What's up with Wellness?
Insights and Trends from Our 2014 Global Wellness Survey

December 11, 2014
Today’s Areas of Focus

• Global Trends
• Employee Engagement
• What’s Next?

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Principal, Health & Productivity
Global Trends
Global Wellness Research

Working Well: A Global Survey of Health Promotion, Workplace Wellness and Productivity Strategies

Objective:
• Assess trends in employer wellness strategies and practices

Participants:
• Data collected 2007-2014
• 1,041 employers in 2014
• 8 million employees
• 11 languages, 37 countries
• 46% multinational employers
• All industry categories

Available at www.bucksurveys.com
Special Thanks

AOK Institute
Associação Brasileira de Qualidade de Vida
Deutsche Demographie Netzwerk
European Network for Workplace Health Promotion
GRUPO LM&S
Health Promotion Board of Singapore
HERO
Hidalgo & Asociados
Hotel Provita
Institute for HealthCare Consumerism
International Association for Workplace Health Promotion
Institute of Sports Medicine Austria
International Organisation of Employers
LorantMS/CAMSA
Midwest Business Group on Health
Nat. Institute of Occupational Health and Poison Control China
National Wellness Institute of Australia
Sanpo Society Japan
SCIATH Insurance Brokers
Vishwas
Location of Employees

- Africa/Middle East: 22%
- Asia: 41%
- Australia/NZ: 23%
- Europe: 42%
- Latin America: 28%
- United States: 68%
Companies Offering Health Promotion to Employees

- North America: 79%
- Europe: 46%
- Asia: 46%
- Latin America: 46%
- Africa/Middle East: 38%
- Australia/New Zealand: 47%
Number of Years with a Wellness Strategy

- 0 - 1 year: 11%
- 2 - 5 years: 51%
- 6 - 10 years: 22%
- More than 10 years: 14%
- Do not know: 2%

62% less than 5 years
## Employer Objectives Driving Wellness Strategy

<table>
<thead>
<tr>
<th>Objective</th>
<th>All regions*</th>
<th>Africa/Middle East</th>
<th>Asia</th>
<th>Australia/NZ</th>
<th>Canada</th>
<th>Europe</th>
<th>Latin America</th>
<th>United States</th>
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</thead>
<tbody>
<tr>
<td>Improving morale/engagement</td>
<td>1</td>
<td>4</td>
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<td>3</td>
<td>1</td>
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<td>Reducing employee absences</td>
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<td>7</td>
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<tr>
<td>Improving workplace safety</td>
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<td>Improving productivity/presenteeism</td>
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<td>8</td>
<td>4</td>
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<td>2</td>
<td>3</td>
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<td>Maintaining work ability</td>
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<td>5</td>
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<tr>
<td>Organizational values/mission</td>
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<td>7</td>
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<td>6</td>
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<tr>
<td>Reducing health care costs</td>
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<td>10</td>
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<td>Promoting corporate image or brand</td>
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<td>6</td>
<td>9</td>
<td>9</td>
<td>9</td>
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<tr>
<td>Social/community responsibility</td>
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<td>5</td>
<td>7</td>
<td>9</td>
<td>10</td>
<td>7</td>
<td>10</td>
<td>10</td>
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<tr>
<td>Attracting and retaining employees</td>
<td>9</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>8</td>
</tr>
</tbody>
</table>

1 = most important, 10 = least important

*Across all regions:

- **Ranked 1st:** Improving morale/engagement, Reducing employee absences, Improving workplace safety
- **Ranked 2nd:** Improving productivity/presenteeism, Maintaining work ability, Organizational values/mission
- ** Ranked 3rd:** Reducing health care costs, Promoting corporate image or brand, Social/community responsibility, Attracting and retaining employees

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**buckconsultants**

**Xerox**
Engagement is Critical…

Top factors driving employee engagement:

1. The ability to manage stress
2. Feeling a sense of purpose at work

# Health Issues Driving Wellness Strategy

<table>
<thead>
<tr>
<th></th>
<th>All regions*</th>
<th>Africa/ Middle East</th>
<th>Asia</th>
<th>Australia/NZ</th>
<th>Canada</th>
<th>Europe</th>
<th>Latin America</th>
<th>United States</th>
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<tbody>
<tr>
<td>Stress</td>
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<td>2</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Physical activity/exercise</td>
<td>2</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>4</td>
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<tr>
<td>Nutrition/healthy eating</td>
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<td>8</td>
<td>6</td>
<td>3</td>
<td>3</td>
<td>3</td>
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<tr>
<td>Workplace safety</td>
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<td>5</td>
<td>9</td>
<td>6</td>
<td>1</td>
<td>12</td>
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<tr>
<td>Work/life issues</td>
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<td>2</td>
<td>13</td>
<td>4</td>
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<td>4</td>
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<tr>
<td>Depression/anxiety</td>
<td>6</td>
<td>8</td>
<td>11</td>
<td>8</td>
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<td>7</td>
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<tr>
<td>High blood pressure (hypertension)</td>
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<td>5</td>
<td>4</td>
<td>12</td>
<td>6</td>
<td>12</td>
<td>9</td>
<td>6</td>
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<tr>
<td>Chronic disease (e.g., diabetes)</td>
<td>8</td>
<td>12</td>
<td>8</td>
<td>8</td>
<td>3</td>
<td>10</td>
<td>11</td>
<td>4</td>
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<tr>
<td>Personal safety</td>
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<td>10</td>
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<td>11</td>
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<td>Psychosocial work environment</td>
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<td>10</td>
<td>7</td>
<td>11</td>
<td>12</td>
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<td>14</td>
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<tr>
<td>Sleep/fatigue</td>
<td>11</td>
<td>12</td>
<td>10</td>
<td>6</td>
<td>11</td>
<td>9</td>
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<tr>
<td>High cholesterol (hyperlipidemia)</td>
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<td>15</td>
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<td>14</td>
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<td>12</td>
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<td>Obesity</td>
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<td>15</td>
<td>6</td>
<td>12</td>
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<td>Tobacco use/smoking</td>
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<td>16</td>
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<tr>
<td>Infectious diseases/AIDS/HIV</td>
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<td>Substance abuse</td>
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<td>Maternity/newborn health</td>
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<td>16</td>
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<td>15</td>
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</tr>
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</table>

1 = most important, 17 = least important

Ranked 1st

Ranked 2nd

Ranked 3rd
Leading Cause of Death (Working Age Adults)

Heart disease

Stroke

Lung cancer

HIV/AIDS

Alcohol

By 2030, depression will be the world’s greatest health burden.

Mental Health – Stress, Burnout, Depression

“Impact of Depression in the Workplace in Europe”

- One in ten have taken time off work because of depression
- 36 working days (on average) lost per episode of depression
- Rates as high as 26% of working population

“From Eldorado to Burnout Zone”
German study of IT workers

- 50% had frequently reached their limits and experienced a physical or mental collapse
Growth in Global Strategies

Multinational Employers with a Global Health Promotion Strategy

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2009</th>
<th>2012</th>
<th>2014</th>
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<tbody>
<tr>
<td>%</td>
<td>34%</td>
<td>46%</td>
<td>49%</td>
<td>56%</td>
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</table>
Employee Engagement
Pursuing the Elusive Culture of Health

Extent to which organizations currently have a Culture of Health

- 33% very strong + 43% moderately strong
- 76%

Organizations planning to pursue a Culture of Health in the future

- 78% extremely or very much pursuing + 17% moderately so
- 95%

Attributes of a Culture of Health...

...promoting healthy lifestyle choices:
- Senior leaders are champions and role models
- Support at all levels, including middle management
- Frequent communication, including employee feedback
- A holistic approach – physical, psychosocial, financial
- Supportive workplace and environmental policies
A Culture of Health: Almost Everyone Wants it

**Culture of Health: Got It**

<table>
<thead>
<tr>
<th>Region</th>
<th>Extremely so</th>
<th>Very much so</th>
<th>Moderately so</th>
<th>Slightly so</th>
<th>Not at all</th>
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<tbody>
<tr>
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<td>40%</td>
<td>20%</td>
<td>20%</td>
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<tr>
<td>Asia</td>
<td>9%</td>
<td>42%</td>
<td>41%</td>
<td>7%</td>
<td>1%</td>
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<td>Australia/NZ</td>
<td>24%</td>
<td>8%</td>
<td>34%</td>
<td>26%</td>
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<tr>
<td>Canada</td>
<td>4%</td>
<td>23%</td>
<td>44%</td>
<td>23%</td>
<td>6%</td>
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<tr>
<td>Europe</td>
<td>6%</td>
<td>27%</td>
<td>49%</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Latin America</td>
<td>5%</td>
<td>23%</td>
<td>36%</td>
<td>25%</td>
<td>11%</td>
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<tr>
<td>United States</td>
<td>6%</td>
<td>25%</td>
<td>46%</td>
<td>19%</td>
<td>4%</td>
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</table>

**Planning to Pursue It**

<table>
<thead>
<tr>
<th>Region</th>
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<th>Very much so</th>
<th>Moderately so</th>
<th>Slightly so</th>
<th>Not at all</th>
</tr>
</thead>
<tbody>
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<td>Africa/Middle East</td>
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<td>50%</td>
<td>20%</td>
<td></td>
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<tr>
<td>Asia</td>
<td>33%</td>
<td>44%</td>
<td>21%</td>
<td>2%</td>
<td></td>
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<tr>
<td>Australia/NZ</td>
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<td>37%</td>
<td>13%</td>
<td>5%</td>
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<td>Canada</td>
<td>29%</td>
<td>44%</td>
<td>21%</td>
<td>4%</td>
<td>2%</td>
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<td>Europe</td>
<td>23%</td>
<td>46%</td>
<td>29%</td>
<td>2%</td>
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<td>Latin America</td>
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<td>45%</td>
<td>22%</td>
<td>6%</td>
<td>4%</td>
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<tr>
<td>United States</td>
<td>40%</td>
<td>45%</td>
<td>12%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

[Diagram images of cultural health perceptions by region]
Branding is Moving Beyond Physical Health

- A distinct brand rose to 43%, from 41% in 2012
- Only 35% have No wellness or well-being program identity, down from 37%
- Branding and leader support continue to rise in importance – beyond “culture change by proclamation”

Relevant highlights

- 57% pursue overall well-being: physical, financial
- 57% see as important to employee value proposition
- 43% leaders strongly support wellness
- 30% get feedback regularly
Branding for More Holistic Messaging

Wellbeing

- Healthy Pursuits
- PEOPLEFIRST - DESTINATION HEALTH
- BALANCE
- working better together
- people care
- ENERGY 4
- PERSONAL RESILIENCE
- Essential Choices
- choose smart, live smart
- destination: success
- destination: wellness
Communication Channels: Secrets to Success?

- **Big jumps in social and mobile**
  - Workplace challenges (41% in 2009 to **54%** in 2014)
  - Social media (11% in 2010 to 17% in 2014)
  - Mobile (4% in 2009 to **19%** in 2014)

- **Leader briefings** slipped from 37% in 2009 to 34% in 2014, yet use is rebounding vs. in prior years

- **100%** of those achieving > 6% trend reduction use targeted emails for personalization

- **93%** achieving > 6% trend reduction used:
  - Annual benefits materials,
  - Web portals or intranets,
  - Posters or flyers, and/or
  - Home mailings

Almost all channels rose in use

- **76%** use a web portal
- **76%** use posters and flyers
- **71%** targeted emails
- **54%** workplace challenges
Confirmed Barriers and Challenges

**Trust**
- Fear for personal data privacy
- Reassurance
- Security

**Time**
- Too time starved or work-life stressed
- Ease of use
- Clear action steps

**Tolerance**
- Impatient with the hassle factor
- One-stop shop
- Single sign-on

**Traction**
- Lack of accountability, denial
- Personal/relevant
- Social media
- Know my numbers
## Challenge: Know and Overcome Your Barriers

<table>
<thead>
<tr>
<th>Time: 65%</th>
<th>#1: Time to participate and change health habits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traction: 55%</td>
<td>#2: Difficult to find personal motivation to change long-held habits</td>
</tr>
<tr>
<td>Trust: 36%, 28%, 24%</td>
<td>#3: Concern for privacy of their health data #4: Skepticism of programs’ help for their health #6: Mistrust of employer’s intentions</td>
</tr>
<tr>
<td>Tolerance: 25%, 17%</td>
<td>#5: Programs lack relevance to unique needs #7: Difficulty accessing resources, web, tools</td>
</tr>
</tbody>
</table>
A Continuum Evolving to Well-being

Wellness 1.0
- Prevention and health promotion activities such as:
  - Fun runs
  - Competitions
  - Health risk appraisals
  - Tobacco cessation
- Focus on driving participation
- Little measurement of outcomes

Wellness 2.0
- Health appraisals and screenings
- Integrated resources
- Lifestyle coaching support
- Portals with single sign-on
- Incentives help motivate participation
- Incentive tracking
- A start on defined clinical outcomes

Well-being 3.0
- Broadened to well-being
- Integrating health, wealth and career
- Tied to business mission and EVP
- Enabling culture
- Promotion of intrinsic motivators
- Extended to family
- Using innovative, personalized technologies
- Metrics and outcomes driven
What’s next?
What We Will Address

• Does wellness reduce health care costs?
• Is it a lever to defer the ACA excise tax?
• Based on recent EEOC actions, do incentive strategies need to be reconsidered?
• What is the fastest growing wellness component?
• How will the transformation taking place in U.S. health care change wellness strategy?
U.S. Employer Objectives Driving Wellness Strategy: 2007-14

- Reducing health care costs – U.S. leading wellness objective since 2007
- Remaining top U.S. wellness objectives in line with rest of world

Wellness Program Objective – % ranking as “extremely important” (“5” on 5-point scale)
Wellness and Health Trend Reduction

Reduction in health care trend rate (US employers)

- Yes 28%
- No 13%
- Do not know 59%

Average annual reduction in health care trend rate (US employers)

- Reduction of 0-1 trend percentage points per year: 32%
- Reduction of 2-5 trend percentage points per year: 57%
- Reduction of 6-10 trend percentage points per year: 9%
- Reduction of more than 10 trend percentage points per year: 3%

69% of U.S. employers who indicated their wellness program had an impact on trend, reported reductions of 2% or more.

12% of U.S. employers who indicated their wellness program had an impact on trend, reported reductions of 6% or more.
Wellness in U.S. After Health Care Reform: Lever to Shift Trend Line and Defer Excise Tax?

**ACA Excise Tax**
- 38% of large employers impacted in 2018\(^1\)
- $120B in new taxes 2018-2024\(^1\)

**Cost Avoidance**
- **2015-24: $31M**
- **2015-24: $72M**

**Per 1,000 employees:**
- 2% avoids $31M
- 6% avoids $72M

\(^1\)ACA excise tax estimates from American Health Policy Institute 2014 “the Impact of the Health Care Excise Tax on U.S. Employers and Employees”

\(^2\)1,000 active employee headcount (40% single and 60% family) unchanged from 2014-2024

\(^3\)Starting cost based on 2014 Kaiser Family Foundation Employer Health Benefits Survey average single/family rates adjusted by 5%
## Incentives Moderate After Explosive Growth

Organizations that offer incentives, including rewards, penalties, or both, to encourage participation in wellness initiatives – by region*

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2012</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa/Middle East</td>
<td>60%</td>
<td>65%</td>
<td>34%</td>
</tr>
<tr>
<td>Asia</td>
<td>69%</td>
<td>73%</td>
<td>41%</td>
</tr>
<tr>
<td>Australia/NZ</td>
<td>29%</td>
<td>64%</td>
<td>29%</td>
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<tr>
<td>Canada</td>
<td>55%</td>
<td>56%</td>
<td>41%</td>
</tr>
<tr>
<td>Europe</td>
<td>43%</td>
<td>47%</td>
<td>25%</td>
</tr>
<tr>
<td>Latin America</td>
<td>51%</td>
<td>48%</td>
<td>16%</td>
</tr>
<tr>
<td>United States</td>
<td>90%</td>
<td>88%</td>
<td>62%</td>
</tr>
</tbody>
</table>

*Data reflects percentage of organizations offering incentives.
Incentive Amounts Greater for Employers Achieving Highest Health Trend Reduction

- **Trend Reduced 2% or >**
- **Trend Reduced < 2%**

<table>
<thead>
<tr>
<th>Category</th>
<th>Trend Reduced 2% or &gt;</th>
<th>Trend Reduced &lt; 2%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health status improve</td>
<td>$350</td>
<td>$65</td>
</tr>
<tr>
<td>Education course</td>
<td>$300</td>
<td>$70</td>
</tr>
<tr>
<td>Disease management</td>
<td>$250</td>
<td>$60</td>
</tr>
<tr>
<td>Tobacco cessation</td>
<td>$200</td>
<td>$50</td>
</tr>
<tr>
<td>Preventive exams</td>
<td>$150</td>
<td>$40</td>
</tr>
<tr>
<td>Healthy living activities</td>
<td>$100</td>
<td>$30</td>
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<tr>
<td>Therapeutic adherence</td>
<td>$75</td>
<td>$20</td>
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<tr>
<td>Workplace &quot;challenges&quot;</td>
<td>$60</td>
<td>$20</td>
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<tr>
<td>Biometric screening</td>
<td>$50</td>
<td>$10</td>
</tr>
<tr>
<td>Health risk assessment</td>
<td>$30</td>
<td>$10</td>
</tr>
</tbody>
</table>

- 2% or > trend reduction
  - Average incentive 30% higher
  - Higher incentives in 9 of 11 categories

- Premium differential is the most prevalent way to pay incentives
  - 52% use reduction
  - 33% use surcharge
Do employers measure outcomes from wellness programs?

Have measured specific outcomes from health promotion programs

<table>
<thead>
<tr>
<th>Region</th>
<th>2014</th>
<th>2012</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Regions</td>
<td>52%</td>
<td>68%</td>
<td>53%</td>
</tr>
<tr>
<td>Africa/Middle East</td>
<td>40%</td>
<td>40%</td>
<td>25%</td>
</tr>
<tr>
<td>Asia</td>
<td>53%</td>
<td>54%</td>
<td>47%</td>
</tr>
<tr>
<td>Australia/NZ</td>
<td>47%</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>Canada</td>
<td>30%</td>
<td>30%</td>
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<tr>
<td>Europe</td>
<td>37%</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>Latin America</td>
<td>42%</td>
<td>61%</td>
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</tr>
<tr>
<td>United States</td>
<td>37%</td>
<td>53%</td>
<td>37%</td>
</tr>
</tbody>
</table>
What is fueling the rapid global growth of Telemedicine?

- **Access**: 1 billion have poor access globally

- **Cost savings**: Alternate care options 2-30x more costly

- **Productivity**: Employees spend more time working

#1 – Telemedicine services
#2 – Cycle to work program
#3 – On-site child care
#4 – On-site healthy lifestyle programs and coaching
#5 – Personal health record (electronic summary of personal health information)
## Health System Quality/Cost – How Does U.S. Compare?

<table>
<thead>
<tr>
<th>Country Rankings</th>
<th>AUS</th>
<th>CAN</th>
<th>FRA</th>
<th>GER</th>
<th>NETH</th>
<th>NZ</th>
<th>NOR</th>
<th>SWE</th>
<th>SWIZ</th>
<th>UK</th>
<th>US</th>
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<tbody>
<tr>
<td><strong>Overall Ranking (2013)</strong></td>
<td>4</td>
<td>10</td>
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<td>5</td>
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<td>7</td>
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<tr>
<td><strong>Quality Care</strong></td>
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<td>4</td>
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<td>Cost-Related Problem</td>
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<td><strong>Healthy Lives</strong></td>
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<tr>
<td><strong>Health Expenditures/Capita, 2011</strong></td>
<td>$3,800</td>
<td>$4,522</td>
<td>$4,118</td>
<td>$4,495</td>
<td>$5,099</td>
<td>$3,182</td>
<td>$5,669</td>
<td>$3,925</td>
<td>$5,643</td>
<td>$3,405</td>
<td>$8,508</td>
</tr>
</tbody>
</table>

Notes: *Include ties. **Expenditures shown in $US PPP (purchasing power parity); Australian $ data are from 2010.

**Current State**

Employer-directed purchasing of care

Fragmented marketplace. Employers pushing care to employees.

**Technology**
Data exists in silos, difficult to obtain, and doesn’t flow freely between players in the system

**Insurance Companies**
Focused on administration, discounts and sick care

**Providers**
Paid fee for service; lack incentives to promote quality care and wellness – delivering fragmented care; looming doctor shortage

**Cost Containment**
Wellness, lifestyle coaching, incentives – low engagement cost containment measures

**Employee**
Uninformed consumer without access to marketplace transparency

**Future State**

Consumer-directed purchasing of care.


**Providers**
Paid for quality and outcomes; Accountable Care Organizations
Patient Centered Medical Homes
Hospital System Consolidation

**Insurance Companies**
Partnering with providers in new delivery of care models and offering products through exchanges

**Tools and Technology**
Price transparency tools
On-demand information
Electronic health records
mHealth

**Exchanges**
Private and public exchanges
Individual and group exchanges

**Employee**
Active participant in purchasing and consuming health care

**Employer**
Transitioning to a “sponsor” role by providing employees with money to purchase benefits
Are Career and Wealth the Real Wellness Incentive?

Wellness 3.0

• Focus on overall well-being
• Support employees in health, wealth, and careers
• Intrinsic incentives and motivators cause behavior change

Health improvement and wellness necessary to meet career and wealth goals
Additional Resources

www.bucksurveys.com

www.globalhealthyworkplace.org
Questions?

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