

Americas Wellness

Winning over the hearts and minds of employees

Results from the 2015/2016 Staying@Work and Global Benefits Attitudes Surveys

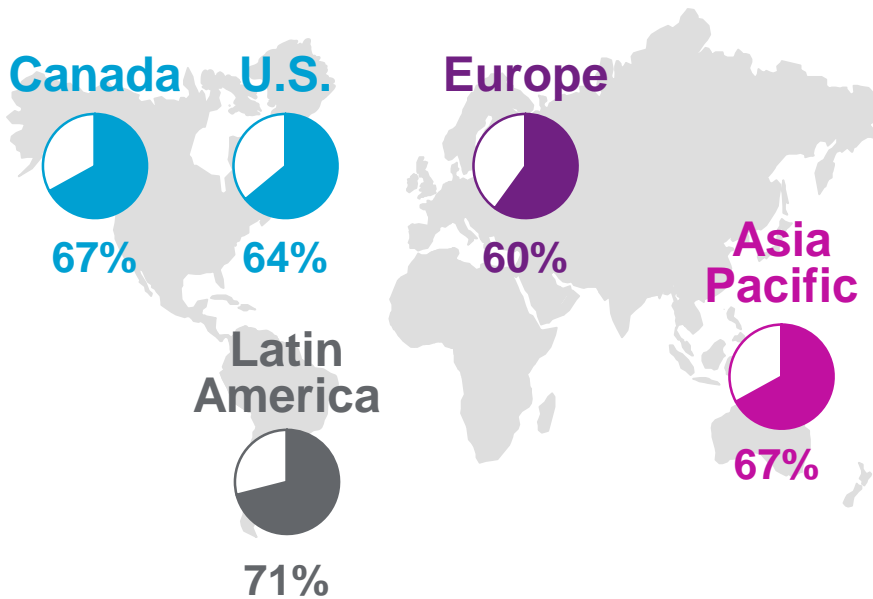
June 14, 2016

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Health is a priority for employees and they want employer involvement

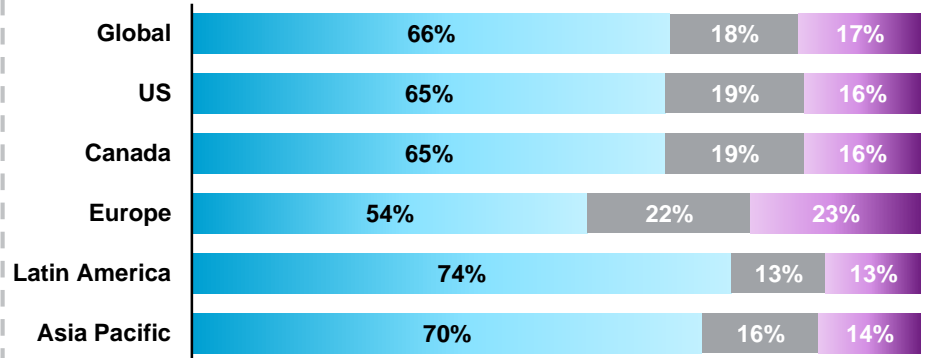
Managing my health is a top priority in my life.
% agree or strongly agree



Please indicate your degree of agreement towards the following.

Employers should take an active role in encouraging their employees to live healthy lifestyles

It is not the role of an employer to encourage their employees to live healthy lifestyles



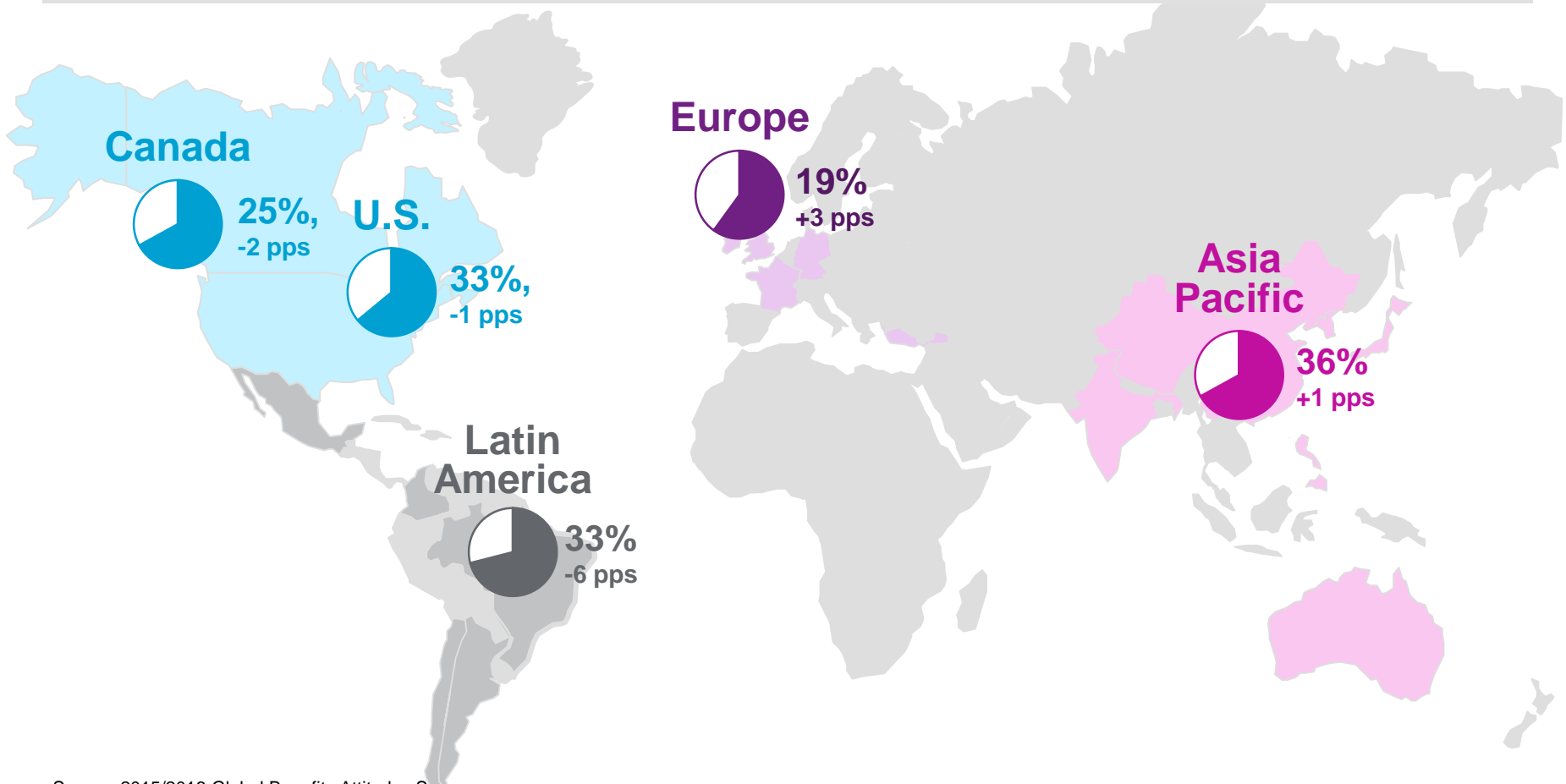
■ Strongly prefer
 ■ Prefer
 ■ Slightly prefer
 ■ Neutral
 ■ Slightly prefer
 ■ Prefer
 ■ Strongly prefer

7-in-10 think managing health is a top priority in life.
2-in-5 dislike their employer having access to their health data.

Source: 2015/2016 Global Benefits Attitudes Survey
Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

But employees have not connected to employer initiatives

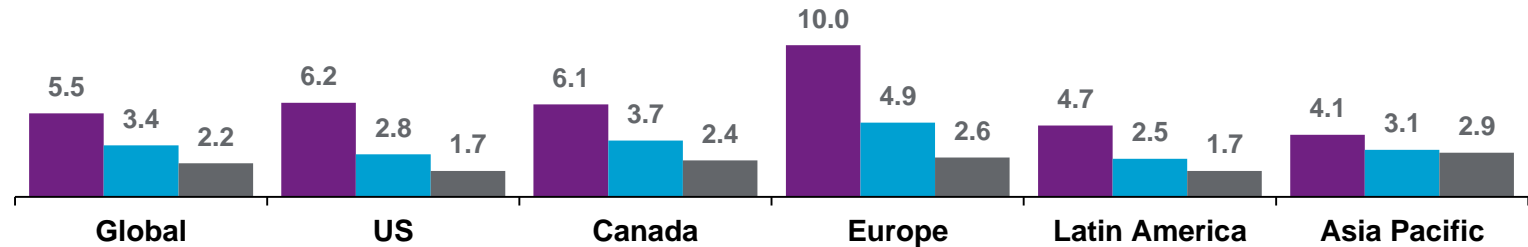
The well-being initiatives offered by my employer have encouraged me to live a healthier lifestyle.
% agree or strongly agree



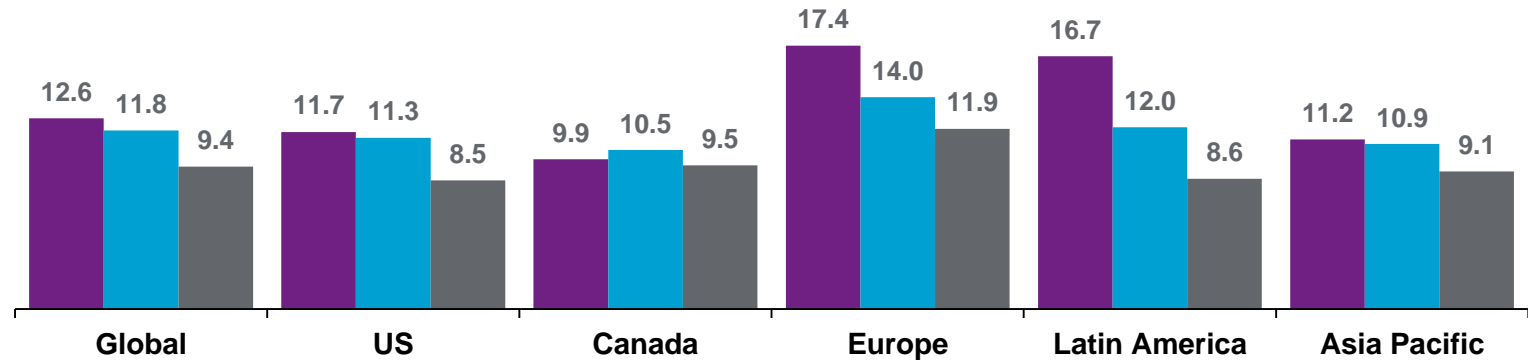
Source: 2015/2016 Global Benefits Attitudes Survey
Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

Employees in poor health are less productive at work...

FTE days lost to absence



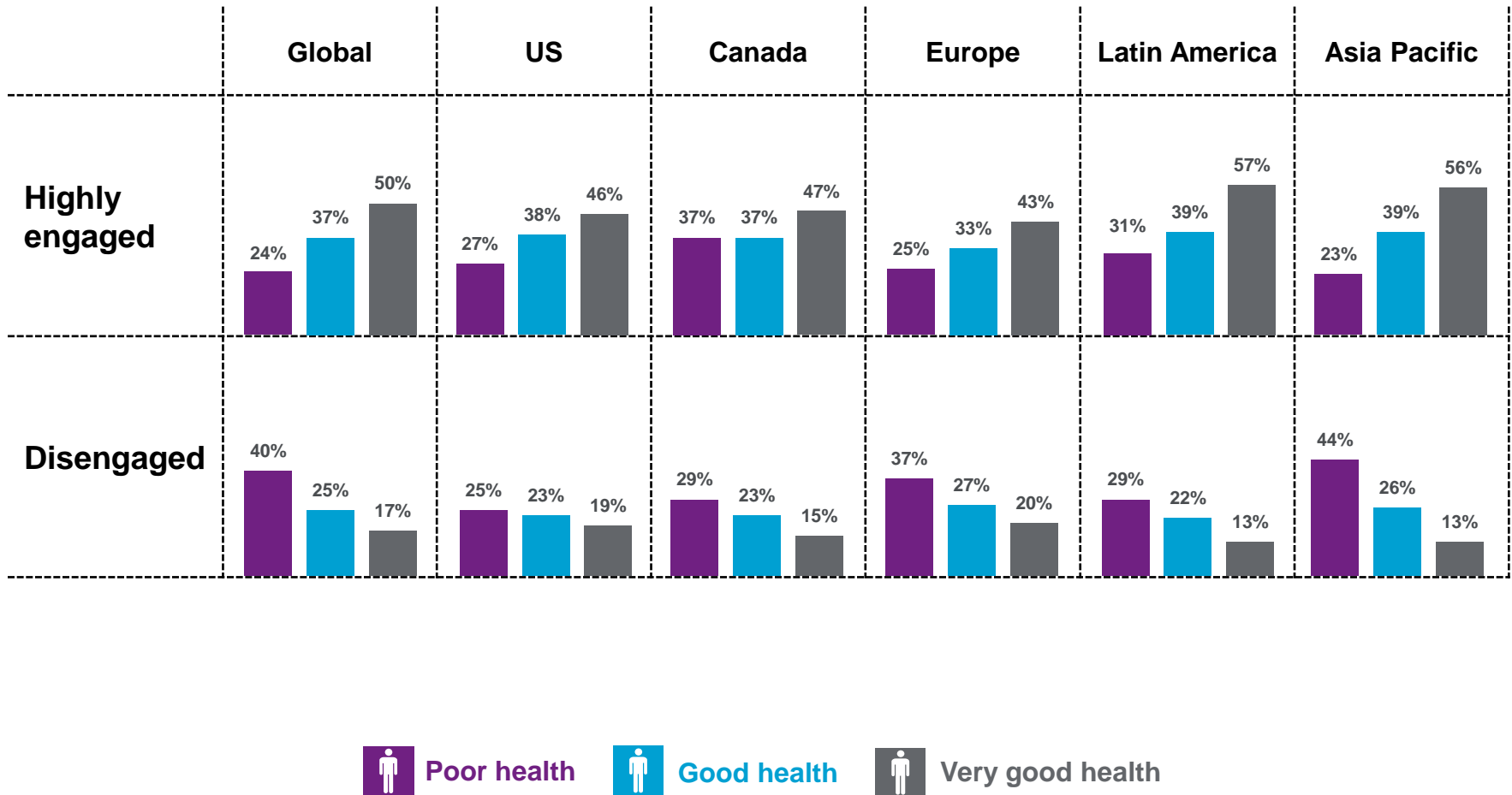
FTE days lost to presenteeism



Source: 2015/2016 Global Benefits Attitudes Survey

Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

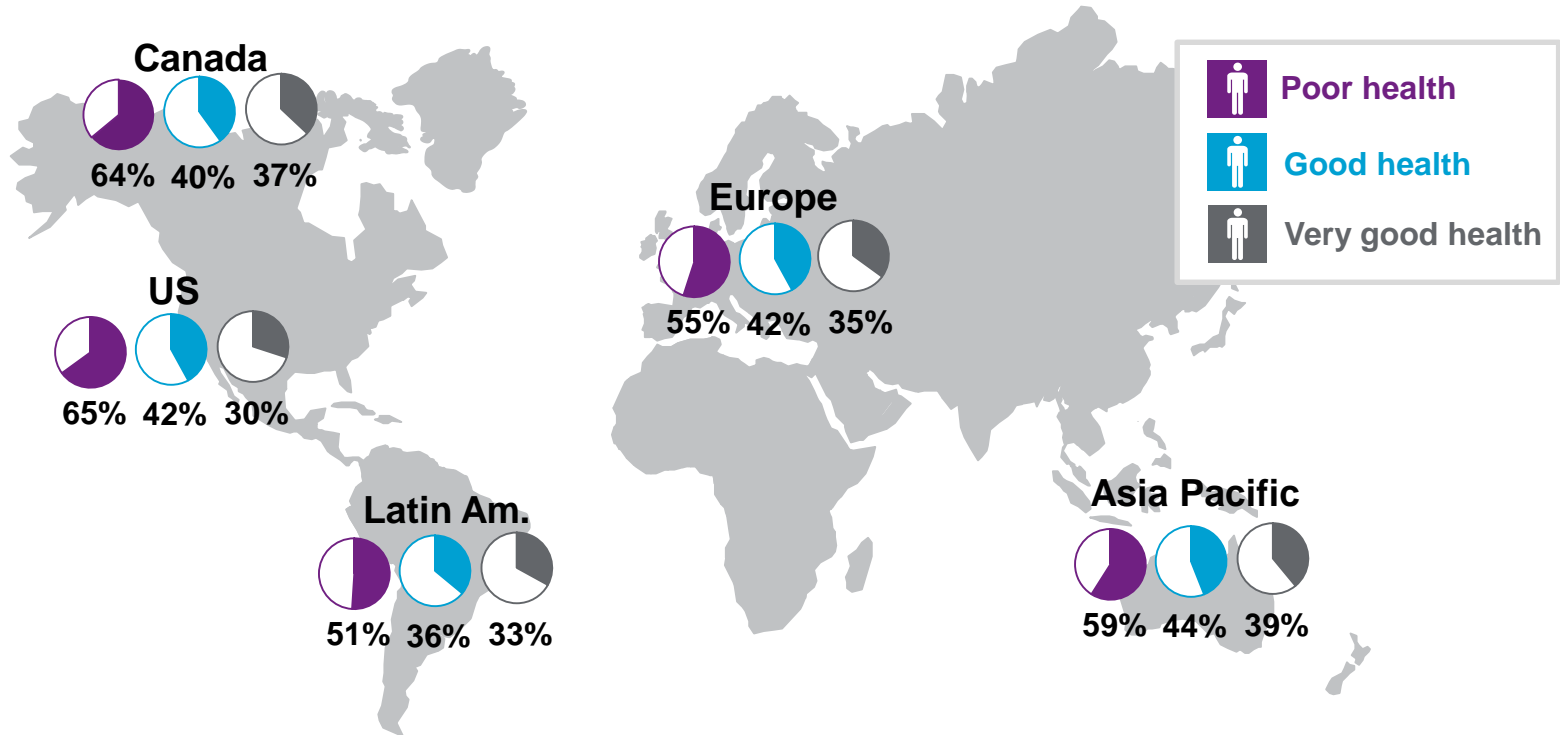
...and are less engaged than employees in good health



Source: 2015/2016 Global Benefits Attitudes Survey
 Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

Employees in poor health are more likely to be stressed and financially struggling

% highly stressed employees



	Global			US			Canada			Europe			Latin America			Asia Pacific		
% Struggling* <i>*Employees experiencing long and short-term worries</i>	26%	20%	12%	45%	28%	14%	31%	22%	14%	29%	18%	9%	40%	29%	16%	22%	14%	8%

Source: 2015/2016 Global Benefits Attitudes Survey

Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

Many employees prefer to manage their health on their own

To what extent do you agree or disagree with the following statements about your employer offering initiatives to help you live a healthy lifestyle? % agree or strongly agree

		Global	US	Canada	Europe	Latin America	Asia Pacific
Personal	I prefer to manage my health on my own	71%	71%	76%	73%	59%	72%
Building trust	I don't want my employer to have access to my personal health information	39%	46%	52%	48%	28%	34%
	I don't trust my employer to be involved in my health and well-being	31%	30%	36%	36%	29%	31%
Programs	The initiatives offered by my employer do not meet my needs	34%	32%	38%	38%	40%	32%
	I am not sure about the activities provided by my employer or how to sign up	26%	19%	24%	30%	29%	29%
Manager	My manager is not/would not be supportive of my participation	23%	14%	20%	28%	30%	26%

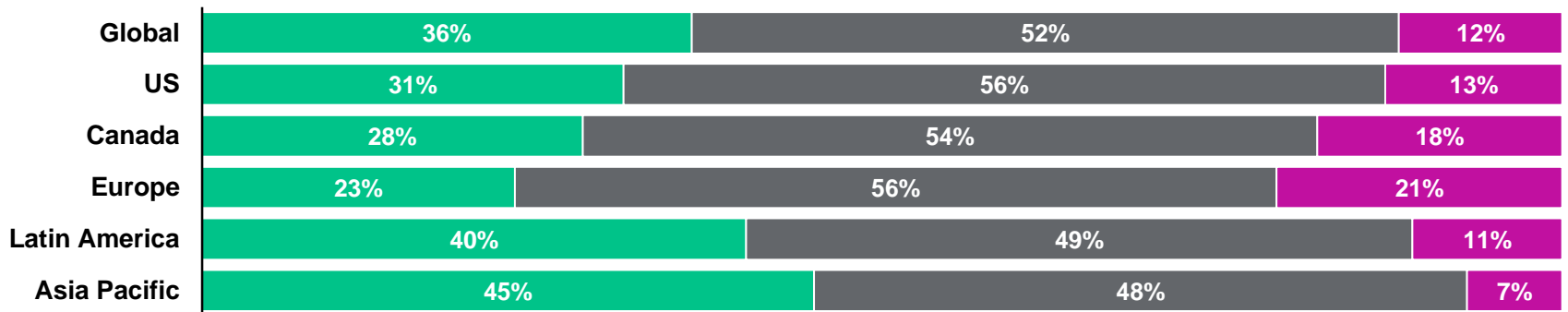
Source: 2015/2016 Global Benefits Attitudes Survey

Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

Attitude toward employer involvement in health and well-being



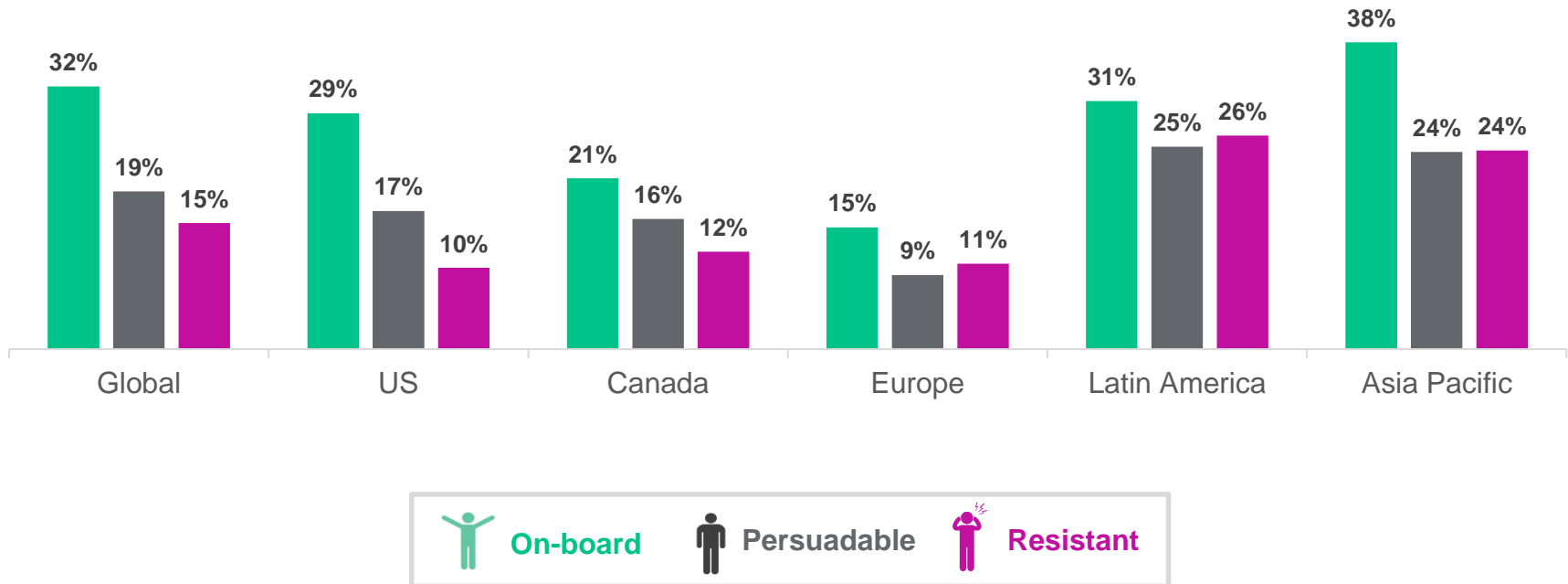
On-board	Support the role of the employer in encouraging health and their initiatives and are comfortable with targeted messages
Persuadable	Positive to some employer involvement but sceptical about the degree to which the employer should move beyond
Resistant	Do not support the role of employers in health and well-being and are very uncomfortable with targeted messages



Source: 2015/2016 Global Benefits Attitudes Survey
 Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

On-board employees are more likely to participate in employer initiatives

Participation in well-being initiatives via employer or health plan (%)



Source: 2015/2016 Global Benefits Attitudes Survey

Sample: US, Canada - Full time employees with employer-based health care, Other countries – All respondents

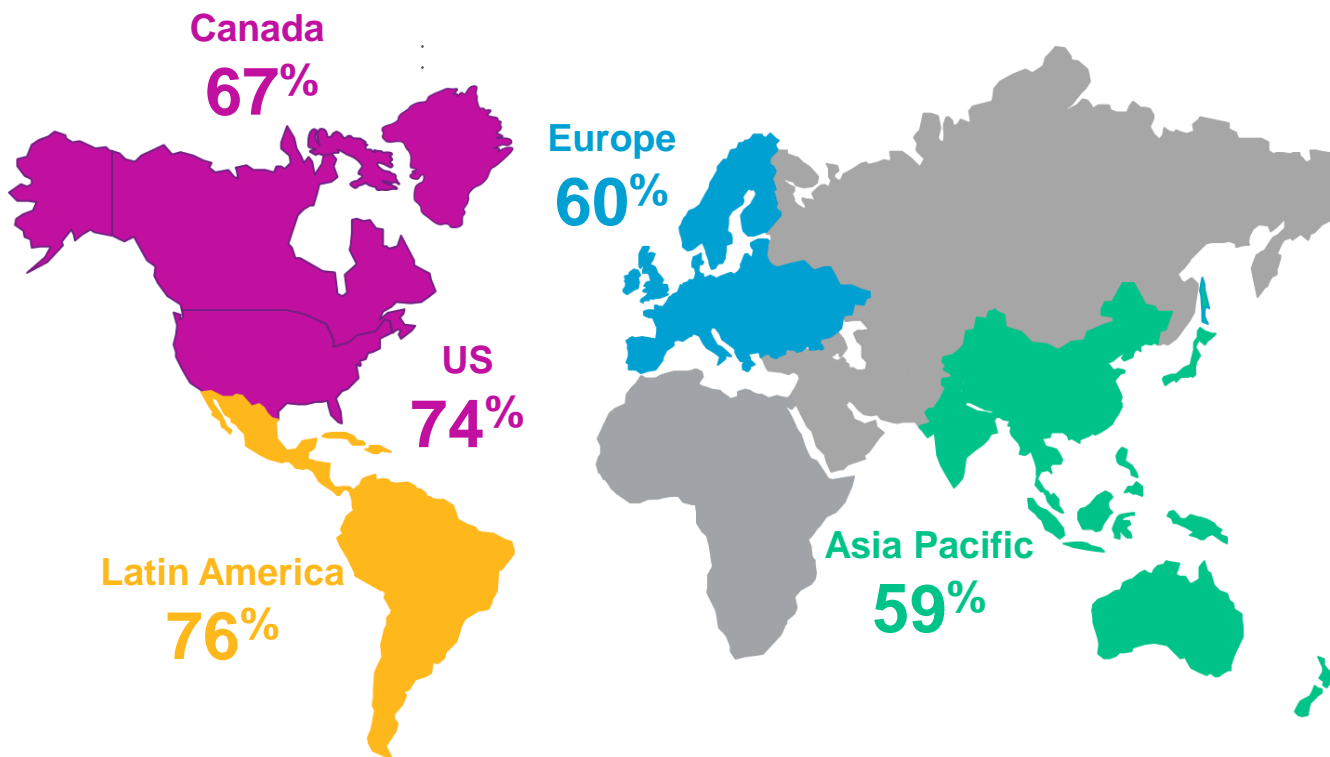
How to build a culture of health and well-being?

- 1 The employer role:** Move from 'pull' (encouragement) to 'push' (driving change) gradually – build employee permission.
- 2 Trust:** There is a strong connection between health engagement and the broader employment deal. Address concerns on privacy of personal information.
- 3 Social connections:** Leverage worksite and support interactions and competitions around health. Important for managers to be effective advocates of employer programs.
- 4 New technology:** Use technology, peer groups and personal communication to motivate action.

A focus on addressing financial security

Sizeable numbers of employees concerned on the level of debt they face

Financial security has become a more important issue for me over the last two or three years



I often worry about how much debt I have

Global 31%

US 36%

Canada 35%

Europe 24%

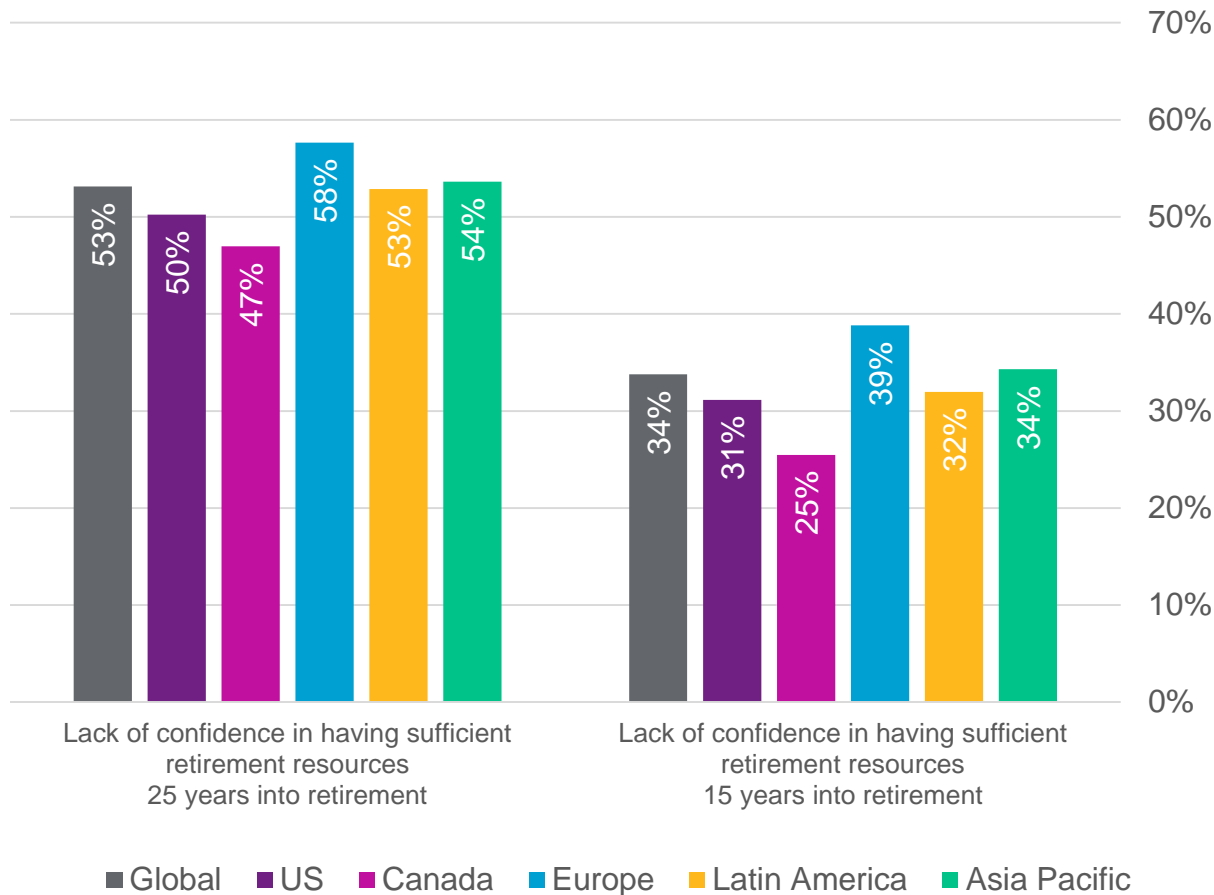
Latin America 43%

Asia Pacific 26%

Source: 2015/2016 Global Benefits Attitudes Survey
Sample: All employees. Except US and Canada, full-time employees only.

The long-term outlook is pessimistic ...

Half of employees are not confident of having enough resources to afford long spells in retirement



My generation is likely to be much worse off in retirement than my parents' generation are/were

Global 66%

US 76%

Canada 74%

Europe 76%

Latin America 70%

Asia Pacific 51%

Note: Percentage agree or strongly agree, not at all confident or not too confident





Source: 2015/2016 Global Benefits Attitudes Survey

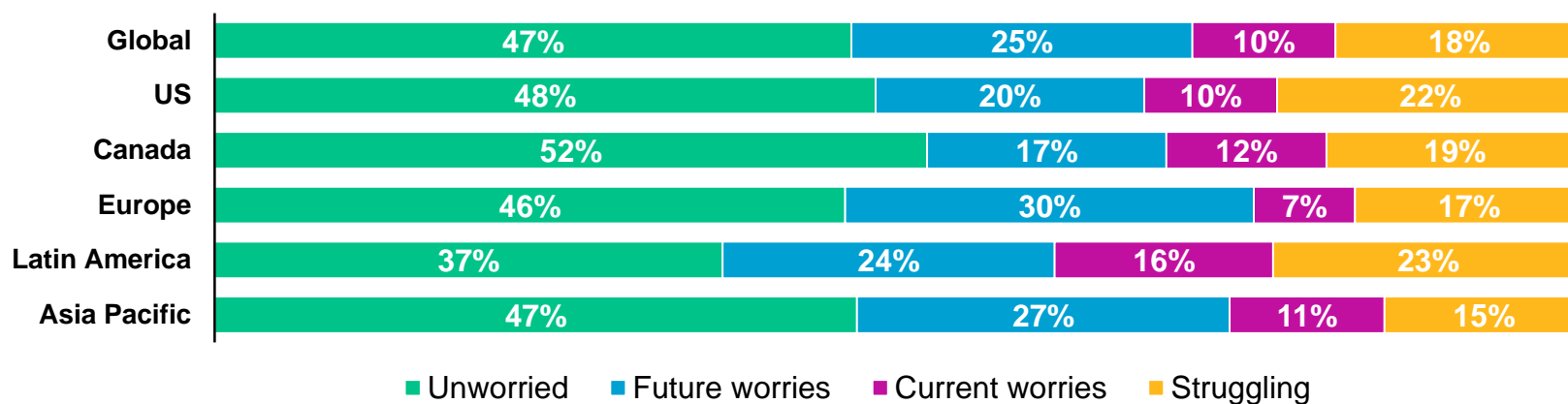
Sample: All employees. Except US and Canada, full-time employees only.

Financial worries widespread

We define four types of employees according to their financial worries



 Unworried	Employees are not worried either for the short- or long-term
 Future worries	Employees experiencing long-term worries only
 Current worries	Employees experiencing short-term worries only
 Struggling	Employees worried about both, the short- and long-term



Source: 2015/2016 Global Benefits Attitudes Survey

Sample: All employees. Except US and Canada, full-time employees only.