

# WORKING WELL: A Global Survey of Health Promotion and Workplace Wellness Strategies

*Executive Summary*

## EXECUTIVE SUMMARY

### Overview

For the third consecutive year, Buck Consultants' survey **WORKING WELL: A Global Survey of Health Promotion and Workplace Wellness Strategies** investigates emerging trends in employer-sponsored health promotion and wellness programs. By exploring areas such as program strategy, design, objectives, incentives, measurement, evaluation, and communication, this research seeks insights into how employers around the world implement and evaluate strategic wellness initiatives. The 2009 survey also assesses the impact of the current economic downturn on employer wellness initiatives.

This year, 1,103 organizations from more than 45 countries representing more than 10 million employees responded to the survey. The survey questionnaire was offered online in 10 languages. Participants were senior or mid-level professionals with responsibility for corporate health or wellness strategy.

### What is Workplace Wellness?

The term "wellness" is not defined or used consistently around the world. As defined for this report, wellness refers to programs designed to improve the health and well-being of employees (and their families), in order to enhance organizational performance and reduce costs. Wellness programs typically address specific behaviors and health risk factors, such as poor nutrition, physical inactivity, stress, obesity, and smoking. These factors commonly lead to serious and expensive health problems and have a negative impact on workforce productivity.

Wellness programs raise awareness, provide information and education, and offer incentives that encourage employees and their families to adopt healthier lifestyles. These initiatives are most successful in a workplace environment that promotes and supports health and well-being.

Wellness programs also can help reduce the incidence and severity of chronic illnesses such as asthma, diabetes, and heart disease. Employers often integrate their wellness initiatives with chronic disease management programs to provide a continuum of healthy lifestyle support.

Health promotion, health improvement, health and well-being, and disease prevention programs are other terms used in place of wellness. This survey report uses the terms wellness and health promotion interchangeably.

### Program Prevalence

Although most employers offer (or support in their local communities) at least one program that promotes the good health of their workforce, documented wellness strategies are not universally embraced. Sixty-four percent (64%) of the 1,103 organizations that participated in the survey indicate they have a wellness strategy (an increase from 60 percent last year and 49 percent in 2007). However, nearly two-thirds of employers with a wellness strategy have not completely implemented their strategy.

Among multinational employers (organizations that employ workers in multiple countries), 41 percent have a global strategy, and 48 percent have globally centralized ownership and responsibility for wellness, a significant increase from last year's 22 percent.

Wellness programs are most prevalent in North America, where they are offered by 77 percent of participating employers, but employer health promotion is growing in popularity throughout the rest of the world, despite current economic conditions.

**Strategic and Health-Related Objectives**

The most common strategic objective for wellness initiatives worldwide is improving productivity and reducing “presenteeism” (when employees are at work but not fully productive due to personal health issues). While this objective has ranked high in past surveys (second or third in priority in most regions), this year participants in five of seven regions of the world ranked it first, reflecting a stronger perceived correlation between healthier workers and business performance.

Among United States employers, the top objective remains reducing health care costs — an anomaly compared to the other six regions but not at all surprising. Concerns about global competitiveness have put ever-increasing pressure on U.S. employers to reduce the financial burden of providing health care benefits. Asian respondents identified improving workforce morale and engagement as their top priority. Rounding out the top three objectives for wellness programs are reducing employee absences due to sickness or disability and maintaining work ability.

**Table One: Top Strategic Objectives for Wellness Programs – by Region**

Priority	Africa	Asia	Australia	Canada	Europe	Latin America	United States
1	Improving Productivity/ Reducing Presenteeism	Improving Workforce Morale/ Engagement	Improving Productivity/ Reducing Presenteeism	Improving Productivity/ Reducing Presenteeism	Improving Productivity/ Reducing Presenteeism	Improving Productivity/ Reducing Presenteeism	Reducing Health Care/ Insurance Costs
2	Reducing Employee Absence	Improving Productivity/ Reducing Presenteeism	Reducing Employee Absence	Reducing Employee Absence	Improving Workforce Morale/ Engagement	Maintaining Work Ability	Improving Productivity/ Reducing Presenteeism
3	Maintaining Work Ability	Reducing Employee Absence	Improving Workforce Morale / Engagement	Reducing Health Care / Insurance Costs	Reducing Employee Absence	Reducing Employee Absence	Reducing Employee Absence

Table Two identifies the top health risks or issues that drive employers’ wellness strategies. These vary somewhat by region.

**Table Two: Top Health Risks or Issues Driving Wellness Strategy – by Region**

Priority	Africa	Asia	Australia	Canada	Europe	Latin America	United States
1	Stress	Stress	Stress	Stress	Stress	Physical Activity/ Exercise	Physical Activity/ Exercise
2	Infectious Diseases/ AIDS/HIV	Physical Activity/ Exercise	Physical Activity/ Exercise	Work/Life Issues	Physical Activity/ Exercise	Nutrition/ Healthy Eating	Nutrition/ Healthy Eating
3	Work/Life Issues	Nutrition/ Healthy Eating	Work/Life Issues	Depression	Work/Life Issues	Stress	Chronic Disease (e.g., heart disease, diabetes)

Stress is cited as the top health risk driving wellness programs in most areas of the world. This is not surprising, given political, economic, and societal developments (e.g., globalization, change in working patterns, and lack of job security) over the last five to 10 years. The recent economic downturn has intensified this situation.

Exceptions are the United States and Latin America — where exercise and nutrition are of top concern. This difference in priorities may reflect the increasing prevalence of obesity in these regions.

**Program Components**

Employers utilize a broad range of components in their wellness programs. Table Three shows the relative popularity of these components by geography.

Among the most popular health promotion resources are employee health screenings, including biometric screenings (such as blood pressure, cholesterol, and body fat), health risk appraisals (health and lifestyle questionnaires), and executive screening programs. Immunizations and gym or fitness club membership discounts also are among the most prevalent offerings in several geographies. Other popular program elements are health portals and Web sites, on-site classes, and employee health fairs.

**Table Three: Top Wellness Program Elements – by Region**

Africa	Asia	Canada	Europe	Latin America	United States
Biometric health screening	Biometric health screening	Immunizations/flu shots	Gym/fitness club membership discount	Immunizations/flu shots	Immunizations/flu shots
Executive screening program	On-site health classes	Gym/fitness club membership discount	Biometric health screening	Biometric health screening	Health risk appraisal
Health portal/Web site	Company-sponsored sports teams	Executive screening program	Immunizations/flu shots	On-site health classes	Gym/fitness club membership discount
Employee health fairs	Executive screening program	Health portal/Web site	Employee health fairs	Health risk appraisal	Employee health fairs
Health risk appraisal	Health risk appraisal	On-site health classes	On-site health classes	Gym/fitness club membership discount	Health portal/Web site

These components are well-entrenched, but respondents predict that other less-established elements will grow at a rate of 100 percent or greater during the next three years. The fastest-growing wellness program components (see Table Four) include technology-driven tools, such as online healthy lifestyle programs, and personal health records (an electronic summary of personal health information). By increasing the degree of personalization and leveraging technology, these tools seek to deliver greater participation and results than the one-size-fits-all efforts of early wellness initiatives.

Other rapidly growing program elements include on-site resources such as caregiver support, personal health coaching, employee health fairs, and improvement in vending machine food choices. Due to increasingly aging populations, especially in Asia and Europe, the trend toward employer support for caregivers will likely continue.

“Cycle-to-work” programs, which are among the least prevalent in all regions except Europe, are predicted to grow significantly over the next three years. The concurrent growing emphasis on environmental sustainability will help drive such trends.

Strong growth also is predicted for programs designed to improve the psychosocial work environment (e.g., managing work demands and personal control, balancing effort and reward, supporting respect and trust in the workplace) and those that support work/life balance (e.g., flexible job structure arrangements, commute time reduction, concierge services). These efforts reflect an increasing appreciation among employers that management practices and the work environment can have a significant impact on the health and well-being of employees.

**Table Four: Fastest Growing Wellness Program Elements – by Region**

Africa	Asia	Canada	Europe	Latin America	United States
Caregiver support	Cycle-to-work program	Personal health/ lifestyle coaching (on-site)	Vending machines emphasize healthy food options	Cycle-to-work program	Cycle-to-work program
Programs to improve the psychosocial work environment	Online healthy lifestyle programs	Cycle-to-work program	Online healthy lifestyle programs	Vending machines emphasize healthy food options	Vending machines emphasize healthy food options
Vending machines emphasize healthy food options	Vending machines emphasize healthy food options	Programs to improve the psychosocial work environment	Programs to improve the psychosocial work environment	Online healthy lifestyle programs	Programs to improve the psychosocial work environment
Company-sponsored sports teams or leagues	On-site physiotherapy/ physical therapy	Employee health fairs	Disease management programs	Programs to improve the psychosocial work environment	Personal health/ lifestyle coaching (on-site)
Work/life balance support	Programs to improve the psychosocial work environment	Personal health record	Personal health record	Personal health record	Personal health record

**Motivational Strategies**

Employers utilize both financial and non-financial methods to encourage employee engagement in wellness programs and to motivate lifestyle-related behavior changes. Incentive rewards, until recently a U.S. phenomenon, are increasingly offered by employers in all parts of the world. Respondents plan to significantly expand incentive programs over the next few years, even though many perceive them as only moderately successful (similar to last year’s survey).

Financial incentives range from minimal amounts to more than \$2,000 U.S. dollars per employee, per year. In the United States, incentives average \$163 per employee (up from \$145 last year), with a median value of approximately \$50.

**Measurement and Financial Outcomes**

One of the survey’s intriguing findings is that worldwide, only 22 percent of surveyed employers use financial metrics to validate the success of their wellness programs. Larger organizations (those with more than 10,000 employees) are more likely to measure outcomes, as are employers in Latin America, Asia, and the United States.

These variations may be explained in part by the differences in strategic priorities. For example, employers in some countries emphasize financial metrics while employers in other countries focus on employee morale. Most notably, in the United States (where health care cost control is the primary strategic driver for wellness), 42 percent of respondents have measured the effect of wellness programs on their health care cost trend rate. Of these employers, 43 percent report a reduction, typically two to five trend percentage points per year.

Still, there appear to be gaps between employers' goals for their wellness initiatives and their ability to measure or demonstrate their success. The fact that organizations continue to offer wellness programs suggests they remain committed to their value. To some extent, employers also may recognize that measurable savings from health and behavior changes take years to manifest

## Impact of the Economic Downturn

Current economic conditions have caused 24 percent of respondents to reduce wellness services. However, 19 percent have increased them, perhaps to help employees and their families deal with personal aspects of the downturn.

Budget reductions for wellness programs generally are consistent with or less than other budget cuts. Wellness appears to be holding its own as an organizational priority.

## Conclusion

The results of this survey provide strong evidence that employers are increasingly recognizing the value of employee health and well-being to their organizations and their people. The trend toward further globalization of wellness programs continues, as does a greater emphasis on improving worker productivity through health promotion.

Notwithstanding differences in objectives and approaches among regions, most notably between the United States and other regions, continued global expansion of health promotion initiatives seems certain — despite the economic downturn and the challenges employers face in quantifying the success of their initiatives.

## For More Information

This Executive Summary highlights emerging trends and insights on employer-sponsored health promotion and wellness programs from the 2009 survey. The full report contains extensive details and in-depth analysis on program prevalence, objectives, components, motivational strategies, communication, measurement, and financial outcomes. Participating employers also shared their greatest wellness successes and their visions for the future of their wellness programs.

This executive summary is also available in Chinese, French, German, Japanese, Portuguese, and Spanish.

Also available are supplemental special reports, providing additional information and analysis for Brazil, Canada, Singapore, South Africa, and the United Kingdom. For more information, please visit [www.bucksurveys.com](http://www.bucksurveys.com).

## ABOUT THE SURVEY SPONSORS

### About Buck Consultants

Buck Consultants, an ACS company, is a global HR consulting firm that helps organizations develop, deploy, and manage their human capital. We combine our legacy in HR with the BPO expertise, global reach, and core technologies of ACS, to provide end-to-end solutions that help our clients solve complex HR — and business — issues.

### About Buck Surveys

Our team of experts conducts a suite of surveys for HR professionals, ranging from detailed compensation surveys to specific benefits-related data resources for organizations spanning the globe. These surveys provide the quality data that companies can rely on to make decisions critical to organizational success.

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Special thanks to the following organizations that collaborated in the creation and distribution of this survey:

**CIGNA** ([www.cigna.com](http://www.cigna.com)) is a global health service company dedicated to helping people improve their health, well-being, and sense of security, providing an integrated suite of medical, dental, behavioral health care, health coaching, and wellness programs to people around the world. **vielife** ([www.vielife.com](http://www.vielife.com)), a CIGNA company, is a leading provider of global health and productivity solutions including online health assessment and behavioral change programs available in Chinese, French, Spanish, Portuguese, and English.

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Additional promotion was provided by many organizations worldwide, including:

- The AsiaPacific Wellness Forum
- Associação Brasileira de Qualidade de Vida
- The Biokinetics Association of South Africa
- CPH Health
- The European Agency for Safety and Health at Work
- Health & Productivity Institute of Australia
- Health Promotion Board of Singapore
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- World Congress

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