

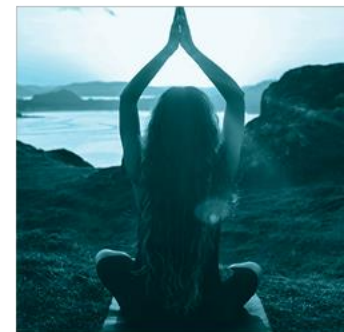
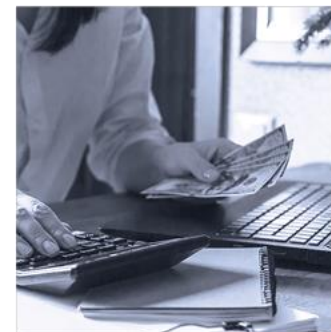
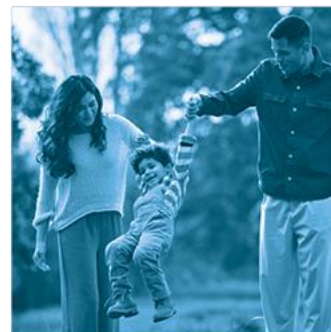
**15<sup>th</sup> Annual**  
Employer-Sponsored Health  
& Well-being Survey

**Employers' Steadfast  
Commitment to  
Employee Well-being**

**Thought Leadership Series:**

**What's Ahead for Well-being: Employer Trends and Future Outlook**

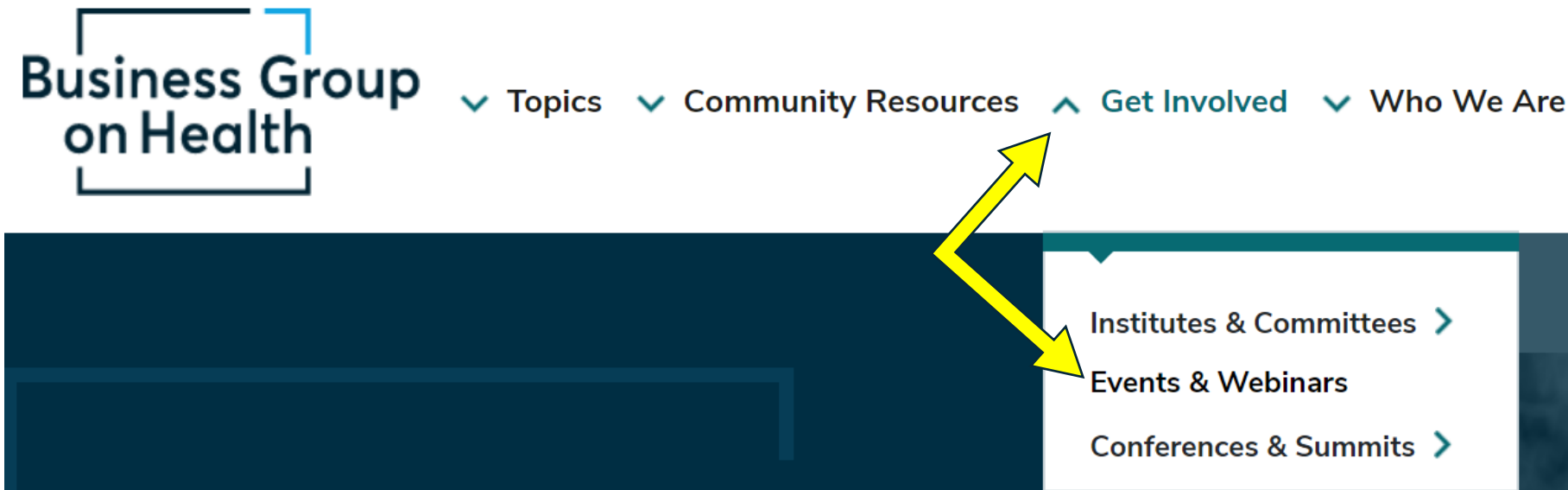
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**Corrie Zenzola**

*Vice President*

**Business Group on Health**



**Robert Kennedy**

*Health & Welfare Practice Leader*

**Fidelity Workplace  
Consulting**

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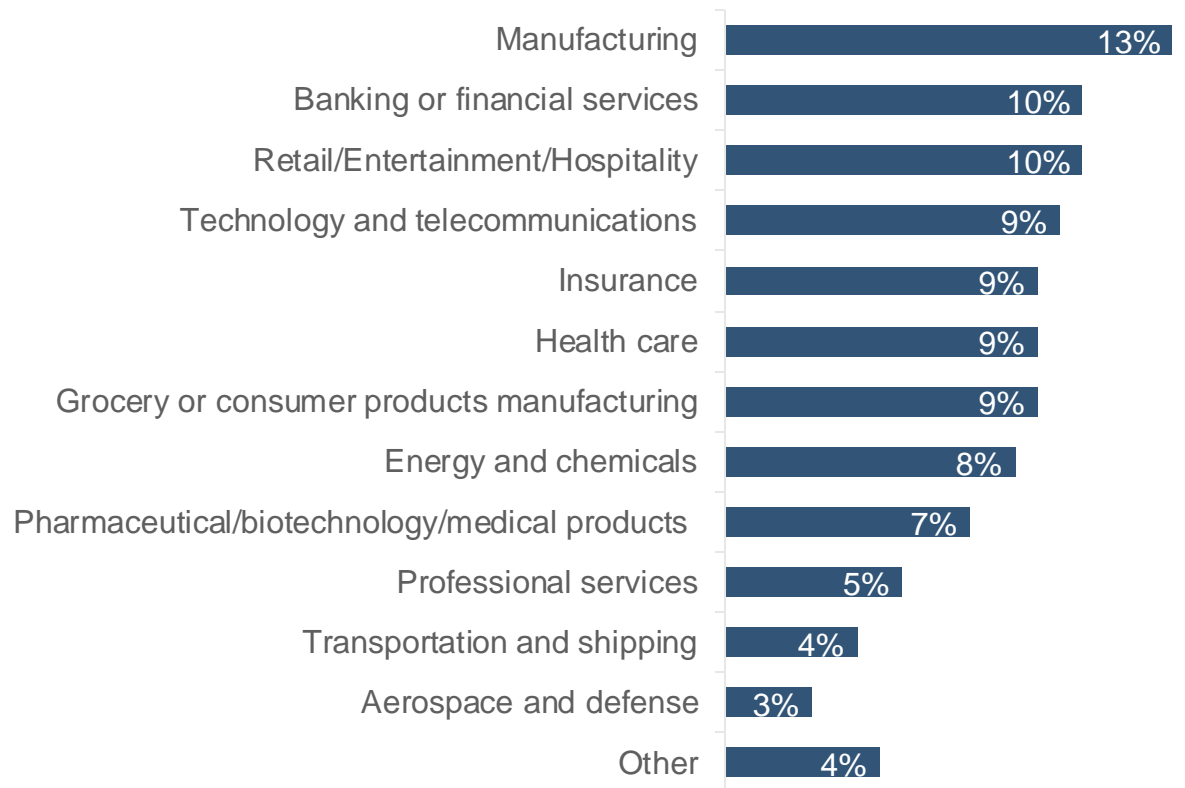
# Overview

160 employers responded to this year's survey, fielded in January and February 2024, representing a wide range of industries.

The survey focused on areas such as:

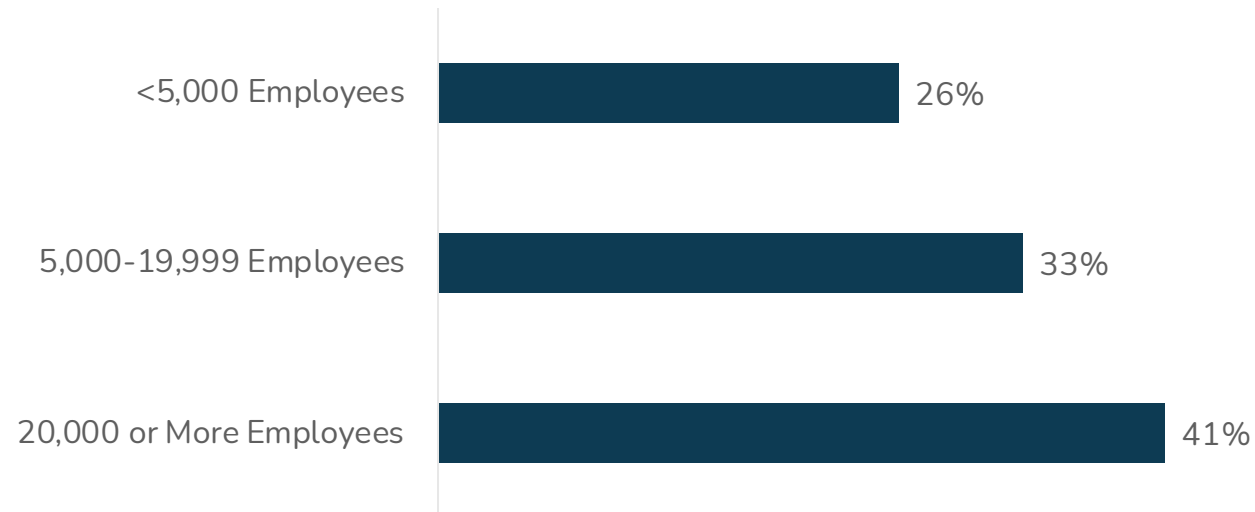
- Defining well-being and employer strategies
- Types of well-being programs offered
- Well-being budget and staffing
- Incentives for well-being
- Global well-being strategies for multinationals
- Future of health improvement investment

## Respondents by Industry

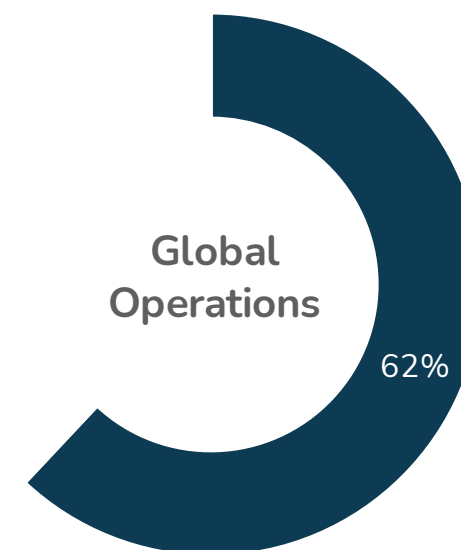


# Respondent Details

## Respondents by Number of U.S. Employees



## Respondents by Geographic Presence





# The Current State of Well-being

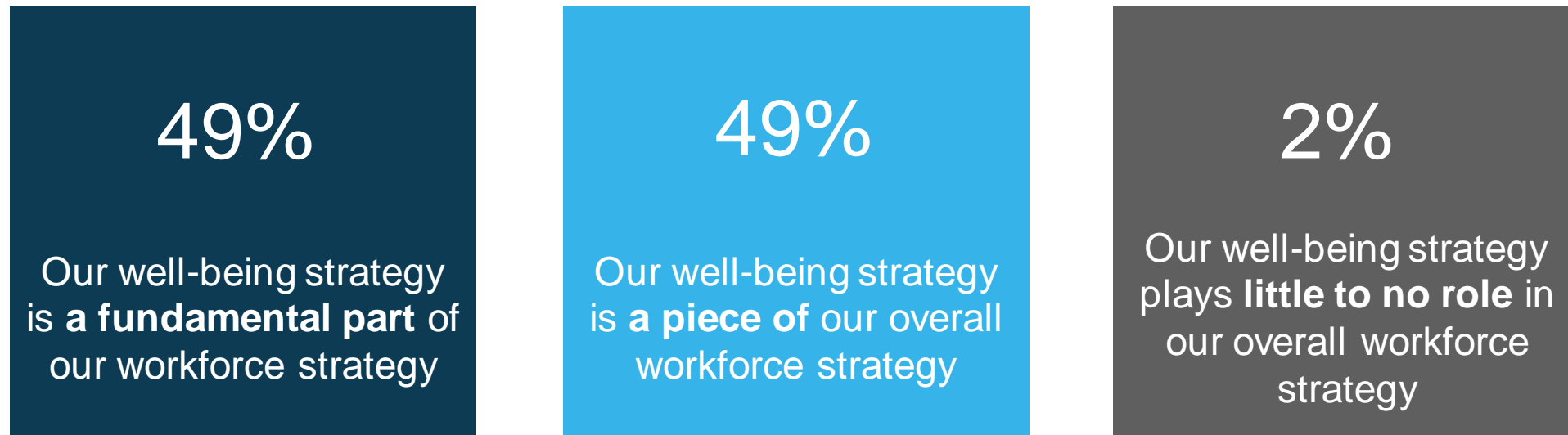


# Role of Employee Well-being in Overall Workforce Strategy, 2024



Employers consistently note a connection between well-being and workforce strategies; the extent is evenly split between “fundamental” and “it's a component.”

N=160



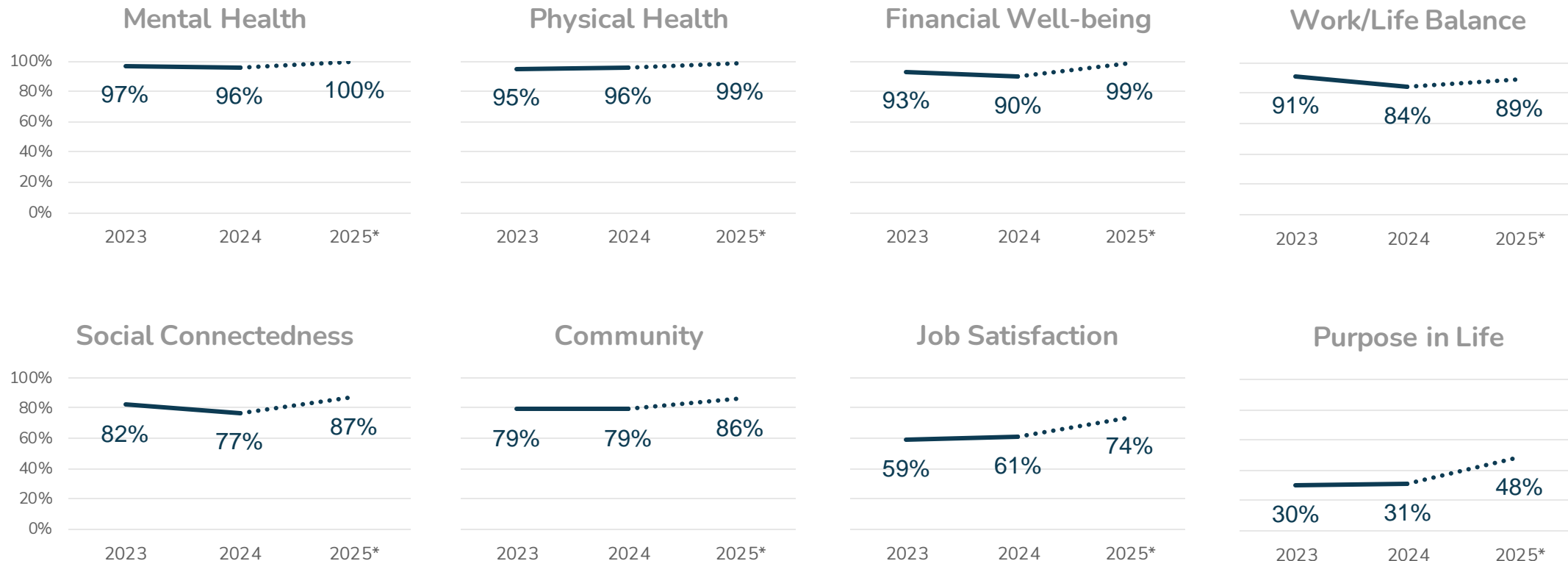
Q: Which of the following best describes the importance of well-being programs for your overall workforce strategy?

# Employers' Dimensions Included in Well-being, 2023-2025



Nearly all employers' well-being strategies include mental and physical health and financial well-being, while inclusion of job satisfaction and purpose in life continue to grow.

N=160



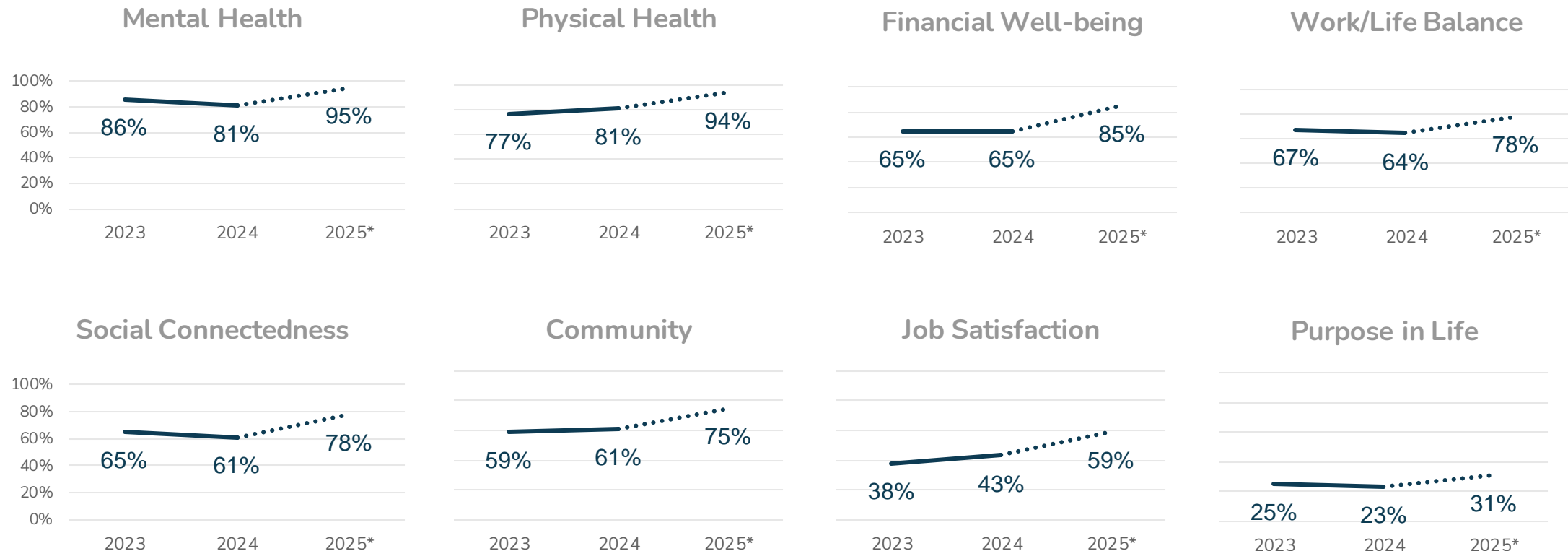
\*2025 represents those employers that already have the programs in place and those who are considering adding programs for 2025.

Q: Please indicate which of the following dimensions you will include in your overall well-being strategy in 2024 or 2025:

# Dimensions of Global Well-being Programs, 2023-2025

In 2024, more employers are addressing physical health, community and job satisfaction in their global well-being strategy.

N=80



\*2025 represents those employers that already have the programs in place and those who are considering adding programs for 2025.

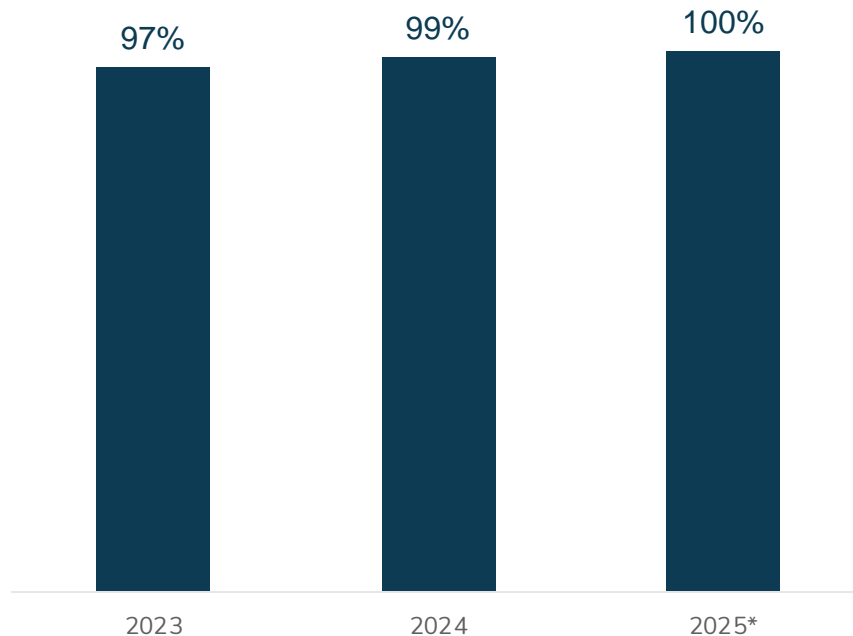
Q: Please indicate which of the following dimensions you will include in your global well-being strategy for 2024 and 2025.

# Employee Assistance Programs, 2023-2025

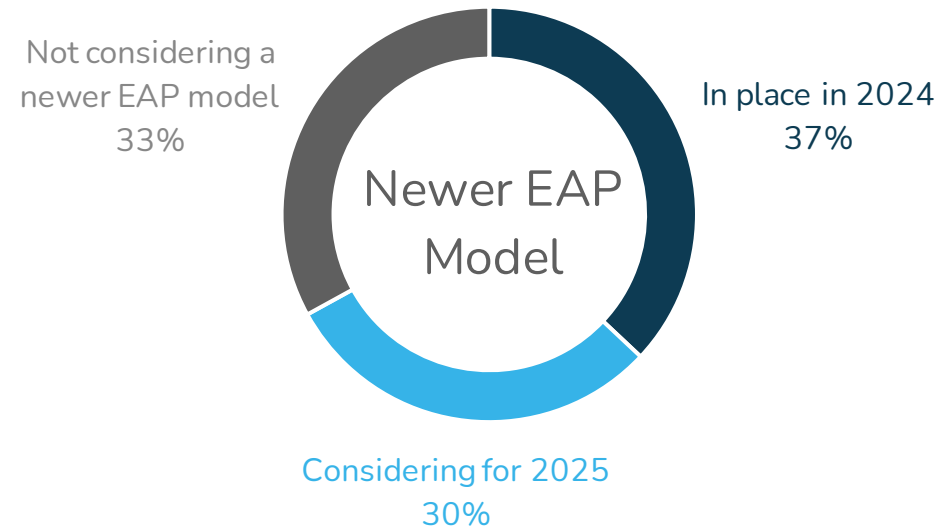
Nearly all employers currently offer an employee assistance program (EAP), but many have moved (or are considering moving) to a newer EAP model.

N=153

## Employers Providing an EAP



Ninety-seven percent of employers offer some type of employee assistance program, including 37% of employers who utilize a **newer EAP model**—an uptick from 34% in 2023.



\*2025 represents those employers that already have the programs in place and those who are considering adding programs for 2025.

Q: Please indicate which mental health programs or initiatives your organization has in place in 2024 or are considering for 2025.

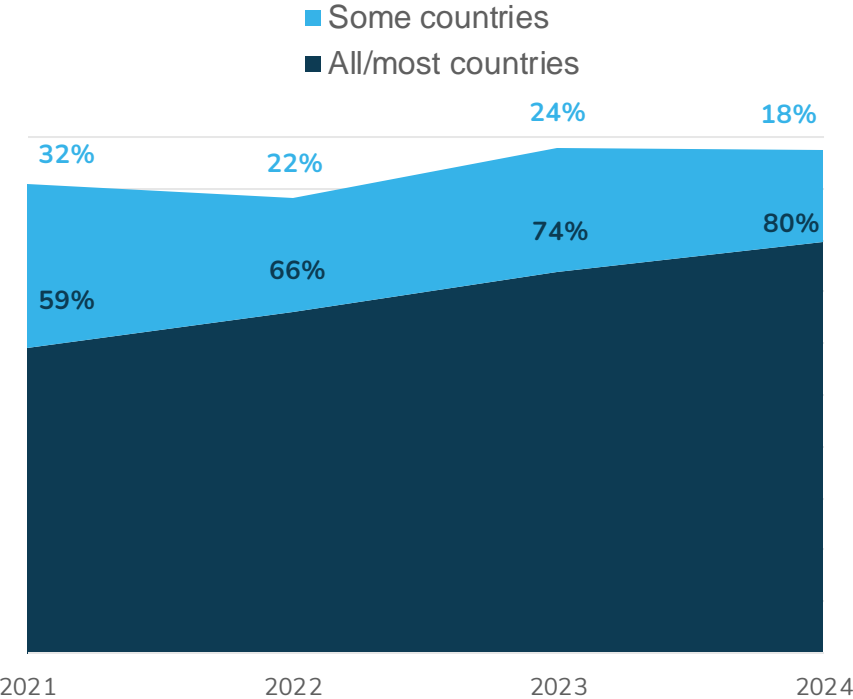
# Global Employee Assistance Programs, 2021-2024



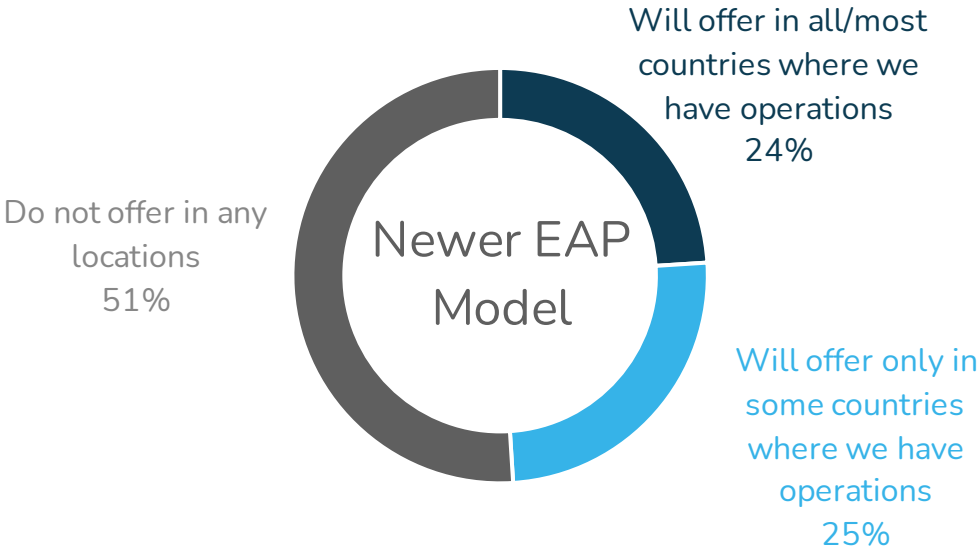
Year over year, more employers are making EAPs available in all/most the countries in which they have operations.

N=79

## Employers Providing an EAP



Ninety-eight percent of employers offer some type of employee assistance program in at least some countries, including 49% of employers who utilize **newer EAP models** (in at least some countries), up from 38% last year.



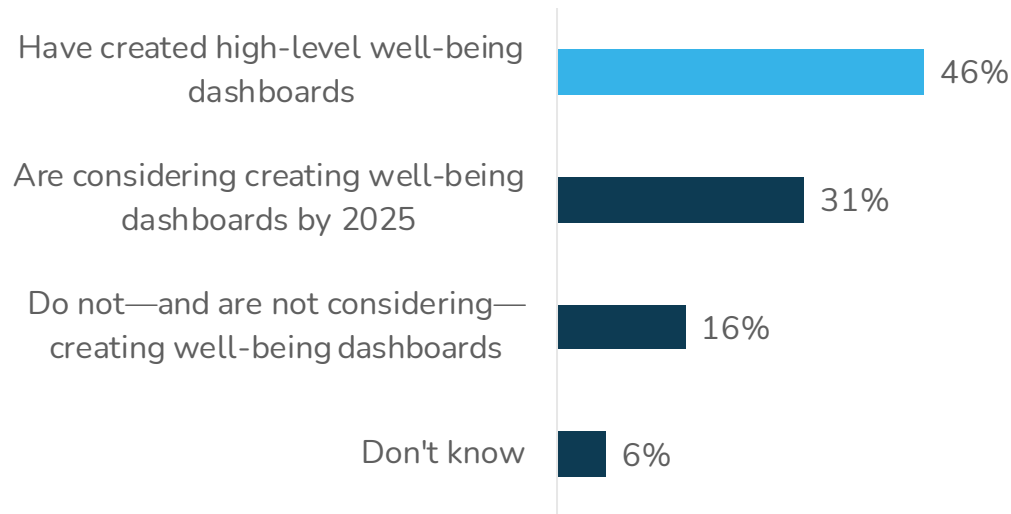
Q: Which of the programs will your company be offering in 2024?

# High-Level Well-being Dashboards, 2024-2025

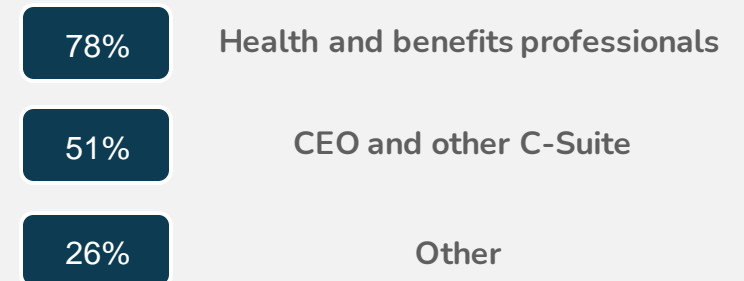
Nearly half of employers are creating high-level well-being dashboards, for use in health and benefits as well as in the C-Suite.

N=156

## Prevalence of Well-being Dashboards



## Audience for the Dashboards



Note: Other responses included: business leadership; team leaders; business partners; executive leaders (below C-suite); all employees.

Q: Does your company, or your consultants on your behalf, create high-level well-being dashboards?

Q: Who is the audience for your dashboard(s)? (Please select all that apply)

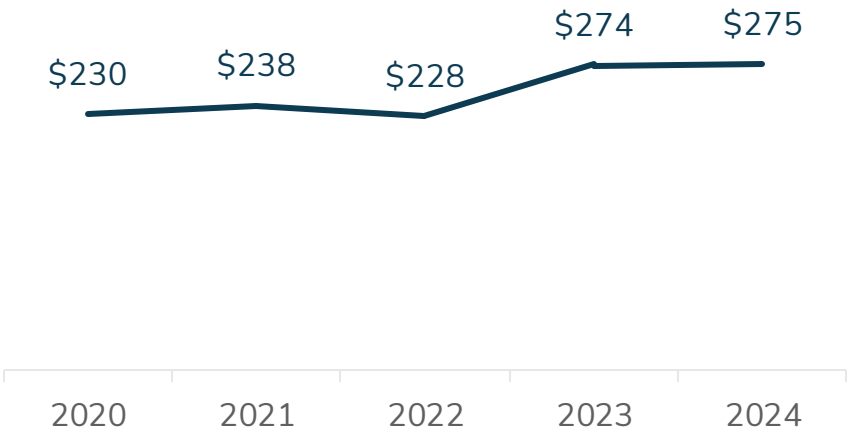
# Well-being Budget Per Employee Per Year, 2020-2024



Employer investment in employee well-being is holding steady in 2024—with employers investing \$275 per employee in 2024.

N=58

All Employers



Note: Mid-market: <5K employees. Large: 5-20K employees. Jumbo: 20K+ employees  
Q: For 2024, what is your organization’s well-being budget? Include costs for all the programs captured in the previous section, including any associated incentives.

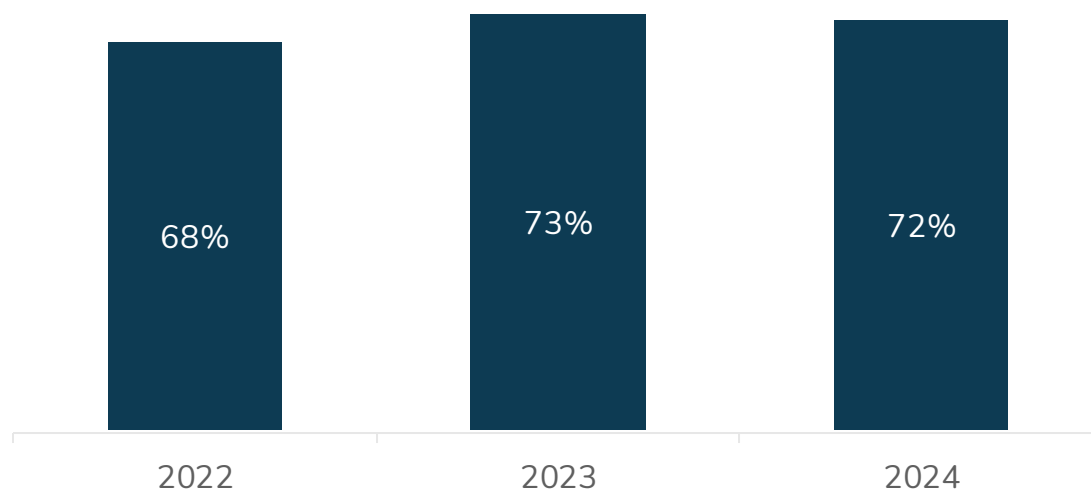
# Employers' Use of Financial Incentives/Disincentives for Well-being Programs, 2022-2024



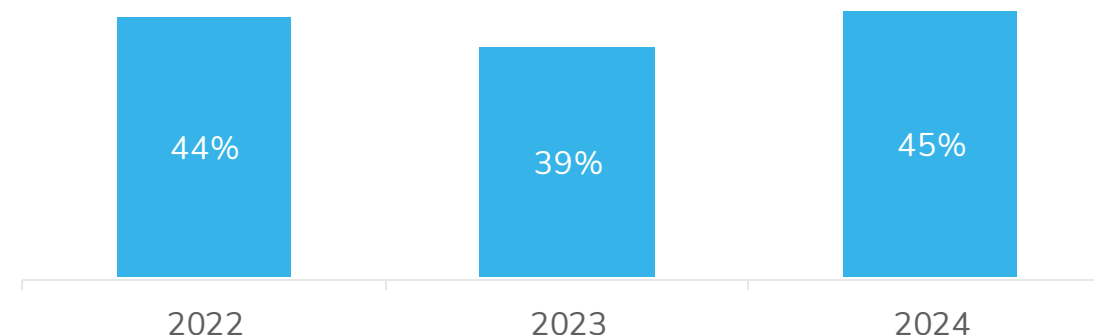
In 2024, the percentage of employers offering financial incentives for employees stayed about the same; however, more employers extended incentives to spouses/partners in 2024.

N=141

Financial Incentive/Disincentive Prevalence -  
Employees



Financial Incentive/Disincentive Prevalence –  
Spouses/Partners



Q: For 2024, will incentives and/or disincentives be offered to employees and spouses/partners for participating in well-being initiatives and/or for progressing toward or achieving healthy goals? (Select all that apply)

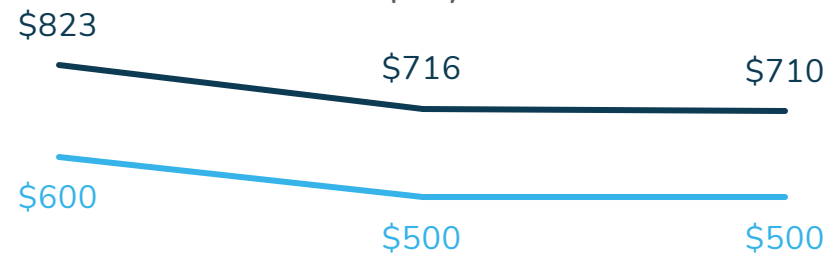


# Financial Incentive/Disincentive Amounts for Participating in Well-being Programs, 2022-2024

The average dollar value of financial incentives/disincentives in 2024 is \$710 for employees and \$486 for spouses/partners.

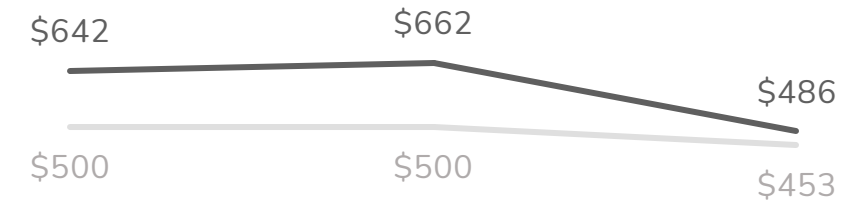
N=94

Maximum Financial Incentive/Disincentive Amount –  
Employees



N=58

Maximum Financial Incentive/Disincentive Amount –  
Spouses/Partners



*Of those employers who offer financial incentives to both employees and spouses/partners,  
**52% offer the same financial incentive amount to both groups.***

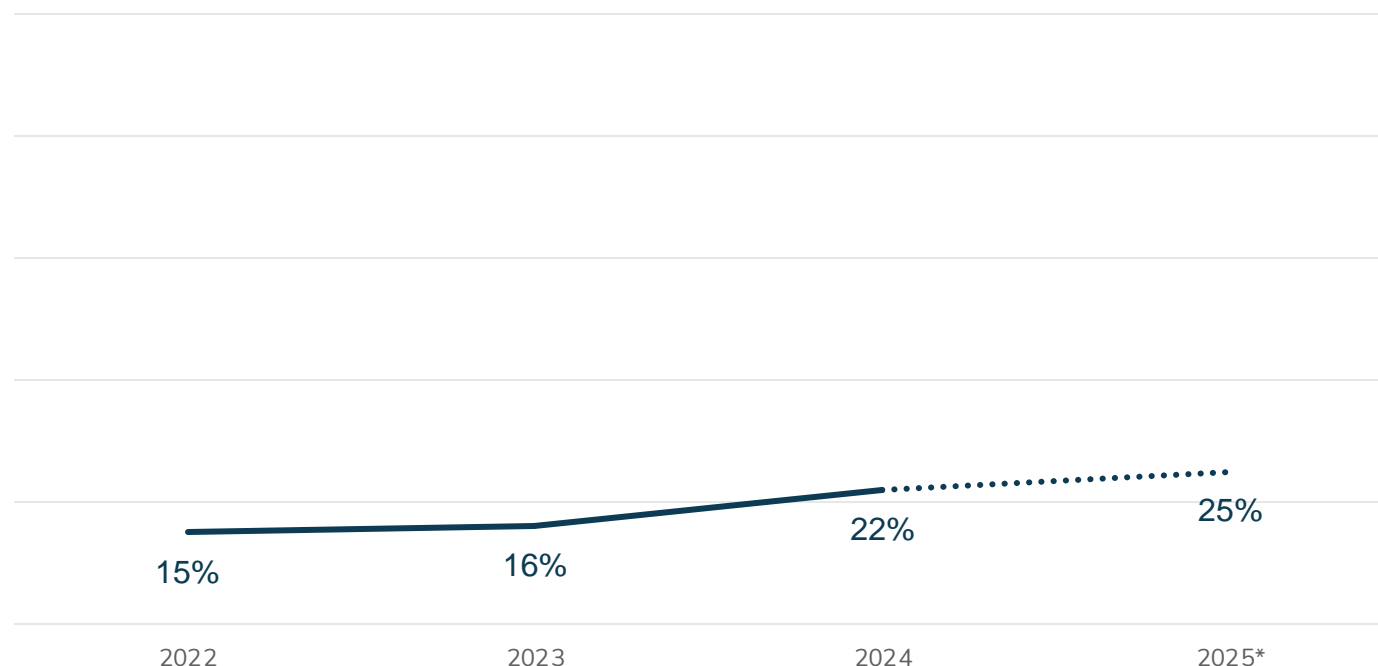
Q: What is the maximum dollar value of all incentives/disincentives (combined across all incentive-based initiatives and including any value of disincentives) that can be earned in 2024 (e.g., \$300 reward for health assessment completion and a \$500 penalty for not completing a biometric screening, the total value is \$800)?

# Employer Well-being Incentives Outside the U.S., 2022-2025

Use of incentives/disincentives outside the U.S. has slowly increased since 2022, with the possibility of further expansion in 2025.

N=79

## Use Incentives/Disincentives Outside the U.S.

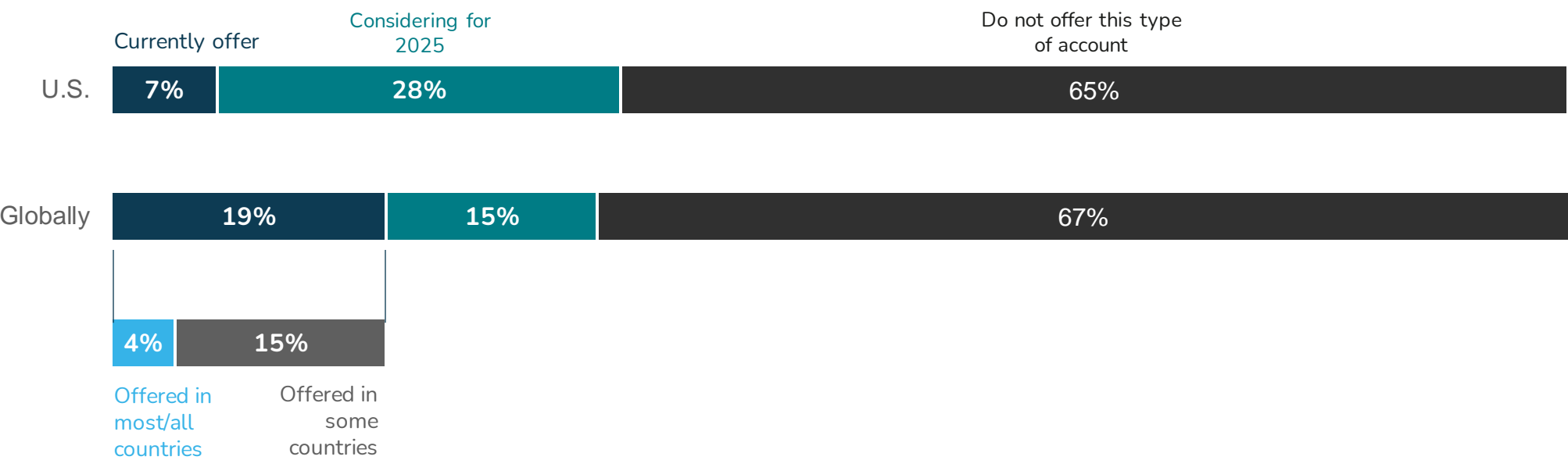


\*2025 represents those employers that already have the programs in place and those who are considering adding programs for 2025.  
Q: In 2024, will your organization offer incentives/disincentives for well-being programs/initiatives to global employees outside the U.S.?

# Lifestyle Spending Accounts, U.S. vs. Global, 2024-2025



Seven percent of employers offer an LSA in the U.S., and 19% of employers reported offering an LSA-like account in at least some countries they have operations.



Q: In 2024, will your organization fund a post-tax Lifestyle Spending Account (LSA) for employees to reimburse a wide variety of well-being related expenses (e.g., more than simply fitness/gym reimbursements)?

Q: In 2024, will your organization fund an account for employees to reimburse a wide variety of well-being related expenses (similar to an LSA) outside the U.S.?

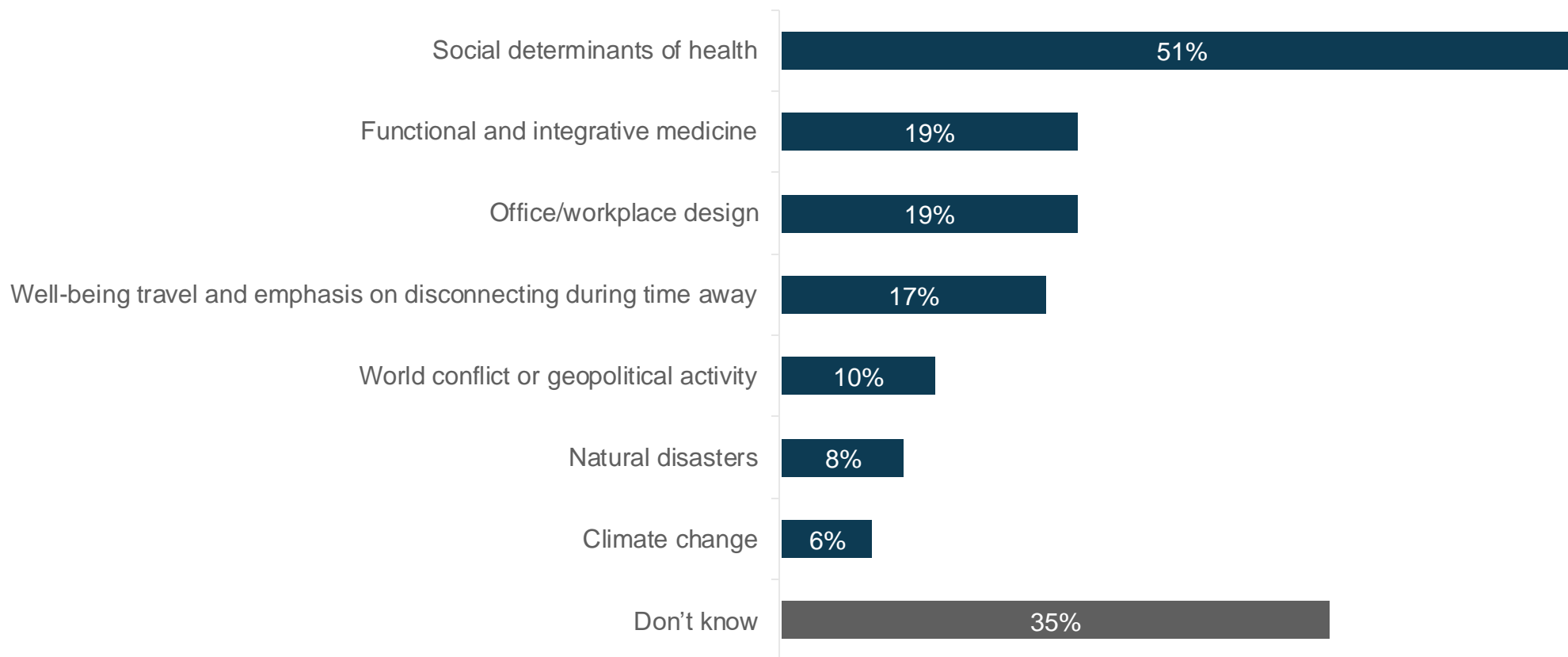


# Emerging Trends

# Employers Expanding Scope of Well-being Strategy in the Next 3-5 Years, 2024

Employers intend to expand their well-being strategies to help address social determinants of health as well as other issues that can impact employee well-being.

N=156



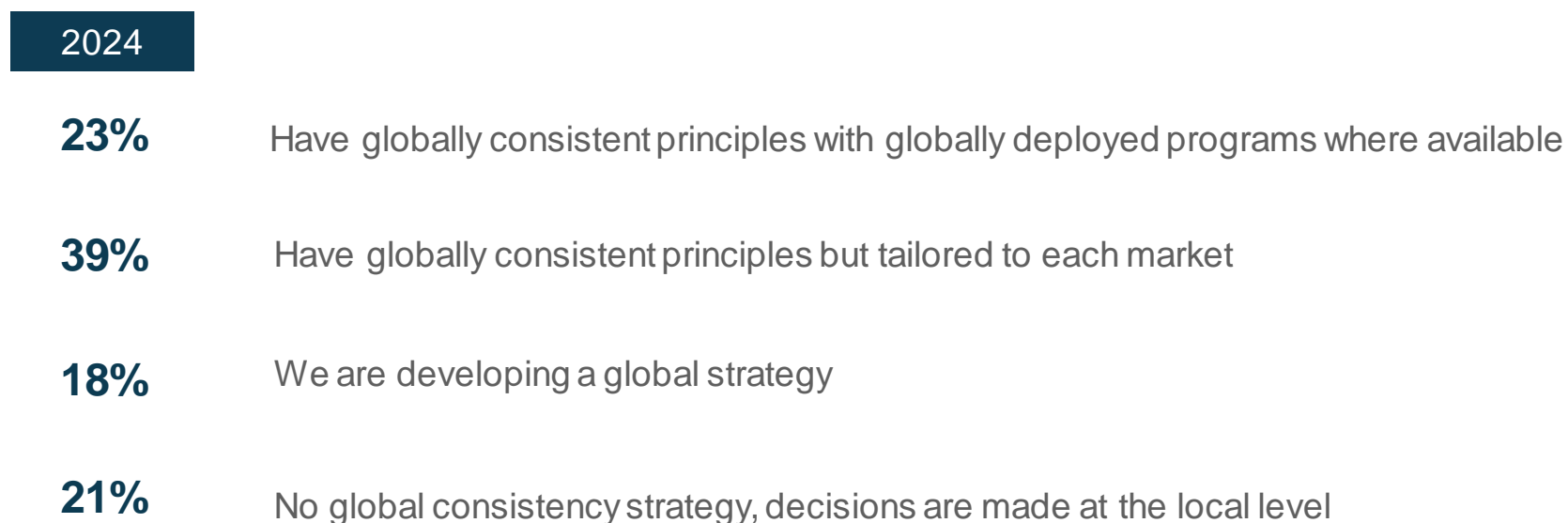
Q: Will you expand the scope of your well-being strategy to address the following impacts on personal well-being in the next 3-5 years? (Please select all that apply)

# Employers with a Globally Consistent Well-being Strategy, 2024



Sixty-two percent of global employers have a globally consistent well-being strategy.

N=80



Q: In 2024, what is your approach for your global well-being strategy?



# The Future of Well-being

# Employers' Future Well-being Strategy Over the Next 3-5 Years



Nearly all employers are planning to continue or expand **(96%)** their well-being programs over the next 3-5 years.

The dimensions that may experience expansion by the greatest number of employers are mental health and financial well-being.

Few employers intend to eliminate incentives over the next 3-5 years. Instead, the majority will continue at the same level or expand their use of incentives.



# What's Happening at Business Group on Health



June 4, 10:00 am ET

## Employer to Employer Call: Compelling Health & Well-being Communications

Share your health and well-being communications strategy & learn from others.



June 10, 12:00 pm ET

## Elevate Your Approach to Health & Well-Being

Hear from three Best Employers Awards winners on how they elevated their well-being programs and organizational culture.



June 20, 12:00 pm ET

## Public Policy Webinar: Regulatory & Compliance Update

Learn about recent legislative action, regulatory guidance and other developments impacting employer-sponsored group health plans.



## SURVEY PARTICIPATION



Please participate in our annual  
2025 Employer Health Care  
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# Thank you

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