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TEN YEARS OF HEALTH AND WELL-BEING AT WORK:

Learning from our  
past and reimagining  
the future



Employers are getting smart, serious and sophisticated in their approach to employee health and well-being. They are using data, demographics and technology in smart ways to fuel program innovation, relevancy and engagement. Behavioral health is top of mind as employers get serious about decreasing mental health stigma and increasing access to services. And they are adopting sophisticated strategies to address complex and chronic conditions as costs and prevalence rates increase across the U.S.



## INTRODUCTION

This report explores the survey responses of more than 500 U.S.-based employers. It shows how employers have shifted their approach from employee wellness to well-being over the past decade and what they plan to do in the future.

You will learn how employers are addressing:

### **BEHAVIORAL HEALTH:**

Reducing stigma, expanding access, treating substance use disorders, and integrating physical and behavioral health

### **WORKPLACE DEMOGRAPHICS:**

Offering programs for a diverse workforce, especially women

### **COMPLEX AND CHRONIC CONDITIONS:**

Leveraging Centers of Excellence and advocacy services

### **TECHNOLOGY:**

Increasing employee health engagement, using artificial intelligence and virtual reality

Insights found in this report suggest opportunities to enhance well-being programs as well as ways to manage the challenges of administering them.

EMPLOYERS GET SERIOUS ABOUT

# Behavioral health

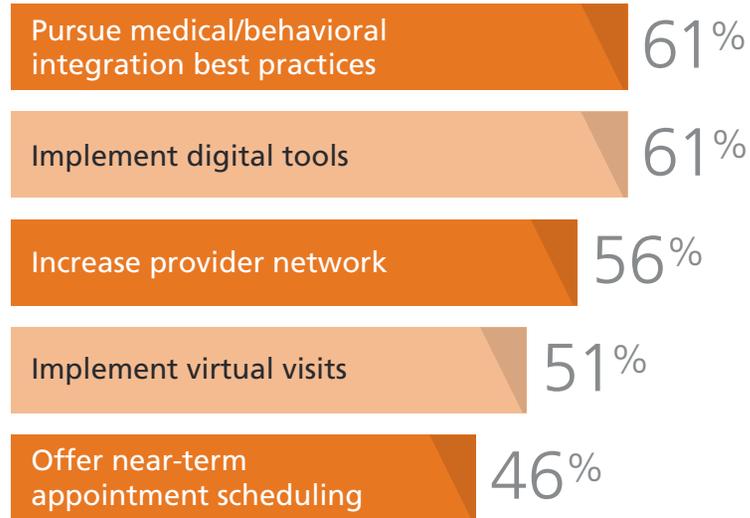
Behavioral health remains a top concern for employers. Nearly all employers say they plan to reduce the stigma surrounding mental health. A majority express concern about substance use disorders and access to behavioral health services.



## Almost nine in 10 employers plan to address mental health stigma and have concerns with employee access to behavioral health services.

**87%**  
of employers are concerned with the level of access their employees have to behavioral health services

Employers are exploring a variety of ways to increase access to behavioral health services.



An overwhelming majority of employers are exploring a variety of means to improve access. They are deploying digital tools, expanding provider networks, offering virtual visits and eliminating discouraging wait times for appointments.

**88%**  
of employers have plans to address mental health stigma (within a year).

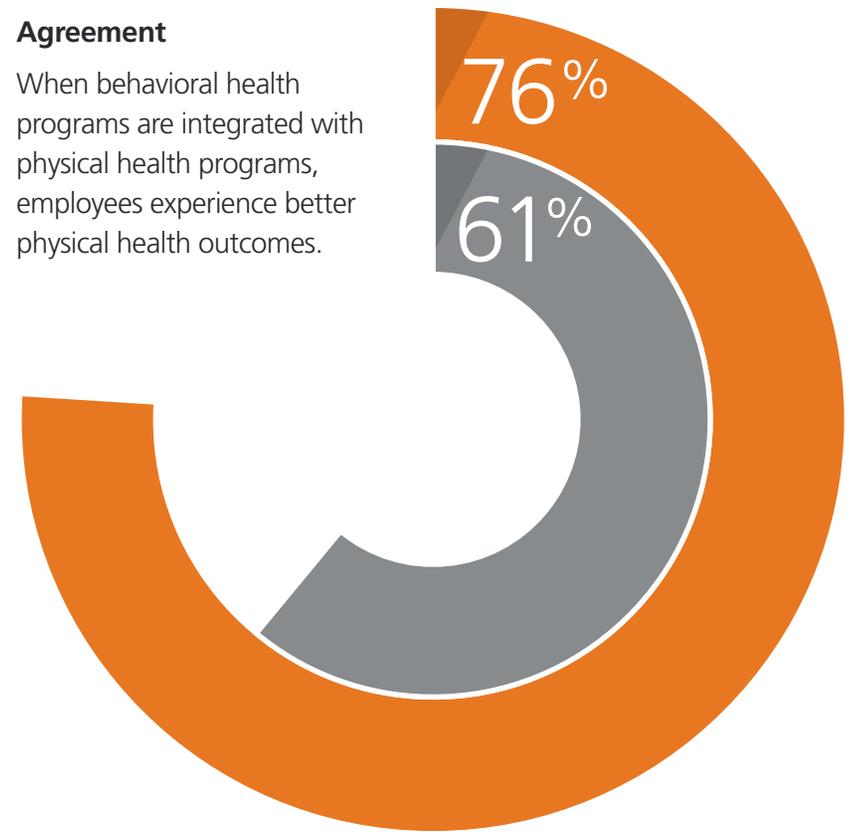
## It's a strong belief that behavioral and physical health program integration is key to better physical health outcomes.

### Integrating physical and behavioral health

There is a profound connection between behavioral health and physical health. Awareness of this critical relationship and how it impacts an individual's overall well-being is spreading steadily. Roughly 75 percent of employers believe that integrating physical and behavioral health programs leads to better physical health outcomes — a 25 percent increase from how employers responded last year.

### Agreement

When behavioral health programs are integrated with physical health programs, employees experience better physical health outcomes.



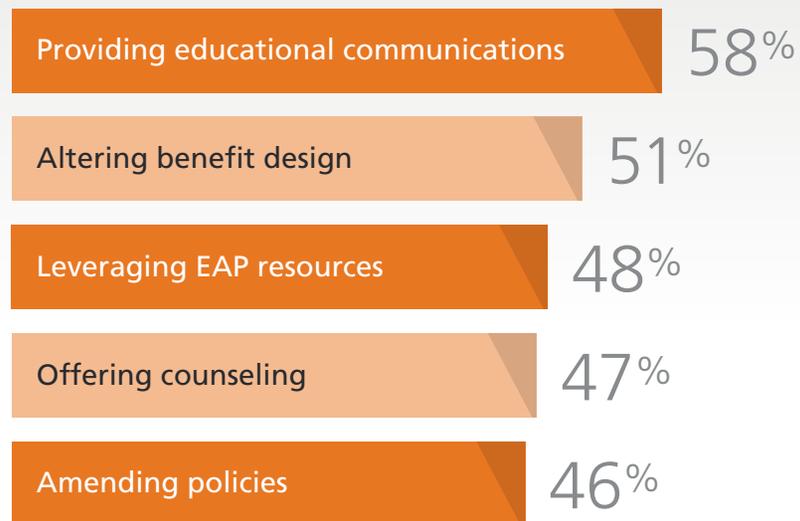
2018

2017

## Many are concerned with substance use disorder and are addressing it within their organization.



### Actions to address (Among those concerned)



### Substance use disorder

Concern about substance use disorders also figures large among most employers, and with good reason. Alcohol use disorder and opioid use disorder affect millions of Americans, their families and their fellow employees.

The opioid use epidemic and its deadly fallout across the country are inspiring employers to take action. Many employers are launching education efforts, expanding their benefits, leveraging their Employee Assistance Program (EAP) and offering counseling.

## EMPLOYERS GET SMART ON Workplace demographics

### Women's health

Demographics are an important consideration in well-being programs. **74 million** women make up almost **47 percent** of all workers in the U.S. Women also own close to **10 million** businesses, accounting for **\$1.4 trillion** in receipts.\*

Employers are taking note. More than eight out of 10 employers say it's very important to offer health and well-being programs tailored specifically for women's needs. They also say they plan to increase their investment in women's well-being over the next three years.

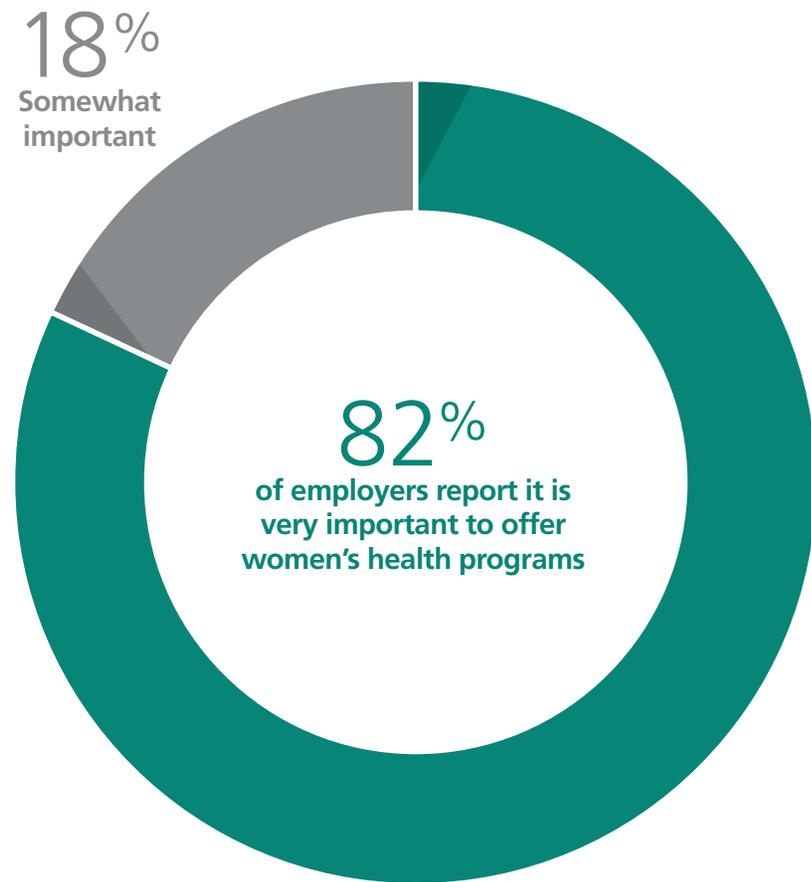
\*<https://blog.dol.gov/2017/03/01/12-stats-about-working-women>



## Over three-quarters feel it is very important to offer programs specific to the health needs of women.

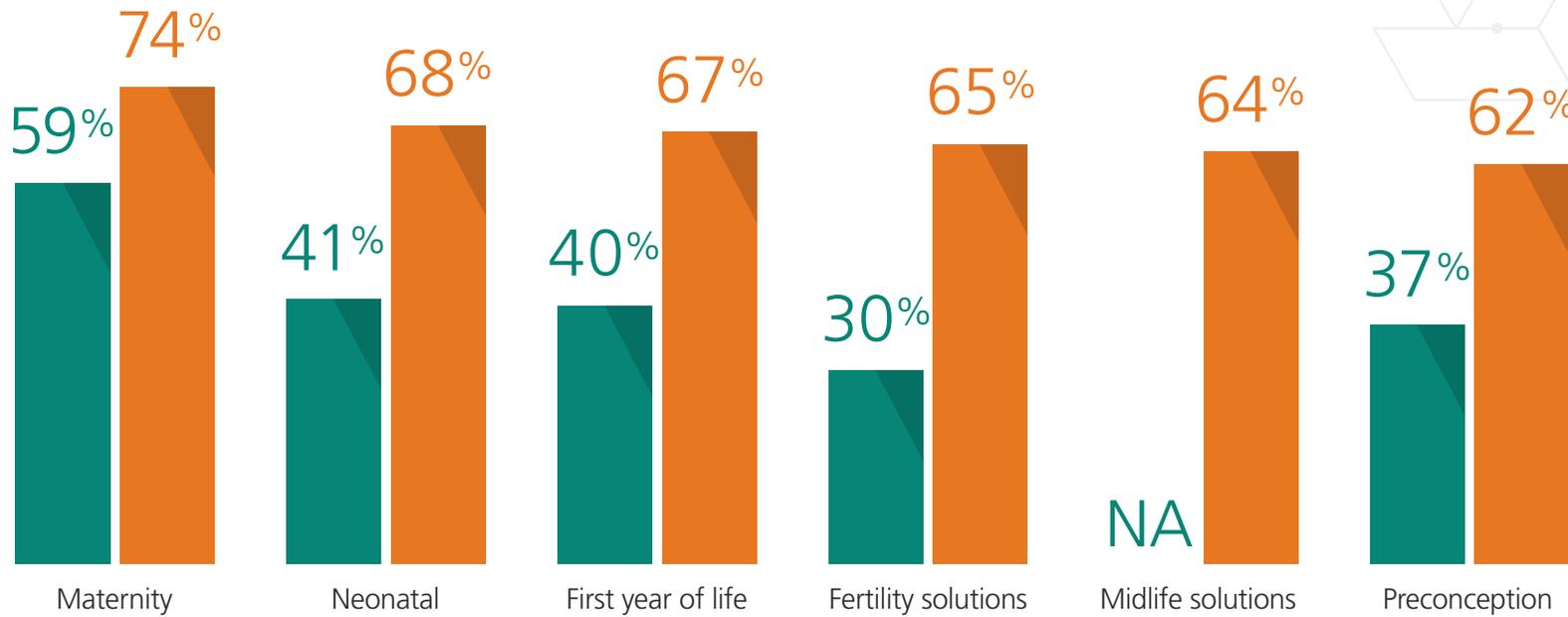
The prevalence of women’s programs that address their health care needs from pre-conception to midlife continues to expand.

**84%** plan to increase investment in women’s well-being over the next three years.



## The prevalence of women's program offerings continues to grow.

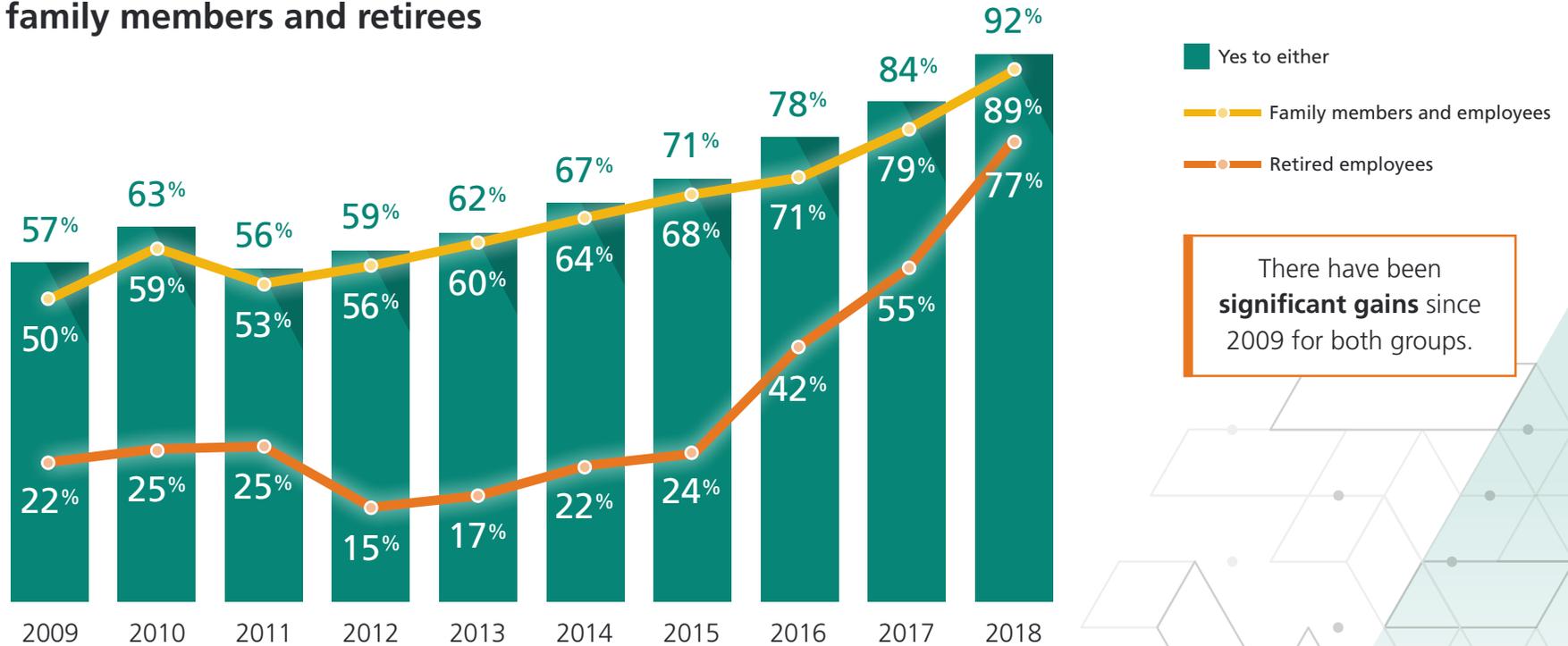
Percentage of employers offering the following programs



2018 2016

## More employers are extending programs to family members and retirees.

Percentage of employers offering programs to family members and retirees



### Family members and retirees

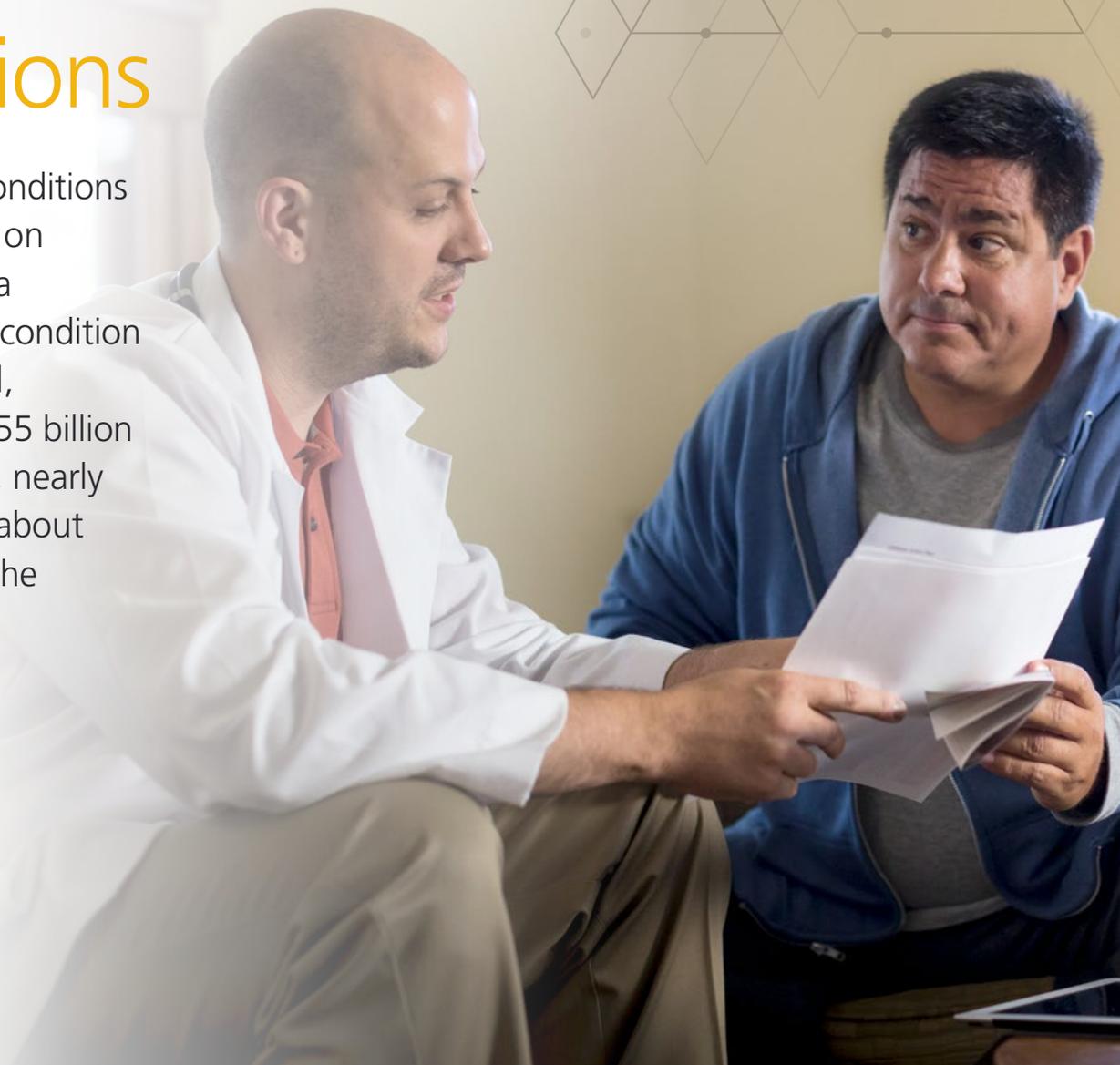
Increasingly, employers also are offering programs to family members. Family members can frequently influence an employee’s exercise, diet and other lifestyle choices. Well-being programs can be more effective when family members buy into them, too. Concerned about the dramatic rise in health care costs for older individuals, employers also are offering their well-being programs to their retirees.

EMPLOYERS GET SOPHISTICATED WITH STRATEGIES TO ADDRESS

# Complex conditions

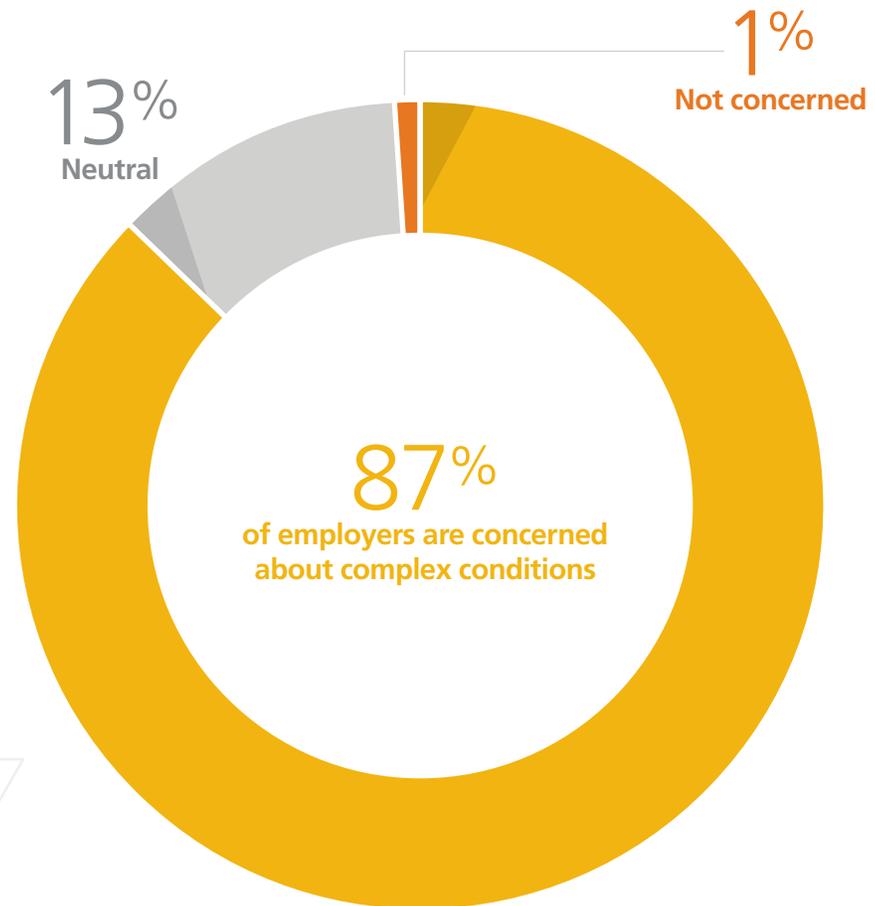
Cancer, musculoskeletal issues, cardiac conditions and renal disease take an enormous toll on those who have them. They also create a disproportionate economic burden. Four condition categories — oncology, musculoskeletal, cardiology and kidney — account for \$455 billion in health care spending.\* Not surprisingly, nearly nine out of 10 employers are concerned about costs related to these conditions. So are the people who suffer from them.

\*"Complex, Costly Conditions" white paper, Optum, 2019

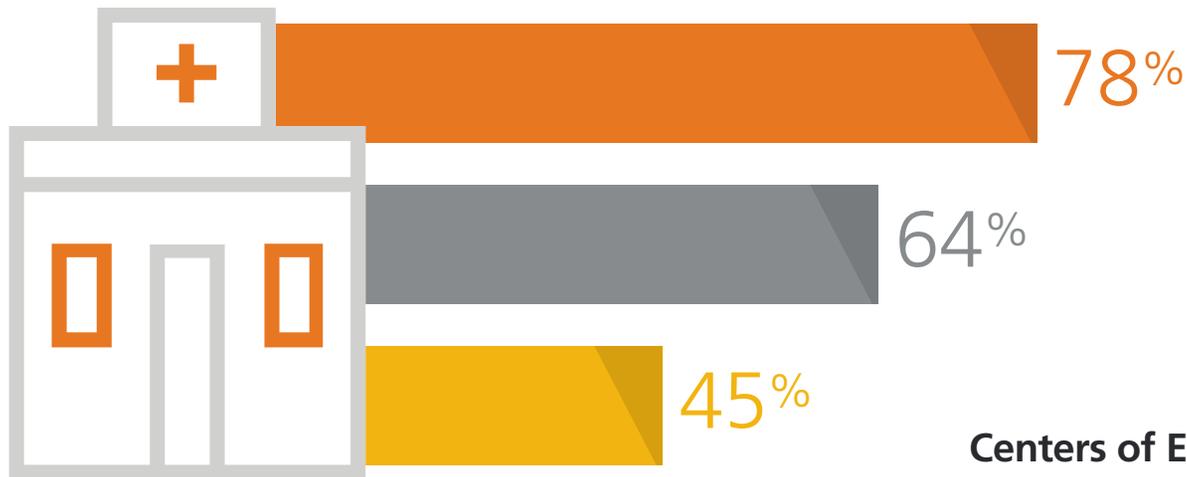


## A large majority of employers are concerned with costs related to complex and chronic conditions.

These conditions and related needs are complicated and profound. Employers are responding by adopting more nuanced strategies, including contracting with Centers of Excellence and leveraging advocacy services to help guide patients through the health care system.



## Centers of Excellence strategy implementation continues to increase.



### Centers of Excellence

More than three-quarters of employers are deploying a Centers of Excellence (COE) strategy. COE providers have strong, demonstrated outcomes for specific high-cost, high-risk surgeries and conditions, such as hip and knee replacements or cardiac care.

With their ability to contain costs and provide better outcomes for patients, COEs have gained remarkable traction among employers over the past two years, growing from 45 percent to 78 percent.



## Advocacy services

People with complex and chronic conditions tend to have complex care plans and need help finding and coordinating high-quality care. Advocacy services, designed to help people navigate the complex health care system, can help.

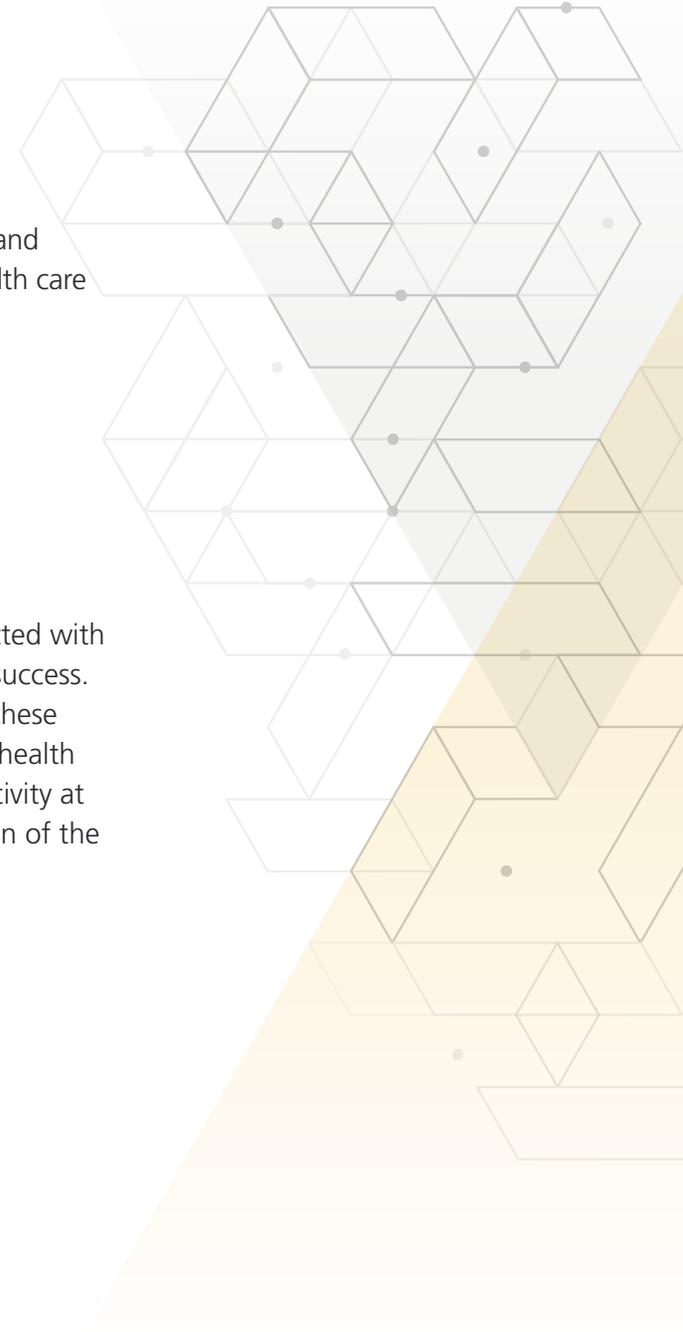
About **43 percent** of all employers offer these services, with jumbo employers taking the lead at **46 percent**, and medium at **35 percent**.

### Employers are leveraging advocacy services and finding success.

(Percentage highly successful; among those offering service)



Employers who have contracted with these services are reporting success. In fact, nearly two-thirds of these employers are noting better health outcomes, improved productivity at work and increased utilization of the right benefits and services.

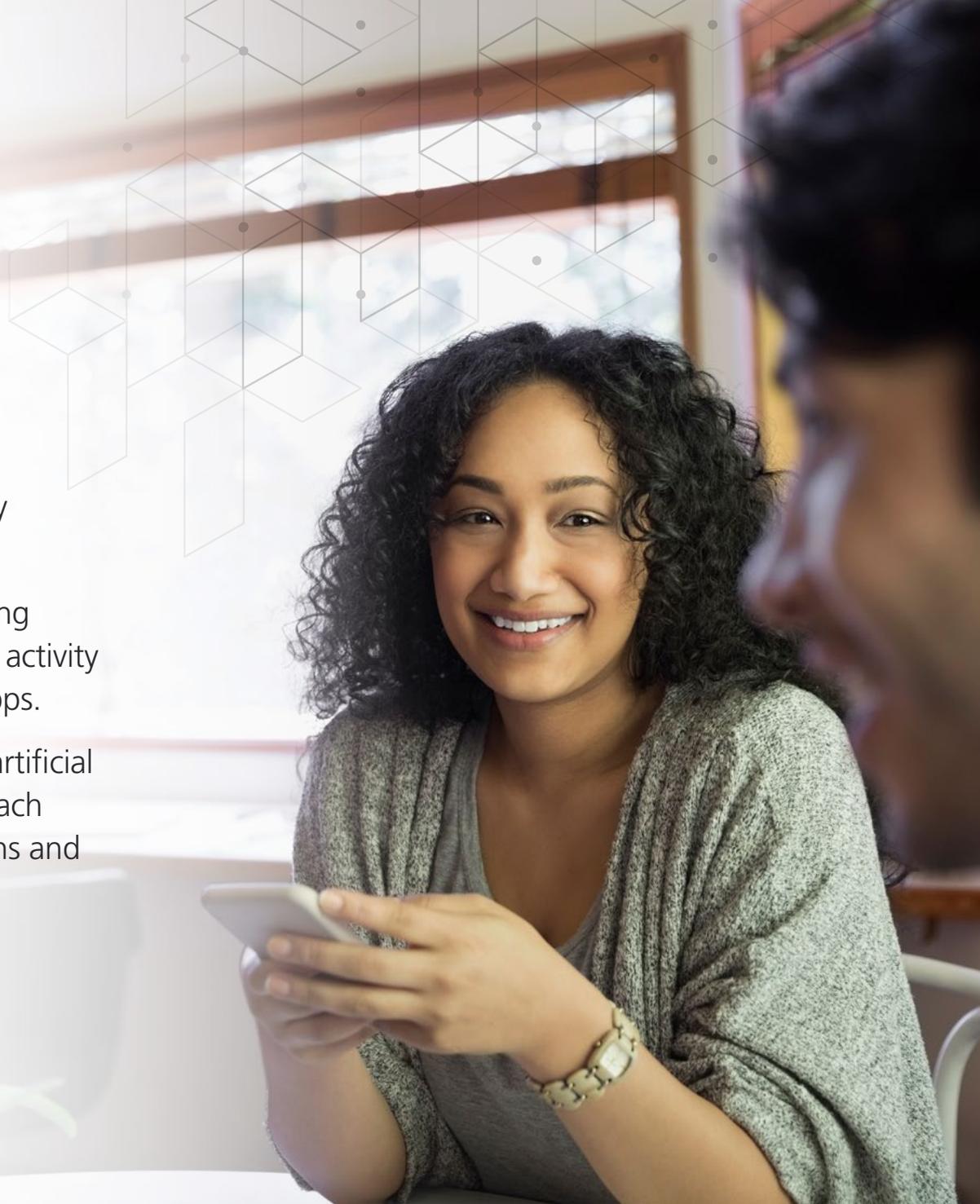


## EMPLOYERS EMBRACE Health tech

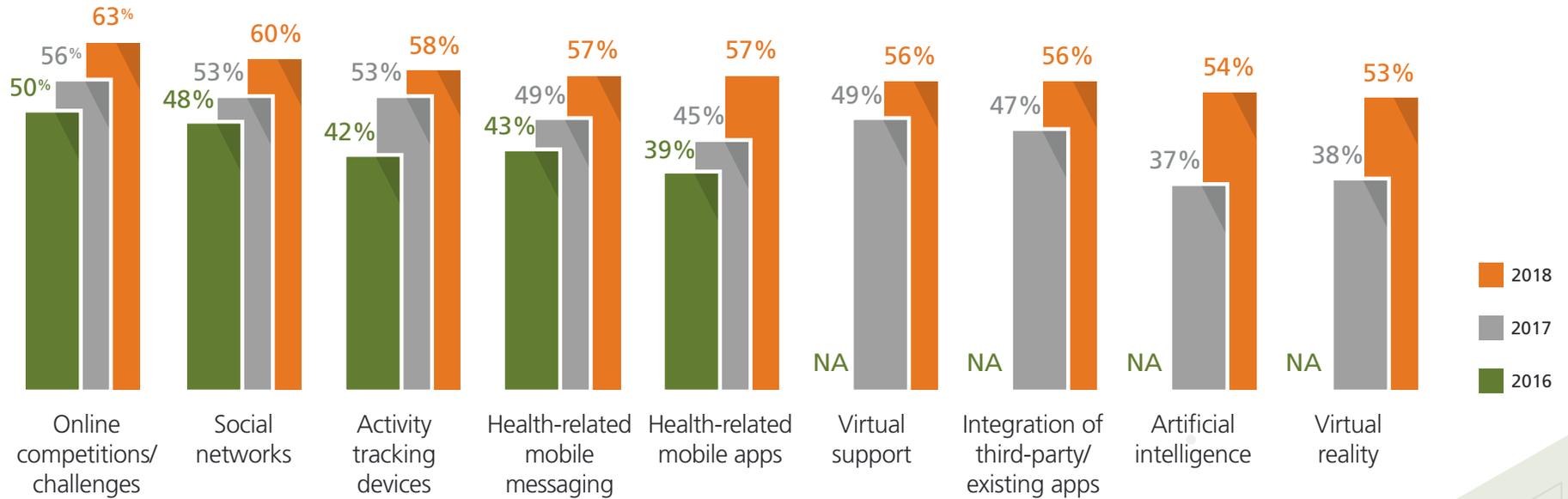
With consumers becoming more adept at navigating the digital landscape, the use of technology to engage employees in well-being programs is booming, especially among large employers.

A growing number of employers are offering online walking challenges, devices to track activity levels, and health-related text alerts and apps.

In addition, employers also are turning to artificial intelligence to customize experiences for each employee, with individual recommendations and next-best steps.



## Technology use to engage employees in healthy behaviors is trending upward and continued growth can be expected.



Employers say their investments in technology are paying off, with the majority rating their efforts as highly successful.

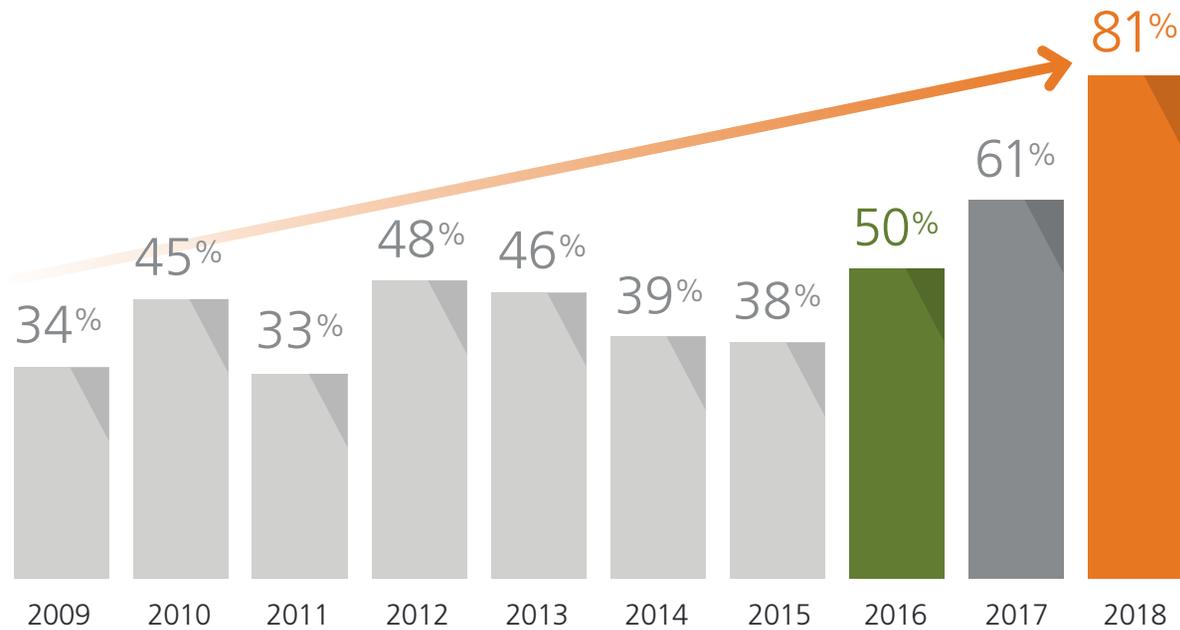
Given its positive trajectory, the use of technology is expected to continue its upward trend.

Large and jumbo employers are **significantly driving this trend.**

## FINAL THOUGHTS

Today, well-being programs are an indispensable benefit, with most employers planning to increase their investment.

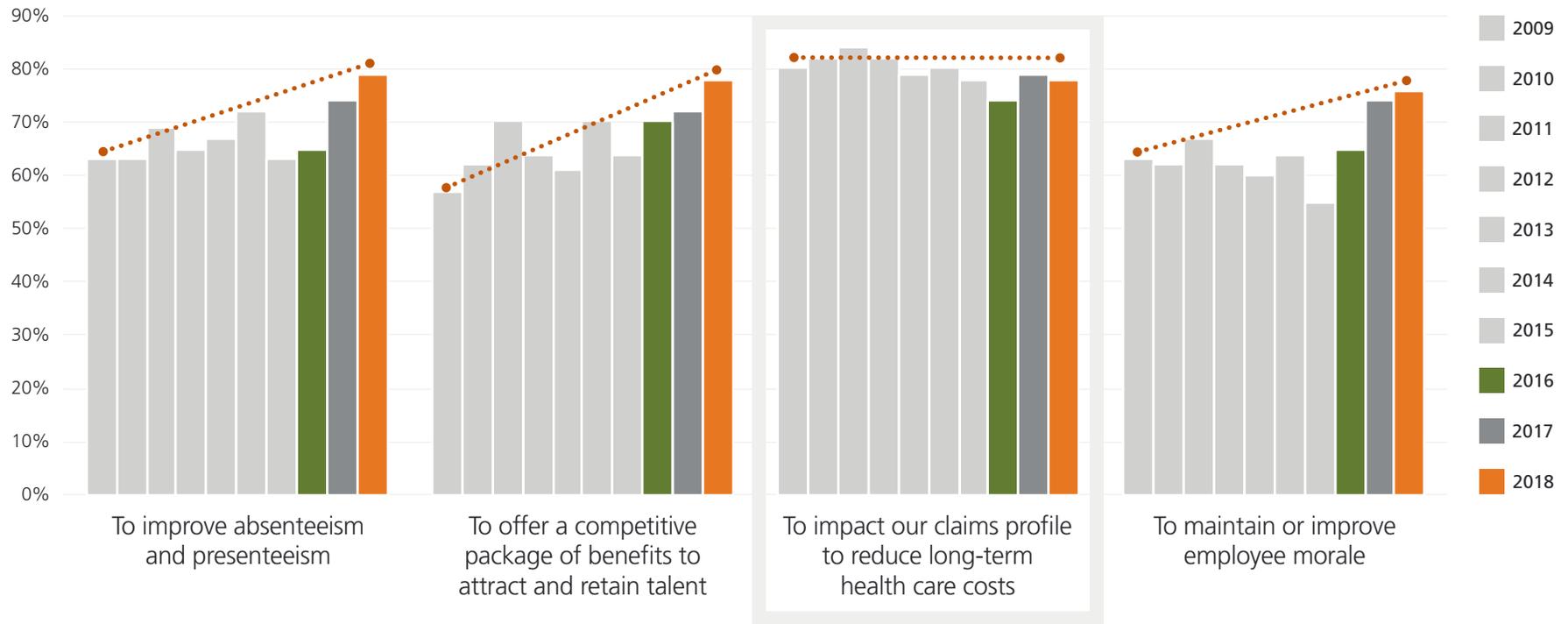
**Over 80 percent of employers expect their health and wellness program spending to increase.\***



\*Over the next three years.

## The top reasons for offering programs have evolved.

Well-being programs have the potential to create value for employers beyond containing health care costs. Employers recognize that well-being strategies play a critical role in driving a positive employee experience that results in healthy, happy, loyal and productive employees.



- Outcomes like **health care cost savings** are still important but have changed little over time.
- Outcomes like **increased recruitment, retention, morale and productivity** are significantly climbing.

## Conclusion

The insights in this survey are practical yet inspiring.

They show real-world options for employers committed to helping employees become healthier, happier and more productive.

As employers and health plans continue to focus on population health strategies, it becomes even more important for them to find a partner who can help them:

- Improve access to behavioral health services and address mental health stigma
- Provide an integrated medical benefit management strategy that includes utilization management, care management, focused claims review and Centers of Excellence to address complex and costly conditions
- Leverage data and technology to drive engagement, program innovation and relevancy across diverse populations

## Methodology

### Company size

#### Medium

100–2,999 employees

#### Large

3,000–9,999 employees

#### Jumbo

10,000+ employees

### Method

#### Web-based surveys

with respondents who are members of an online panel

Surveys were conducted in

**December 2018 – January 2019**

2018: n = 544 (medium, large, jumbo)

10-year insights: n = 435 (large and jumbo only)

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