



# STATE OF THE INDUSTRY: ENGAGEMENT & WELLNESS IN 2015

How organizations are improving employees' lives  
and boosting their businesses

*Produced in partnership with*  
**Workforce**

# Executive Summary

Employee engagement and wellness programs are ubiquitous at organizations large and small worldwide. These programs are a billion-dollar solution to combat employee disengagement, fight absenteeism, increase employee empowerment and improve employee health and well-being. When implementing programs, organizations have historically looked for customized solutions to their industry-specific employee engagement or wellness challenges, although executives see little distinction between engagement and wellness (for executives, the ideal program is a holistic solution that leads to a better life for the employee and positive organizational culture for the employer). In 2015 organizations will increase their employee engagement and wellness program budgets and broaden program scope with an eye on increasing engagement, participation and retention numbers.

## Key Findings

1. Top 2015 priorities include **increasing engagement, retention and employee well-being**. Low priorities include transitioning to private exchanges and making technological improvements to programs
2. Companies will increase their employee engagement and wellness **program budgets** in 2015
3. **Organizations tailor** employee engagement and wellness programs to their specific needs
4. Executives see employee engagement and wellness as analogous, while managers are more results oriented
5. In 2015, employers will **broaden their program scope** to improve employee participation

# Introduction

Today's employees face unprecedented demands on their time and energy. Long commute times, rigorous schedules, unhealthy eating habits, poor sleep, financial woes and more all contribute to poor work-life balance and disengaged employees. A recent study suggests as many as 70 percent of American workers are disengaged at work,<sup>1</sup> a number that can reach more than 80 percent globally.<sup>2</sup> A disengaged workforce can both affect an employer's bottom line and contribute to a negative organizational culture. Unhappy workers are less willing to work, less able to come to work and less likely to stay at an organization they feel doesn't care about their well-being.

Companies are doing all they can to reverse this disengagement trend. Executives want holistic solutions to encourage healthy work-life balances, while managers want more visible results, whether it's fewer sick days taken or fewer health care claims processed. Enter employee engagement and wellness programs: company-sponsored initiatives designed to help employees lead better lives. Initiatives range from recognition programs to on-site healthy meal plans, with everything in between (See Appendix C). Such programs are popular: Most large companies (98 percent) and many small ones (73 percent) offer at least one wellness program designed to either increase engagement, improve quality of life, or both.<sup>3</sup> Organizations demonstrate their willingness to invest in their workforce, spending more than \$6 billion on wellness programs<sup>4</sup> and close to a billion on employee engagement programs annually.<sup>5</sup> Exactly what programs do organizations offer, and how will those programs change in 2015?

In collaboration with Human Capital Media Advisory Group, the research arm of *Workforce* magazine, Virgin Pulse conducted a worldwide survey of 1,395 HR management professionals across a broad range of industries and organization sizes to gain a deep look at the state of the industry and discover how and why institutions are budgeting, implementing, measuring and improving employee engagement and wellness programs.

## Read on to learn:

- **Top 2015 priorities** for employee engagement and wellness programs
- What's happening to employee engagement and wellness **program budgets** this year
- How **employers choose** employee engagement and wellness programs
- **What executives think** about employee engagement and wellness programs
- **What opportunities exist** as employers look to broaden program scope to encourage greater employee participation

1 Lipman, V. (2013). *Surprising, Disturbing Facts From The Mother Of All Employee Engagement Surveys*. Forbes.

2 Bersin, J. (2014). *Why Companies Fail To Engage Today's Workforce: The Overwhelmed Employee*. Forbes.

3 Kaiser Family Foundation. (2014). *Employer Health Benefits 2014 Annual Survey*.

4 RAND Corporation. (2014). *Do Workplace Wellness Programs Save Employers Money?*

5 Hollon, J. (2012). *Weekly Wrap: \$720 Million Spent on Engagement and This Is All We Get?* TLNT.

# Trend 1: Top 2015 Priorities — What Your Peers Are Doing and Why

In 2015 organizations will continue to invest in employee engagement, retention and well-being, keeping many of the programs that proved successful in 2014. While all organizations have similar priorities, there are some differences between executives and managers regarding employee engagement and wellness priorities.

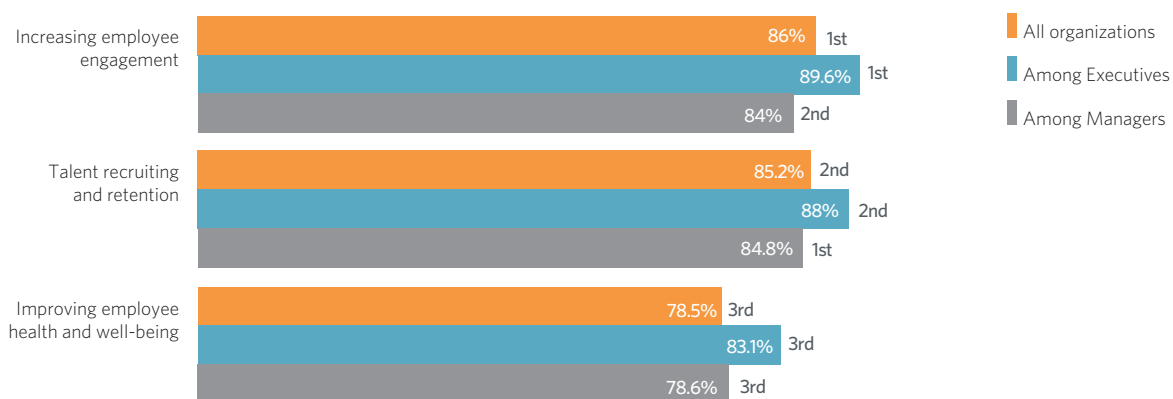
## Making (and Keeping) Happy Employees

Among all organizations, there's a desire to increase employee engagement, improve talent recruiting and retention and better employees' health and well-being. HR managers and executives mostly agree with this assessment, with slight variations (Figure 1). Executives' objectives align with overall organizational objectives, while managers prioritize talent recruiting and retention over other areas. More so than managers, executives believe employee engagement is at the heart of everything (see Trend 4), so they're more concerned with engagement as a whole rather than talent retention specifically. A holistic engagement solution increases engagement, which improves wellness, which in turn betters health and drives retention. As one executive respondent said, employee engagement is "happy healthy employees who want to stay for the long haul...low turnover, loyal and committed."

*"[Employee engagement is] happy healthy employees who want to stay for the long haul...low turnover, loyal and committed."*

- Survey Respondent

Figure 1. 2015 Top Priorities

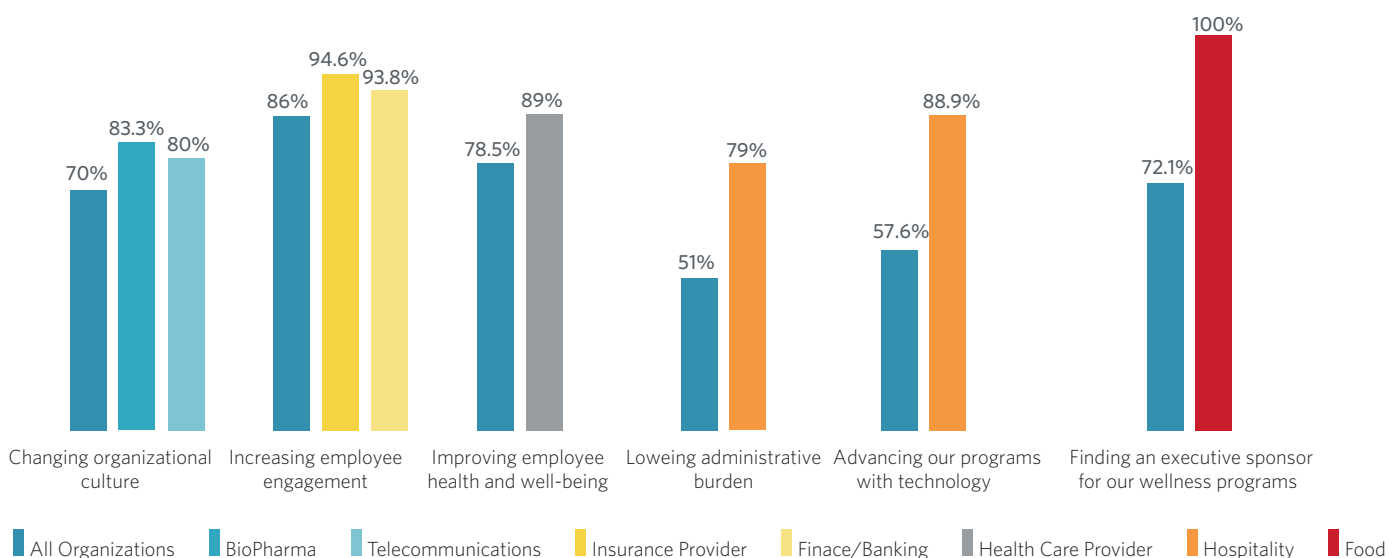


# Resolving Industry-specific Challenges

In 2014, organizations faced industry-specific challenges, which they'll continue to address in 2015 as they work to resolve their unique issues. For example, "Demonstrating the impact of HR on productivity improvements" will be a priority for more than half (56.1 percent) of all companies, but nearly three-quarters (72.7 percent) of food-related companies—an industry where high employee productivity is key to improving margins—cite this as a higher priority. The more relevant the challenge is to a particular industry, the more likely organizations will look to overcome that particular challenge through specific programs (Figure 2).

Executive buy-in is crucial in determining the success or failure of employee engagement and wellness programs, and many organizations report needing to find an executive sponsor for their wellness programs in the coming year. However, service-related industries are more likely to need executive sponsorship above all other organizations. When asked to identify challenges for 2015, nearly three-quarters (72.1 percent) of HR professionals in our survey report needing to find an executive sponsor for their wellness programs. However, for the food industry, all responding companies are looking for executive sponsors. Organizations in these industries should examine their year-over-year claims reduction data. Such data have helped other organizations demonstrate ROI and measure program impact. Companies looking to measure HR's impact on productivity should also use the obvious source: productivity data, which provides a more robust measurement over claims reduction or absenteeism (see Trend 2).

Figure 2. Industry-specific Priorities



# Fine the Way They Are, Thank You

Just as there's general consensus on the top priorities for 2015, there's also agreement on the bottom priorities, with minor variations between executives and managers. Most (77.4 percent) US-based respondents aren't looking to move their health insurance to a private exchange in 2015 (Figure 3). Private exchanges may save organizations money on their healthcare plans, but companies aren't convinced enough about the long-term cost savings to make the switch. A few years ago there was some initial interest,<sup>6</sup> with companies such as Sears and Walgreens overhauling their healthcare plans by joining private exchanges.<sup>7</sup> This year, however, many employers will wait to see if private exchanges will prove cost effective before considering a switch.

Other low priorities include investing in technology or lowering administrative burden. These options would require large investments, and although budgets are increasing (see Trend 4), companies plan to stick with their current technology (however, some industries such as hospitality disagree.) Here, executives and managers see eye to eye on what organizations shouldn't focus on first in 2015 (Figure 4).

Figure 3. Is your organization considering moving your health insurance to a private exchange?

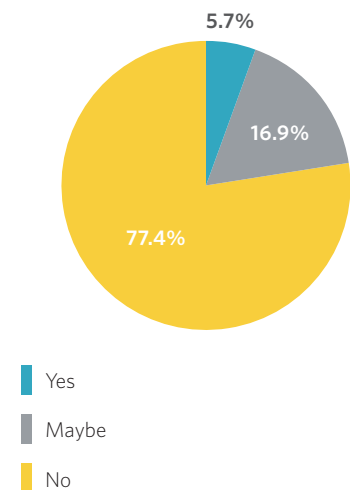
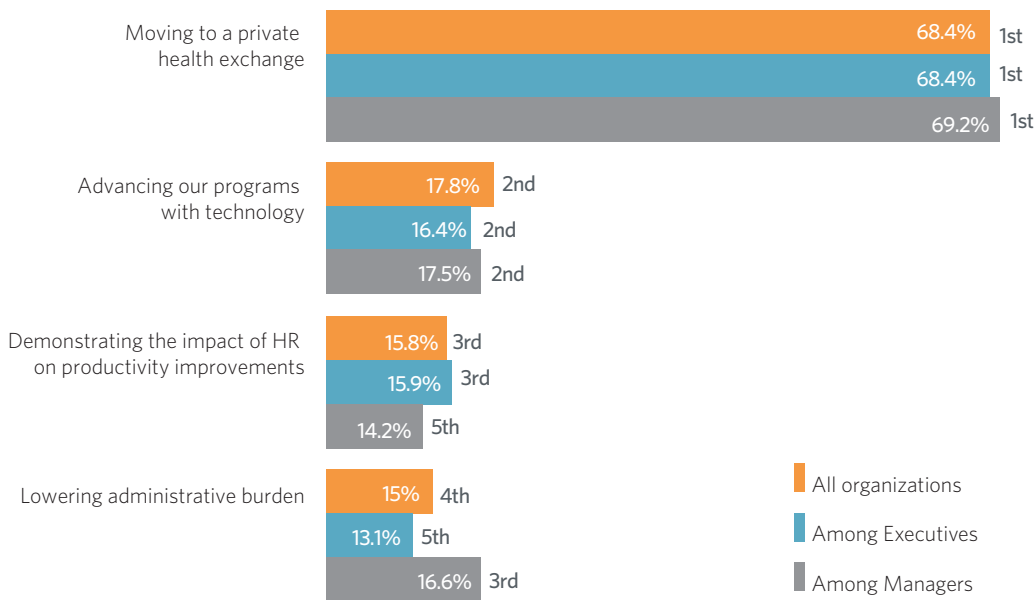


Figure 4. "Not a Priority" — Bottom Priorities of 2015



Lowest priority of 2015: Moving to a private health exchange

6 Booz & Company (2012). *The Emergence of Private Health Insurance Exchanges Fueling the "Consumerization" of Employer-Sponsored Health Insurance*.

7 Humer, C. (2014). *U.S. corporate health exchanges find no new blue chip clients*. Reuters.

# Trend 2: Budgets are Going Anywhere But Down

With employee disengagement affecting more than 80 percent of workers globally, organizations understand that the challenge of motivating employees won't be solved quickly. Thankfully, the past few years have seen employee engagement gains, according to a recent Aon study,<sup>8</sup> and successful employee engagement and wellness programs contribute to the upturn in employee engagement. Because of this previous success, budgets for employee engagement and wellness programs are either holding steady or increasing (Figure 5). Previous program success is often cited as a reason for the budget change (Figure 6). Budgets don't have to be astronomical to be successful either. Many organizations report success on a budget as little as \$50,000 annually (Appendix C). Companies also spend similar amounts on both employee engagement and wellness programs, with neither program type receiving significantly more or less than the other. When employee engagement and wellness programs are successful, organizations have demonstrated a willingness to spend more money on both and on incentives to encourage employee participation.

Figure 5. Has the budget for wellness and engagement programs increased or decreased compared with last year?

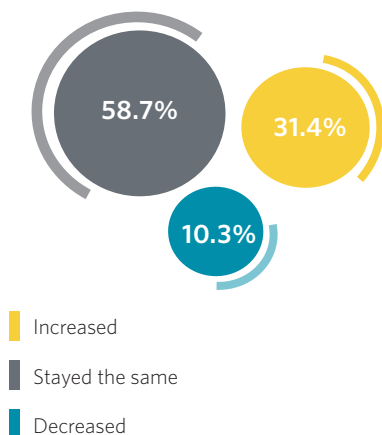
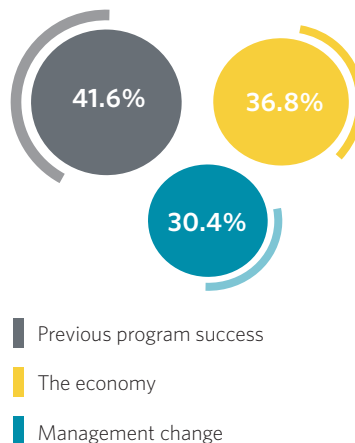


Figure 6. What contributed to the budget change?



<sup>8</sup> Aon. (2014). *2014 Trends in Global Employee Engagement*.

# What Drives Employees? Incentives

Companies use incentives like cash, gift cards and premium reductions to encourage wellness program participation, which provide extra value to employees beyond the obvious benefit of increased engagement or better health. Organizations use program participation — more so than engagement levels or results — to identify how to allocate their program incentives. In this way, incentives are more encouragement than reward, which aligns with executives' stated goal of creating empowered employees who make their own health choices (Trend 5). Incentives are a great way to combat disengagement and provide that extra perk for employees, who may be unsure about participating in a program, or debating whether or not to stay with their current company. As employers refine their employee participation in employee engagement and wellness programs in 2015, they can either use traditional incentives mentioned above or offer esoteric incentives to encourage employee participation and build empowerment.

## You Did *What* at Work? Unique Incentives for Program Participation



Flower-arranging classes



Onsite nail and beauty salons



Onsite yoga and meditation classes

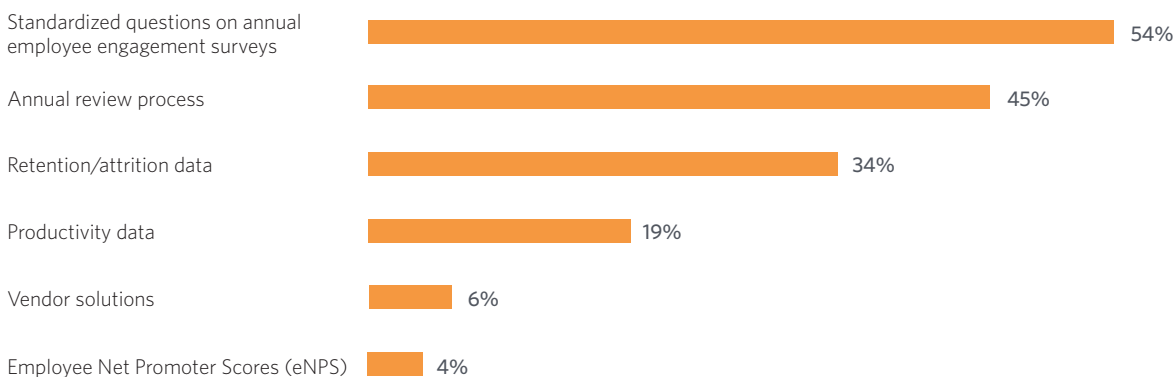


# What Drives Employers? Returns

As organizations invest in employee engagement and wellness, many want to see proof of their investment. How are organizations measuring their returns? There's no universal solution. Measuring methods differ from company to company and often from program to program.

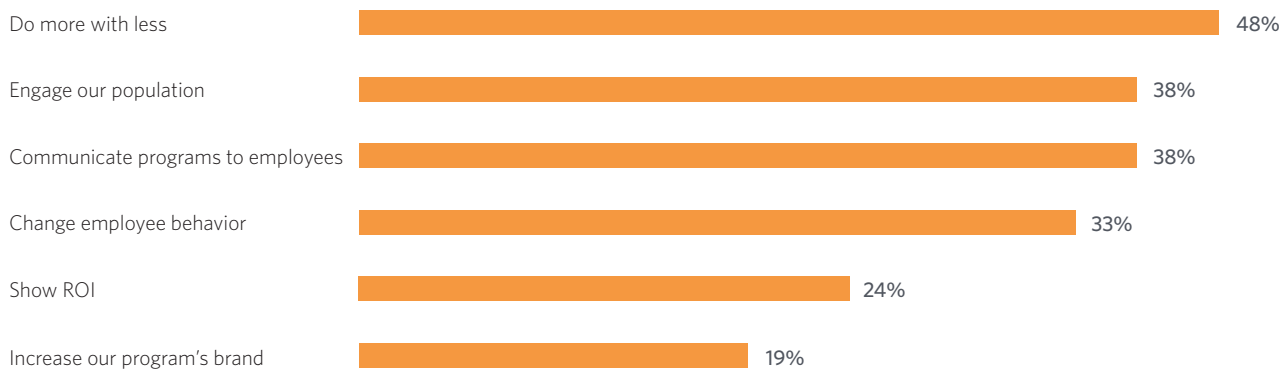
Engagement program success is self-reported at half of all companies, through annual reviews or surveys (Figure 7). Reviews and surveys provide unbiased feedback directly from the workforce. But the infrequent nature of reviews and surveys may not provide the most accurate assessment or reflect employees' current attitudes. Organizations looking to increase their programs should examine their assessment tools and ask whether other methods may provide a more accurate pulse on employee engagement. Ongoing assessment methods — such as examining productivity data — may provide a more real-time snapshot of employee engagement. What's more, it's successfully used by a fifth of our respondents. The benefit of using ongoing assessment tools like productivity data or employee Net Promoter Scores (eNPS) over one-time assessments is accuracy. Ongoing assessments can alert employers to challenges (like low participation rates or sentiment) quicker, as well as give those organizations the chance to respond to those challenges earlier. Without checking in with employees regularly, organizations could make choices based on outdated or single point in time-based data.

Figure 7. How does your organization measure employee engagement?



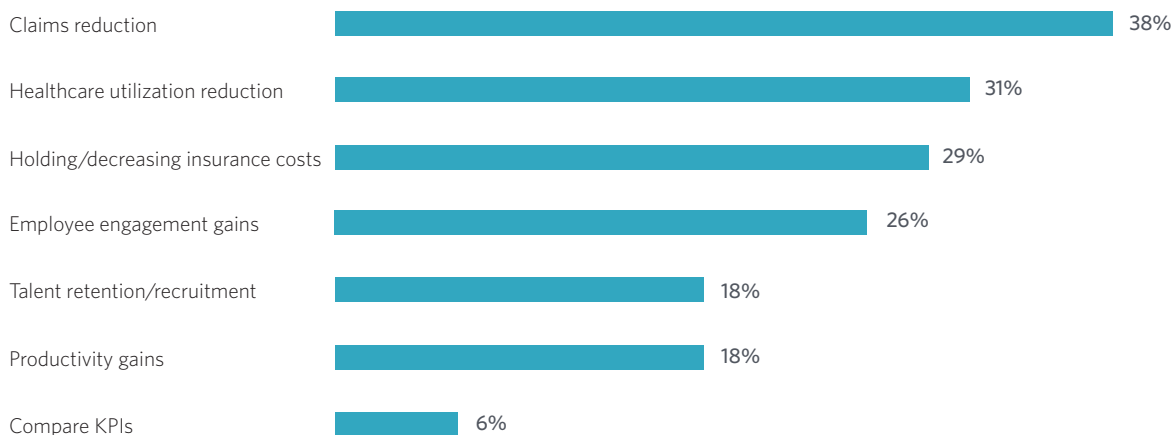
One way companies might improve their measurement metrics for employee engagement programs is through a vendor solution. Everybody can use a helping hand from time to time, and many respondents already use outside vendors to help them do more with less (Figure 8). In addition to helping measure program impact, organizations can use vendors to do everything from help show ROI to communicate program offerings to employees, which could increase participation rates and drive down disengagement.


Figure 8. We use outside vendors to help us



In contrast to the predominance of self-reported data for employee engagement, organizations tend to measure wellness program impact through cost reduction, in the form of reduced claims or decreasing insurance costs (Figure 9). By looking at hard numbers, organizations can get a better picture of wellness gains, though some don't track program impact at all.

Figure 9. How do you measure the impact of your wellness programs?





Developing and maintaining wellness programs can be costly and sometimes identifying a program's impact can be tough. Did an employee stop smoking because of the employer-sponsored smoking cessation program, or because friends and family encouraged a behavior change? While one way to measure a program's impact is to identify its ROI, only 1 in 4 organizations (26.2 percent) track wellness program ROI. This number isn't surprising. ROI can be expensive to identify, track and prove — this may be why 24 percent of organizations use outside vendors to help them show ROI. Even identifying baselines can be tricky, with the need to both identify the cost of a particular program as well as its return. Take biometric screenings, for example. While a baseline cost may be easy to identify (typically \$40-\$70 per participant),<sup>9</sup> what metrics will be used to calculate their ROI?

Though not all organizations track wellness program ROI, many measure impact in other ways, such as through engagement or productivity gains. While healthcare claims and utilization reductions may not provide hard ROI numbers, companies still succeed at using those numbers to make the business case for these programs. Clearly organizations can provide successful results to budget directors and other senior executives. Ninety percent of companies wouldn't have similar or increased year-over-year budgets otherwise. Indirect savings—like retaining top employees or reducing the use of sick leave—may provide just enough indirect examples of program success to satisfy everyone.

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<sup>9</sup> Stovall, L. (2013). *Biometric Screening Prices: How Much is it Really Going to Cost? Total Wellness*.

# Trend 3: Tailor-made Programs that Motivate and Drive Employers

Employee disengagement creates a negative work atmosphere, which leads to slow productivity and lost profits. Sick employees have higher absentee rates (absenteeism costs American companies nearly half a trillion dollars annually, according to a 2012 study<sup>10</sup>) and more frequent insurance claims. And unhappy employees won't stay, costing organizations money as they spend more on hiring and training. Offering broad, successful employee engagement and wellness programs to current and potential hires helps companies be seen as an employer of choice and attract and retain top talent, helping address turnover. For their current workforce, organizations want to ensure the right employees get into the right programs, whether it's a program designed to help them stop smoking, lose weight or alleviate stress.

As they broaden program offerings, specific industries also want wellness programs tailored to their needs. Construction companies more so than finance companies need programs that address high accident rates, while those in the transportation industry need programs that counteract the negative health effects of sedentary work. It's for these reasons that many organizations develop and maintain tailor-made employee engagement and wellness programs. While reducing accident costs was a desired outcome for a little more than half (52 percent) of respondents, 100 percent of construction companies cited accident costs as a much higher concern. Likewise, 100 percent of transportation companies cited the need to improve their employees' physical health (Figure 10).

Figure 10. Everyone agrees: 100% of HR professionals in these industries are motivated to ...



## BioPharma

-Use our wellness program to improve employee physical health

-Use our employee engagement program to Improve productivity



## Construction

-Use our employee engagement program to reduce accident costs



## Retail

-Use our employee engagement program to increase employee retention



## Telecommunications

-Use our wellness program to improve employee physical health

-Use our employee engagement program to increase employee satisfaction

10 Jaspén, B. (2012). *U.S. Workforce Illness Costs \$576B Annually From Sick Days To Workers Compensation*. *Forbes*.

# What Else Drives Employers? Bettering Their Workforce

Now more than ever, companies show they care about employee well-being. While Employee Assistance Program participation was an impressive 70 percent in 2008,<sup>11</sup> by 2014 total engagement program participation was 98 percent among large organizations. Why do so many companies offer employee engagement and wellness programs? HR executives and managers mostly agree on the purpose of employee engagement and wellness programs. Engagement leads to a positive organizational culture, giving employees a reason to stay with their organization. It's no surprise that increasing engagement is everyone's top priority (Figure 11).

When designing wellness programs, everyone's priorities are similar — organizations are interested in improving health and well-being while cutting costs at the same time (Figure 12). Here's where wellness measurement metrics come in handy. Executives say reducing costs is their top concern and organizations using reduced costs as a means to demonstrate ROI have an advantage: being able to speak to executives' concern when securing executive buy-in.

Figure 11. When designing **employee engagement** programs, what are the top three motivations for your organization?

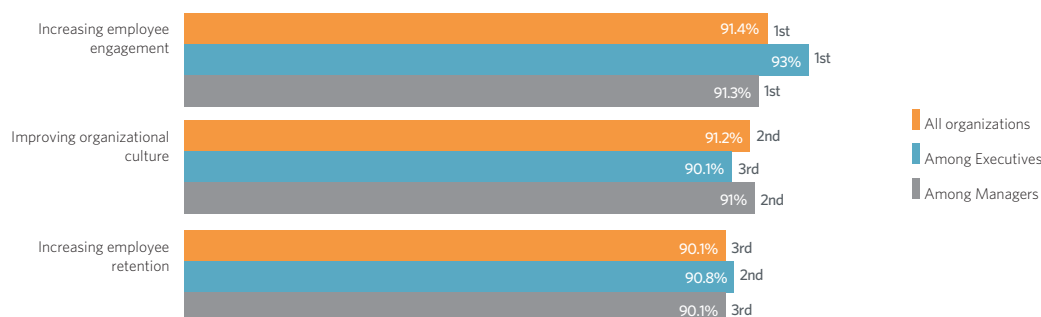
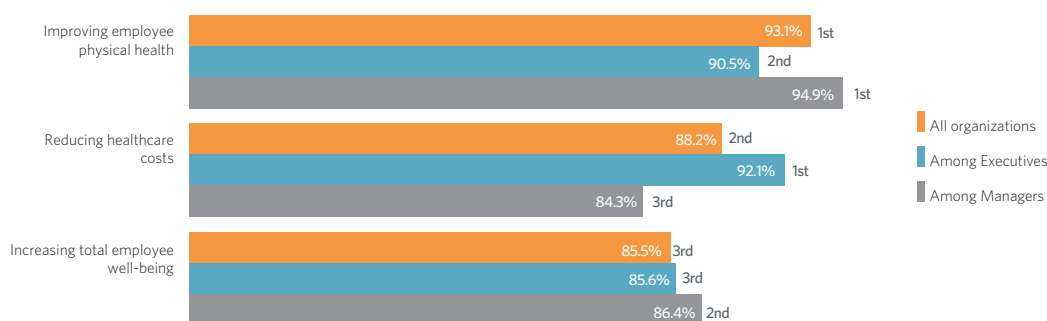


Figure 12. When designing **employee wellness** programs, what are the top three motivations for your organization?



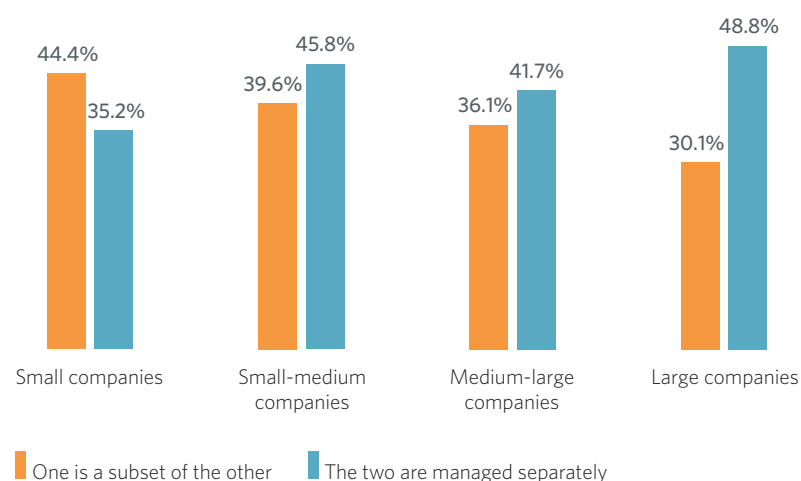
<sup>11</sup> United States Department of Labor. (2009). *Health and Wellness Research Study: Corporate and Worksite Wellness Programs: A Research Review Focused on Individuals with Disabilities.*

# Trend 4: The Blurry Line Between Employee Engagement and Wellness

Opinions differ over what constitutes *employee engagement*, what constitutes *wellness* and whether there's any overlap between the two when it comes to managing and measuring programs. Does employee engagement influence wellness, or vice versa? If so, should that change managers' approaches when the time comes to seek executive buy-in? If not, what *does* it influence?

Regarding how programs are managed, smaller organizations tend to combine their employee engagement and wellness programs, with one program a subset of the other. As companies grow and their programs mature, the two programs split and are managed separately, no longer subsets (Figure 13).

Figure 13. What is the relationship between employee engagement and wellness in terms of your department structure?





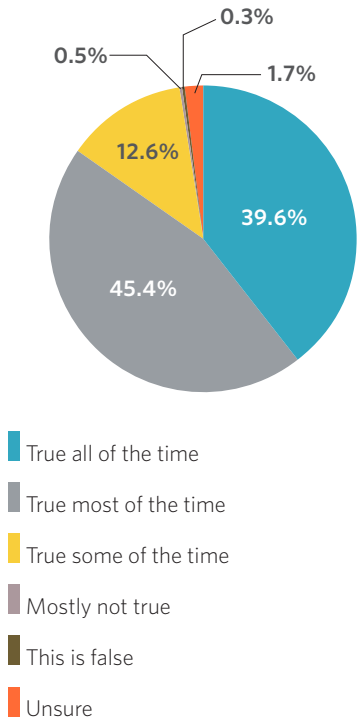
# At companies with separately managed employee engagement and wellness programs...

In large organizations with separately managed programs, the goals for engagement and wellness diverge. For example, end goals for employee engagement include offering programs related to organizational culture (like recognition programs), while goals for wellness programs tend to converge around offering programs designed to improve employees' physical and emotional health (like gym memberships).

These programs belong to employee engagement	These programs belong to wellness
Organizational culture	Employee physical health
Talent attraction/retention	Employee mental health
Financial management	Employee emotional health

Yet for HR professionals at director level and above, the lines and influencers between employee engagement and wellness get a little blurrier. In general, there's near universal agreement that well-being can influence employee engagement (Figure 14). While the programs may be *managed* separately, our respondents see no difference in what programs *influence*. In their eyes an employee engagement program can influence an employee's mental health just as much as a wellness program designed specifically to tackle mental health issues.

Figure 14. How true is this statement?  
"Well-being can influence engagement."



This attitude—that employee engagement programs can also drive employee wellness—is especially true at the executive level. Executives see employees’ physical and mental well-being directly affected by both employee engagement and wellness programs. Mental well-being especially is a concern for executives, as they believe it affects both work stress and productivity. Instead of addressing good mental health solely with wellness programs, executives want to see it addressed with employee engagement programs as well.

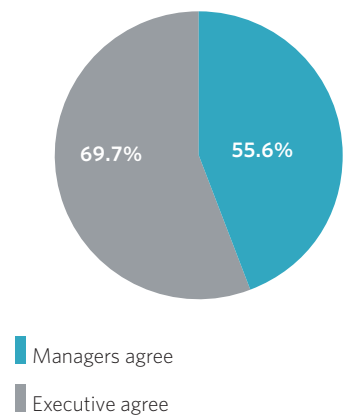
As one director defined employee engagement:

*“Employee engagement is the emotional commitment the employee has to the organization and its goals. This emotional commitment means engaged employees actually care about their work and their company. They don’t work just for a pay check, or just for the next promotion, but work on behalf of the organization’s goals. When employees care — when they are engaged — they use discretionary effort.”*

- Survey Respondent

Armed with this knowledge, HR managers looking to secure executive buy-in for new programs can make the business case this way for employee engagement programs: Besides improving productivity, engagement and retention, a successful engagement program will also improve employee health and well-being.

### Mental health is influenced by my organization’s employee engagement programs





# Trend 5: Doing What It Takes to Get Employees in the Door

The idea that employee engagement and wellness programs can lead to better lives for employees, which in turn leads to more productivity and engagement at work, is key to why such programs exist in the first place. Sure, there are financial considerations — the US government offers incentives to employers who offer certain wellness programs.<sup>12</sup> But beyond money, executives want fully committed employees who are emotionally invested in their organization's goals. One executive described a wellness program as a “holistic support system that augments primary health interventions producing well-adjusted, healthy people engaged in meaningful work and meaningful relationships.” Another executive felt the duty of wellness programs was to optimize “physical, mental and emotional states to enable productivity and enjoyment of work and personal lives.”

Even though executives want employees to be healthy and happy, both personally and professionally, they often struggle with low program participation. Wellness programs must be voluntary, so employers can't require enrollment. We've seen how employers use incentives to nudge employee participation in the right direction, but participation rates can vary wildly (Appendix B). There could be many reasons behind low participation numbers. Companies might be targeting a minority of their employees with a certain program. They may not communicate the value of the program to employees clearly, or the particular program just may not interest their employees. Regardless of the reasons behind previous participation rates, companies will do more than offer incentives in 2015. They'll look to broaden the scope of their wellness programs.

*“[A wellness program is a] holistic support system that augments primary health interventions producing well-adjusted, healthy people engaged in meaningful work and meaningful relationships.”*

- Survey Respondent

*“[Wellness programs should optimize the] physical, mental and emotional states to enable productivity and enjoyment of work and personal lives.”*

- Survey Respondent

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<sup>12</sup> United States Department of Labor. (2013). *Incentives for Nondiscriminatory Wellness Programs in Group Health Plans*.

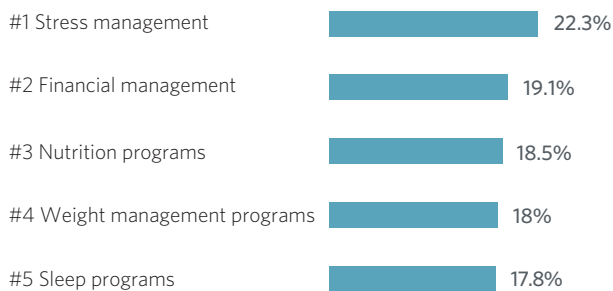
As a way to encourage employee participation, companies want to offer more options that influence employee behavior without seeming intrusive. One respondent said their organization was looking to create “an atmosphere that encourages healthy choices without tracking things like cholesterol levels.” Executives already know that a host of issues can affect employee well-being — 9 out of 10 HR professionals named poor health, high stress and lack of sleep as such factors (Figure 15). When looking to broaden their programs, employers need look no further than addressing these universal issues.

Figure 15. Top 5 Factors Affecting Employee Well-being



Some companies are beginning to do just that — a fifth of all organizations plan to offer programs that address stress, sleep and financial planning within the next two years (Figure 16). With a third of the workforce averaging less than seven hours of sleep per night,<sup>13</sup> 1 in 3 American adults considered obese,<sup>14</sup> and 4 out of 10 workers reporting their job is very or extremely stressful,<sup>15</sup> adding programs that address these issues should lift participation rates beyond their current levels and address well-being, engagement and productivity issues as well. Because as one respondent put it, “Wellness is defined as happiness and well-being in terms of health (food, exercise, sleep).”

Figure 16. Top 5 Programs Employers Plan to Offer in the Next 2 Years



13 American Psychological Association. (2014). *More Sleep Would Make Most Americans Happier, Healthier and Safer*.

14 CDC. *Fighting Obesity in the Workplace*.

15 CDC. *STRESS...At Work*.

## Conclusion

Many organizations had success with their employee engagement and wellness programs in 2014, with programs tailored to their industry and individual needs. Organizations will be looking to replicate that success in 2015. Though employee engagement and wellness programs are often managed separately — especially at larger companies — executives recognize how they both can affect all aspects of employees' lives. Employee health and well-being is important across the board, not only for organizational culture but also for fighting disengagement and improving recruiting and retention. In their quest to create a workforce that feels empowered to make healthy lifestyle choices, organizations will broaden and expand their programs in 2015, both as a way to encourage employee participation and to be seen as an employer of choice, attractive to top candidates. By addressing such universal concerns as stress, sleep and poor nutrition, employers will continue to employ happy, healthy and committed employees.

*“Someone can be happy at work, but not engaged. We promote to be emotionally committed to their company and their work goals.”*

- Survey Respondent





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### 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 2M+ employees have selected Virgin Pulse's programs to reinvigorate their workplace.

Learn more at [www.virginpulse.com](http://www.virginpulse.com).

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### About *Workforce* Magazine

*Workforce* is a multimedia publication that covers the intersection of people management and business strategy. Our community of senior-level human resources executives and C-level officers are the key decision-makers on talent management matters in the 2,500 largest corporations in America. They read us for our editorial focus and relevance to help them improve their business — and their bottom line — through effective management of the workforce. While employees and executives often bemoan the bureaucratic nature of HR processes, companies increasingly realize they need to be smarter about the ways they attract, retain and train their workforce. Our content helps HR professionals approach their jobs from a more strategic, big-picture, business-results perspective.

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### About Human Capital Media

The Human Capital Media (HCM) Research and Advisory Group is the research division of Human Capital Media, publisher of *Chief Learning Officer*, *Talent Management* and *Workforce* magazines. The Research and Advisory Group specializes in partnered research solutions — customizable and proprietary deliverables that integrate seamlessly with existing sales and marketing programs. Leveraging our access to senior-level decision-makers and proven HR industry expertise, we undertake market and thought leadership research in the human resources industry. Creating custom content and presenting thought leadership research are all part of the Research and Advisory Group's focus.

If you have any questions, contact Sarah Kimmel, director of research and advisory services: [skimmel@humancapitalmedia.com](mailto:skimmel@humancapitalmedia.com).

# Appendix A: Survey information

## Dates

December 3-17, 2014

## Demographics

Total number of respondents: 1,395

## Functional respondent level

- Human Resources: 44.3%
- Administration/management: 22.5%
- Other: 33.2%

## Organizational respondent level

- 35.1% at director level or above

## Organizational size

- Small companies: 54.4%
- Small-medium companies: 20.3%
- Medium-large companies: 7.2%
- Large Companies: 18.1%

## Industry

- |                         |                                |
|-------------------------|--------------------------------|
| • BioPharma: 0.7%       | • Insurance provider: 4.3%     |
| • Construction: 1.4%    | • Manufacturing: 8.2%          |
| • Education: 11.4%      | • Nonprofit: 7.9%              |
| • Engineering: 1.4%     | • Professional services: 11.1% |
| • Finance/banking: 3.6% | • Retail: 2.8%                 |
| • Food: 1.1%            | • Technology: 4.6%             |
| • Government: 10.1%     | • Telecommunications: 1.2%     |
| • Health care: 9.9%     | • Transportation: 2.1%         |
| • Hospitality: 2.1%     | • Other: 16.1%                 |

## Geographic distribution

- |                        |                |
|------------------------|----------------|
| • United States: 81.1% | • Africa: 1.8% |
| • Canada: 4.7%         | • Asia: 3.3%   |
| • Europe: 4.7%         | • Other: 4.5%  |

# Appendix B: Program Offerings and Employee Participation

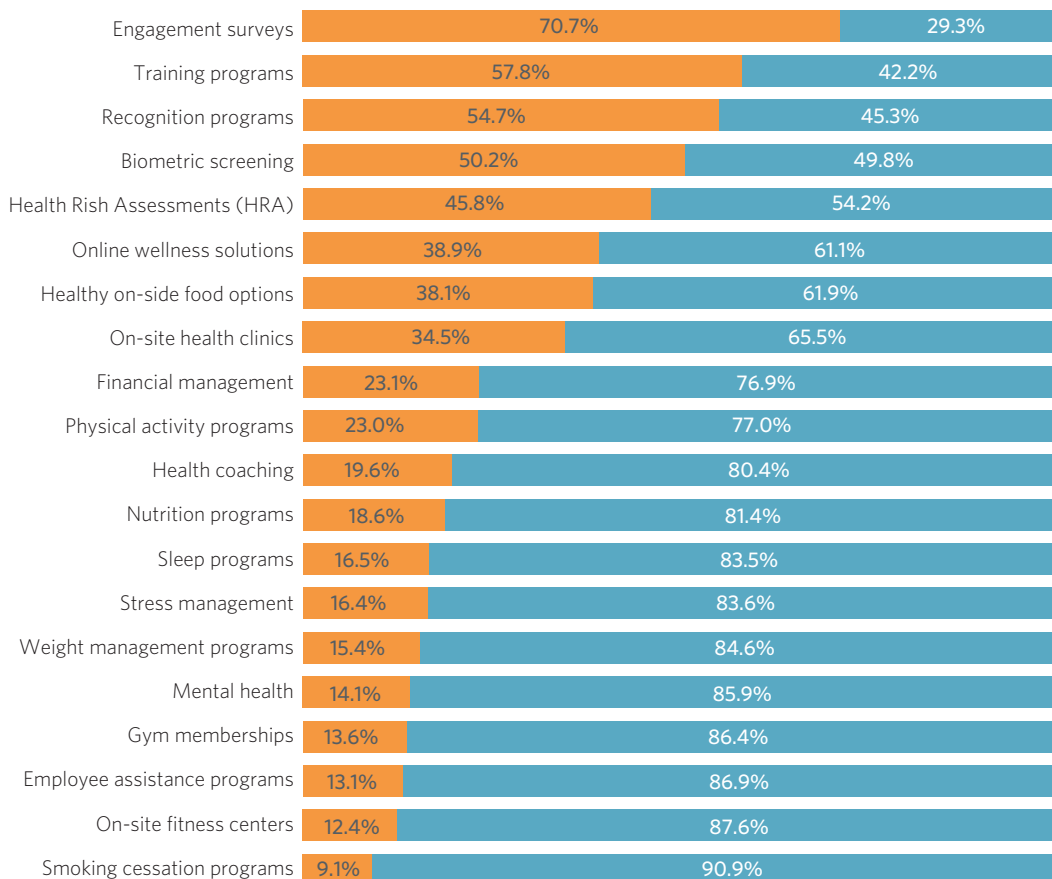
Figure 17. More than half of organizations offer these programs

• EAPs	• Engagement surveys	• Health coaching
• Health Risk Assessments (HRAs)	• Mental health programs	• Online wellness solutions
• Physical activity programs	• Recognition programs	• Smoking cessation programs
• Stress management	• Training programs	• Weight management programs

Less than half of organizations offer these programs

• Biometric screenings	• Financial management programs	• Gym memberships
• Healthy on-site food options	• Nutrition programs	• On-site fitness centers
• On-site health clinics	• Sleep programs	

Figure 18. What percentage of your employees participate in the following programs?



More than 50% participation Less than 50% participation

# Appendix C: Budget Tables

Figure 19. What is the approximate annual budget for employee engagement programs at your organization?

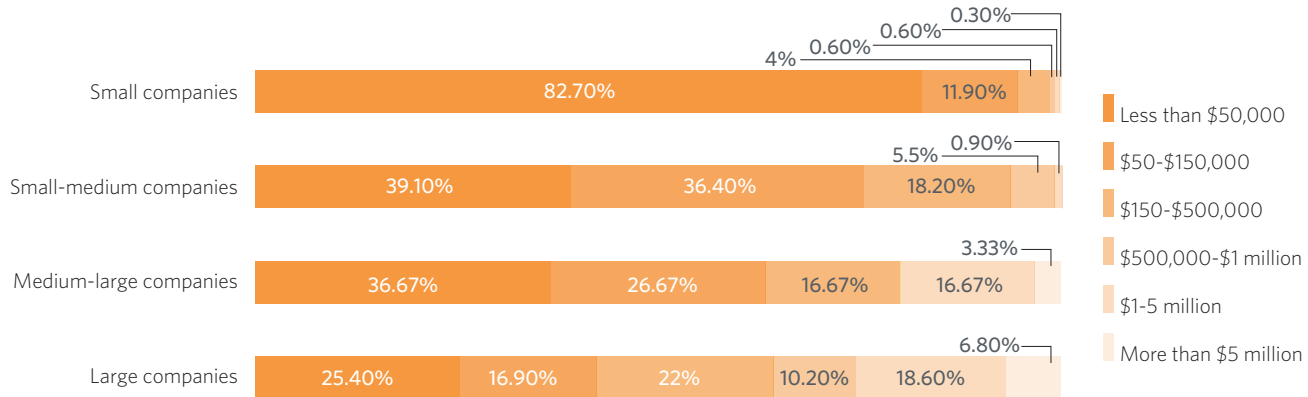


Figure 20. What is the approximate annual budget of wellness programs at your organization?

