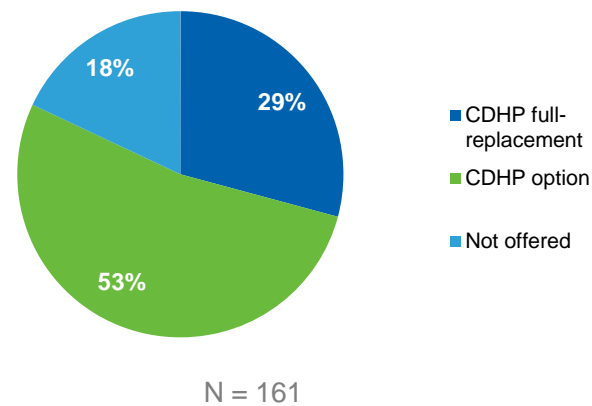
Respondents by Industry



Respondents by Size



Respondents by CDHP Offering



Executive Summary

92% of companies include well-being as part of their overall business strategy with a focus on supporting employee engagement and productivity



Employers Continue to Invest in Incentives

- Employee incentive prevalence increased from 74% to **86%**
- Average annual incentive amount for employees for 2018 is **\$784**, up from \$742 last year
- **83%** plan to continue or expand well-being incentives over the next 3-5 years



Employers Seek More Impactful Channels of Communication

- **Personalization** works – **85%** of employers that personalize communications find that it increases engagement
- **61%** of employers are employing social media, texting, or mobile apps to communicate with employees



Opportunities Exist to Define Global Well-Being

- **52%** of multinational employers have yet to develop a global well-being strategy
- Of those with a global strategy, **77%** tailor programming by country

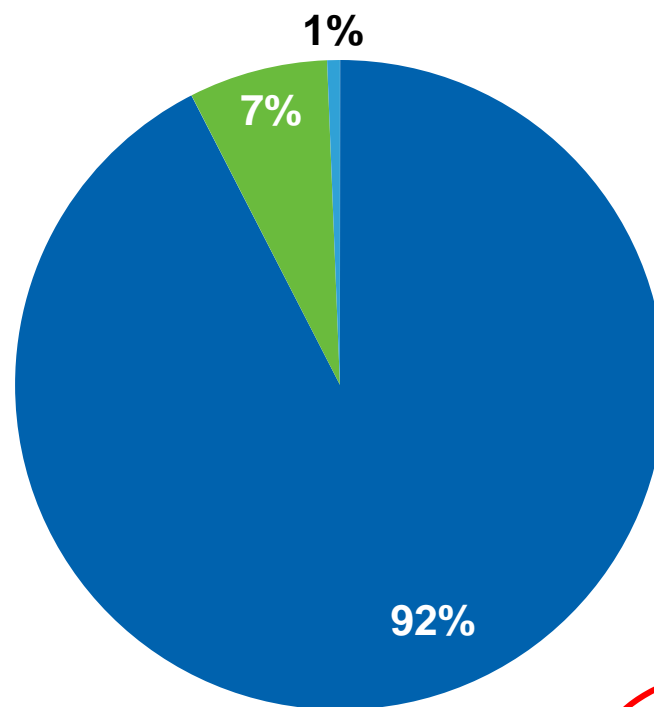
Defining Well-Being



Well-Being is Nearly Universal Among Employers

92% of employers consider well-being part of their overall business strategy, up from 86%

Employers for Whom Well-Being is Part of their Overall Business Strategy

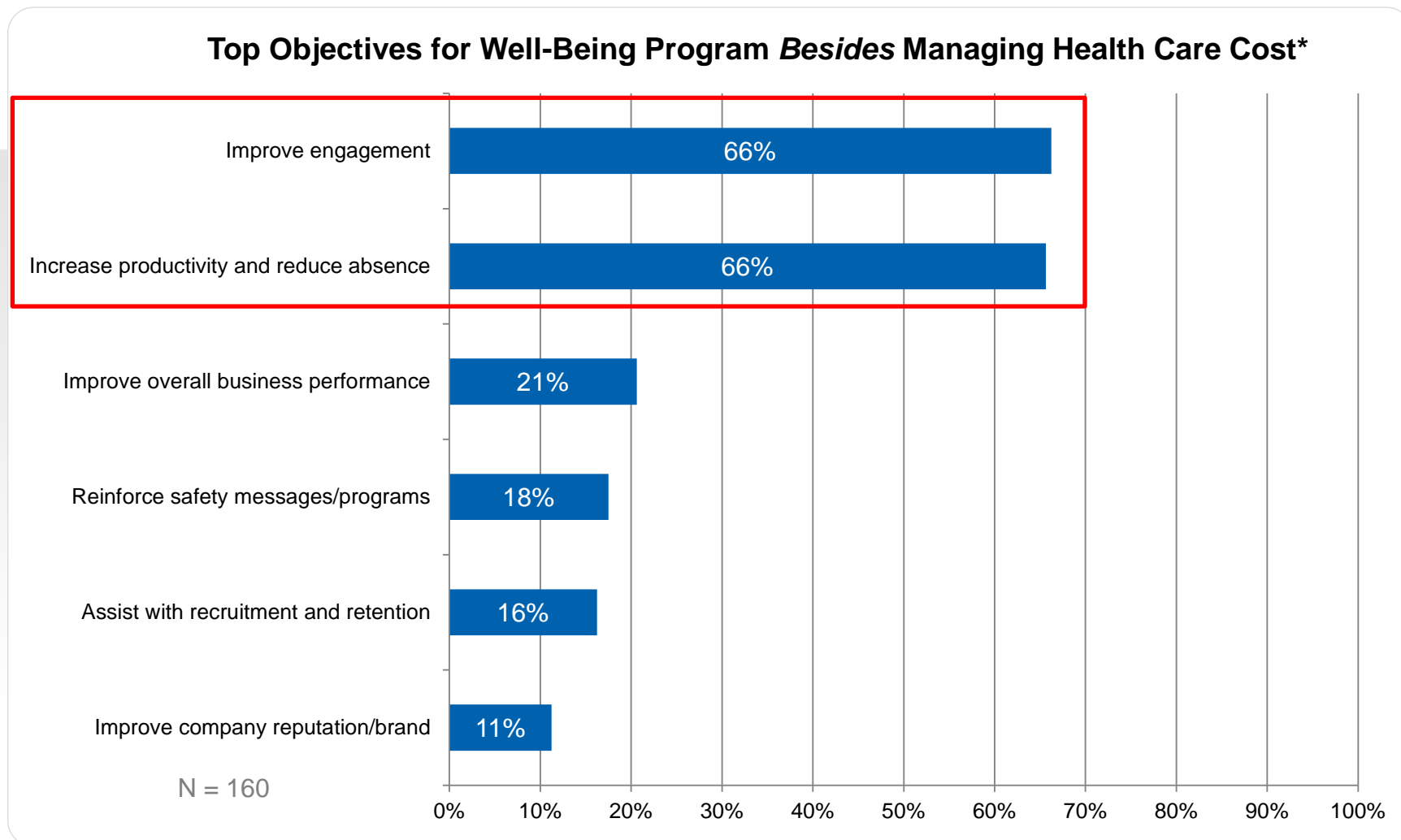


■ Yes ■ No ■ Don't Know

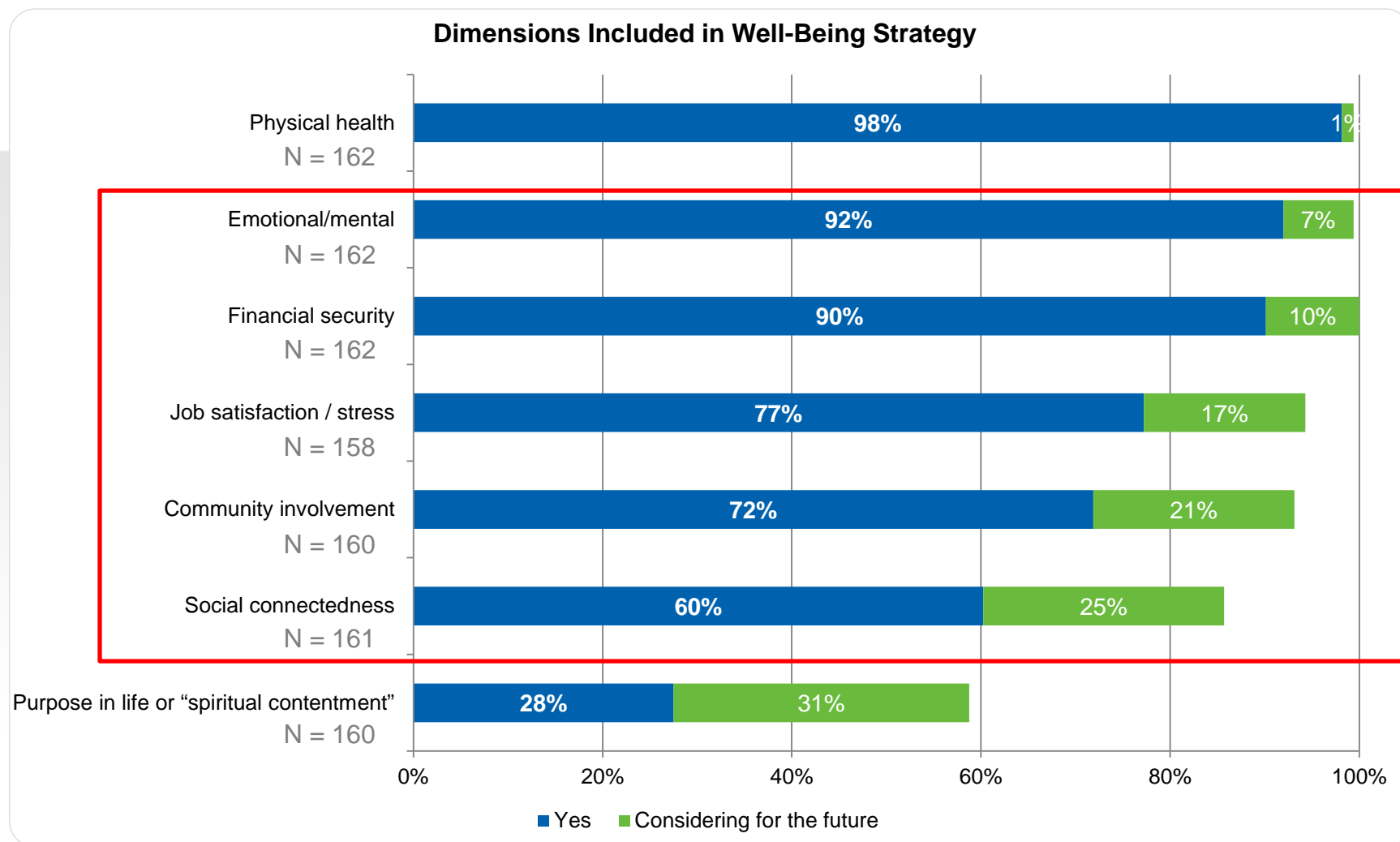
N = 159

**26% of employers
tie well-being to at least one
key business metric**

Engagement and Productivity are the Main Areas of Focus



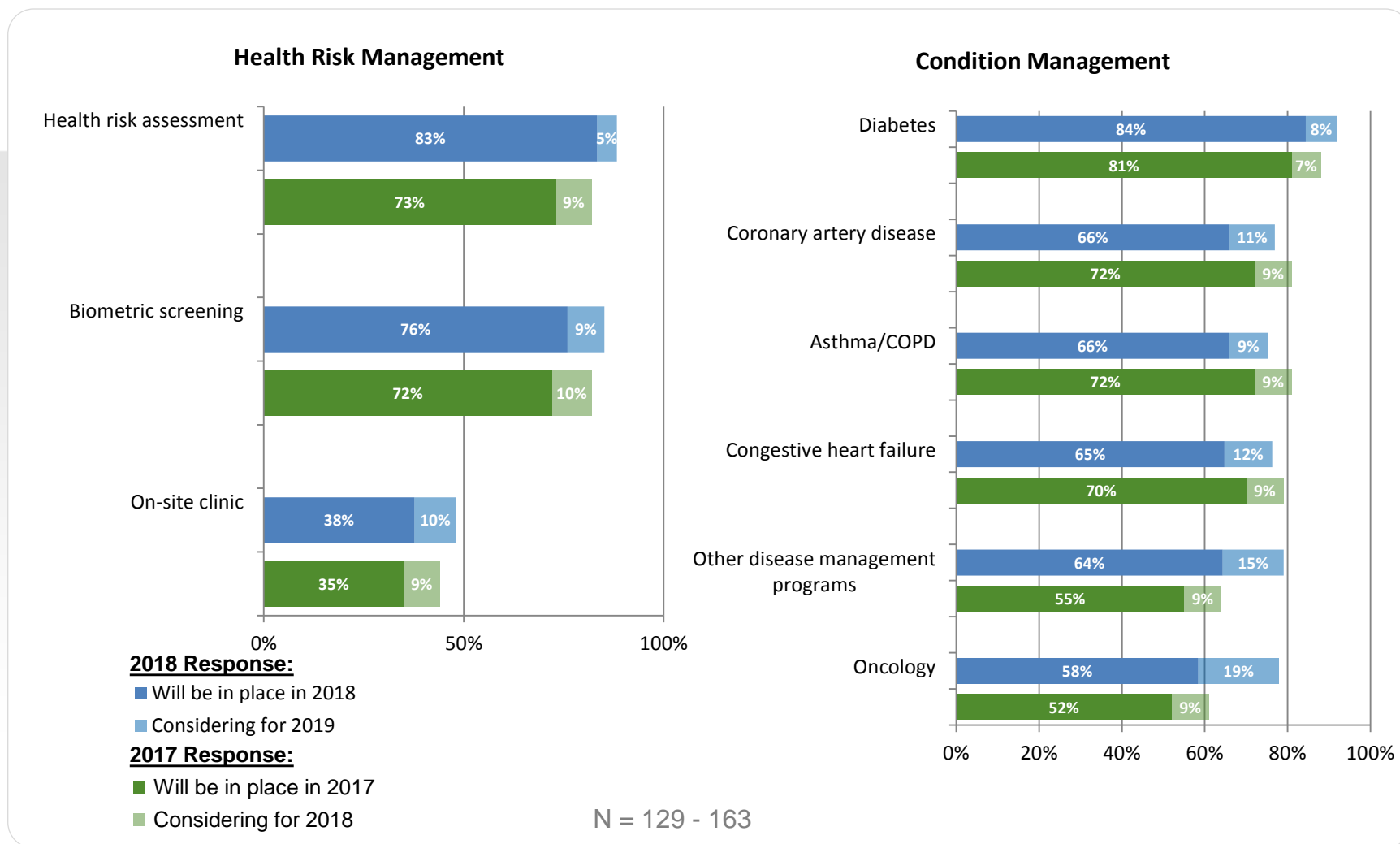
Expanded Definition of Well-Being is the Norm



Program Overview

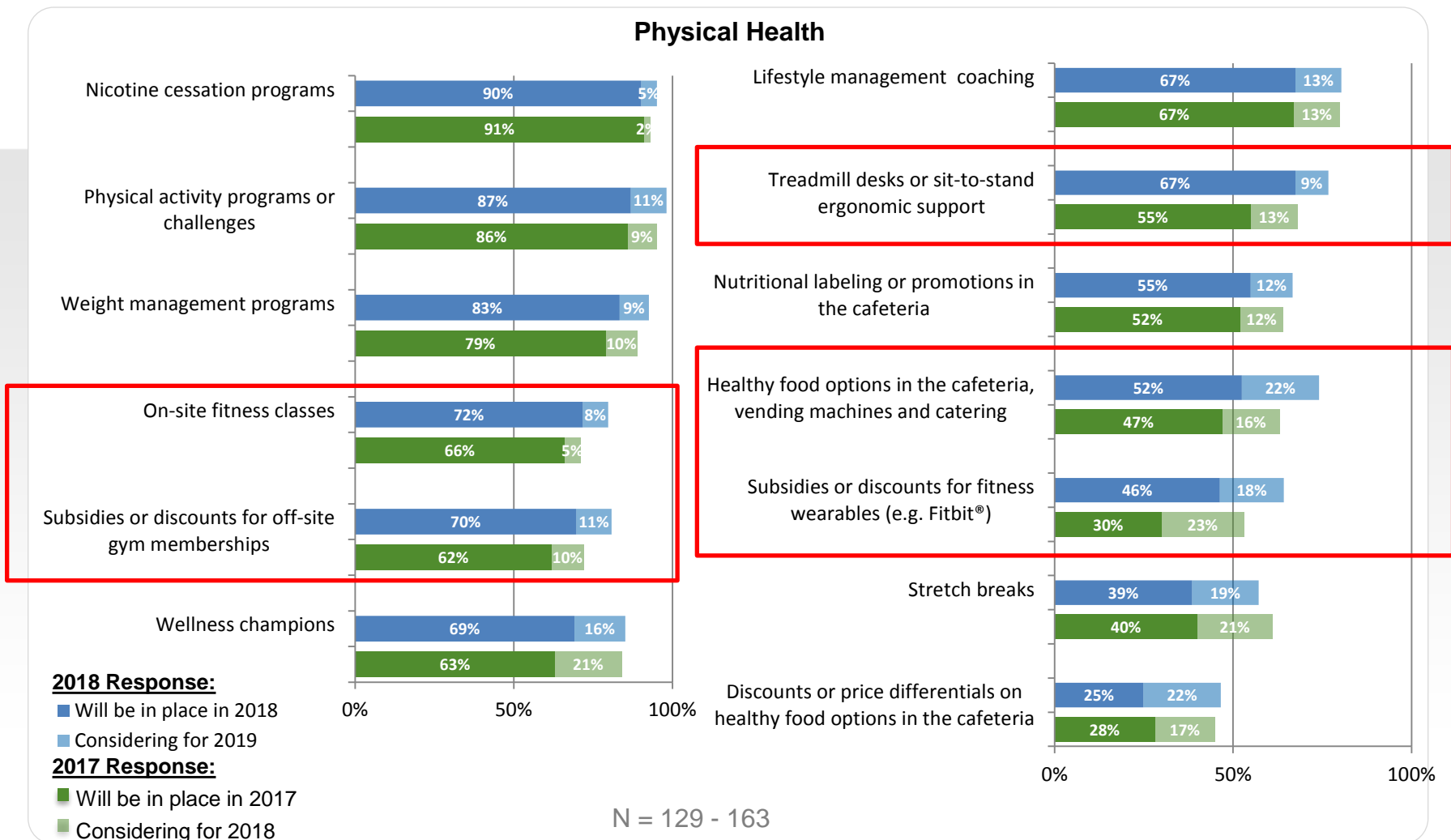


Employers Hold the Course on Condition Management Programs

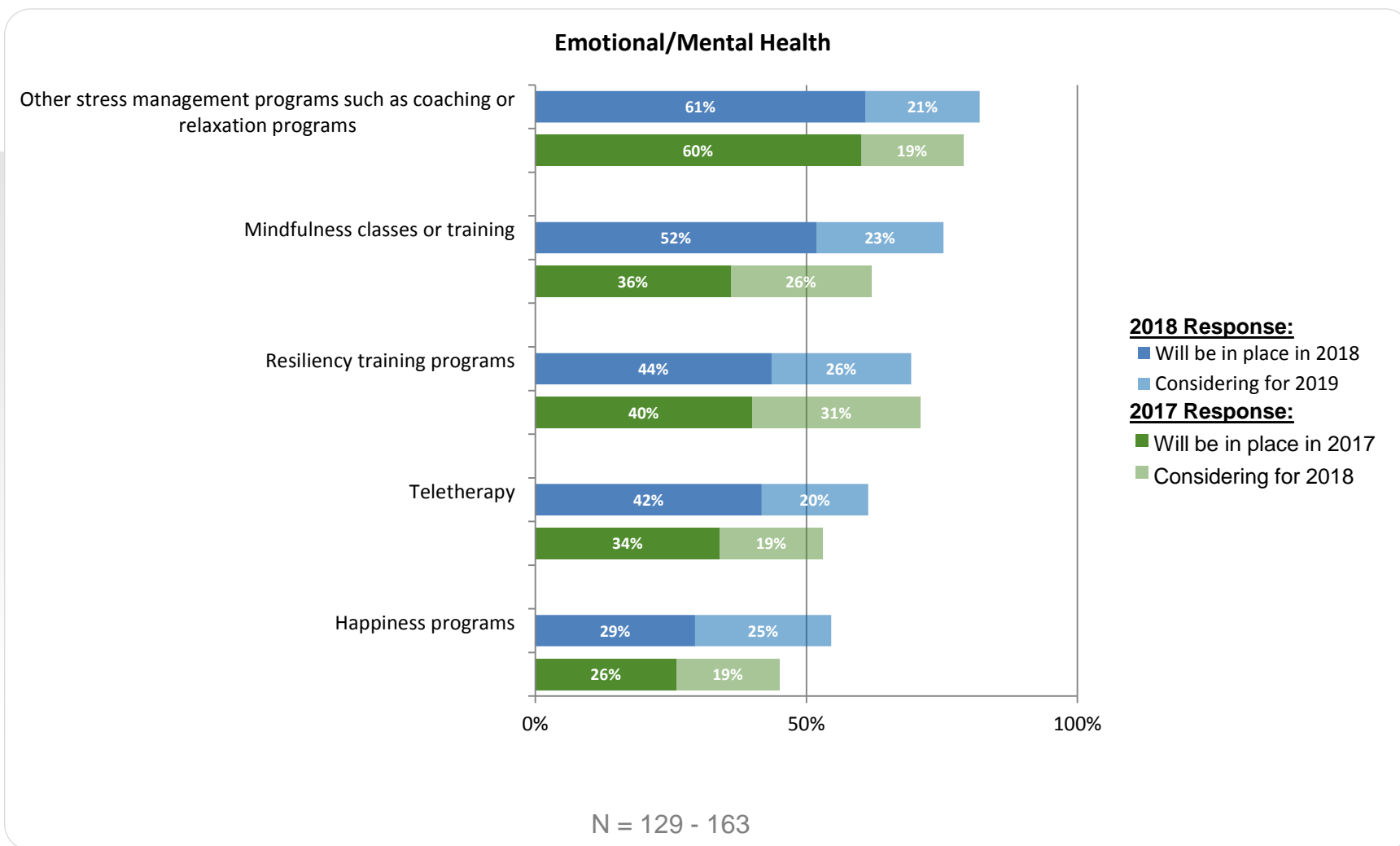


Growth in Select Fitness and Healthy Eating Programs

Employers continue to add value through new benefits while keeping traditional support programs in place

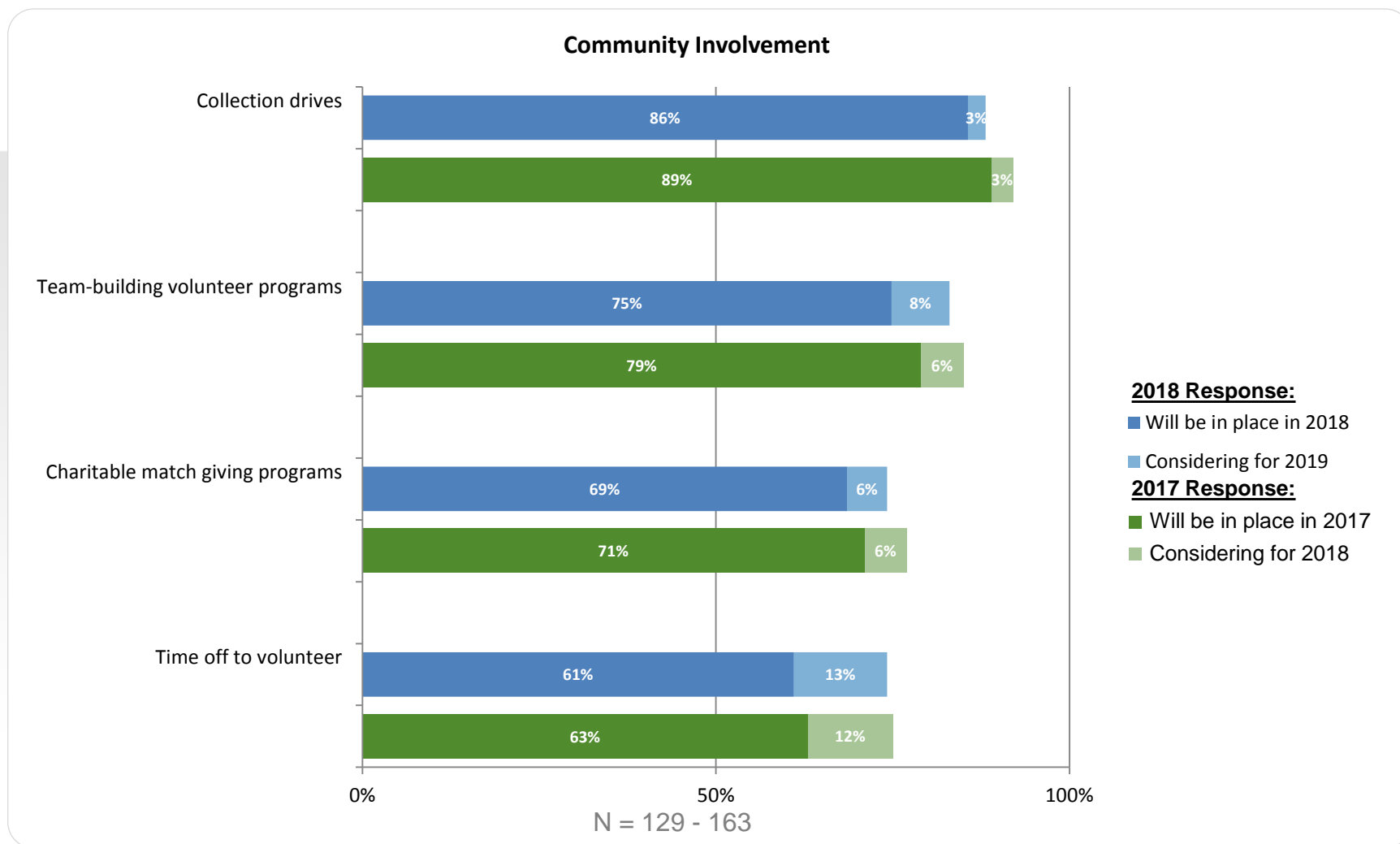


Emotional Support Programs Continue to Grow



2018 Response:
 ■ Will be in place in 2018
 ■ Considering for 2019
2017 Response:
 ■ Will be in place in 2017
 ■ Considering for 2018

Community Involvement Remains Stable



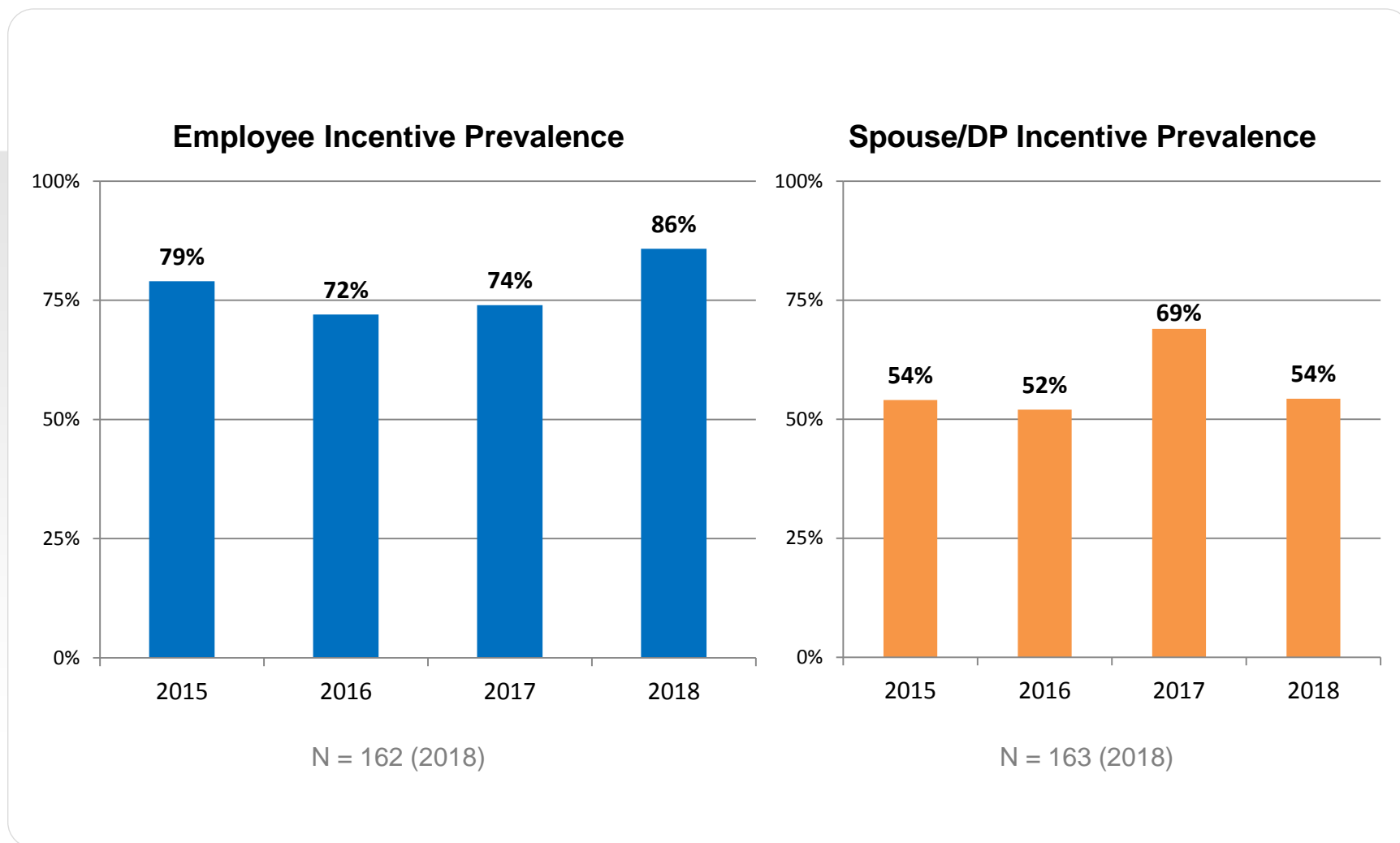
Debt is Emerging as a Focus Area



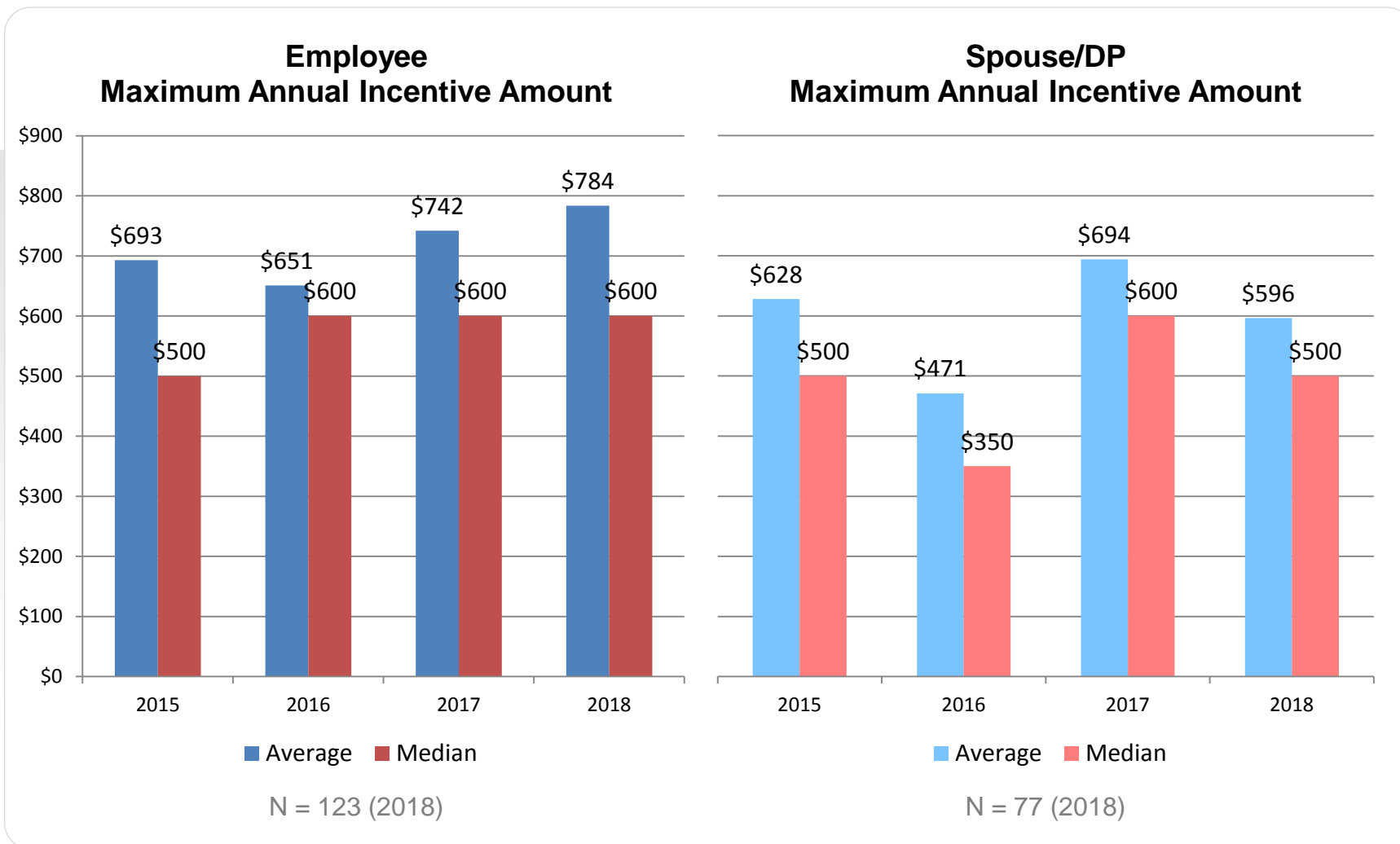
Incentives in 2018



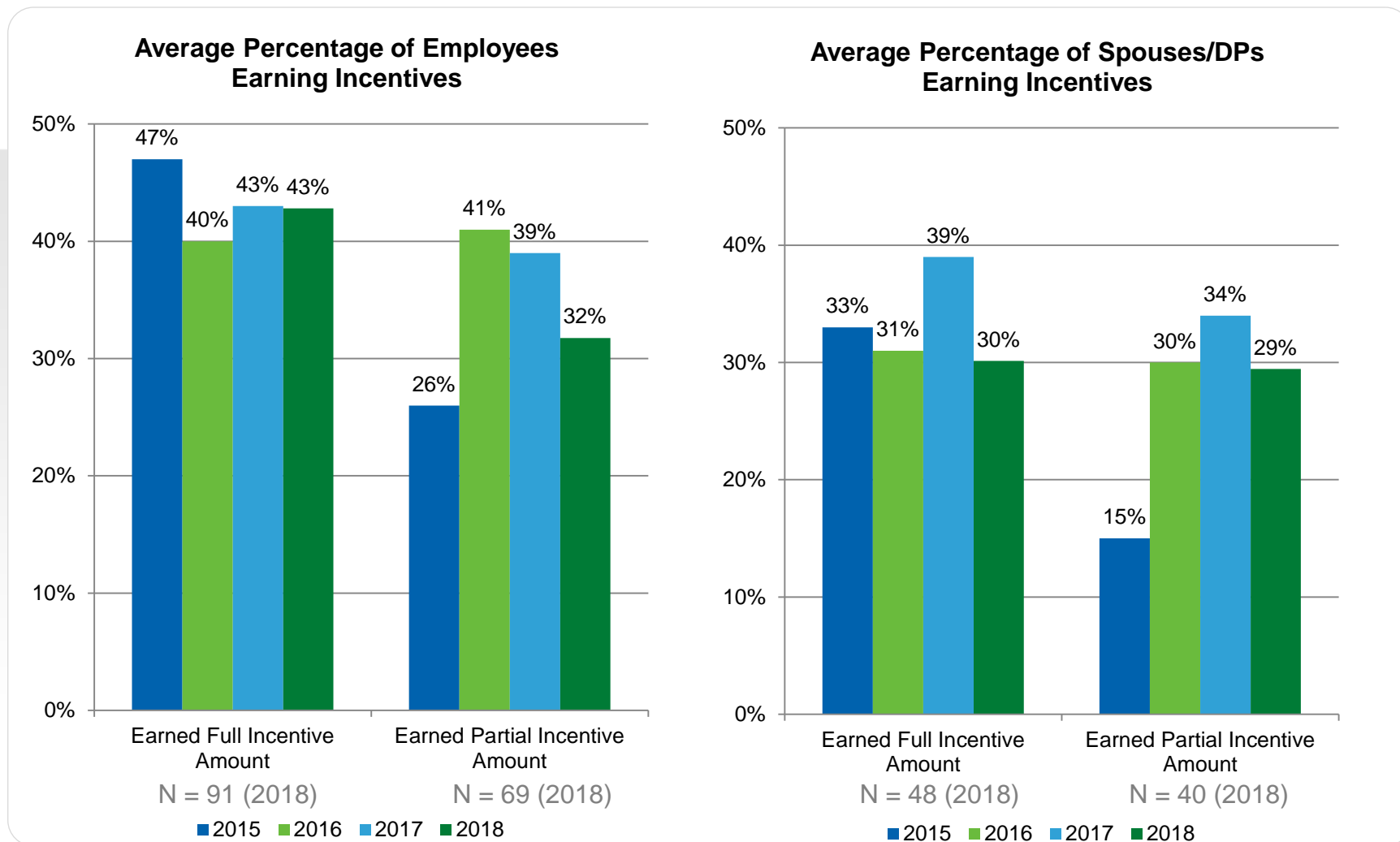
Financial Incentives More Prevalent for Employees; Less so for Spouses



Financial Incentive Amounts Rising for Employees; Dropping for Spouses

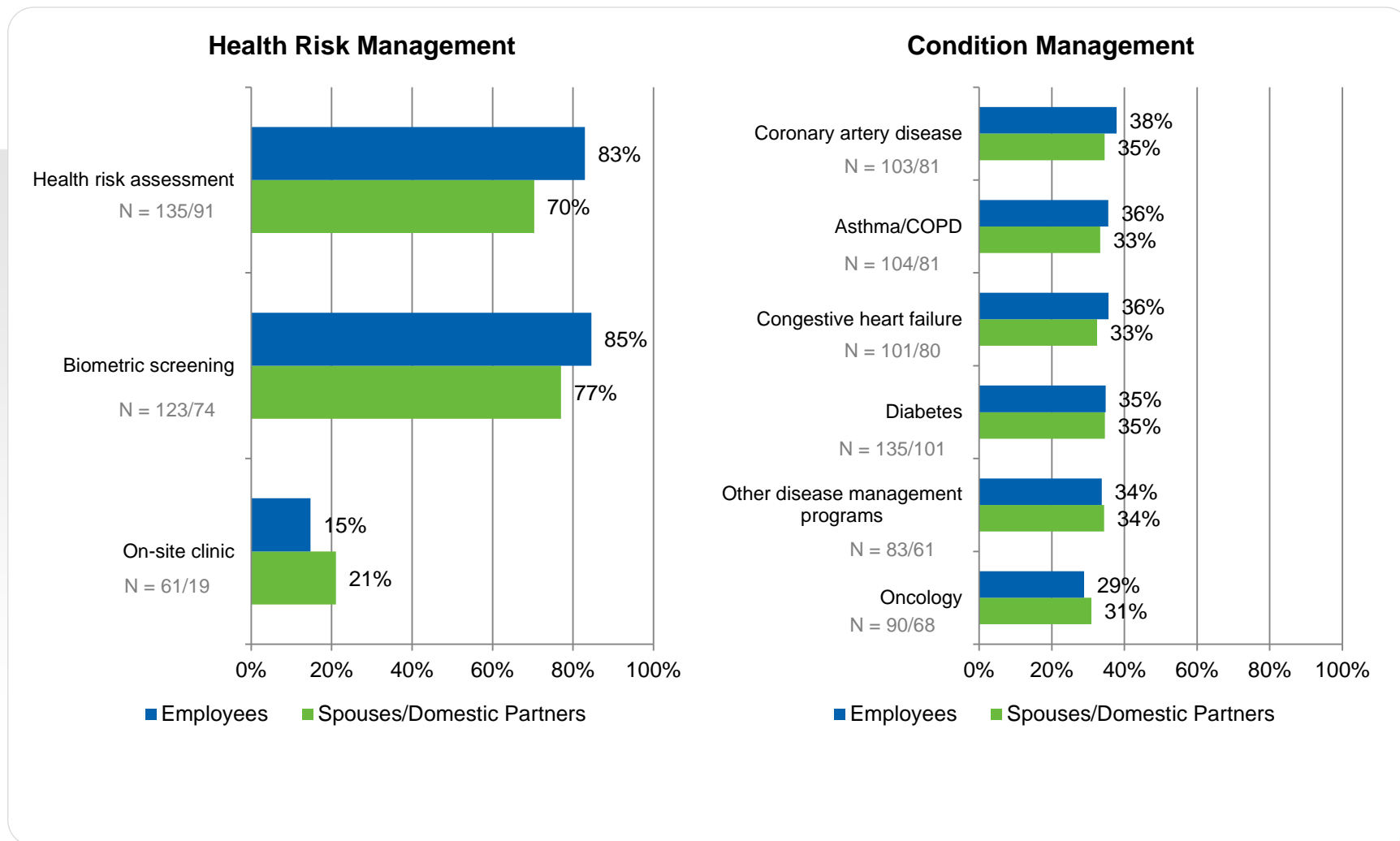


Employee Participation Holding at Similar Rates to Prior Years



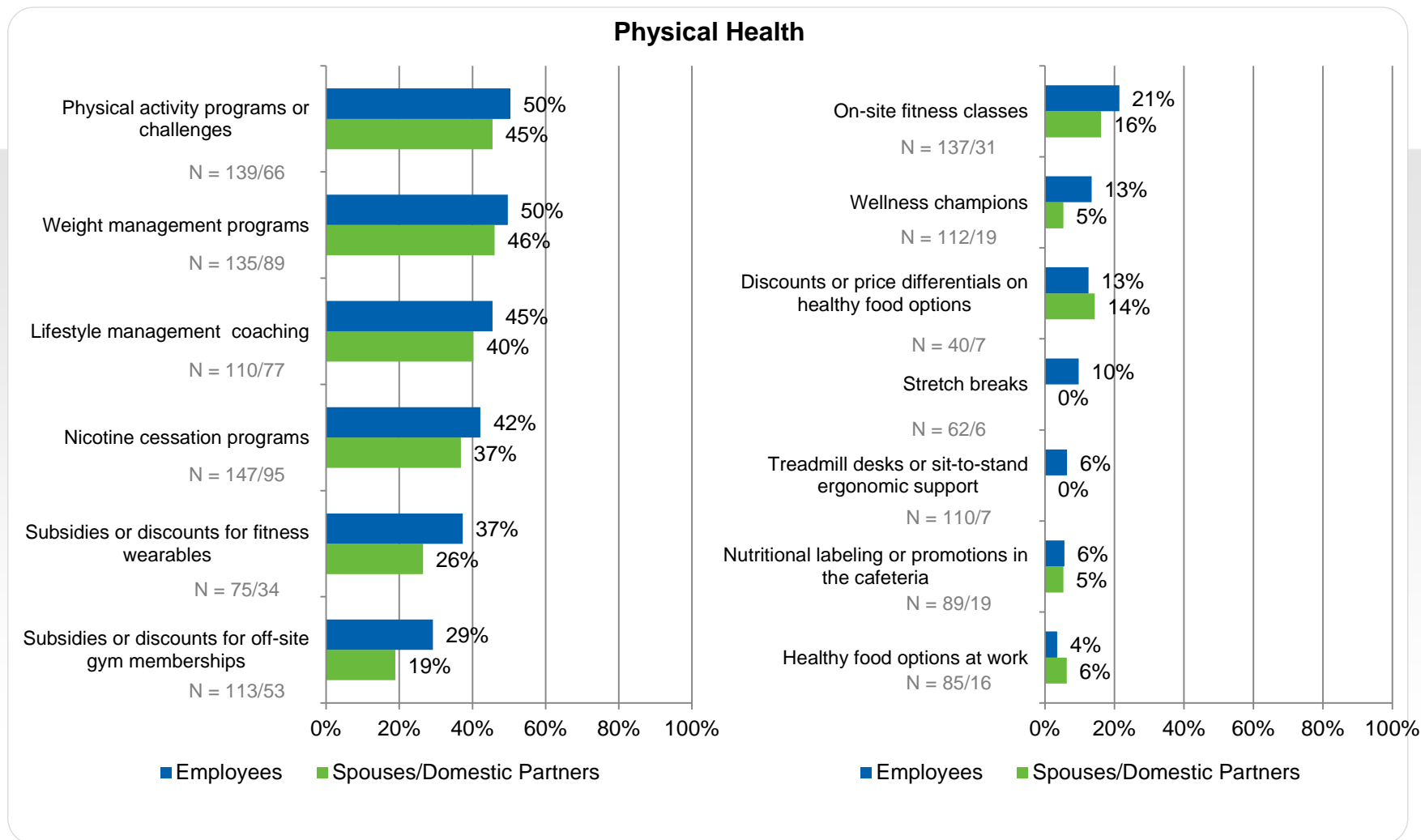
A Look at Incentive Prevalence by Program...

(of those companies with programs in place)



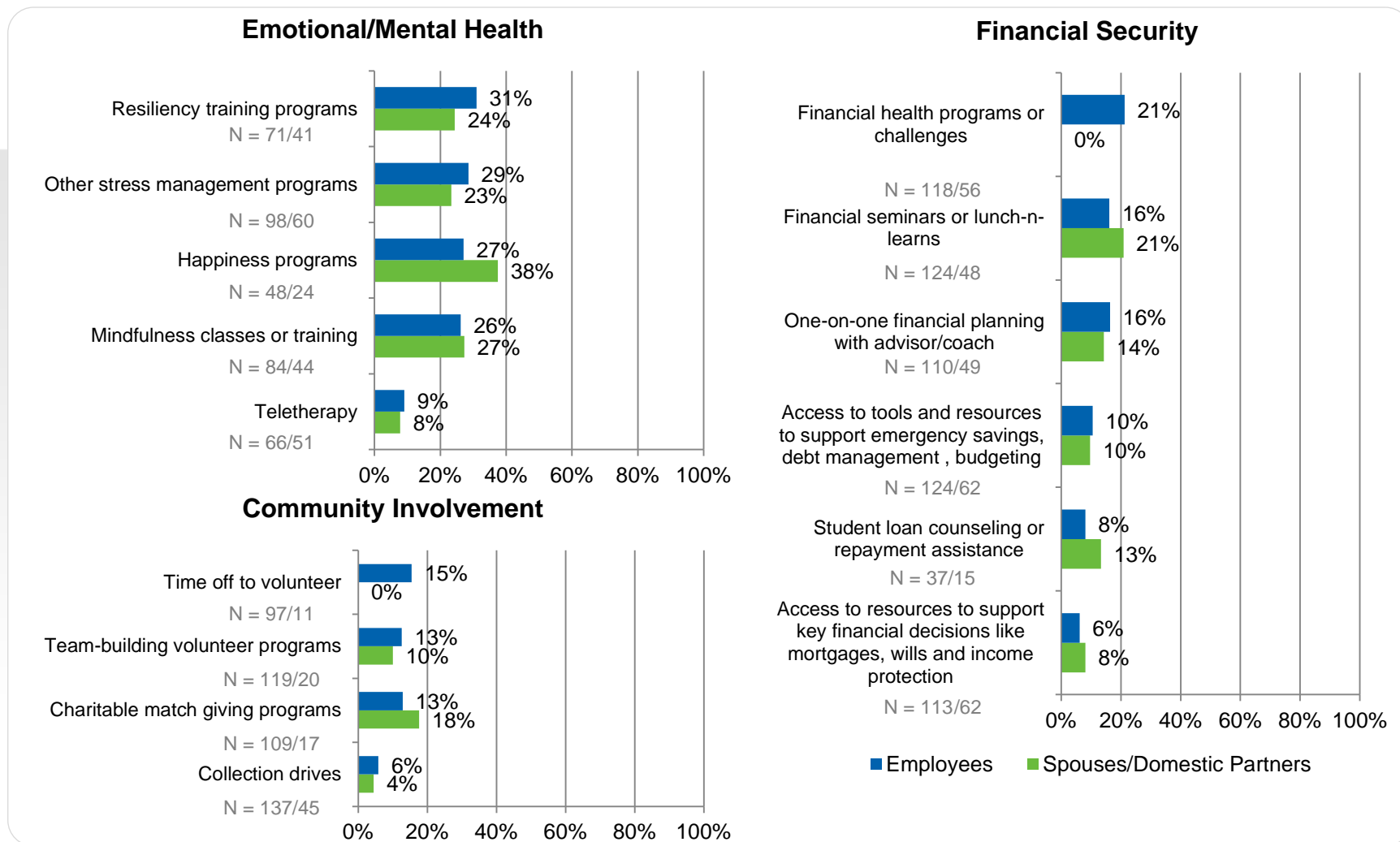
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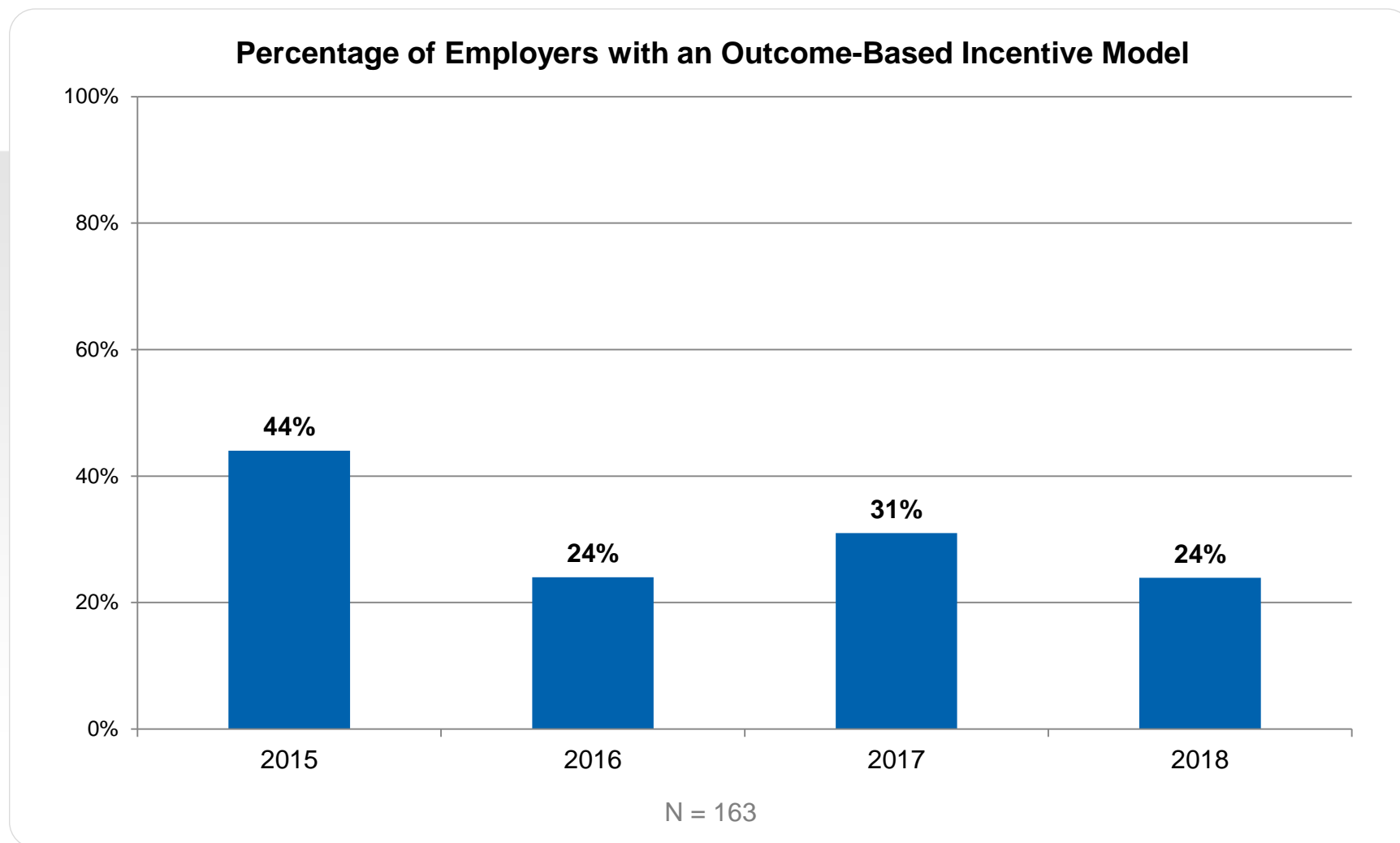


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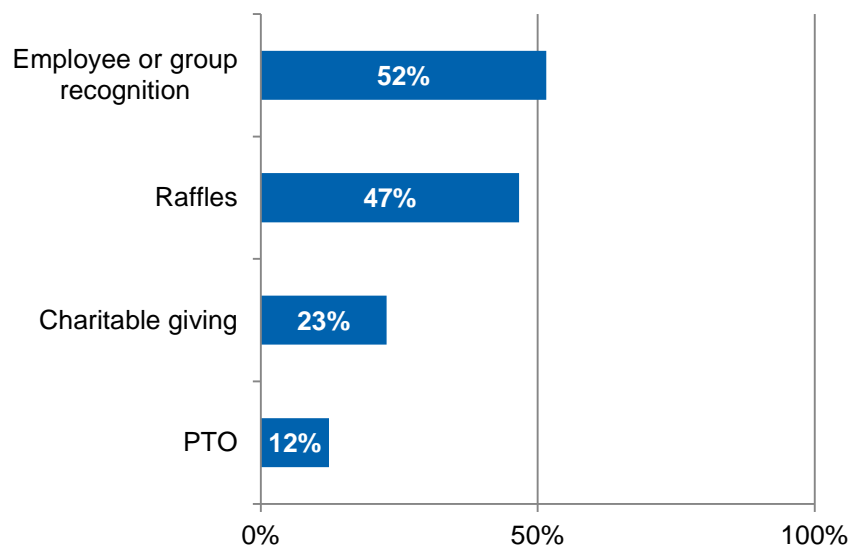


Outcome-Based Incentives Remain Less Common



Non-Financial Incentives Remain Prevalent

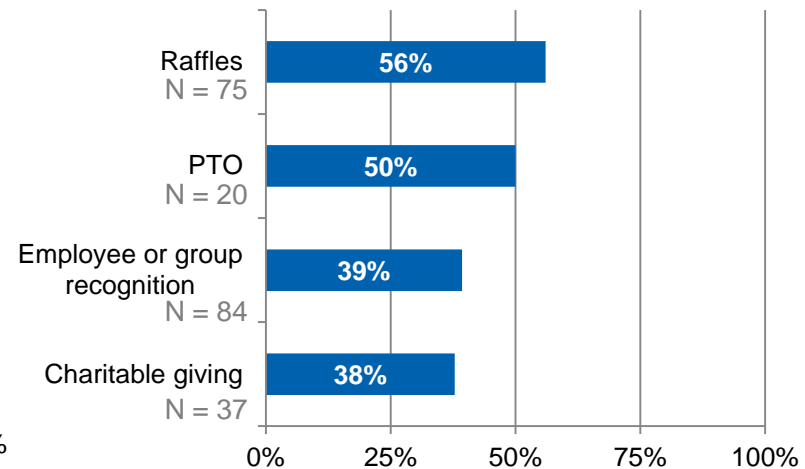
Prevalence of Non-Financial Incentives



N = 163

67%
of companies offer at least one non-financial incentive

Employers for Whom Non-Financial Incentives Have Improved Participation and/or Engagement



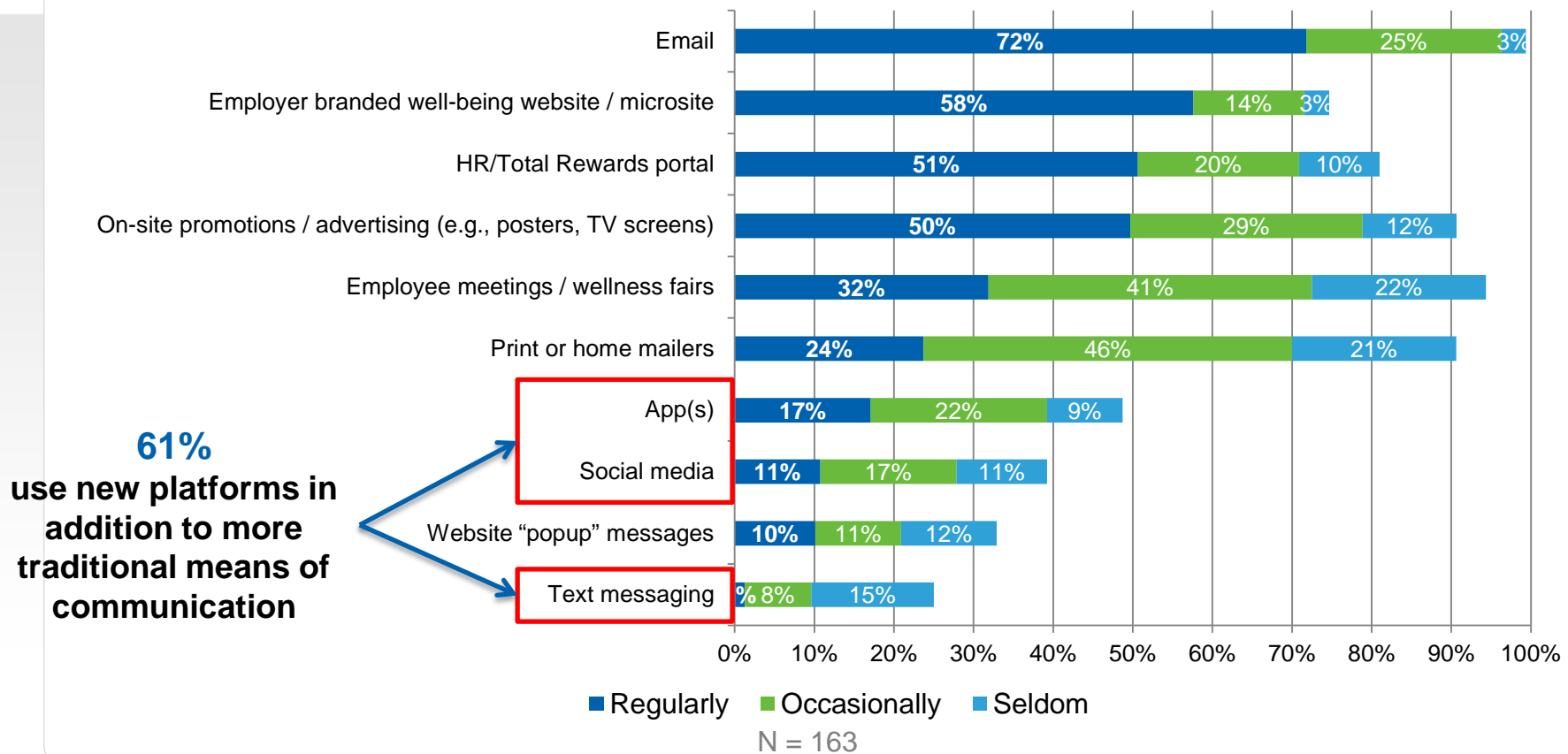
52%
of companies offering non-financial incentives find at least one to be successful

Communications



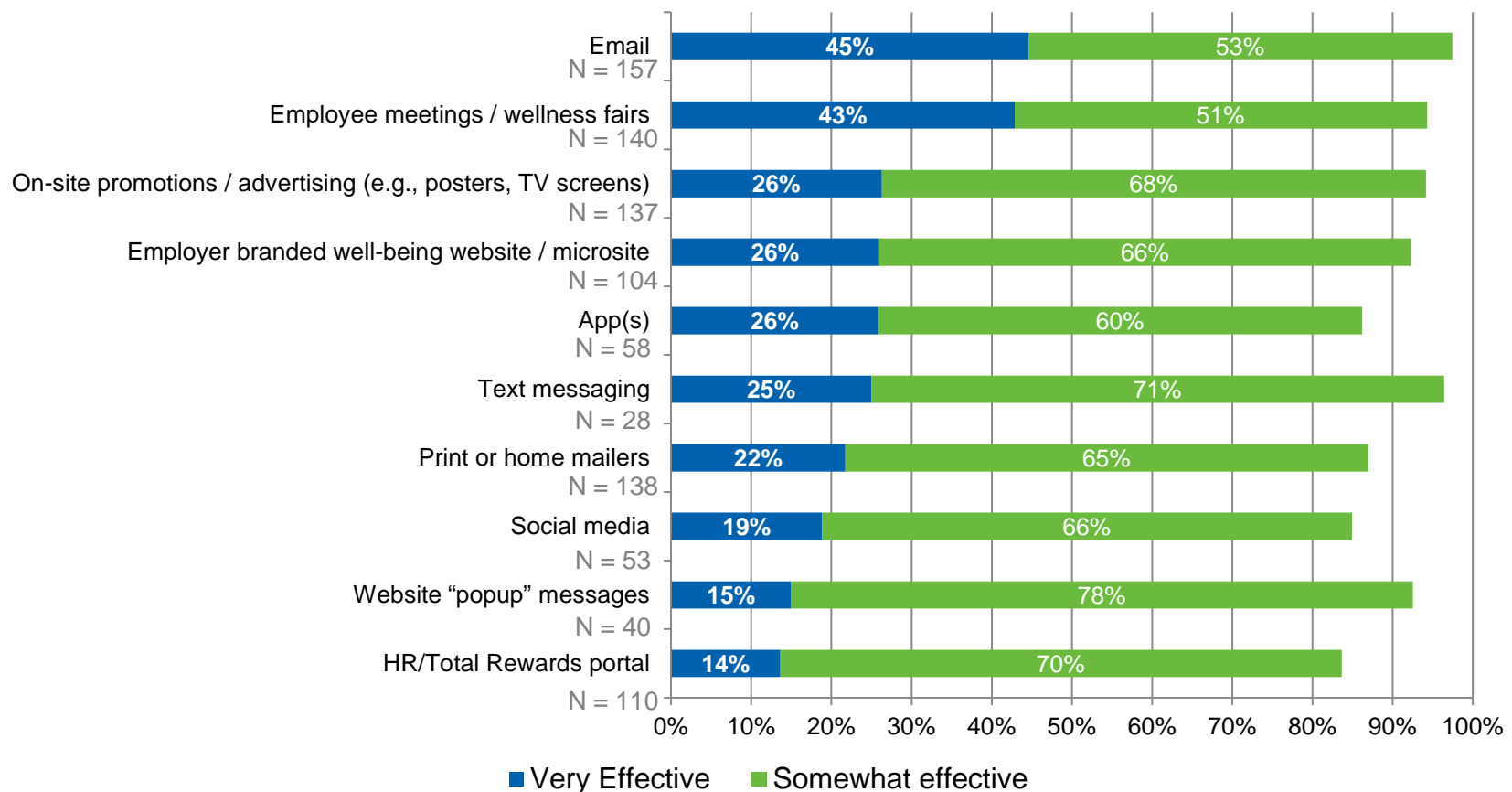
New Technologies are Supplementing Traditional Communications

Frequency that Employers Use Communication Channels to Engage Employees in Well-Being Programs

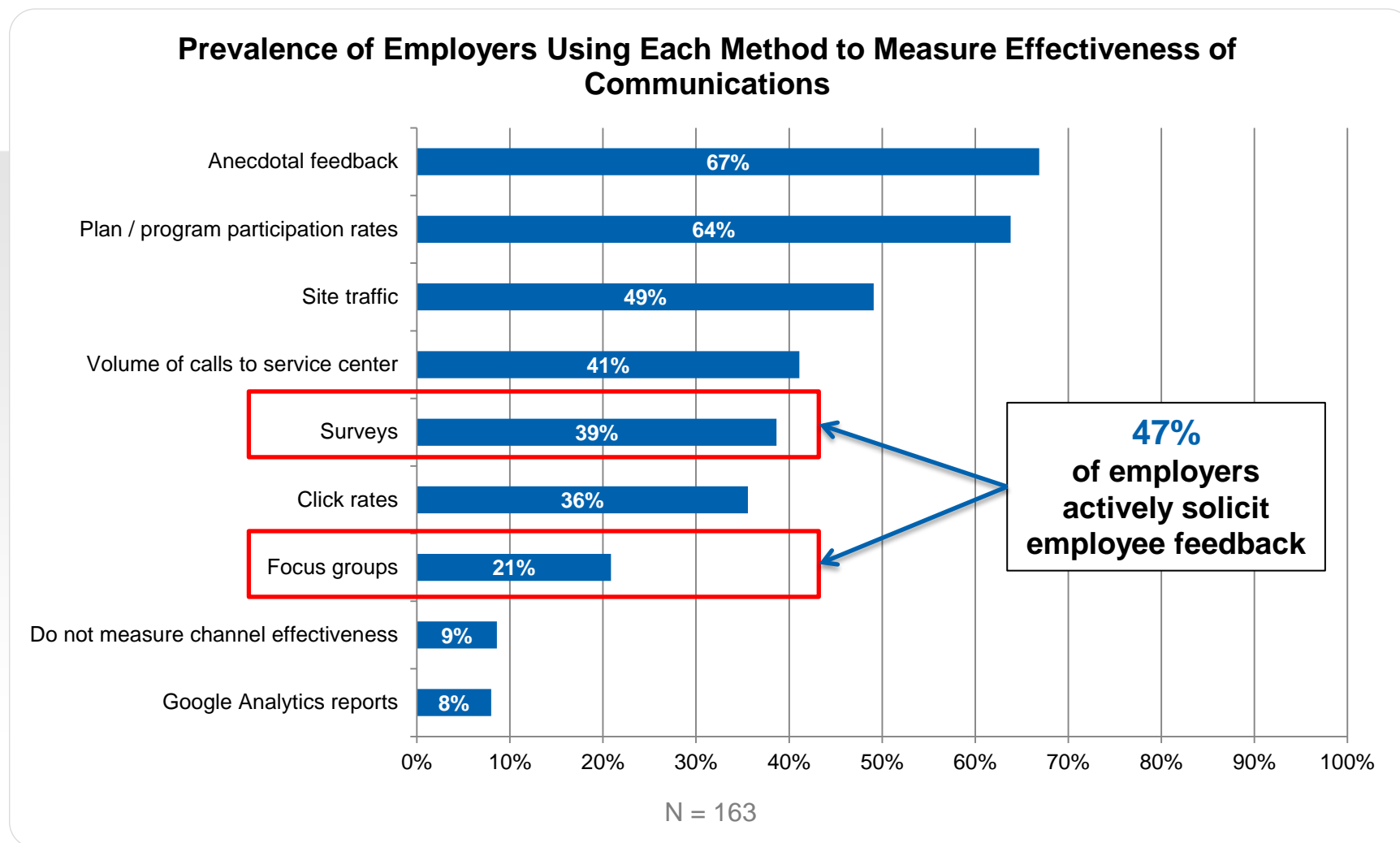


Employers Have Confidence in Their Channels of Communication

Effectiveness of Each Communication Channel at Prompting Immediate Action from Employees (Among Those That Use Them)

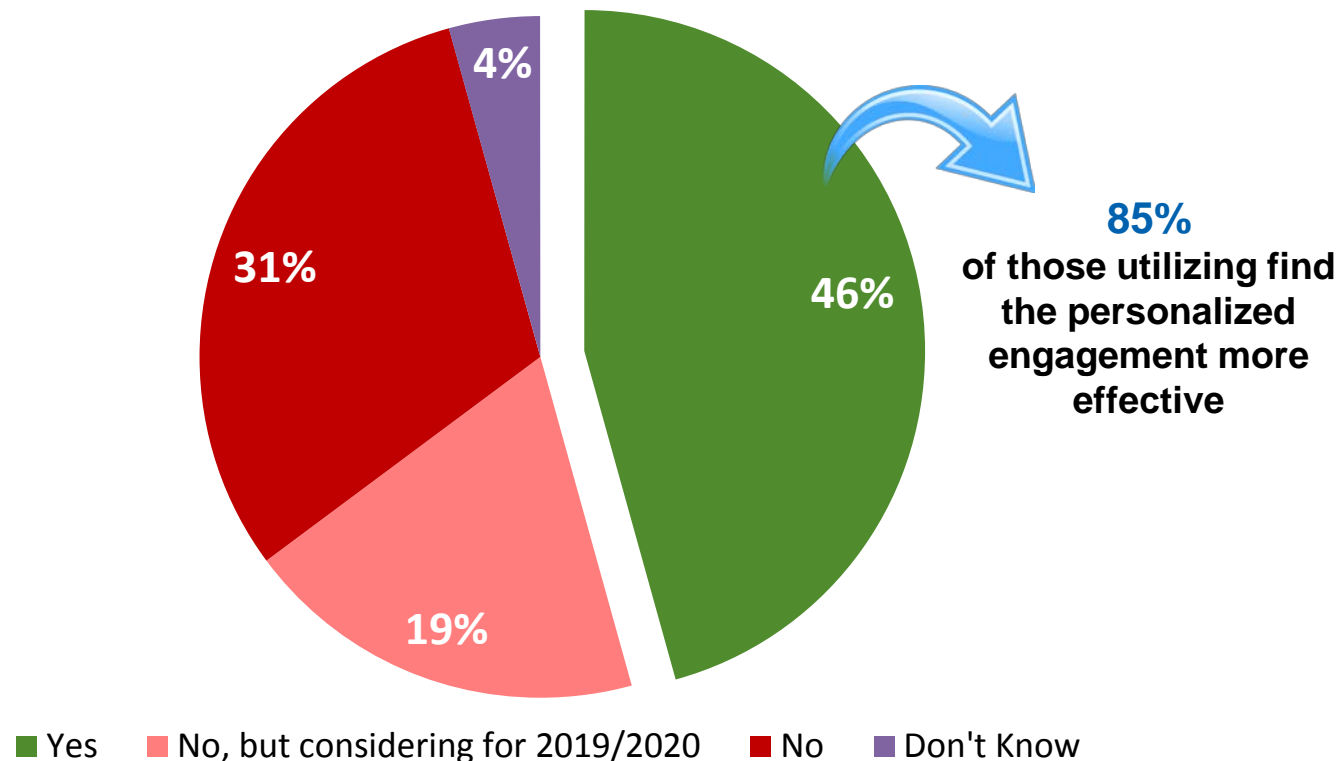


Employers Use a Variety Of Methods to Measure Channel Effectiveness



Employers are Divided on the Use of Third-Party Vendors for Outreach

Employers Using a Third Party Vendor for Personalized Well-Being Outreach



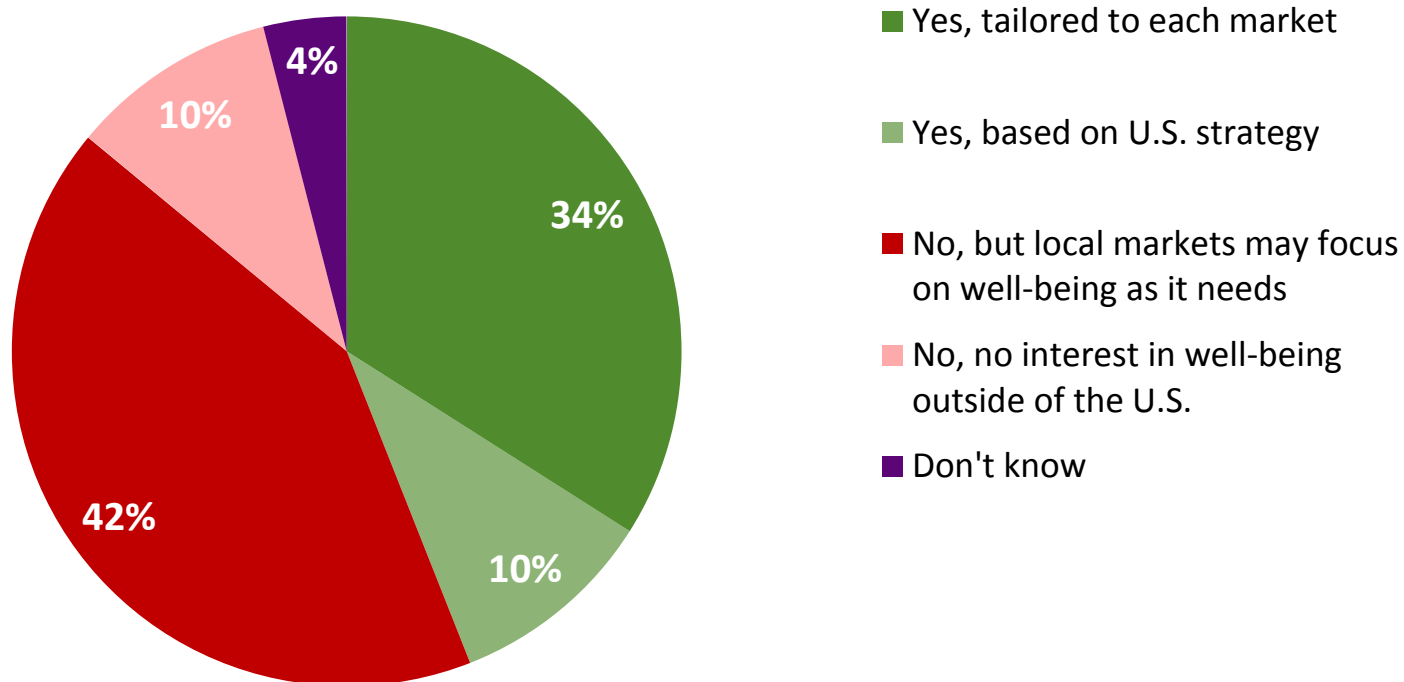
N = 162

Global Strategy



Well-Being Is Addressed Country-by-Country, if at all

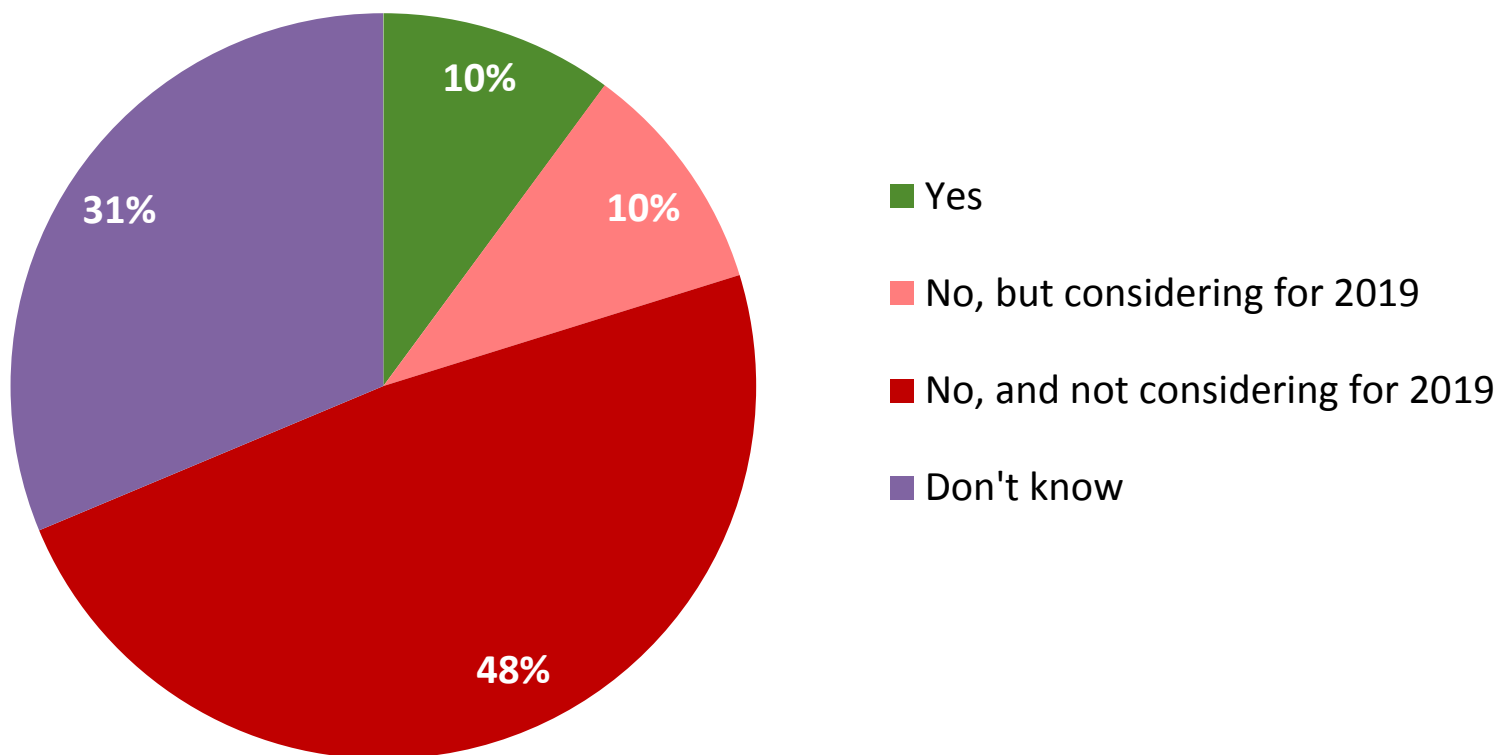
Prevalence of Global Well-Being Strategies Among Multinational Organizations



N = 100

Incentives Are Far Less Prevalent Outside the U.S.

Prevalence of Incentives/Disincentives Outside the U.S.

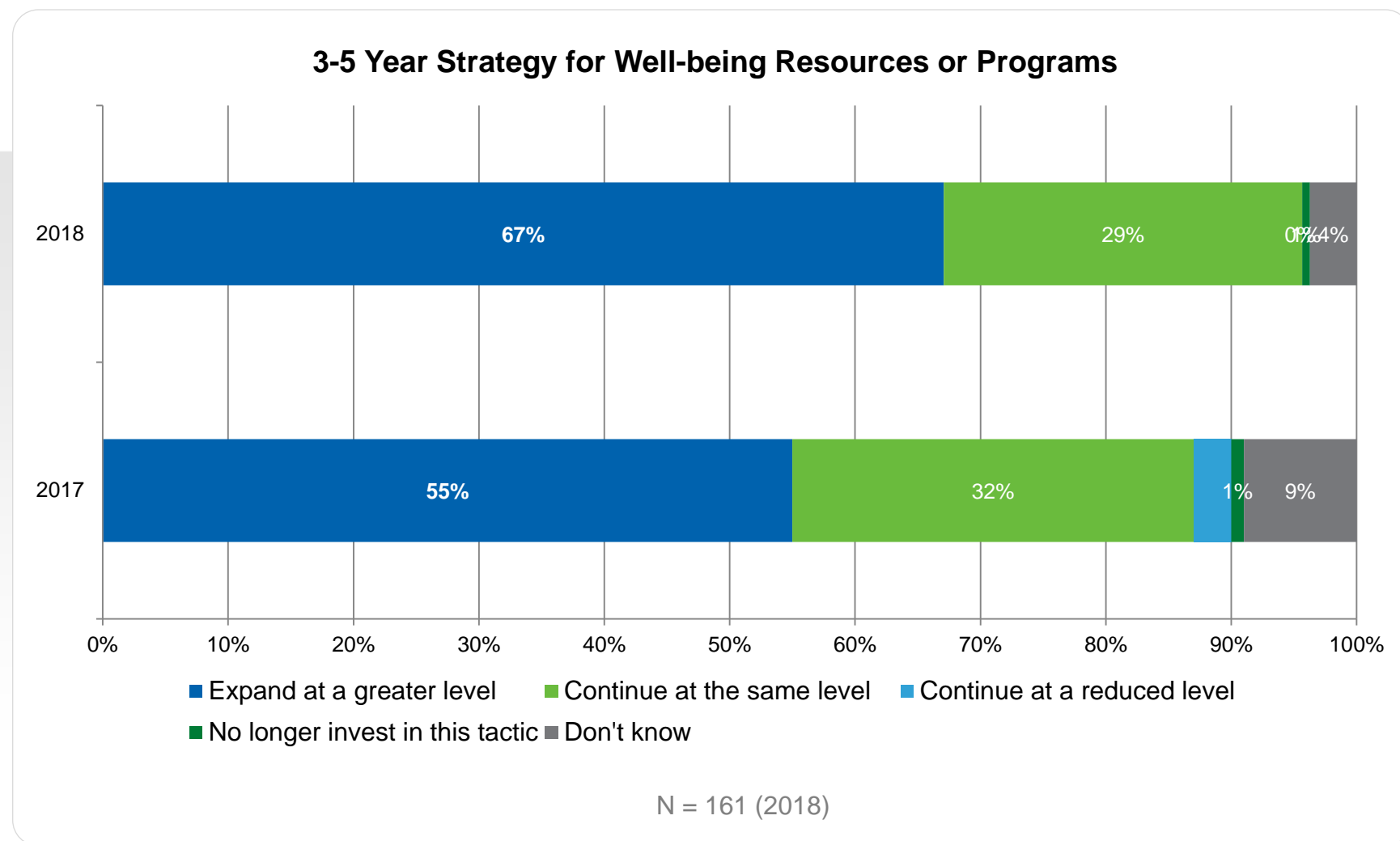


N = 99

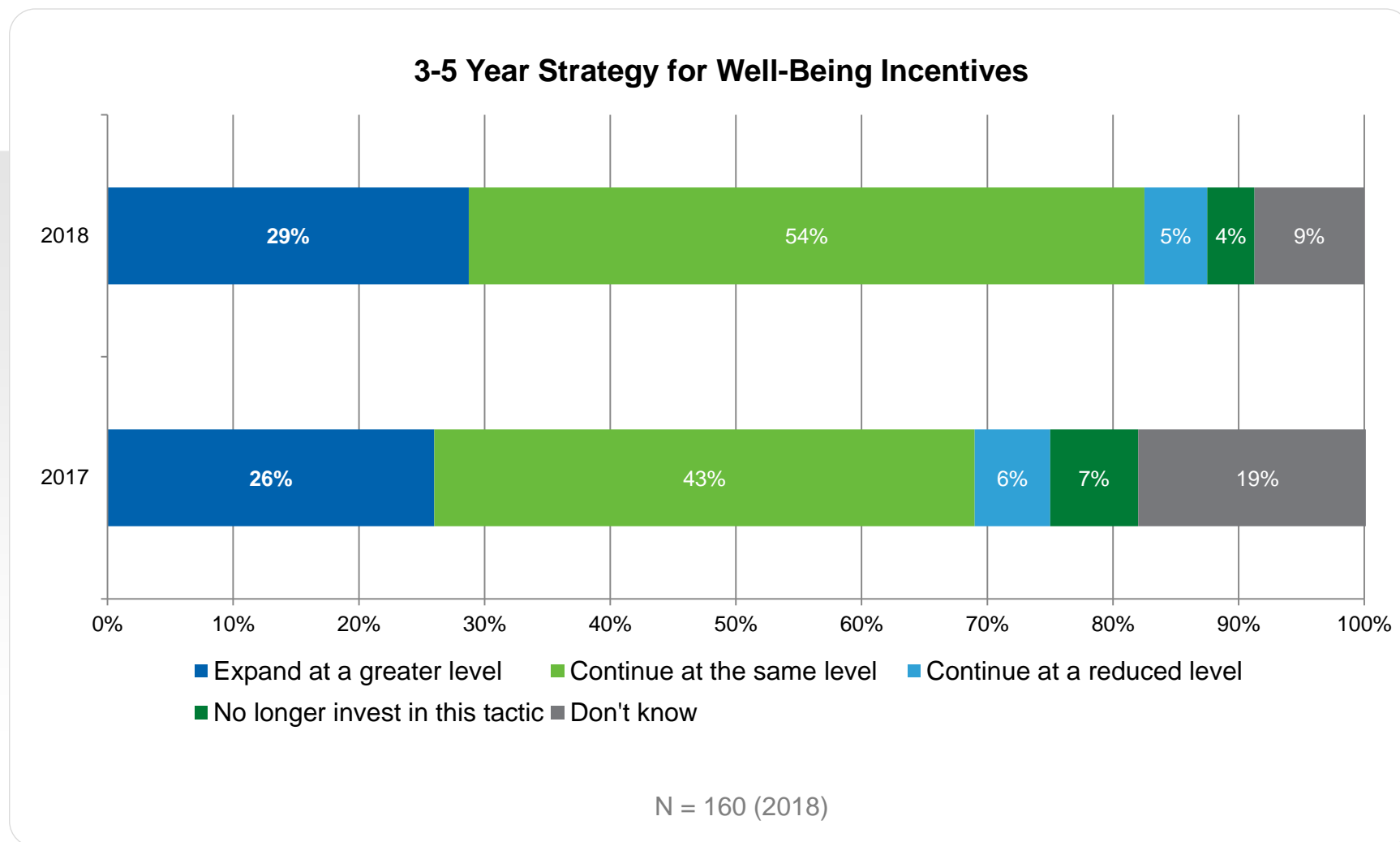
Looking Forward



Employers Will Continue to Expand Well-Being Programs



Employers Will Continue to Expand Incentives



Key Questions for Employers

- ▶ What **role** does well-being play in your organization?
- ▶ Is the **breadth** of programs offered in alignment with your well-being goals?
- ▶ Are **incentives** aligned with desired behaviors?
- ▶ What means of **communicating** are most impactful? Are there opportunities to add greater levels of **personalization**?
- ▶ Does your organization need a **global** well-being strategy?



List of Selected Participants

ADT	DTE Energy	JetBlue	Quanex Building Products
American University	Dun & Bradstreet	Kennametal	Rolls-Royce North America, Inc.
AmeriGas	Duke Realty	KeyBank	Sauder Woodworking Co.
Amgen Inc.	DuPont	Kimberly-Clark	Schwan's Shared Services, LLC
Apache Corporation	Duquesne University	L.L.Bean, Inc.	Seattle Children's Hospital
Aramark	Eastman Chemical Company	LafargeHolcim	SIGOS
Assurant, Inc.	Edward Jones	Lenovo	Smith & Nephew, Inc.
AT&T	El Camino Hospital	Levi Strauss & Co.	Sodexo
Athenahealth	Excela Health	Marathon Petroleum Company	Sprint
Banner Health	EY	MAXIMUS	Stanley Black & Decker
BASF Corporation	FANUC America Corporation	McKesson	Staples
Baylor Scott & White Health	FCA US LLC	Mercy Health	Synopsys, Inc.
BD	First American	MetLife	T. Rowe Price
Best Buy	GE Appliances, a Haier company	Mutual of Omaha	Texas Health Resources
BMC Software	General Mills	NBA	Time Warner
BorgWarner Inc.	Hanes Brands Inc.	Nestle	The Toro Company
CareFirst BCBS	Harris Corporation	Newell Brands	Trustmark Companies
Chesapeake Energy	Harris Health System	NextEra Energy, Inc.	Universal Health Services, Inc.
CNO Financial Group	The Hartford	Nissan North America	University System of Georgia
Compass Group USA	HCR ManorCare	O'Neal Industries	Unum
Consumers Energy	Hillenbrand, Inc.	OGE Energy Corp	UPMC
Cook Children's	Honeywell	On Assignment, Inc.	US Foods
Crowley	Huntsville Hospital	Pfizer	Utah State University
CVS Health	IBM	Pinnacle Foods	Volvo
Delta Air Lines	IDEXX	Pitney Bowes	Webster Bank
Dematic Corp	ING Financial Services LLC	Portland State University	Wells Fargo & Company
Devon Energy	Intel	Praxair, Inc.	Zachry Group
Diageo North America	JE Dunn Construction	Qualcomm	

Select list of participants that agreed to show their names

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