

HEALTH AND WELLNESS

Thought Leadership Survey Results

January 25, 2019

EXECUTIVE SUMMARY

Employee Health and Wellness Is Top Priority for Employers

Maintaining (and improving) employee health and wellness is a common organizational goal, according to HR leaders. As a priority, it outranks “compensation” and “flexibility,” and even “diversity and inclusion;” and is right in line with ensuring strong employee morale and satisfaction. In fact, the two may go hand in hand as HR leaders who report that health and wellness is a priority at their organization are twice as likely as those who don’t to say their employees are very satisfied with the organization.

Nearly all HR leaders emphasize the need for employers to encourage their own employees to take steps to improve their health, be physically active and reduce the likelihood of chronic health conditions. Over 9 in 10 feel that employer support in this way can ultimately lead to a decline in overall healthcare costs.

- The top organizational priorities for employees as defined by HR leaders include:
 - Employee satisfaction/morale (74%)
 - Health and wellness (71%)
 - Career growth and development (69%)
 - Diversity and inclusion (58%)
 - Compensation (53%)
 - Flexibility (40%)
 - Collaboration (34%)
 - Those who say that health and wellness is a priority are twice as likely than those who don’t to say their employees are very satisfied with the organization (40% vs 19%).
- 95% of HR leaders think that it’s important for organizations to support and encourage their employees to be physically active and 93% think it’s important to help their employees prevent chronic conditions like type 2 diabetes.
- 95% of HR leaders believe that helping employees make lifestyle changes to improve their health is critical to reducing healthcare costs.

Overall Benefit Satisfaction Connected to the Inclusion of Health and Wellness Programs

The vast majority of HR leaders rate their current benefits quite positively (as either good or even exceptional), and they largely believe their employees would say the same. As part of the benefits package, health and wellness programs are both widely available – and seen as critical to offer, especially to those leaders for whom employee wellness is a high priority. Employee assistance programs are also fairly common and considered important, while other programs (financial wellness, and in particular volunteering) are not seen as equally important or available to employees.

When it comes to health and wellness programs in particular, about half of HR leaders say that participation is fairly prevalent (by a majority of employees) – and has been generally trending upward. Further, over half have made changes to their programs recently (within the past two years). It is important to note that those who offer health and wellness programs express even stronger satisfaction with current benefits (and are more likely to say their employees are happy with benefits too).

- 85% of HR leaders rate the employee benefits that their organization currently offers as exceptional or good, in particular those who offer health and wellness programs (87% vs 68%). Few (4%) say the benefits are subpar or horrible.
 - Likewise, 75% of HR leaders think the employees at their organization would rate their benefits as exceptional or good, again even higher for those who offer health and wellness programs (77% vs 62%).
- Most HR leaders say it is very important for organizations like theirs to offer health and wellness programs (62%) and employee assistance programs (58%), more so than financial wellness programs (45%) and especially volunteer/service programs (33%).
 - Those who say health and wellness is a top priority for employees at their organization are more likely to believe it's very important for organizations to offer health and wellness programs (70% vs 44%).
- The following programs are currently being offered to employees at their organization:
 - Health and wellness programs (87%)
 - Employee assistance programs (81%)
 - Financial wellness programs (66%)
 - Volunteer/service programs (42%)
- Among those who offer a health and wellness program at their organization, 52% say that half or more of their employees participate. In the past year, these HR leaders generally think that participation in the health and wellness program has increased (56%) or stayed the same (38%). Further, 36% of HR leaders say that the last time that their organization made any updates to its health and wellness program was within the past year; but others say it was 1-2 years ago (37%) or 3 or more years ago (26%). A mere 1% say their organization has never made updates.

Clear Widespread Advantages to Offering Wellness Programs, but Motivating and Sustaining Employees Stands in Way of Success

Beyond better employee health, most HR leaders recognize many other benefits to having wellness programs available, from an increase in employee morale and productivity to a decrease in absenteeism and healthcare costs. Having a program is also seen as a key conduit to attracting top talent to an organization.

Almost three-quarters of HR leaders describe their current program as a “huge success,” but that said, almost all still say that their program could use some improvement. Getting employees excited seems to be one of the greatest barriers to execution and therefore fundamental to program goals. In fact, lack of employee interest and participation is cited as the biggest obstacle, even beyond cost. Related to participation, organizations struggle to find a solution that will support employees in continuing the lifestyle improvements made during the program.

- According to most HR leaders, the top benefits of offering a health and wellness program include:
 - Healthier employees (76%)
 - Improved employee productivity (64%)
 - Lower healthcare costs (63%, especially to those at self-insured organizations 69% vs 59%)
 - Improvement in overall morale (59%)
 - Reductions in work related illness and injuries (58%)
 - Decrease in absenteeism (54%)
 - Lower levels of stress among employees (52%)
- 80% think offering health and wellness programs is essential to attracting top talent.
- 73% of HR leaders whose organization offers a health and wellness program think their program has been a huge success. However, 87% also recognize that their program could use some improvement.
 - 89% of HR leaders think getting employees excited about health and wellness programs is both the biggest challenge and the key to success.
 - According to most HR leaders, the biggest challenge associated with health and wellness programs involves lack of employee interest/participation (76% which includes sustaining employee engagement over time (44%), lack of employee participation/sign-up (41%), and lack of employee interest (39%), followed by finding a program that does it all (42%) and the high cost to implement (42%).
 - 75% of HR leaders say their organization has struggled to find a health and wellness program that can help employees sustain behavior changes.

Better Technology, Well-Known Brands and Full-Service, Easy-to-Use Offerings May Be the Solution to Indifference and Inaction

Currently, a slight majority (just over 1 in 2) of health and wellness programs offer informational emails, on-site flu shots, and gym assistance, but beyond that, most don't provide any other more innovative features. In an ideal world, when creating a program, most HR leaders say they would take into account both the cost and ease of use for the employee, as well as the organization – and would ensure that whatever program they provide is accessible to employees of all fitness and health levels.

Moreover, the vast majority recognize the benefit of a single, holistic solution that's attached to a well-known name. Specifically, almost 9 in 10 believe that using a full-service, off-the-shelf program would be extremely valuable to their organization. And while only about one-quarter currently partner with a well-known health and wellness brand, nearly 9 in 10 suggest that this may be important in facilitating employee engagement (the most often cited obstacle). Likewise, while most programs don't incorporate many technological tools right now (i.e., a free or reduced-price fitness tracker or digital health coaching), the majority think their organization should encourage employees to take advantage of a fitness tracker if available and express moderate interest in digital health coaching.

- Health and wellness programs offer employees:
 - On-site flu shots (55%)
 - Informational health and wellness emails (54%)
 - Free or reduced-price gym memberships/onsite gym (51%)
 - Wellness/fitness challenges or “friendly competition” among employees (48%)
 - Free or reduced-price lifestyle change programs (48%)
 - Incentive/rewards (46%)
 - Routine biometric screening (38%)
 - Company social events (32%)
 - Digital health coaching (29%)
 - Involvement of senior leadership (28%)
 - Paid time off to participate in wellness related activities (26%)
 - Partnership with a well-known health and wellness brand (26%)
 - Free or reduced-price fitness trackers or smartwatches (24%)

- If HR leaders were to create a health and wellness program for their organization, the important features that they would want to include are:
 - Affordability for the employee (73%)
 - Ease of use for the employee (72%)
 - Affordability for the organization (68%, especially to smaller organizations with fewer than 5,000 employees (70% vs 60%) and those that are self-insured (74% vs 64%))
 - Accessible to all health and fitness levels (65%)
 - Ease of use for the organization (55%, especially to smaller organizations with fewer than 5,000 employees (58% vs 46%))
 - Ability to customize (54%)
 - Use of an app to track progress (45%)
 - Scalability (42%)
 - Partnering with a recognizable brand name to encourage participation (36%)
 - Use of a fitness tracker (34%)
- 87% think a full-service, off-the-shelf health and wellness program offering would be extremely valuable to their organization.
- 86% think partnering with a known brand would help with employee engagement in wellness programs.
- 80% think their organization should encourage employees to use a fitness tracker as part of a health and wellness program.
- About half of HR leaders (52%) express interest in digital health coaching and around one-third are excited (32%) and eager to learn more (38%). Less than 1 in 5 feel skeptical (17%), cautious (14%), indifferent (11%), or overwhelmed (6%).

SCREENING QUESTIONS

BASE: ALL QUALIFIED RESPONDENTS

Country

	Total
Base	505
United States of America	100%

Gender

	Total
Base	505
Male	46%
Female	53%
Transgender	1%
Other	-
Prefer not to answer	1%

Age

	Total
Base	505
18-24	3%
25-34	21%
35-44	36%
45-54	24%
55-64	15%
65+	3%
Mean Age	43.1

Employment

	Total
Base	505
Employed full time	100%

Q620. You said you are employed full time. Which of the following best describes your title within your organization?

	Total
Base	505
Senior executive (e.g., CEO, CFO, CIO, COO)	10%
Senior management (e.g., senior vice president, vice president)	23%
Director/manager/supervisor/team leader	67%

Q625. What is your main functional role at your organization?

	Total
Base	505
Human resources	100%

Q630. Which of the following best describes your role in the decision-making process at your organization regarding employee benefits?

	Total
Base	505
Primary decision-maker in determining and/or making changes to the benefits offered to the employees at my organization.	57%
One of several people actively involved in determining and/or making changes to the benefits offered to employees at my organization.	43%

Q640. In what state is your company headquartered? (REGIONAL NET)

	Total
Base	505
Northeast	21%
Midwest	21%
South	36%
West	22%

Q650. Across all locations, approximately how many total employees work for your company or organization?

	Total
Base	505
1,000 to 2,499	55%
2,500 to 4,999	21%
5,000 to 9,999	10%
10,000 to 14,999	4%
15,000 to 19,999	2%
20,000 or more	7%

Q655. In what industry is your primary full-time job?

	Total
Base	505
Manufacturing	17%
Health care and social assistance	14%
Educational services	8%
Professional, scientific and technical services	8%
Retail trade, except of motor vehicles and motorcycles	8%
Finance and Insurance	6%
Construction	5%
Transportation and warehousing	5%
Information Services (incl. publishing, libraries, motion picture & video, music & sound, telecommunications)	3%
Administrative Support (incl. employment agencies, professional associations, collection agencies, credit bureaus, security services, visitor and convention services, etc.)	3%
Public administration	3%
Accommodation and food services	3%
Arts, entertainment and recreation	2%
Real Estate, rental, and leasing	2%
Other services (except public administration)	2%
Electricity, gas, steam and air conditioning supply	1%
Agriculture, forestry, fishing and hunting	1%
Mining, quarrying, and oil and gas extraction	1%
Wholesale trade, except of motor vehicles and motorcycles	1%
Wholesale, retail trade and repair of motor vehicles and motorcycles	*
Water supply, sewerage, waste management and remediation activities	-
Other	7%

Q660. What was your company or organization's total gross revenue (before expenses, taxes, etc.) for 2017?

	Total
Base	505
Less than \$200,000	*
\$200,000 to \$499,999	*
\$500,000 to \$999,999	*
\$1 million to \$2.49 million	4%
\$2.5 million to \$4.99 million	5%
\$5 million to \$9.99 million	6%
\$10 million to \$24.9 million	4%
\$25 million to \$49.9 million	3%
\$50 million to \$99.9 million	5%
\$100 million to \$249.9 million	6%
\$250 million to \$499.9 million	8%
\$500 million to \$749.9 million	10%
\$750 million to \$999.9 million	6%
\$1 billion to \$1.49 billion	8%
\$1.5 billion to \$1.99 billion	3%
\$2 billion or more	9%
I work for a nonprofit or governmental agency	22%

ORGANIZATION VALUES & BENEFITS

BASE: ALL QUALIFIED RESPONDENTS

Q700. Which of the following are your organization's top priorities for employees?

	Total
Base	505
ANY (NET)	99%
Employee satisfaction/morale	74%
Health and wellness	71%
Career growth and development	69%
Diversity and inclusion	58%
Compensation	53%
Flexibility (such as telecommuting, flex hours, etc.)	40%
Collaboration	34%
None of these	1%

Q705. Thinking specifically about employee benefits, how important is it for organizations like yours to offer the following programs?

Summary of very / somewhat important

	Total
Base	505
Health and wellness programs (a program designed to support healthy behaviors and improve physical and mental health)	96%
Employee assistance programs (a program that offers free and confidential assessments, short-term counseling, referrals, and follow-up services to employees who have personal and/or work-related problems)	94%
Financial wellness programs (a program that provides tools, education and resources to employees to improve their overall financial health)	92%
Volunteer/service programs (a program that allows employees to take paid time off to volunteer)	75%

Summary of not at all / not very important

	Total
Base	505
Volunteer/service programs (a program that allows employees to take paid time off to volunteer)	25%
Financial wellness programs (a program that provides tools, education and resources to employees to improve their overall financial health)	8%
Employee assistance programs (a program that offers free and confidential assessments, short-term counseling, referrals, and follow-up services to employees who have personal and/or work-related problems)	6%
Health and wellness programs (a program designed to support healthy behaviors and improve physical and mental health)	4%

Q710. Which of the following programs are currently offered to employees at your organization?

	Total
Base	505
ANY (NET)	97%
Health and wellness programs	87%
Employee assistance programs	81%
Financial wellness programs	66%
Volunteer/service programs	42%
None of these	3%

Q715. Overall, how would you rate the employee benefits your organization offers?

	Total
Base	505
AT LEAST MEDIOCRE (NET)	96%
GOOD/EXCEPTIONAL (SUB-NET)	85%
Exceptional	21%
Good	64%
Mediocre	11%
HORRIBLE/SUBPAR (NET)	4%
Subpar	3%
Horrible	1%

Q720. And how do you think the employees at your organization would rate the benefits?

	Total
Base	505
AT LEAST MEDIOCRE (NET)	94%
GOOD/EXCEPTIONAL (SUB-NET)	75%
Exceptional	19%
Good	56%
Mediocre	19%
HORRIBLE/SUBPAR (NET)	6%
Subpar	5%
Horrible	1%

Q725. How much you agree or disagree with each of the following statements regarding employee health?

Summary of strongly / somewhat agree

	Total
Base	505
Helping employees make lifestyle changes to improve their health is critical to reducing health care costs	95%
It's important for organizations to support and encourage their employees to be physically active	95%
It's important for organizations to help their employees prevent chronic conditions like type 2 diabetes	93%

Summary of strongly / somewhat disagree

	Total
Base	505
It's important for organizations to help their employees prevent chronic conditions like type 2 diabetes	7%
It's important for organizations to support and encourage their employees to be physically active	5%
Helping employees make lifestyle changes to improve their health is critical to reducing health care costs	5%

WELLNESS PROGRAM BENEFITS AND BARRIERS

BASE: ALL QUALIFIED RESPONDENTS

Q800. Regardless of what your organization is currently offering, if you were to create a health and wellness program for your organization, what features would be most important to you?

	Total
Base	505
ANY (NET)	100%
AFFORDABILITY (SUB-NET)	87%
Affordability for the employee	73%
Affordability for the organization	68%
EASE OF USE (SUB-NET)	83%
Ease of use for the employee	72%
Ease of use for the organization	55%
Accessible to all health and fitness levels	65%
Ability to customize	54%
Use of an app to track progress (such as weight loss, biometrics, activity tracking)	45%
Scalability (has the ability to grow and adapt to changing needs)	42%
Partnering with a recognizable brand name to encourage participation (such as Fitbit, Under Armour, or Weight Watchers)	36%
Use of a fitness tracker (such as a Fitbit, Garmin, or Xiaomi)	34%
Other	-

Q805. What are the benefits of offering a health and wellness program?

Base	Total
	505
ANY (NET)	99%
Healthier employees	76%
Improved employee productivity	64%
Lower healthcare costs	63%
Improvement in overall morale	59%
Reductions in work related illness and injuries	58%
Decrease in absenteeism (i.e., sick days)	54%
Lower levels of stress among employees	52%
Greater sense of "community" among employees	43%
Enhanced company image	38%
Helps to attract top talent	36%
Decrease in staff turnover	34%
Other	-
There are no benefits	1%
Not at all sure [Among Those without Wellness Program]	*

Q810. What are the biggest challenges associated with health and wellness programs?

Base	Total
	505
ANY (NET)	97%
LACK OF EMPLOYEE INTEREST / PARTICIPATION (SUB-NET)	76%
Sustaining employee engagement over time	44%
Lack of employee participation/sign-up	41%
Lack of employee interest	39%
Finding a program that does it all	42%
High cost to implement	42%
Helping employees sustain lifestyle changes	40%
Demonstrating return on investment (ROI)	37%
Tracking employee outcomes	33%
Finding a program that offers a user-friendly platform	31%
Lack of support from senior leadership	26%
Takes too much time to implement	24%
Scalability	19%
Other	*
There are no challenges	2%
Not at all sure [Among Those without Wellness Program]	*

Q815. How much do you agree or disagree with the following statements regarding health and wellness programs?

Summary of very / somewhat important

		Total
Base		Variable base
Getting employees excited about health and wellness programs is both the biggest challenge and the key to success [Among all qualified respondents n=505]		89%
The health and wellness program offered by my organization could use improvement [Among Those with a Wellness Program n=434]		87%
A full-service, off-the-shelf health and wellness program offering would be extremely valuable to my organization [Among all qualified respondents n=505]		87%
Partnering with a known brand (such as Fitbit, Under Armour, or Weight Watchers) would help with employee engagement in wellness programs [Among all qualified respondents n=505]		86%
My organization should encourage employees to use a fitness tracker as part of a health and wellness program [Among all qualified respondents n=505]		80%
Offering health and wellness programs is essential to attracting top talent		80%
My organization has struggled to find a health and wellness program that can help employees sustain behavior changes [Among all qualified respondents n=505]		75%
Our health and wellness program has been a huge success [Among Those with a Wellness Program n=434]		73%

Summary of very / somewhat important

Base	Total
	Variable base
Our health and wellness program has been a huge success [Among Those with a Wellness Program n=434]	27%
My organization has struggled to find a health and wellness program that can help employees sustain behavior changes [Among all qualified respondents n=505]	25%
Offering health and wellness programs is essential to attracting top talent [Among all qualified respondents n=505]	20%
My organization should encourage employees to use a fitness tracker as part of a health and wellness program [Among all qualified respondents n=505]	20%
Partnering with a known brand (such as Fitbit, Under Armour, or Weight Watchers) would help with employee engagement in wellness programs [Among all qualified respondents n=505]	14%
A full-service, off-the-shelf health and wellness program offering would be extremely valuable to my organization [Among all qualified respondents n=505]	13%
The health and wellness program offered by my organization could use improvement [Among Those with a Wellness Program n=434]	13%
Getting employees excited about health and wellness programs is both the biggest challenge and the key to success [Among all qualified respondents n=505]	11%

ABOUT ORGANIZATION WELLNESS PROGRAM

BASE: ORGANIZATION OFFERS A WELLNESS PROGRAM

Q900. We'd like to ask you a few final questions about your organization's health and wellness program. What proportion of employees participate in your program?

	Total
Base	434
LESS THAN HALF (NET)	47%
Less than 10%	5%
10-19%	5%
20-29%	10%
30-39%	16%
40-49%	12%
HALF OR MORE (NET)	52%
50-59%	13%
60-69%	10%
70-79%	12%
80-89%	10%
90-99%	4%
100%	3%
Not at all sure	2%

Q905. Has employee participation in your organization's health and wellness program increased, decreased, or stayed the same in the past year?

	Total
Base	434
Increased	56%
Decreased	6%
Stayed the same	38%

Q910. When was the last time your organization made any updates to its health and wellness program (reviewed or changed specific elements offered through the program)?

	Total
Base	434
EVER (NET)	99%
Within the last year	36%
1-2 years ago	37%
3-5 years ago	20%
More than 5 years ago	6%
Never	1%

Q915. Which of the following does your organization's health and wellness program offer?

	Total
Base	434
ANY (NET)	99%
On-site flu shots	55%
Informational health and wellness emails	54%
Free or reduced-price gym memberships/onsite gym	51%
Wellness/fitness challenges or "friendly competition" among employees	48%
Free or reduced-price lifestyle change programs (e.g., smoking cessation, weight loss, counseling)	48%
Incentives/rewards (e.g., gift cards, merchandise)	46%
Routine biometric screening	38%
Company social events (e.g., a healthy potluck)	32%
Digital health coaching	29%
Involvement of senior leadership	28%
Paid time off to participate in wellness related activities (e.g., 30 minutes of exercise daily, a day off to run in a marathon)	26%
Partnership with a well-known health and wellness brand (to offer discounts on products and/or services)	26%
Free or reduced-price fitness trackers or smartwatches	24%
None of these	1%

HEALTH COACHING

BASE: ALL QUALIFIED RESPONDENTS

Q1000. As you may know, some organizations are offering employees digital health coaching through their health and wellness programs. Digital health coaching is a one-to-one coaching program that pairs employees with certified coaches to help employees reach their health goals, such as diabetes management, weight loss, or smoking cessation. The interactions are managed online or through a mobile app.

How do you feel about digital health coaching?

	Total
Base	505
Interested	52%
Eager to learn more	38%
Optimistic	36%
Excited	32%
Like it would be valuable to my employees	31%
Like it would be a good fit for my organization	26%
Skeptical	17%
Cautious	14%
Indifferent	11%
Overwhelmed	6%
Other	*
Not at all sure	1%

FIRMOGRAPHICS

BASE: ALL QUALIFIED RESPONDENTS

Q1500. We'd like to ask you a few final questions about the company or organization you work for. **What best describes the organization?**

Summary of means

	Total
Base	505
For-Profit	78%
Non-Profit	13%
Government	9%

Q1515. What percentage of your employees are the following (please include full time and part time employees)?

	Total
Base	505
Salary-based	54.5%
Hourly-based	45.5%

Q1520. What percentage of your employees work off-site/remotely?

	Total
Base	505
None	9%
ANY (NET)	91%
1% to less than 10%	48%
10% to less than 25%	28%
25% to less than 50%	10%
50% or more	4%

Q1530. Overall, how would you describe employee satisfaction at your organization?

	Total
Base	505
VERY/SOMEWHAT SATISFIED (NET)	92%
Very satisfied	34%
Somewhat satisfied	58%
NOT AT ALL/NOT VERY SATISFIED (NET)	8%
Not very satisfied	8%
Not at all satisfied	1%

Q1540. How many years have you been with your current organization?

	Total
Base	505
Less than 1	1%
1 to less than 6	37%
6 to less than 10	25%
10+	37%
Mean	9.2

DEMOGRAPHICS

BASE: ALL QUALIFIED RESPONDENTS

EDUCATION. What is the highest level of education you have completed?

	Total
Base	505
Less than HS degree	*
HS degree to less than 4-year college degree	20%
4-year college degree or more	79%

RACE. Racial Background

	Total
Base	505
Hispanic	11%
Black	11%
Asian	3%
All Other	75%
Prefer not to answer	1%

METHOD STATEMENT

The research was conducted online by The Harris Poll on behalf of Fitbit among 505 human resource (HR) leaders in the U.S. The survey was conducted December 18, 2018 – January 2, 2019. All respondents were HR decision makers, ages 18+, manager level and above, and employed by a organization with 1000 employees or more. Results were weighted by number of businesses in each employee size class where necessary to bring them into line with actual business proportions in the U.S.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, The Harris Poll avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Notes about reading this report:

- A (*) means less than one-half percent responding; and a (-) means non-response or zero percent
- Percentages may not always add up to 100% because of computer rounding or the acceptance of multiple answers from respondents answering that question

