

2014

The Business of Healthy Employees: A Survey of Workplace Health Priorities

Workforce



Introduction

Today's employers are up against an epic crisis: disengaged employees. Employees are tuned out on the job, and their declining engagement and productivity is costing companies at the bottom line¹. As employers scramble to get their workforce back on track and engaged in their jobs and companies, the solution may be closer than many realize.

The surest route to driving engagement? Investing in employees. With a growing awareness from the C-suite that investment in workplace wellness can be the key to turning disengaged, disinterested employees into productive, focused brand champions committed to their organization², more organizations are supporting employees with robust, holistic wellness programs.

To better understand how employers and employees are engaging with wellness programs, Virgin Pulse, in collaboration with *Workforce* magazine, surveyed 361 organizations and 3,822 employees to gain insight into the challenges and benefits of workplace wellness programs and how programs are developing year over year.

KEY FINDINGS:

- 1. Wellness drives company culture: 87.4 percent of employees state that wellness positively impacted work culture, an increase of 10 percent from 2013.
- 2. Employees want to be healthy: 96.3 percent of employees participate to improve their own health, making improved health a bigger motivator than financial incentives.
- 3. It's not just about physical well-being mental health is a priority, too: 52.4 percent of employers offered services for mental health and depression management in 2014, a significant 14 percent increase from last year.
- **4. Employees want employers to offer more:** The top three offerings employees want include physical activity programs (72.4 percent), healthy on-site food choices (65.5 percent), and on-site gyms and fitness classes. The top three offerings by employers are smoking cessation programs, physical activity programs, and mental health services.
- **5. Measurement remains a significant challenge:** 30 percent of employers are dissatisfied with measurement strategies, and many organizations are not tracking key areas: 47.8 percent are not tracking enhanced engagement, and more than half of the organizations don't track improved productivity (53.1 percent).
- **6. Wellness programs offer employers a leg-up on recruitment:** 88 percent of employees describe access to health and wellness programs as an important factor for defining an employer of choice.
- 7. Employers are leaving money on the table: Nearly half of the employers surveyed, 43.1 percent, aren't planning to take advantage of incentives offered as part of the ACA.

So, if employees are disengaged at work, are they even interested in their employers' health and wellness programs? Actually, yes — employees are engaging with wellness offerings more than ever. This year, 9 out of 10 employees (90.5 percent) say they take advantage of wellness offerings from employers, up 3 percent from 2013. With such a high level of engagement, what do employees get out of their participation? The benefits aren't just improved health — in fact, employees and employers alike are seeing a return on wellness investments, including increased productivity, engagement and happiness. The best wellness programs — ones that will produce lasting behavior change — are those that communicate that the organization is involved in a culture of wellness designed to support employees³.

¹ Limpman, V. (2013). Surprising, disturbing facts from the mother of all employee engagement surveys. Forbes.

² Dunning, M. (2013). Wellness efforts viewed as investments. Business Insurance.

³ Tu, H. (2010). Employers missing out on wellness benefits. Occupational Health Management.

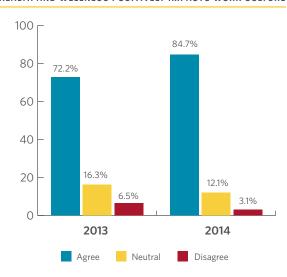


The Cultural Impact of Wellness Programs

"It's become critical to create a culture that engages employees, showing them that the company cares about all aspects of their well-being," said Chris Boyce, CEO of Virgin Pulse. "Employers need employees who are able to engage and to get that, employers have to invest in their workforce with tools and resources that drive daily healthy habits in order to create a workforce that's got the energy, focus and drive necessary to engage at work and in life. When employees feel supported and secure, they're able to connect and bring their best to work."

Organizations using wellness as a strategy are seeing consistently and dramatically improved company cultures. Employers indicate two primary drivers for offering benefits: keeping health costs down (51.7 percent) and the positive impact on work culture (51.7 percent). The effect is noticeable, with more than 8 out of 10 (87.4 percent) employees stating that wellness programs have positively impacted work culture. This is a gain of more than 10 percent from 2013, and shows that organizations investing in wellness programs are improving work environments. For employers looking to mold a high-functioning, highly productive workforce, company culture is the first brick in the road to success.

HEALTH AND WELLNESS POSITIVELY IMPACTS WORK CULTURE



For many employees, the first positive results they see tie directly to their overall well-being, with 76.1 percent of respondents reporting improvement in physical activity levels, 63.8 percent having more energy, and 61 percent generally feeling happier as a result of participation in wellness programs.

It doesn't stop there, though. Employees are also witnessing improvements in other aspects of their well-being, with 31.8 percent of respondents stating they've seen improved productivity, close to one-third of employees (31.8 percent) saying their focus has improved, and 30.9 percent reporting that they've had fewer sick days as a result of participation in wellness programs. Increased productivity alone is enough to

87.4%

of employees state that wellness programs have a positive impact on work culture.

point to the positive impact of wellness for employers, but as many organizations work to reduce health-related leave and absence, reduced sick days and time away from work have significant value⁴.

One respondent summed it up perfectly: "I think health and wellness programs are an excellent benefit that benefits the sponsoring companies. ... I think some companies launch [health and wellness] programs because 'It's the next big thing to do in benefits' — they don't really commit. I am lucky to now work for a company that is truly committed, and it shows [that] through ... [a] culture that truly embraces employees making the most of those resources."

"I feel that the health and wellness programs help the company because employees have more energy and are more engaged throughout the day. I have used less sick time and feel more productive in general."

From employee comments on the Business of Healthy
Employees: A Survey of Workplace Health Priorities (2014)



"We have created a strong culture of health both in the workplace and at home, including the employee and the immediate family. We run numerous wellness initiatives in areas of physical, mental, financial, family health, stress management ... at home and at work. ... We have a wellness coordinator dedicated to showing ... we care about their health and well-being by supporting it through the initiatives, bi-weekly health and wellness newsletters, opportunities through initiatives and our reimbursement program to create healthy behaviors, including fitness initiatives, smoking cessation, weight management, etc. ... All in all, there is a daily focus on health and wellness for employees and their families."

From employer comments on the Business of Healthy
Employees: A Survey of Workplace Health Priorities (2014)

Employees at these types of organizations are more than just engaged in a culture of wellness. More than half of the respondents say that wellness programs make them feel more valued by their employer (55.7 percent). The biggest benefit for employers, however, is how access to wellness programs affects engagement and productivity.

"We're in the midst of a disengagement crisis. Overall employee disengagement is being reported at 70 percent, and that's even higher globally. That means even on a good day, your employees aren't tapping their full brainpower or reaching their full productivity potential." Boyce said. "Wellness programs are a straightforward way to help employees make daily changes that lead to sustainable health changes and improvements in workplace engagement and productivity."

Employees surveyed confirm that wellness programs are directly addressing disengagement, with 5 out of 10 respondents (52.6 percent) stating that wellness programs have increased their feeling of engagement. What's more, nearly two-thirds of employees (64.2 percent) reporting participation in wellness programs say the programs have directly contributed to their productivity on the job. These improvements alone should be enough to showcase the value of wellness in an organization. Employers who are providing wellness programs also demonstrate awareness that the best way to leverage wellness programs for increased engagement is to demonstrate how the organization values the employee.

52.6 %

of employers report that wellness programs increase engagement.

64.2 %

of employees report an increase in productivity directly related to participation in wellness programs.



"Our culture of health is something we do for our associates, not to them, and **if we offer the best, we will attract the best**."

— From employer comments on the Business of Healthy Employees: A Survey of Workplace Health Priorities (2014)

"Your employees' daily engagement in their personal health drives your company's larger engagement strategy," Boyce said. "Helping employees increase their energy, focus and drive by meeting them where they are on their health journey and offering the programs and resources that help them hit their goals benefits everyone. The result? Employees who know the company cares about their well-being and who come to work ready and able to perform at their peak."

Employers offering wellness programs understand the need to design programs with their employees in mind. As one employer described it, "Our culture of health is something we do for our associates, not to them, and if we offer the best, we will attract the best." Employers are showing employees they care about their health and well-being in a variety of ways. One of the most popular ways to demonstrate care and support is by offering incentives to employees like rewards for participation, recognition for their successes, and offering or improving the programs employees are most interested in using — like healthy food choices or increased fitness classes and on-site fitness options.

As one employer put it, "We offer programs that support employees' total well-being — career, social, financial, physical and community."

Employers also noted that an important aspect of demonstrating they care about employee health is to make sure the message isn't just coming from leadership, but modeled by leadership. One employer described the importance, stating, "Modeling wellness at senior levels sets an example that [health and wellness] matters, and we explain why." Leadership involvement is a key area for wellness success.

Boyce explained it further, stating, "Leadership is key in setting the foundational elements of corporate culture that grow organically over time — a company's overall wellness strategy and initiatives must be an extension of its leadership. Employees today are smarter than ever and will see through empty gestures. In order to reach them and reap the rewards of an engaged workforce, executives must show employees — through actions — that the company cares."

Motivation

Of course, employees don't participate in wellness programs for their employer's benefit. "Fostering employees' well-being across the board helps them be their best — not just at work, but in all areas of their lives," Boyce said. "I've talked to a lot of employees, and what they want is simple. They want to be happy, to have more energy, to be sharper and more focused. And they want that extra drive so they can get things done. It's about supporting all aspects of their health and well-being.."

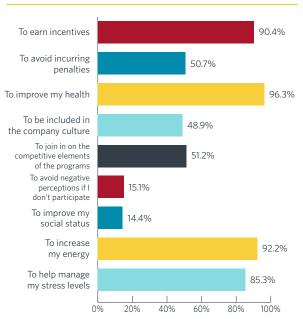
Clearly, this is the result that employees are seeking. Employees are highly motivated to improve their own health, with 96.3 percent reporting this as the primary reason for their participation. Extra energy (92.2 percent) is also a significant motivator for employees. The financial incentives many employers offer don't hurt either, as 9 out of 10 employees (90.4 percent) participate to earn them.

96.3 %

of employees participate in wellness programs to improve their health.



WHY EMPLOYEES PARTICIPATE



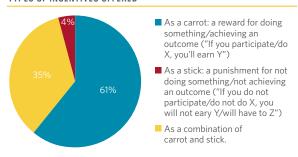
Organizations are tapping the power of incentives to get and keep their workforce engaged while driving healthy behaviors. And incentives can be a great motivator. Nearly two-thirds (61.3 percent) of companies provide positive rewards to employees to keep them motivated. This carrot approach, which often includes financial incentives, rewards employees participating in programs in a tangible

way. The use of negative consequences as a motivator is quite unpopular in organizations, with only 4.1 percent using a stick exclusively.

Some organizations do use a blended approach, with nearly 3 out of 10 organizations using both positive incentives and negative consequences to keep employees motivated and engaged. While 9 out of 10 employees participate to earn incentives, only half (50.7 percent) participate to avoid negative penalties.

"Incentives show employees that you support them," Boyce said. "They show that you celebrate their victories and daily wins, while reinforcing healthy behavior change. It's not just about cash, either — social incentives, a flexible work schedule or just a quick pat on the back all work, and help drive participation and motivation."

TYPES OF INCENTIVES OFFERED



Program Offerings

For wellness programs to be effective, they need to be robust and allow for individual needs and interests. "Personalization is critical. Wellness programs need to be comprehensive and tailored to the individual, meeting them where they are and helping them keep their healthy goals and ambitions in check with robust resources," Boyce said. "Regardless of anyone's age, gender, health status or any other factor, these programs have to be appealing and attainable for everyone."

Employers are demonstrating awareness of this need by continuing to offer robust wellness programs and benefits to employees. Smoking cessation remains a popular offer, due mostly to matching funds provided for these programs by the ACA. Employers also maintain physical activity programs (53.5 percent), health club memberships (49 percent) and weight management programs (47.1 percent). Overall, there's steady or increased offerings for wellness programs. One area that employers are clearly paying attention to is mental health, with 52.4 percent of employers offering services for mental health and depression management — a significant 14 percent increase from last year. These types of programs may be contributing to the number of employees reporting decreased stress levels (39.7 precent), improved sleep (32 percent) and improved morale and engagement

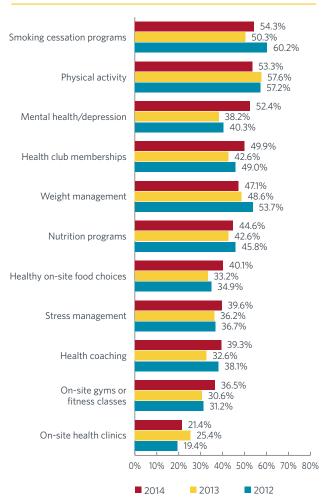


at work (27.5 percent). Research has further indicated that investment in mental health benefits employees and the organization by improving retention, increasing interest in personal development and mastery of workspecific skills, and an improved sense of value as a member of the organization⁵.

The definition of wellness is evolving, and companies are implementing new programs to support a more holistic definition of it. More than one-third (38.4 percent) of organizations are offering financial wellness services, up from 2013, and organizations are beginning to take advantage of improvements in time and productivity (13.6 percent), sleep (11.4 percent) and brain training (5 percent). These programs target sustainable behavior, helping employees modify habits that negatively impact their health long term⁶. As technology and service offerings continue to improve, it's possible programs focused on these areas will continue to develop.

Robust health and wellness programs allow employees more flexibility in picking and choosing the programs that are most relevant and that will work best for them. The top wellness choice for employees is physical activity programs (68.9 percent), followed by healthy on-site food choices (39.9 percent.). Employees are also utilizing weight management programs (28.9 percent) and financial wellness offerings (26.3 percent). With so much to choose from, are employers offering everything employees want?





The reality is, while employees are taking advantage of current offerings, they still want to see more. They're most interested in access to physical activity programs (72.4 percent), healthy food choices (65.5 percent) and on-site gym facilities or fitness classes (62.3 percent). In each of these areas there are significant gaps in what employers are offering and what employees want. At the same time, employers appear to be keeping pace with employee interest in programs like stress management (45 percent), weight management (50.4 percent) and brain training (45 percent).

"As more people join and become active it tends to spur on others to do the same, which makes more employees healthier. It would sure be nice to have on-site programs like the gym that we have in our corporate location. Even some classes like Zumba or body pump or something would be awesome."

From employee comments on the Business of Healthy
Employees: A Survey of Workplace Health Priorities (2014)

⁵ Nelson, A., & Shocklye, C. (2013). Wellness coaching: frontline worker training in mental health. The Journal of Mental Health Training, Education and Practice, 45-55.

⁶ Colling, J. (2013). Position wellness solutions within employee benefit strategies. Strategic HR Review, 337-339.

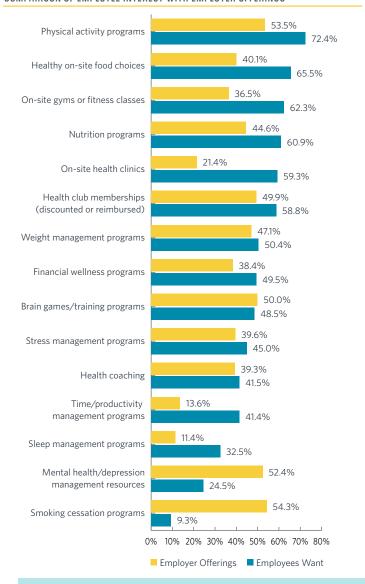


In 2013, many employers felt that employees had a good understanding of the wellness programs offered by the organization, with 3 out of 5 employers (57.3 percent) stating that employees had a good understanding of health and wellness offerings. However, unlike last year, considerably more employers are concerned that employees don't have a good understanding of the program, with nearly one-third of employers voicing concerns about employee understanding (30.1 percent). Why do employers believe that employees are not aware of programs? What more can employers do to make sure employees are participating?

"Programs focusing solely on biometrics and health risk assessments won't be nearly as meaningful or impactful as the ones focusing on all the facets that make up and impact employees' health, and could be the reason behind poor participation," Boyce said. "Participation and engagement is social, and it starts at the top. If executives show their workforce that health and wellness is a priority — and if employees see their colleagues participating in the programs and using the tools the company's offering — participation and engagement in them soar." Even with the fear that employees may not be fully aware of or engaging in all program offerings, nearly all employers are planning to increase their wellness programs.

Of the employers surveyed, three-quarters (72.2 percent) plan to expand wellness programs in the future. When looking toward 2015, organizations indicate that plans are in place to increase the number of physical activity programs (32.8 percent) and further develop nutrition programs (32.8 percent). One-third of employers also indicate planned increases in financial wellness programs (31.7 percent) and stress management programs (30.6 percent), an approach that will clearly address current employee interest. As companies work to improve and promote a healthy culture, demand for additional programs and options is likely only to increase. According to respondents in the survey, 6 out of 10 organizations (60.9 percent) plan to increase spending on health and wellness programs in the future. Both increases in spending and planned offerings indicate that employers that are capitalizing on health and wellness programs are happy with the decision.

COMPARISON OF EMPLOYEE INTEREST WITH EMPLOYER OFFERINGS



72.2%

of employers plan to increase wellness offerings.



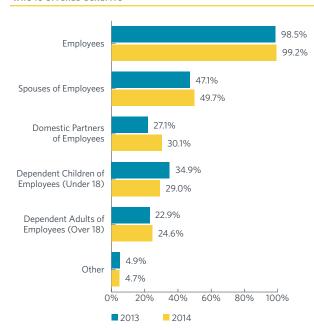
Influence of Participation

Engaging in a wellness program at work doesn't only impact employees on the job. Many find that the wellness programs positively influence others in their lives. As one employee described it, "My healthier habits are aiding not only me, but [have] improved those of my family. We all are living better, with more energy."

"Social support is critical — no one wants to go it alone, especially when tackling major health and wellness goals," said Boyce. "Allowing employees to include family, friends and co-workers on their journey sets them — and your program — up for success."

Employers are taking advantage of the benefits of social support. While wellness benefits were offered universally to employees (99.2 percent), more than half offered access to wellness benefits to spouses (49.7 percent), and one-third of organizations (30.1 percent) offered wellness benefits to domestic partners. The increase in spending for domestic partners, up nearly 10 percent from 2013 (21.7 percent in 2013) was likely impacted by recent federal decisions improve recognition of all types of domestic relationships⁷. Year over year, employers are increasing offerings to non-employees.

WHO IS OFFERED BENEFITS



Employees indicate that their participation in health and wellness programs influences others around them. Nearly half of employees (52.8 percent) indicate that participation has had a positive influence on spouses and partners. Additionally, more than one-third of employees (34.4 percent) believe that participation has had a positive effect on their children. Considering the obesity crisis⁸ and its

impact on health for current and future generations, this could speak to a significant benefit for employers — especially those planning for the future health of the talent pipeline⁹.

Wellness benefits and programs don't just influence employees' families. They also drive company culture, with more than half of the respondents (54.9 percent) indicating that their participation has an influence on colleagues. This motivates current participants to continue to be engaged, improving relationships company-wide, as indicated by 26 percent of respondents, and contributing to an overall sense of well-being (59.8 percent). As one respondent put it, "We challenge each other. ... I have made new friends and it's wonderful. I also inspired my co-workers to join and be healthy and make a little extra money along the way."

54.9 %

of employees report that wellness has a positive impact on colleagues.

⁷ Human Rights Campaign. (2014, 310). The domestic partnership benefits and obligations act. Retrieved from Human Rights Campaign: http://www.hrc.org/laws-and-legislation/federal-legislation/the-domestic-partnership-benefits-and-obligations-act

⁸ Centers for Disease Control and Prevention. (2014). Facts about obesity in the United States. Retrieved from Centers for Disease Control and Prevention: http://www.cdc.gov/pdf/facts_about_obesity_in_the_united_states.pdf

⁹ Committee on Health, Education, Labor and Pensions. (2008). CHILDHOOD OBESITY: THE DECLINING HEALTH OF AMERICA'S NEXT GENERATION. Hearing before the subcommittee on children and families of the committee on health, education, labor and pensions. Washington, DC: U.S. Government Printing Office.



These programs offer additional benefits to employers, too, positioning the company as an employer of choice. According to employee respondents, 88 percent state that having access to health and wellness programs designates an organization as an employer of choice. One employee noted "[wellness programs] not only promote employee well-being, but [are] also a huge selling point when recruiting potential employees to work here." It positions wellness programs as a competitive advantage for organizations.

"Your employees are your company's real competitive advantage, no matter what industry you're working in. They make the magic happen — but you've got to be sure their needs are being met," Boyce said. "Happy employees are your best brand ambassadors. They'll advocate for your company, share their positive experiences among their social networks, and recommend your company as a great place to work to their friends and family members. The potential is huge."

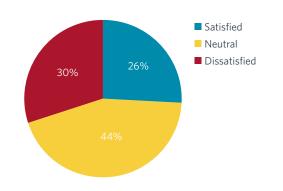
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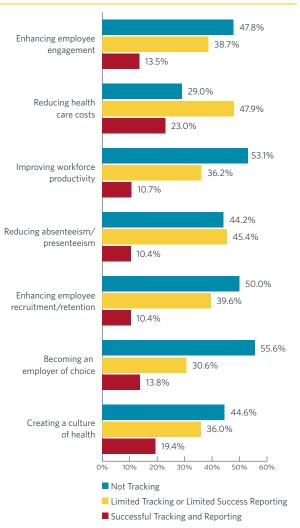
The Measurement Challenge

As organizations continue to commit to health and wellness programs, their primary challenge remains measuring the return on wellness investments. Employers' responses reflect this challenge in measurement, where only 25.9 percent are satisfied with the current use of measurement to show business impact from wellness programs, down 5 percent from 2013. Roughly one-third of organizations (30.3 percent) are dissatisfied with current measurement practices, an increase in dissatisfaction of 5 percent from last year. There appears to be a big disconnect between what employers know are the benefits of wellness programs and what they're measuring.

SATISFACTION WITH WELLNESS MEASUREMENT



METRICS TRACKED BY ORGANIZATION





Most organizations are reporting on health care costs, so it's not surprising that it's a frequently tracked area, with 23 percent of organizations reporting having successfully made a business case with measuring the outcome of health-related savings. Additionally, 38.7 percent of organizations have tried to track and demonstrated some success when examining the ROI on health cost reduction. However, the greatest benefit of wellness programs is demonstrated through the impact on engagement, an area that most organizations are not tracking at all.

When looking at the cost to organizations from engagement, productivity and leave, it's surprising that most organizations don't track these metrics. According to the respondents, almost half of the organizations don't track enhanced engagement (47.8 percent), and more than half of the organizations don't track improved productivity (53.1 percent).

"The links between a high level of engagement and business benefits are clear," Boyce said. "Recent research shows a highly engaged workforce drives profitability, productivity and customer ratings, while reducing shrinkage, turnover and absenteeism." With 70 percent of employees reporting they're disengaged at work — a figure that translates to \$450 billion to \$550 billion in lost productivity annually one organizations dissatisfied with strictly tracking wellness-related metrics should consider improving tracking in these areas.

The challenge may lie in reporting the benefits of wellness to senior leadership. Almost three-quarters of organizations (70.3 percent) are reporting reduced health care costs related to wellness programs, a point where organizations can see demonstrable ROI. As employers have directly stated that a priority with health and wellness programs is to lower health care costs (59.3 percent), there's a clear need to examine the savings. Employers are making an effort to report on enhanced employee engagement (32.2 percent) or improved workplace productivity (31.6 percent), which can provide just as significant ROI — if not better — as reduced health care costs.

These are also among the top priorities for offering wellness programs for the organization, with 51.7 percent of organizations offering wellness because they believe it will drive engagement and 51.7 percent believing wellness will impact work culture. A small number of organizations (15.6 percent) report numbers related to reduced absenteeism or presenteeism to senior leadership.

Lowering health care costs may be the easiest metric to report on, but the real value gained from wellness programs lies in improved engagement and productivity, and reduced leave. The cost of employee leave or lost productivity due to presenteeism is nearly \$227 billion¹¹. "The Boston Consulting Group reports that 80 percent of CEOs underperform on S&P when employee engagement is low. These are very real

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¹⁰ Limpman, V. (2013). Surprising, disturbing facts from the mother of all employee engagement surveys. Forbes.

¹¹ Integrated Benefits Institute. (2012, 9). Knowledge Bank. Retrieved from Integrated Benefits Institute: http://ibiweb.org/research-resources/detail/poor-health-costs-u.s.-economy-576-billion-infographic



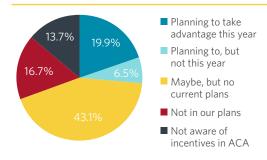
numbers CEOs care about and are measured against," Boyce said. It's time for organizations to do more to measure and report on metrics that really matter to the bottom line, and where health and wellness programs offer the greatest value to the organization: engagement, productivity, improved work culture, and reduced absence and leave.

Utilizing the ACA

Incorporating wellness programs offers up significant advantages that can be driven even further by improving wellness offerings. While organizations are planning to increase spending and improve programs, there's still a significant obstacle to securing budget for program implementation and modification (53.1 percent). With budget being a challenge, it's surprising that more organizations aren't taking advantage of the substantial financial incentives linked with the Affordable Care Act rollout. Of the organizations surveyed, only a quarter (26.4 percent) were planning to take advantage of the increase in wellness incentives provided by the ACA. Nearly half of the organizations surveyed (43.1 percent) have no plans to act on wellness incentives and 13.7 percent weren't even aware that there were such incentives.

As of Jan. 1, 2014, the ACA is offering improved incentives to support workplace wellness programs, including fitness center membership reimbursement, rewarding employees who attend health education seminars and rewarding employees who complete health risk assessments¹². The ACA has also increased rewards by 10 percent for health care coverage, and raised the maximums on rewards for smoking cessation and prevention programs up to 50 percent. It works out to money on the table and missed opportunities for the 4 out of 10 organizations that have no current plans to take advantage of perks the ACA is offering.

HEALTH AND WELLNESS INCENTIVES IN THE AFFORDABLE CARE ACT



Conclusion

"Engagement comes when employees feel supported by their employer, when their needs are being met, and when companies are embracing a culture of health and wellness," Boyce said. This year many employers and employees describing feeling that shift in culture with an improved understanding of how workplace wellness programs contribute to a workplace culture that supports healthy, active, energized, engaged and productive employees. Organizations that are embracing workplace wellness are benefiting from the results, even as they may struggle to track areas like engagement and productivity. While measurement may be a struggle, most organizations are continuing to push to increase and expand programs, signaling an appreciation for the benefits that come from strong wellness offerings.

"It's time to make a mark on disengagement. Offering robust, holistic health and wellness programs helps companies tackle this tough problem by supporting employees with tools that drive daily engagement in their health, so they're better able to engage and handle the challenges and stressors that come along at work and in life," Boyce said. "Healthy, energized, driven employees are engaged ones. When they feel their best, they're ready and able to dig into their work and lives — and these are the people you want working for your company."



ABOUT VIRGIN PULSE

Virgin Pulse, part of Sir Richard Branson's famed Virgin Group, helps employers create a workforce with the energy, focus, and drive necessary to fully engage at work and in life. With its award-winning, online platform, the company fosters healthy daily habits and sustainable behavior change that help employees thrive at work and across all aspects of life. Unlike narrowly-focused employee health and engagement solutions, Virgin Pulse is a hub of consumer-focused strategies and innovative tools that set the foundation for a company's engagement efforts. More than 250 industry leaders representing 1.5M+ employees have selected Virgin Pulse's programs to reinvigorate their workplace.

Learn more at www.virginpulse.com.

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