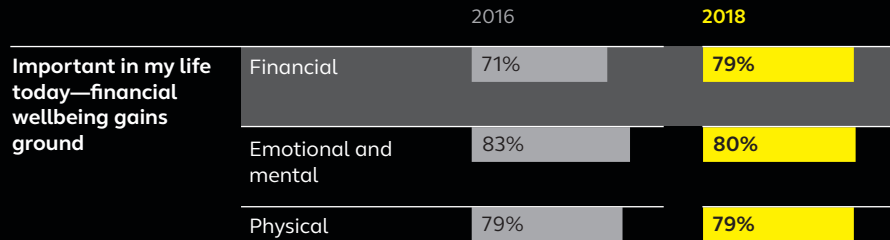


# Current situation: engaged and confused

## The lens on wellbeing is widening—but challenges persist



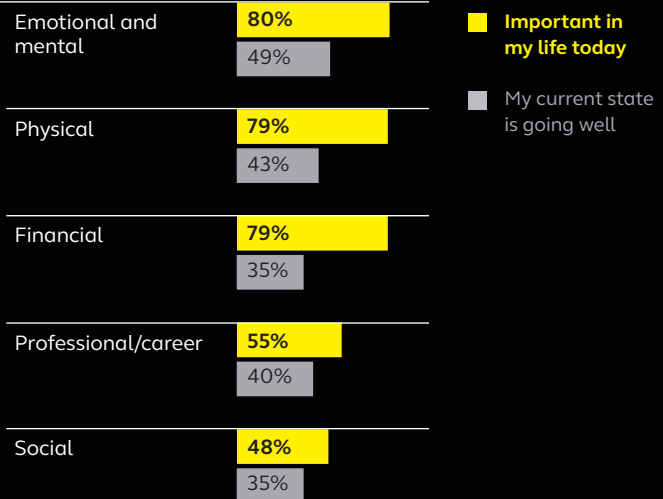
### New and noteworthy

Mental health support losing stigma with more interest in on-site mental health services:

2018	47%
2017	36%



### The gap between importance and current state



### The power of investments

- 82% say health and wellness programs are a good business investment (72% in 2014)
- 77% say health and wellness programs make the company more attractive (64% in 2014)
- 48% say health and wellness programs are one of the reasons I stay at my job (36% in 2014)



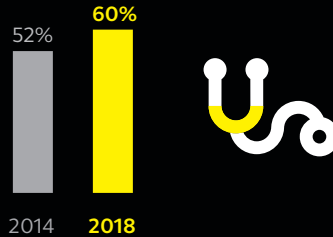
Millennials are more likely to rate wellbeing dimensions as important, but less likely to rate their current wellbeing dimensions as going well

## 3 in 5

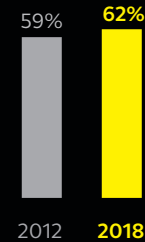
say “health and wellness programs enhance/improve my overall employment experience”

## Accountability ticks up

"I do everything I can to promote and maintain my health and wellness"



Level of personal control over health remains consistent

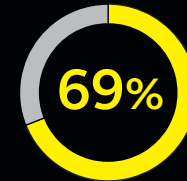


Consumers in high-deductible health plans show higher personal control over health at **66%**

### Healthcare behavior changing slightly

- 60% never compared costs for recommended medical services (64% in 2017)
- 45% never asked if a prescription or treatment may be right for them (46% in 2017)
- 44% never asked or looked up costs for recommended medical services (46% in 2017)

On the downside, 69% of Boomers have never compared costs for recommended medical services, which is **9 points higher** than all other consumers



## Tension mounts between personalization and privacy

### Most helpful resource from employers for managing my health

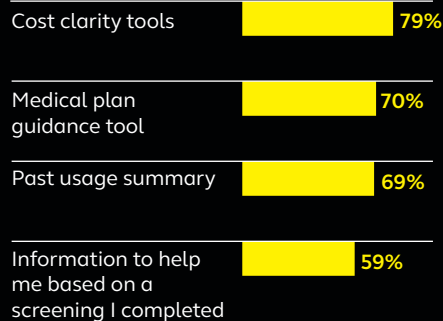
Personalized wellness information

but

### When confronted with the potential data sources

Only 34% say "Yes, I want personalized health communication from my employer or third-party provider"

Value of medical plan tools and information



"I would be comfortable sharing information with my employer or appropriate third party in exchange for personalized health and wellness information or guidance"

