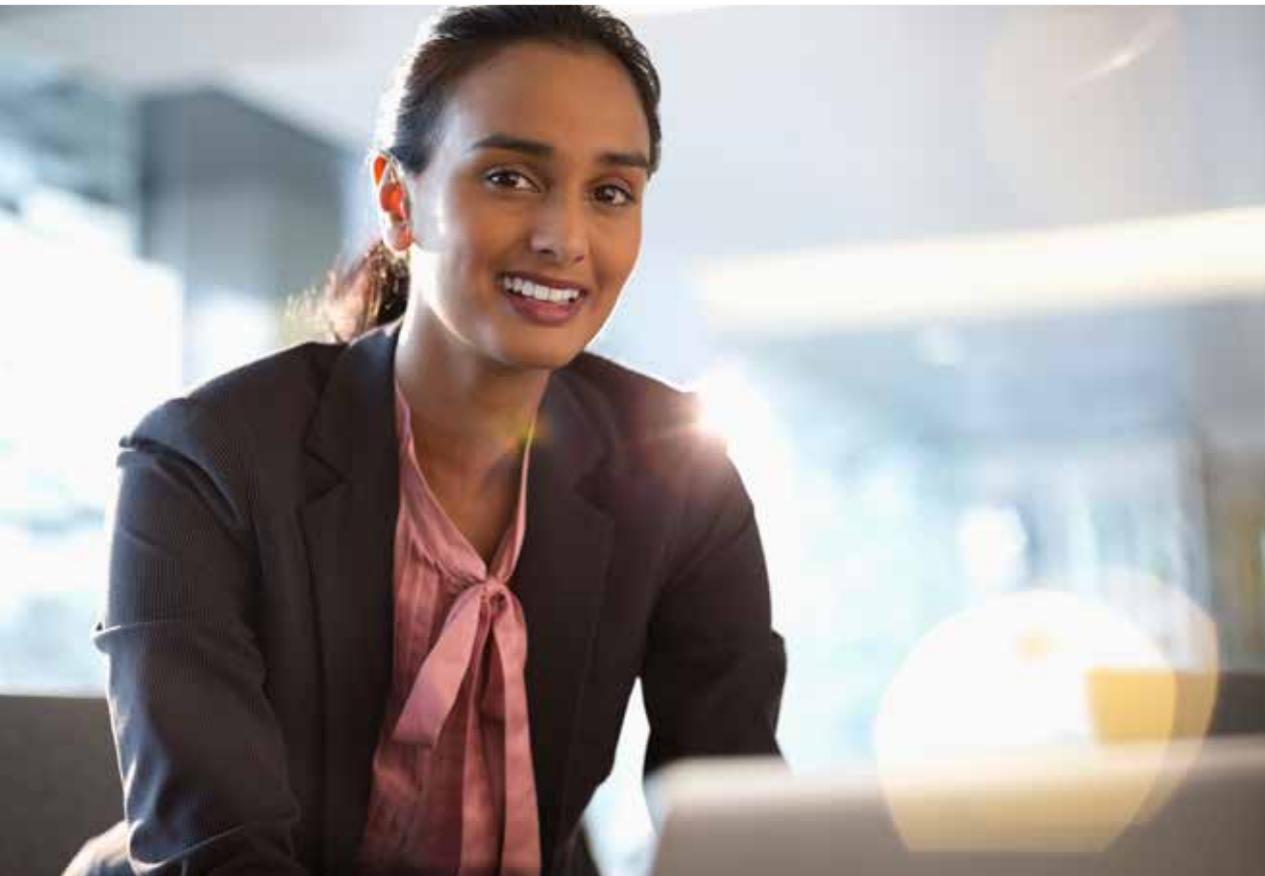


Employee wellbeing: International differences and commonalities



Employers worldwide share several key approaches to health and wellness. They also have distinct differences. This white paper highlights seven insights that define those shared experiences and exceptions based on the following regions:



APAC
(Asia-Pacific)



EMEA
(U.K. + other European countries + United Arab Emirates)



LatAm
(Latin America)

The insights provided in this white paper are based on findings from the 2017 Optum® “International Wellness in the Workplace Benchmark Study” of global health management programmes. This research enables employers to:

- See how they compare with their regional peers
- Gain insights into evolving global practices in the health management field
- Consider thought starters that can help drive greater programme success

SURVEY DESCRIPTION

The Optum “International Wellness in the Workplace Benchmark Study” is a research survey of 273 multinational employers (3,000 or more employees) located in Asia-Pacific (APAC); United Kingdom, Europe and United Arab Emirates (EMEA); or Latin America that offer two or more health and wellness programmes.

THE SEVEN KEY INSIGHTS

- 1 PROGRAMMES:** The mix of programmes offered varies regionally.
- 2 INCENTIVES:** There are some regional differences when it comes to the types of incentives offered.
- 3 PROGRAMME SUCCESS:** Generally, all regions find their programmes equally successful in terms of increased productivity, improved business performance and other key metrics.
- 4 STRATEGY AND BUDGET:** Most have a person dedicated to promoting health and wellness. Generally, all regions have similar strategies and beliefs.
- 5 ENGAGEMENT:** There will be substantial growth in the usage of various emerging engagement strategies. There are some regional differences when it comes to emerging engagement strategies.
- 6 PHYSICAL WORK ENVIRONMENT:** To varying degrees, employers worldwide are improving the physical work environment to help employees make healthy decisions.
- 7 EMPLOYEE WELLBEING AND CULTURE OF HEALTH:** Across all regions, about 50 per cent believe they are contributing to improvement in employee wellbeing.



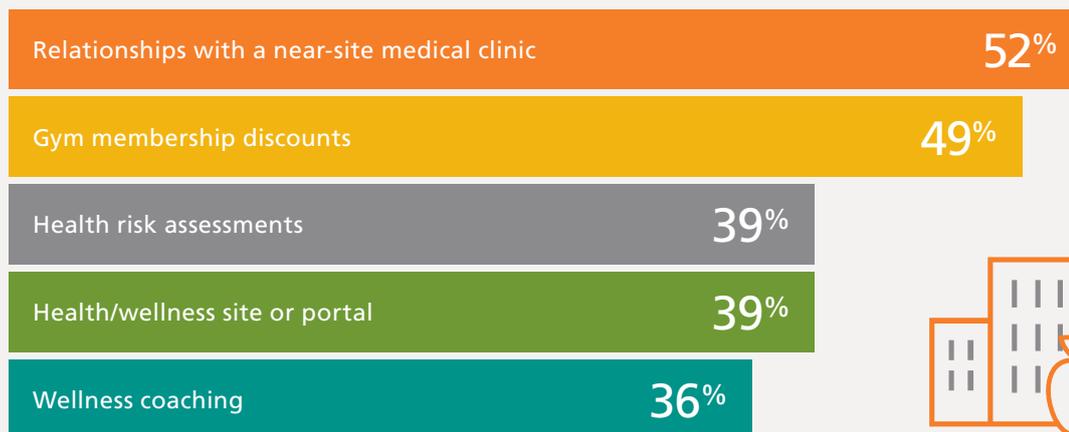
The following pages provide support for each of the above.



PROGRAMMES

On average, employers surveyed offer six health and wellness programmes. APAC employers offer the most.

The top five programmes most commonly offered



Approximately one-quarter to one-third of employees participate in programmes.

There are some differences in programme offerings by region, as evidenced by the five top and bottom programmes. But overall, regional participation rates don't vary significantly.

Top five wellness and health programs offered by region

APAC

1. Relationship w/ near-site clinic
2. Health/wellness site/portal
3. Gym membership discounts
4. Wellness coaching
5. Health risk assessments

EMEA

1. Relationship w/ near-site clinic
2. Gym membership discounts
3. Onsite/worksite fitness center
4. Health risk assessments
5. Weight management programme

LatAm

1. Gym membership discounts
2. Tobacco cessation programme
3. Health risk assessments
4. Health/wellness site/portal
5. Onsite medical clinics/ worksite clinics and healthy pregnancy programmes

Bottom five wellness and health programs offered by region

APAC

1. Sleep health programme
2. Flu vaccines
3. Tobacco cessation programme
4. Musculoskeletal/ orthopedic programmes
5. Onsite/worksite fitness center

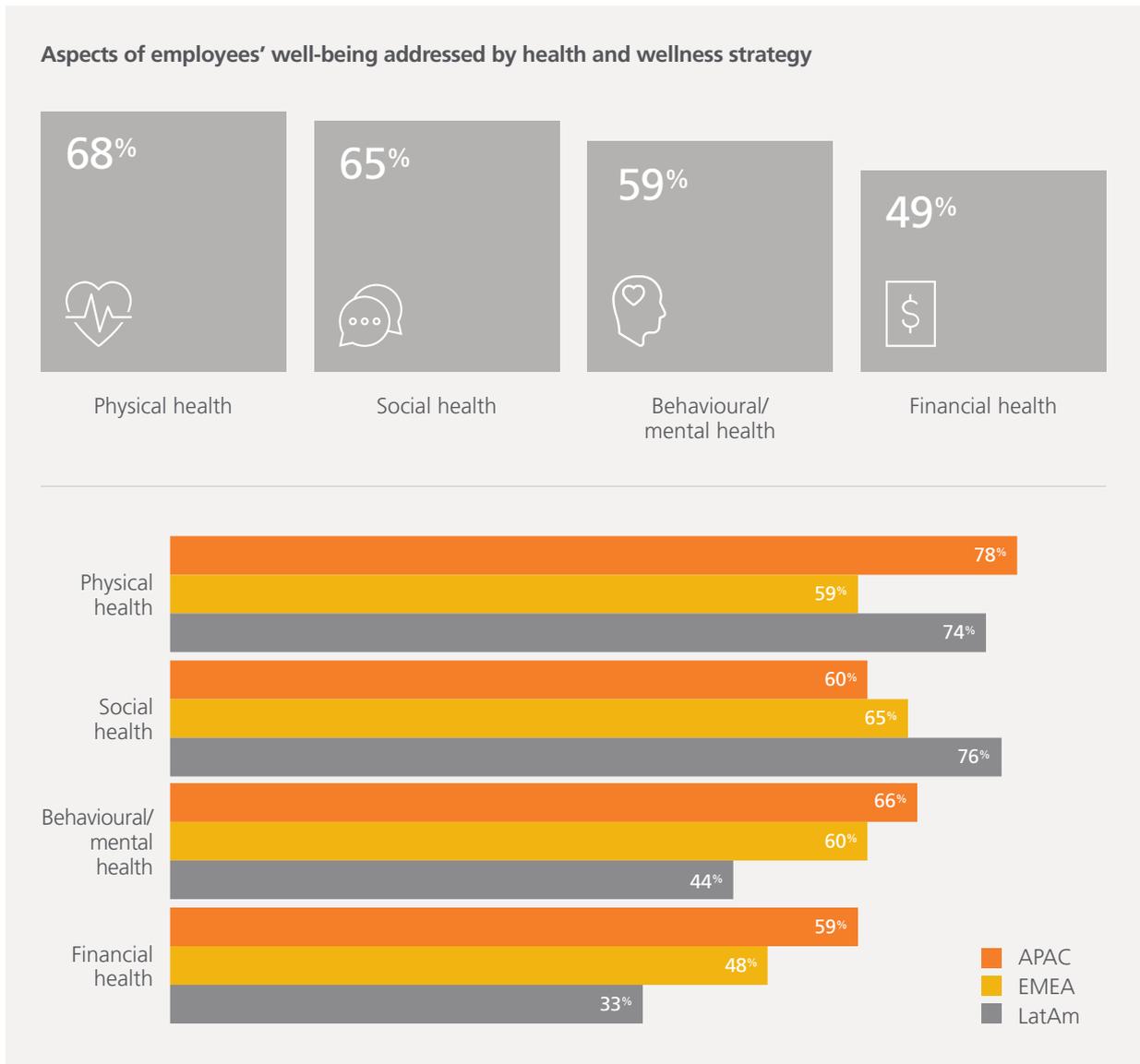
EMEA

1. Health biometric screenings
2. Case management programmes
3. Access to onsite health specialist
4. Health advocacy service
5. Onsite medical clinics/worksite clinics, tobacco cessation programme and flu vaccines

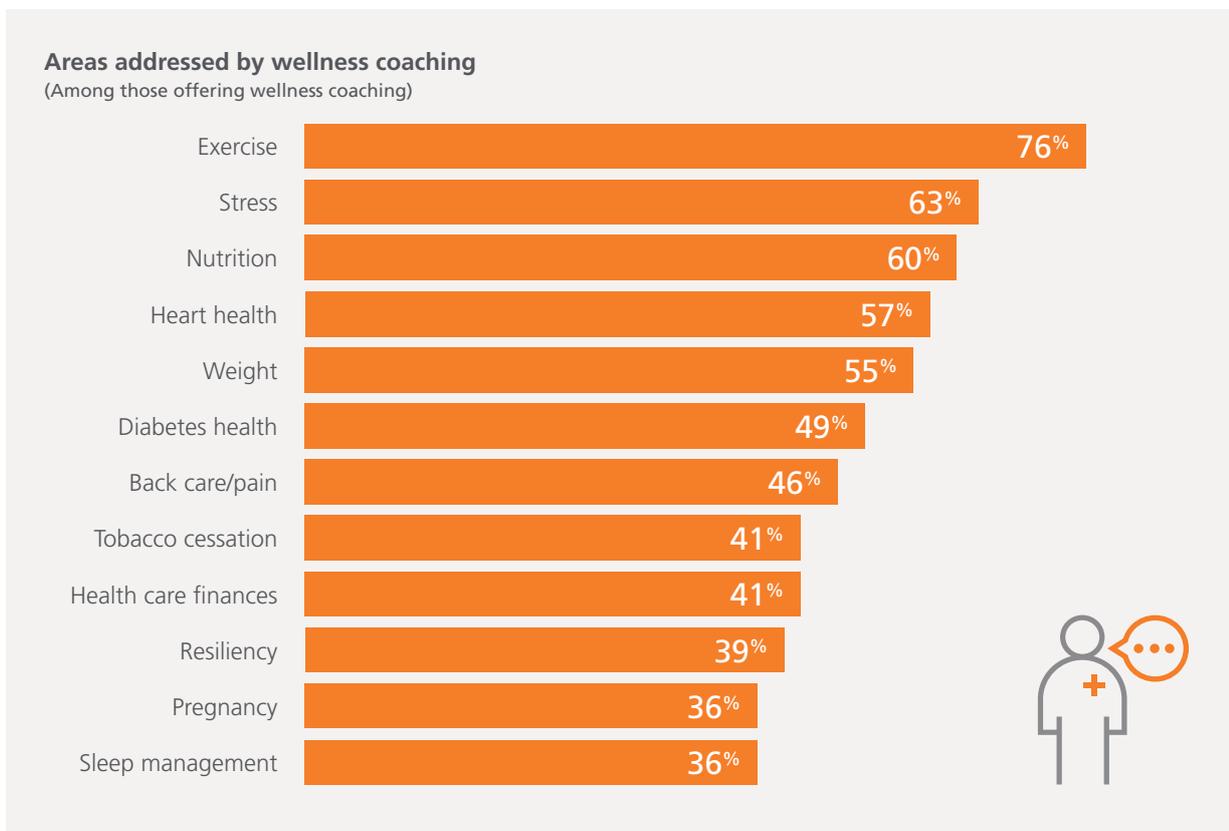
LatAm

1. Case management programmes
2. Health biometric screenings
3. Sleep health programme
4. Onsite/worksite fitness center
5. Access to onsite health specialist

Most of the employers surveyed feel their programmes address multiple employee wellbeing dimensions (physical, social and behavioural) *other than* financial. This is true for Latin American employers in particular.



Exercise was most commonly addressed by wellness coaching; pregnancy and sleep management were least often addressed. Of the areas mentioned, EMEA is least likely to believe their wellness coaching focuses on certain areas.



Overall, close to two-thirds offer health and wellness programmes to employees' family members.

Many programmes that are not currently offered may be added in the next three years. The top eight programmes being considered are:



THOUGHT STARTER: PROGRAMMES

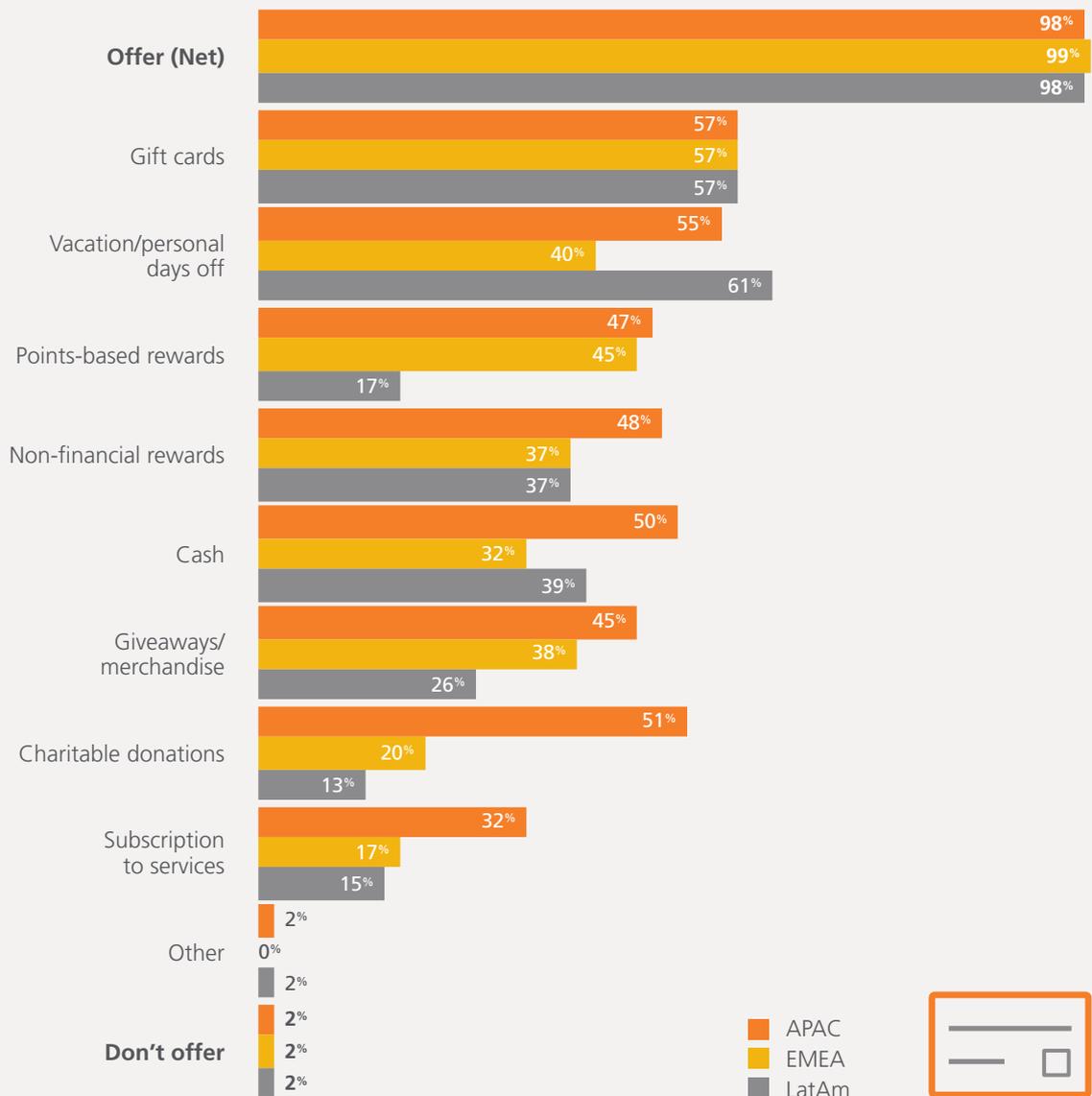
Recognising that the mix of programmes offered varies regionally, what is most valuable to your employees? What might you add or replace to better drive engagement?

2 INCENTIVES



Globally,
98%
of the employers surveyed offer health and wellness incentives.

Offer health and wellness incentives by region



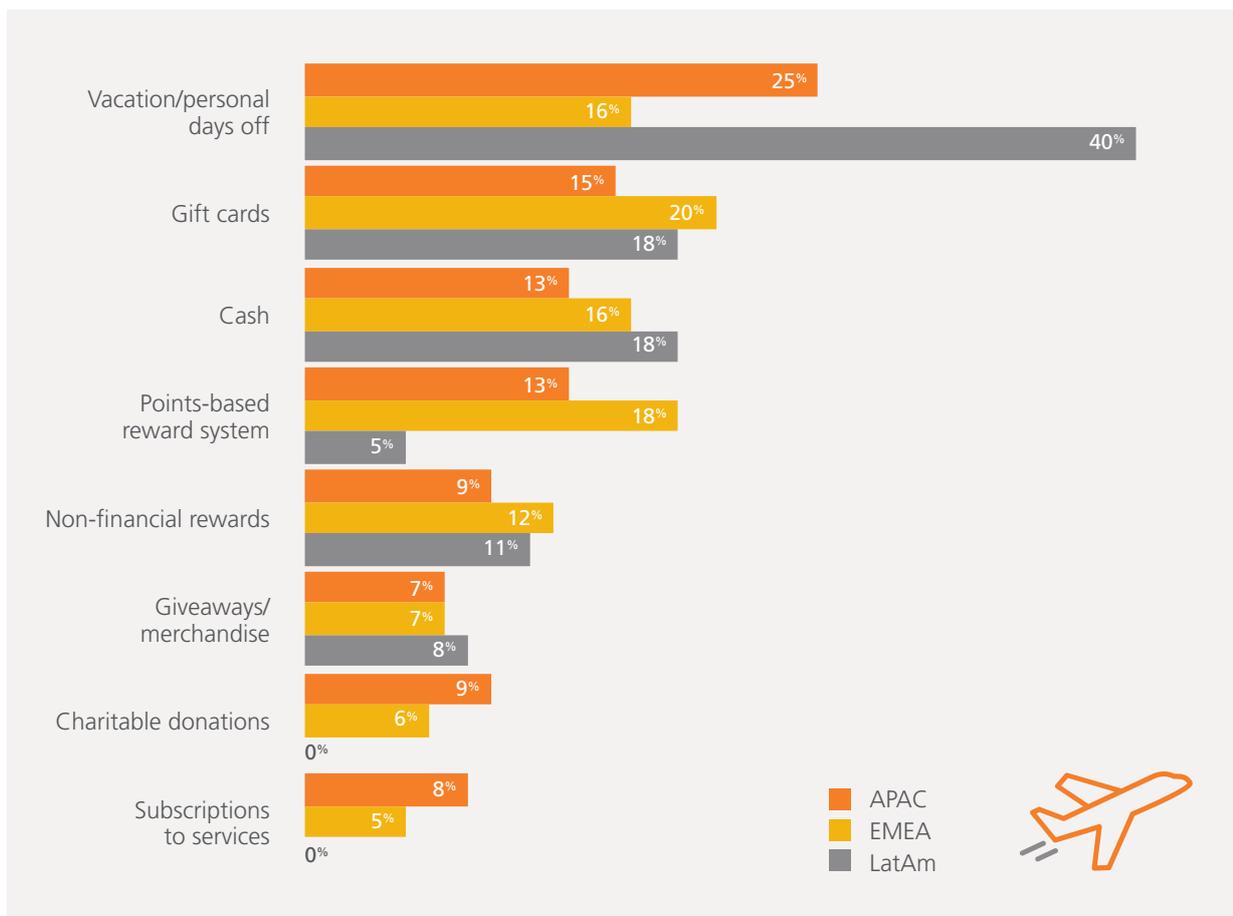


The overall, average, potential per-participant incentive value is

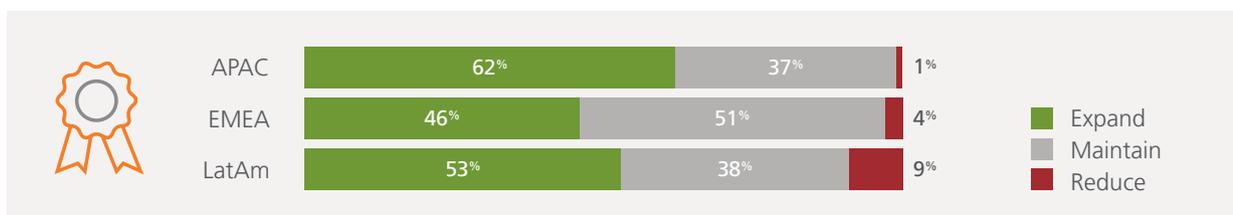
\$510 USD annually.

APAC (A) – **\$522 USD**
 EMEA (B) – **\$523 USD**
 LatAm (C) – **\$448 USD**

The type of incentive varies by region, but vacation or gift cards are considered to be most effective.



Employers expect to maintain or expand their incentive strategy over the next three years.



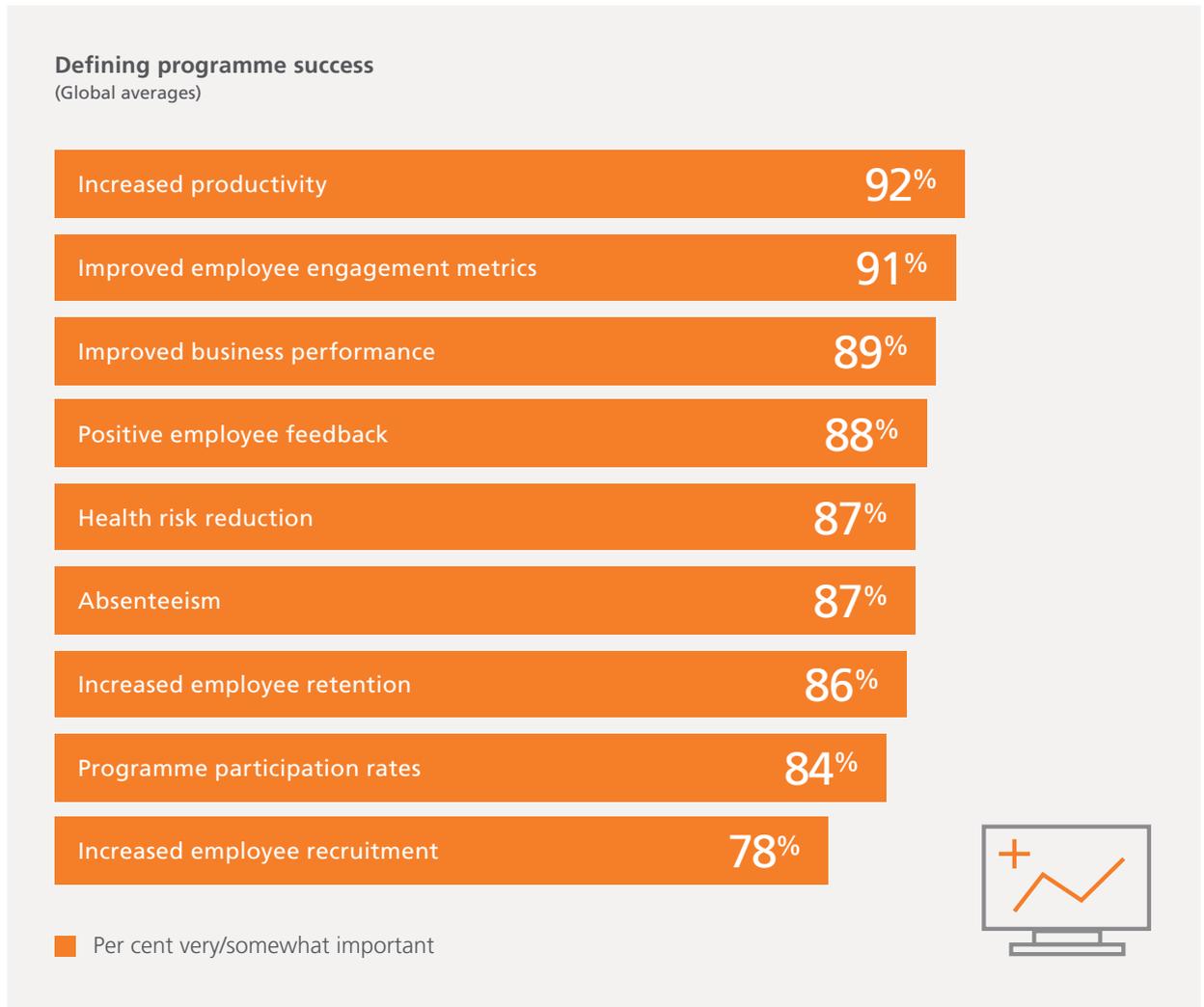
THOUGHT STARTER: INCENTIVES

Employers see the value of incentives and expect to continue offering them. What do your employees most value? What will motivate them to achieve or maintain a desired behaviour?



3 PROGRAMME SUCCESS

Of the employers and regions surveyed, there were a range of important factors that defined success.



Using these factors as a measurement,

4 in 5 employers

deemed their programmes to be successful. Overall, all regions consider their programmes equally successful.

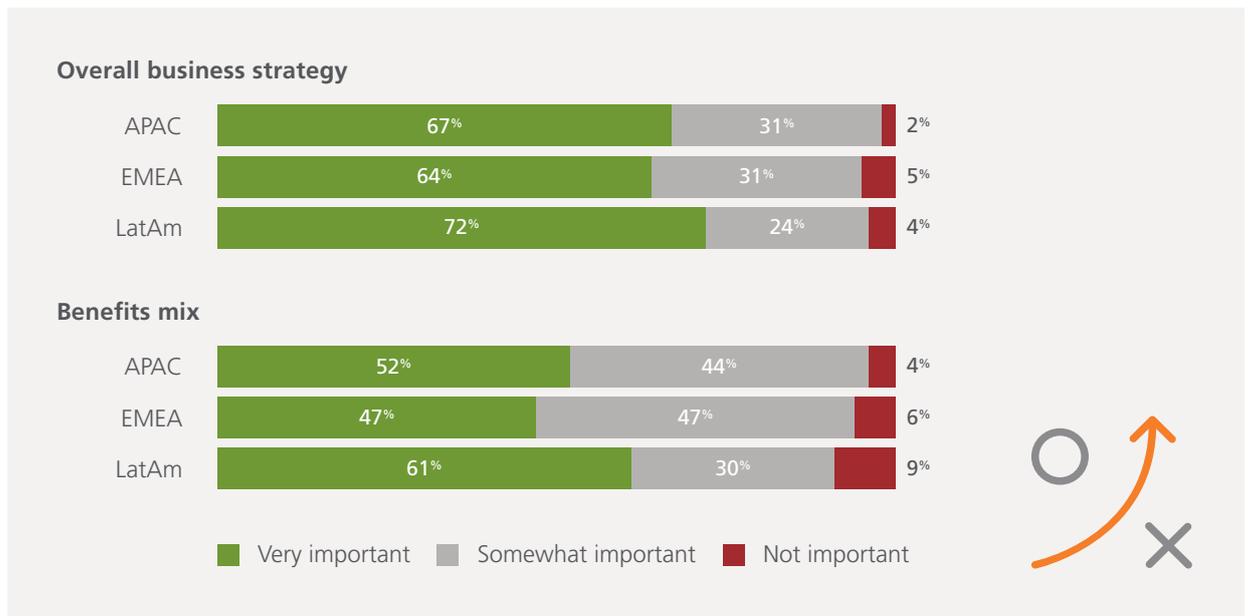


THOUGHT STARTER: PROGRAMME SUCCESS

How do you define success? How does your evaluation compare with the regional averages shown here?

4 STRATEGY AND BUDGET

Most employers have a formal wellness plan. They consider health and wellness solutions an important part of their overall company business strategy and their benefits mix. This consideration is fairly consistent across the regions.



The five reasons for offering health and wellness programmes are the following, highest to lowest.

- 1 Maintain/improve employee morale
- 2 Reduce employee health risks
- 3 Promote more productive workforce
- 4 Improve absenteeism/presenteeism
- 5 Offer competitive package to attract/retain talent

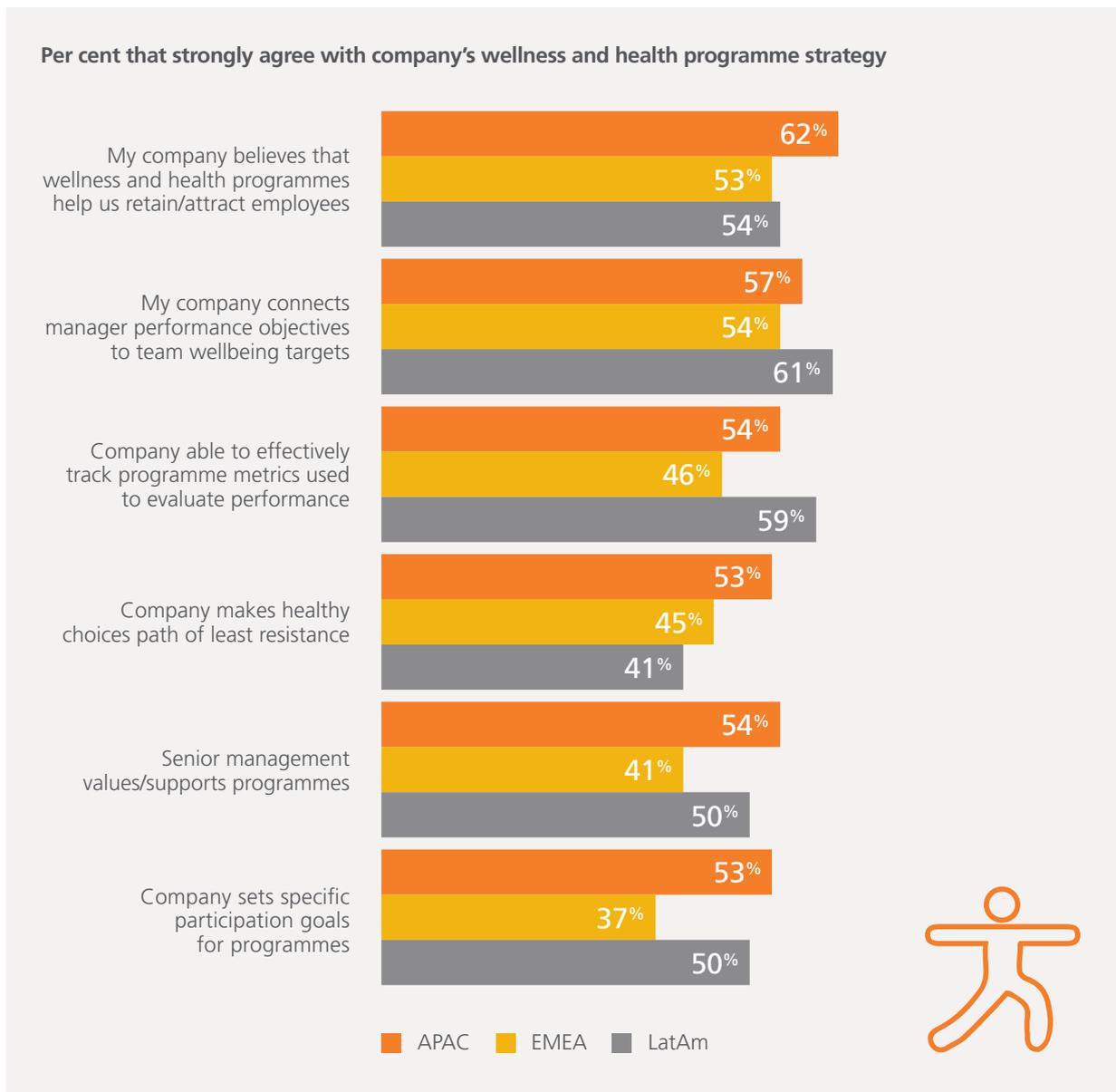


Most employers have a person dedicated to promoting health and wellness: that person is full time in **75%** of the employers surveyed; part time in 20 per cent.

Three-quarters expect their health and wellness programme spending to increase within three years. Latin American employers are most likely to increase spending.



Generally, all regions have similar strategies and beliefs with regard to their health and wellness programmes.

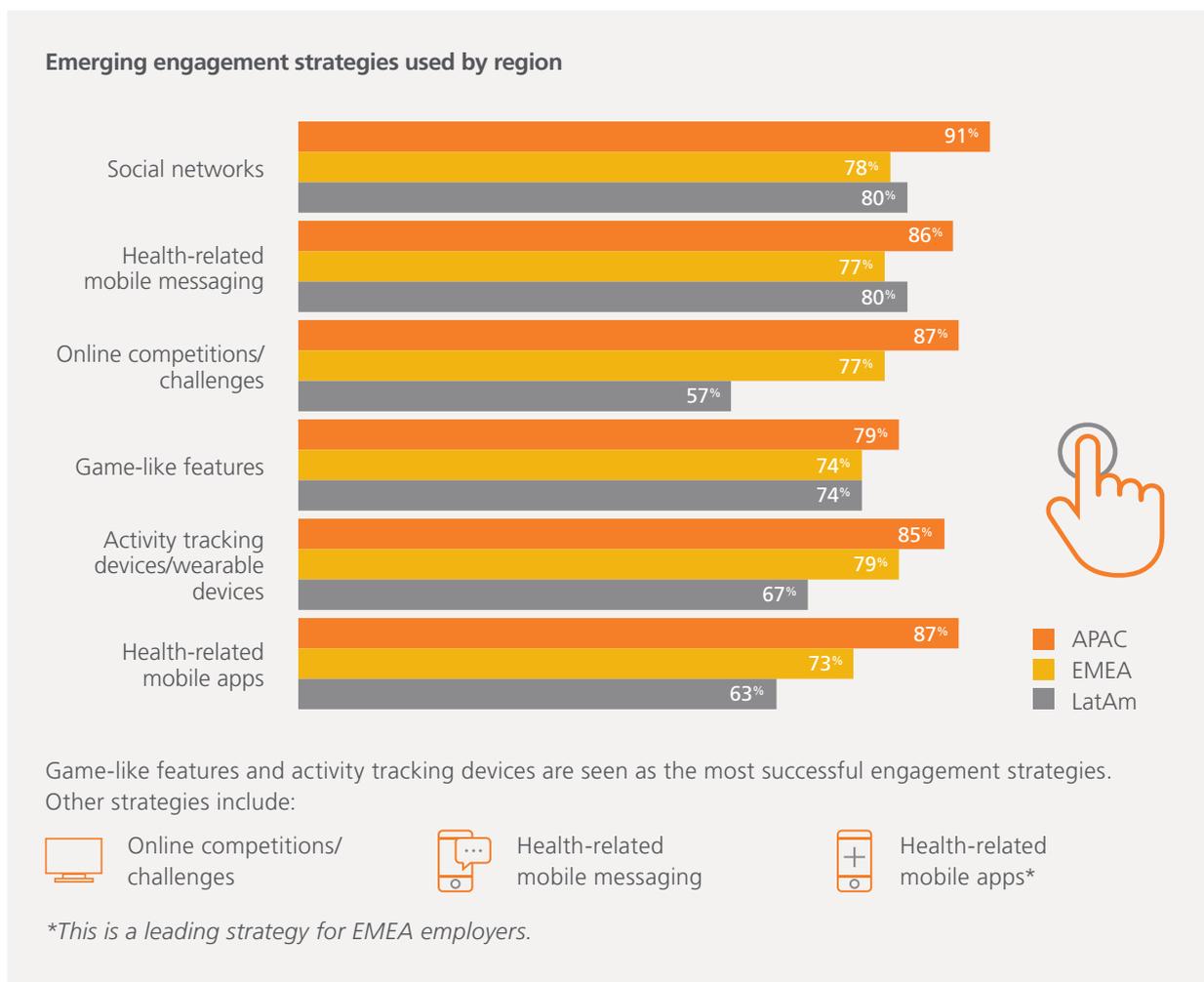


THOUGHT STARTER: STRATEGY AND BUDGET

How do your strategies and beliefs compare to employers in your region? Where might you recalibrate your programme offering to better align with those strategies and beliefs?

5 ENGAGEMENT

Engagement strategies are emerging that employers either currently use or plan to use. These vary significantly by region.



The best means of driving employee engagement varies by environment.

Top five most effective means of driving employee engagement based on environment

Office-based

1. Emails
2. Company intranet
3. Onsite meetings
4. Electronic newsletters
5. Posters

Telecommuting

1. Mobile app
2. Emails
3. Company intranet
4. Electronic newsletters
5. Digital engagement

Manufacturing/production

1. Posters
2. Hardcopy brochures
3. Digital engagement
4. Emails
5. Webinars

Business travel

1. Emails
2. Digital engagement
3. Wallet cards
4. Mobile app
5. Hardcopy brochures

Warehouse

1. Posters
2. Hardcopy brochures
3. Company intranet
4. Wallet cards
5. Digital engagement/webinars

Transportation

1. Emails
2. Digital engagement
3. Hardcopy brochures
4. Wallet cards
5. Mobile app/posters

Regionally, there are some perceived differences on the most effective means.

Most effective means of driving employee engagement by region

Office-based

APAC: Emails
 EMEA: Emails
 LatAm: Emails

Telecommuting

APAC: Posters/brochures
 EMEA: Mobile app
 LatAm: Company intranet

Manufacturing/production

APAC: Emails
 EMEA: Posters
 LatAm: Digital engagement

Business travel

APAC: Emails
 EMEA: Emails
 LatAm: Digital engagement/
 wallet cards/brochures

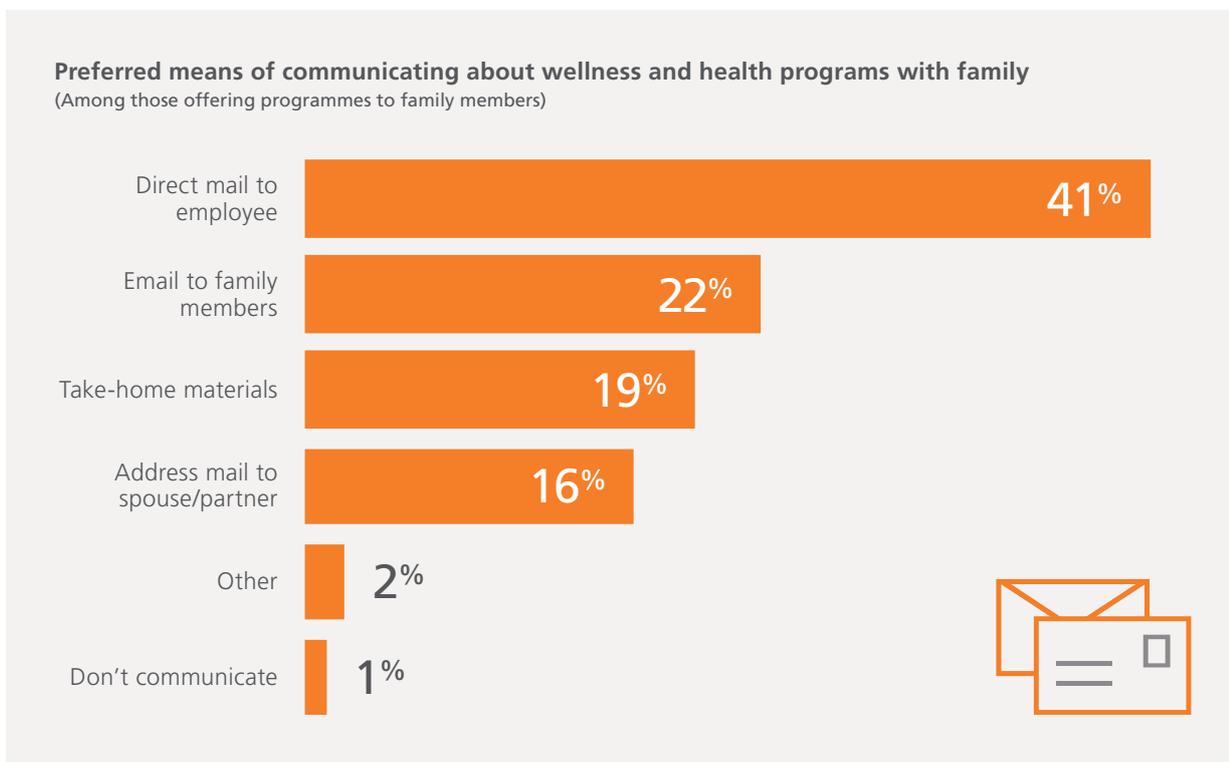
Warehouse

APAC: Brochures
 EMEA: Posters
 LatAm: Mobile app/brochures

Transportation

APAC: Emails
 EMEA: Emails
 LatAm: Posters

Of all the ways health and wellness programmes are promoted, email and internal meetings are most popular. Of those employers offering programmes to family members, direct mail is the most preferred to reach them (compared to email to family, take-home materials and mail addressed to the spouse/partner).



THOUGHT STARTER: ENGAGEMENT

With the range of engagement strategies you currently or plan to use, which is most effective to attract your employees? Are there strategies that you hadn't considered that are effective for others in your region?



PHYSICAL WORK ENVIRONMENT

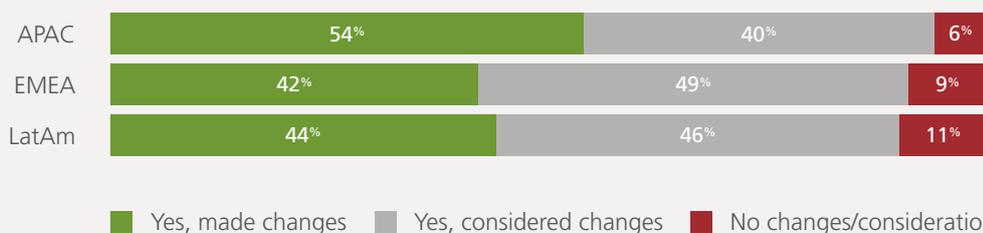


Approximately

50%

of employers globally have recently made physical work environment changes; the remainder have considered doing so. The changes vary by region.

Changes to physical work environment to help employees make healthy decisions by region



Top five changes:

APAC

1. Healthy entrees in cafeteria
2. Onsite gym/fitness center
3. Healthier vending machine options
4. Bike-friendly initiatives
5. Indoor/outdoor walking paths

EMEA

1. Onsite gym/fitness center
2. Healthy entrees in cafeteria
3. Improved access to water
4. Price breaks on healthy food/drinks
5. Healthier vending machine options

LatAm

1. Ergonomic/standing desks
2. Smoke-/tobacco-free campus
3. Healthy entrees in cafeteria
4. Healthy options for meetings
5. Bike-friendly initiatives



THOUGHT STARTER: PHYSICAL WORK ENVIRONMENT

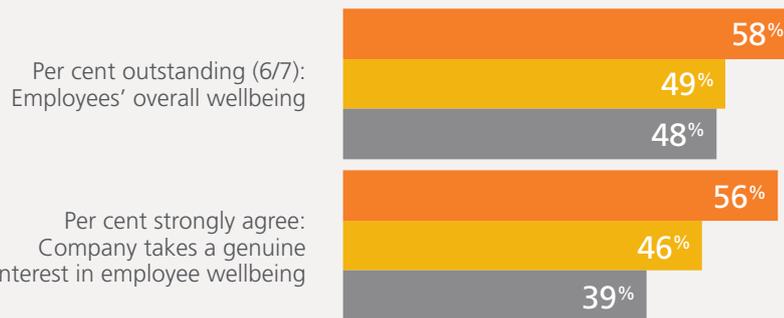
Of the changes other employers in your region have made or are considering, which do you think would help your employees achieve a healthier lifestyle?



EMPLOYEE WELLBEING AND CULTURE OF HEALTH

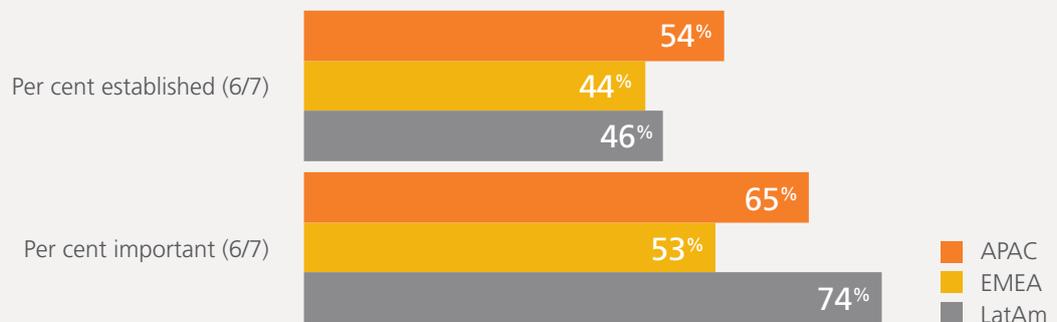
About half of employers believe their employees' wellbeing is outstanding. With the exception of Latin American employers at 39 per cent, about half also strongly agree that the company takes a genuine interest in employee wellbeing.

Employees' overall wellbeing



What's more, half of the employers believe their company has a firmly established culture of health ownership and believe that culture is important or even extremely important. This is particularly high in Latin American employers.

Culture of health ownership



THOUGHT STARTER: EMPLOYEE WELLBEING AND CULTURE OF HEALTH

How would you rate your employee wellbeing and culture of health ownership? How does that compare with others in your region? What could you do to improve it, if desired?

Survey methodology

- Web-based surveys with respondents who are members of an online panel (n=273)
- Surveys were conducted from 28 February through 10 April 2017
- Statistically significant differences are reported at the 95 per cent confidence level
- Maximum margin of error for a sample of 273 is ± 5.9 per cent points
- Percentages in charts and tables may not sum to 100 per cent due to rounding

All respondents were:

- Employed at a multinational employer (3,000+ employees) that offers two or more health and wellness programmes
- Functioning in a human resource or executive, management or administration role
- Involved in health benefits decision making/instituting employee wellness programmes for his or her company

Employers can work with Optum to use the insights captured in this study to evolve their health and wellness practices.

About Optum

Optum, a division of UnitedHealth Group, is a leading information and technology-enabled health services business with more than 133,000 people worldwide. Optum's work stretches across virtually every segment of health care, which means the company is able to bring a big-picture perspective to specific client challenges around the world. Optum uniquely collaborates with our employer partners to drive workplace productivity, reduce and manage health care costs, and offer a simplified approach that creates better health outcomes for employees. Optum's global Corporate Health and Wellbeing solutions include employee assistance and wellness solutions that integrate with our digital engagement platform to engage employees in their health awareness and improve overall health and wellbeing.

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