

# Consumer sentiment during a time of global crisis



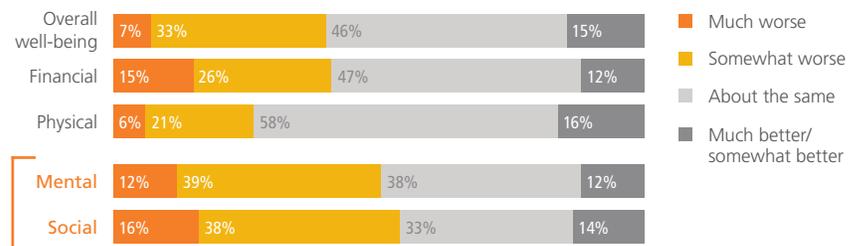
To help guide employer workforce strategies during this rapidly evolving health crisis, Optum® researched how employee well-being, work arrangements, productivity and workplace policies are being impacted.

## Well-being indicators

Employees are feeling a significant impact on mental and social dimensions of well-being.

- Over half (51 percent) of respondents said their mental well-being was at least somewhat worse.
- Fifty-four percent said their social well-being was at least somewhat worse.

Q: "To what extent have COVID-19-related work/life changes impacted your well-being?"

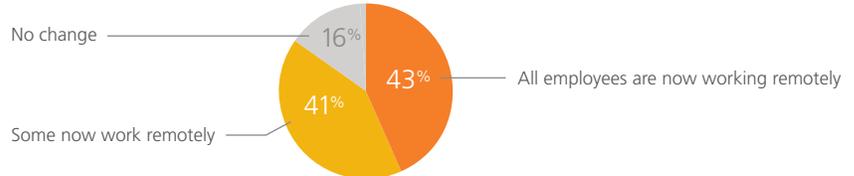


Some percentages sum to greater than 100 percent due to rounding.

## Work arrangements

The global health crisis is impacting employees personally and professionally, with 84 percent of respondents reporting their employer has created new work arrangements in this time of crisis.

Q: "How has the structure of your business changed since COVID-19?"



## Productivity impact

Given the impact this crisis is having on well-being coupled with unprecedented shifts in work arrangements, it's not surprising that employees would report a reduction in productivity levels.

Q: "To what extent have COVID-19-related work/life changes impacted your workplace productivity?"

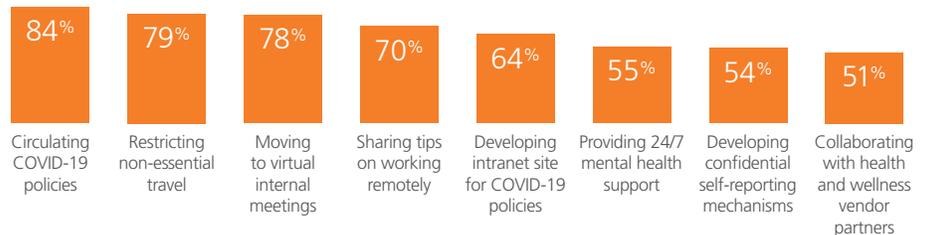


## Employer support

As productivity and well-being levels decline, early research demonstrates that employers are implementing sweeping changes to workforce policies and services. According to employees, over half of employers are supporting them in several important ways.

Q: "In response to the COVID-19 pandemic, is your employer providing the following services?"

Over half of employers are supporting employees in several key areas:



## Key considerations

During these uncertain times, employers can support employee health and well-being by:

1. Expanding workforce strategies to specially address social and mental well-being needs
2. Supporting productivity with training in best practices for remote working, virtual meetings and team communication
3. Maximizing relevant services offered by health and wellness vendor partners

Less than half of employees (47%) report their employer is providing 24/7 clinical support (e.g., telemedicine services).

### Learn more

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## Our methodology

### Online survey: March 25–26, 2020

N=500 U.S. adults employed full-time

#### Employer size:

- 300 survey participants work for employers with 3,000+ employees
- 200 survey participants work for employers with 500 to 2,999 employees

#### Survey requirements:

- All participants were enrolled in health insurance sponsored by their employer for at least three months prior to taking this survey.
  - All participants consider themselves a health care decision-maker for their household.
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