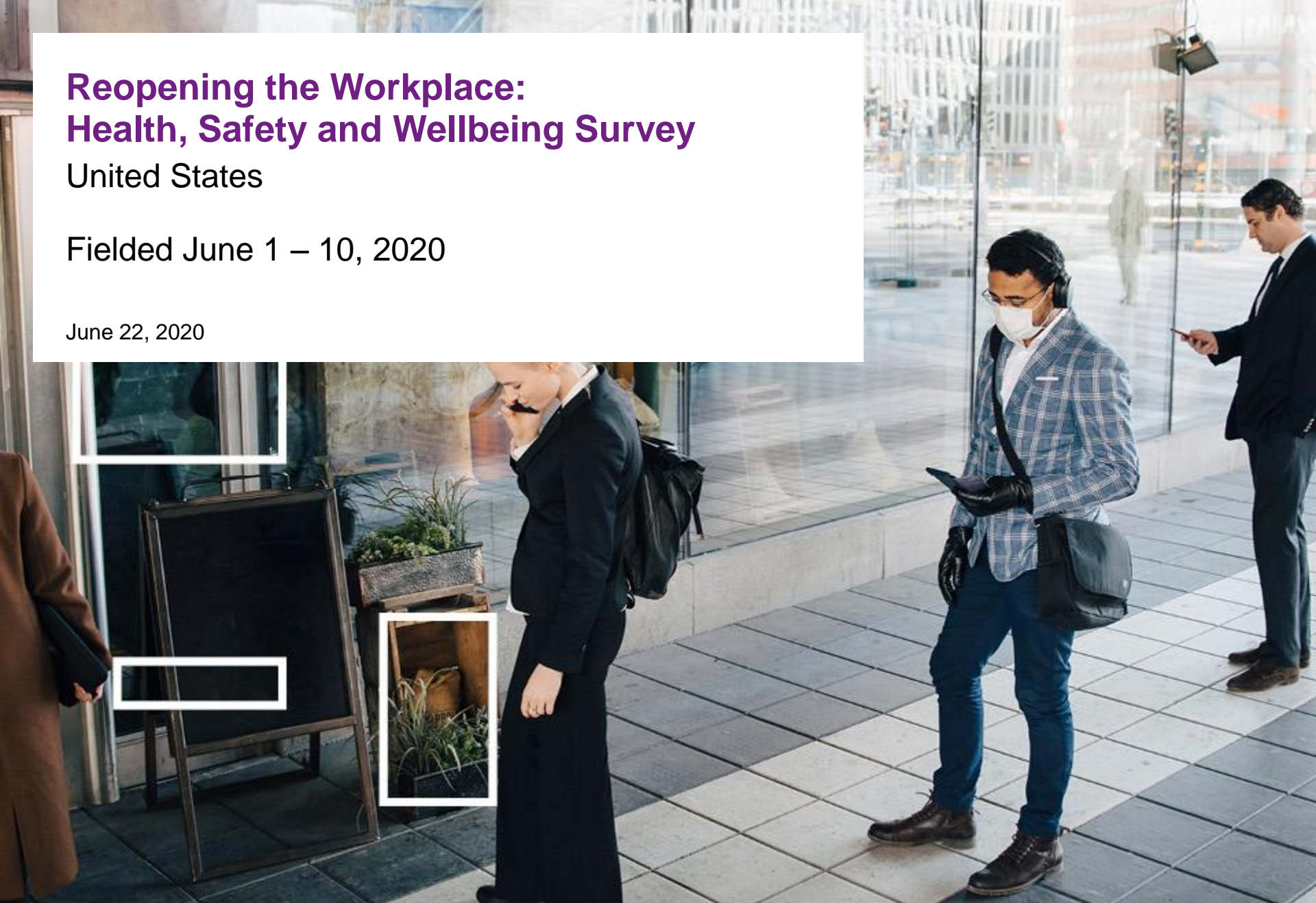


Reopening the Workplace: Health, Safety and Wellbeing Survey

United States

Fielded June 1 – 10, 2020

June 22, 2020



About the survey (United States)

543

Employers with over 100
employees responded

5.3M

US employees at responding
organizations

42%

For profit,
publicly traded

38%

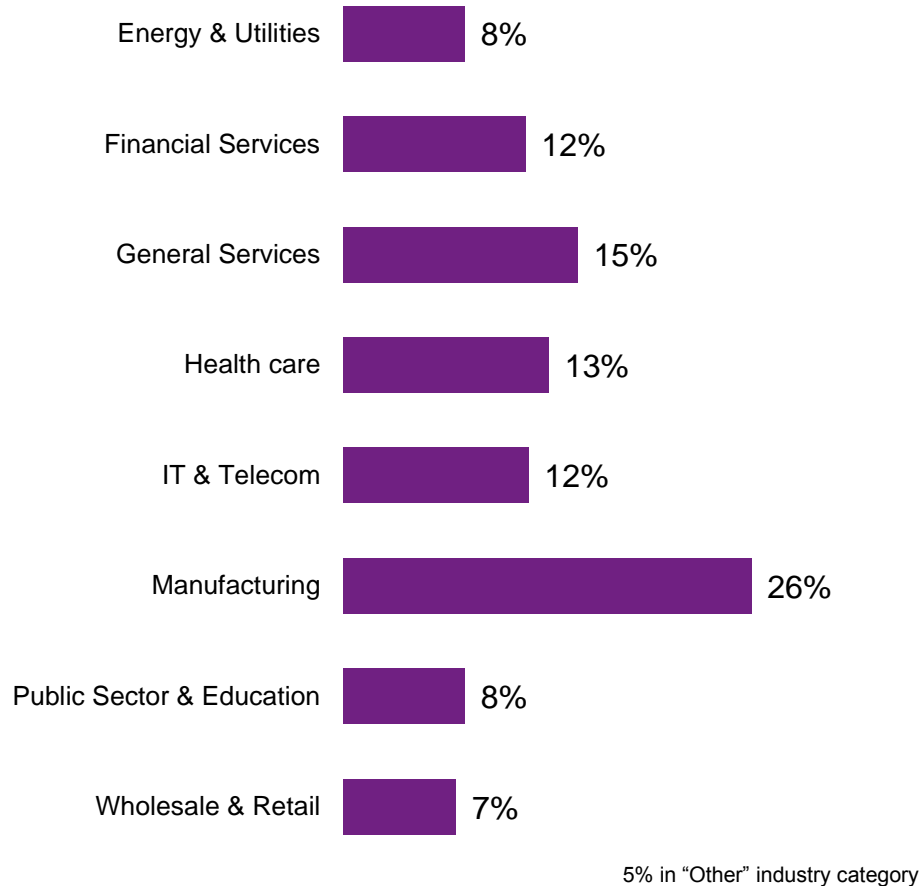
For profit,
private

17%

Nonprofit/
Government

Note: 3% Other

Industry



Note: Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Highlights

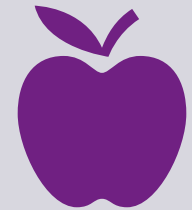
Business impact

Wellbeing and productivity concerns persist. Employer concerns about the impact of COVID-19 on wellbeing remain high (50%) but have dropped since April (64%). Concerns about the negative impact on productivity has lessened as well (27% in June vs. 43% in April).

Workforce reductions are on the rise. Nearly one-third of companies have already taken actions to reduce staff through layoffs and another 20% are planning or considering. More than a quarter of companies have cut salaries and most (70-80%) have not offset those cuts.

Remote work is here to stay. Today, about 60% of employees are working remotely compared to 11% before the onset of the pandemic. Companies anticipate nearly one-third of their employees will still be working remotely at the beginning of 2021.

Reversing temporary actions. Three-quarters of furloughed employees are expected to return to work by Q1, 2021 and just as many workers, who have endured salary cuts or reduced hours, are expected to have those reinstated. However, only 24% of laid off workers are expected to be rehired by the beginning of next year.



Highlights

Safety, flexibility and physical distancing

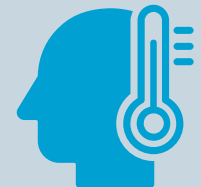
Increased focus on employee safety. As companies reopen the workplace, nearly 50% more companies identified workplace safety as a top priority compared to views in April (39% vs. 27%).

Preparing for a second wave. While two-thirds of companies have a plan to address an exposure, have a screening management team in place **and** are stocking vital supplies, only one-third of companies have a documented plan in the event of a second-wave of infections.

Protecting employees with screenings and PPE. More than half of companies will use employee questionnaires and thermal scanning to screen the workforce on re-entry. PCR, antigen and antibody tests will be used by less than 20% of employers. 49% of companies will only require masks in public locations and 24% will require masks at all times.

Reconfiguring workspaces. More than half of companies have reconfigured physical workspaces to allow workers to maintain 6 feet of distance. More than two-thirds of companies are closing common areas like breakrooms, cafeterias and gyms.

Accommodating at-risk employee. Nearly half of employers have taken steps to accommodate at-risk employees by adding personal protective equipment (65%), expanding physical distancing (64%) and reassigning to new roles (30%).



Highlights

Wellbeing

Leaders demonstrate strong support. More than three-quarters of leaders are taking actions to protect employees, promote a healthy workplace culture and show appreciation for employee contributions during a difficult time. Most companies will maintain their wellbeing budgets and 12% are planning a budget increase in 2021.

Emergence of virtual care. More than 80% of companies are promoting telehealth services. Companies are also adding digital condition management (45%) and virtual physical therapy (29%).

Emotional wellbeing remains a top priority. Enhancing mental health services is a top priority of 47% of employers. Companies are most focused on expanding mindfulness programs, training for managers and high touch navigation.

Expanding financial wellbeing. Most companies (75%) have taken or will take steps to reinforce the value of existing counseling services and tools. But nearly half of companies have adopted or are considering new financial wellbeing services for emergency savings or counselling.

Greater support for caregiving needs. Nearly one-in-four employers will enhance caregiving benefits for their employees. This support includes flexible hours (89%), navigation resources (51%) and backup child or elderly care services (30%).



Employers increase their focus on enhancing employee safety



Which of the following do you expect to be your organization's most important benefits priorities over the next six months?

	April	June
#1 Communicate on benefits and wellbeing programs that might be important to employees at this time	67%	69%
#2 Enhance mental health services and stress/resilience management	43%	47%
#3 Enhance programs/actions around employee safety	27%	39%
Support the financial wellbeing of employees	33%	22%
Ensure business continuity of benefits programs (e.g., vendor management)	25%	22%
Reduce costs of benefits programs	20%	21%
Address benefits for employees not at work (e.g., furloughs, involuntary leave, sick leave)	31%	17%
Reframe benefits in a post-COVID environment	18%	15%
Improve the physical wellbeing of employees	12%	14%
Provide more flexibility to employees about benefit options/choices	8%	13%
Improve social connections (i.e., reduce loneliness)	7%	12%

Note: Percentages indicate "being selected in top 3".

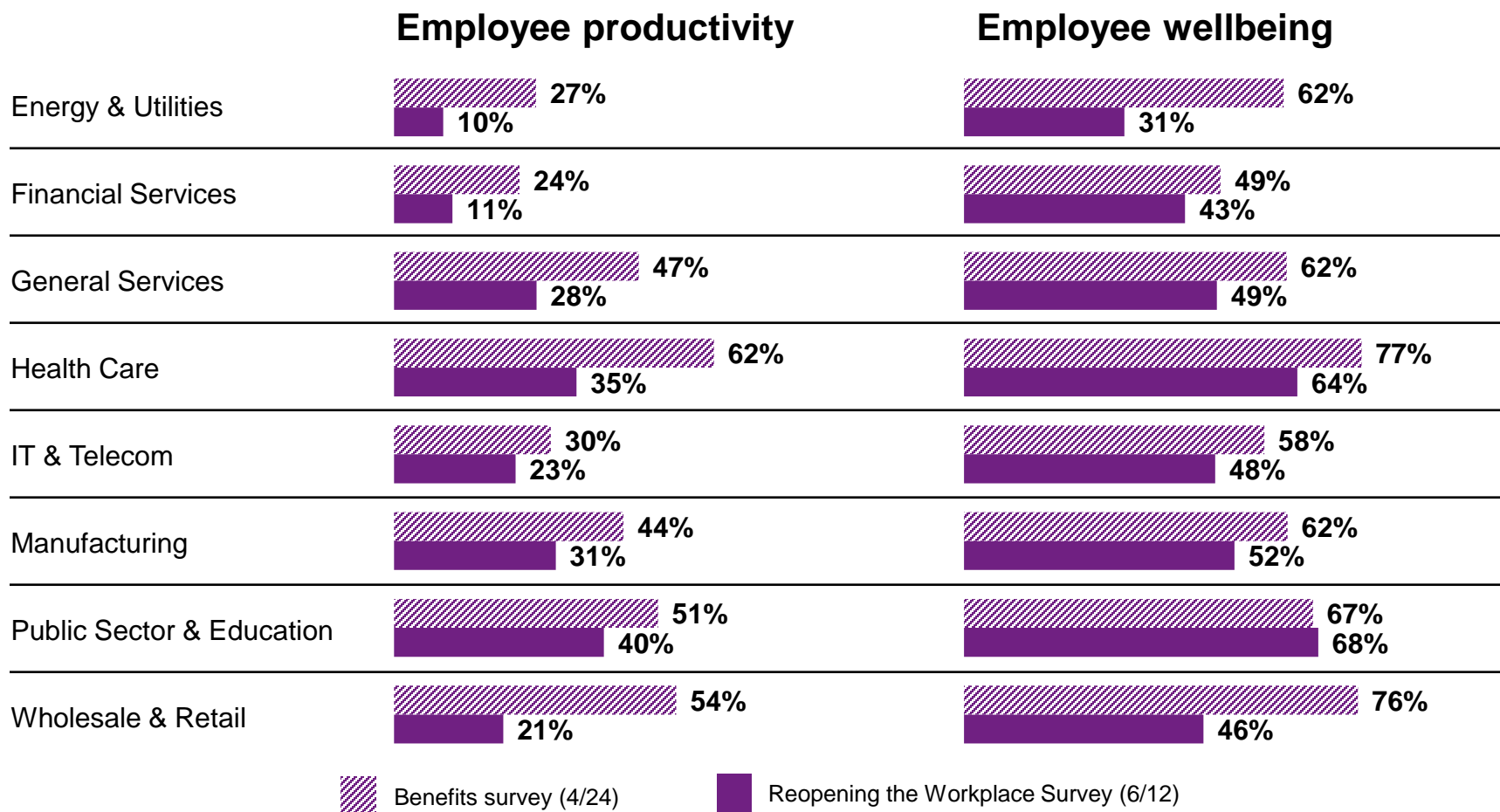
Source: 2020 COVID-19 Benefits Survey, United States and Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Business impact

Wellbeing and productivity impacts by industry

What level of impact will COVID-19 have on the following aspects of your employees over the next six months?

% moderate or large negative impact

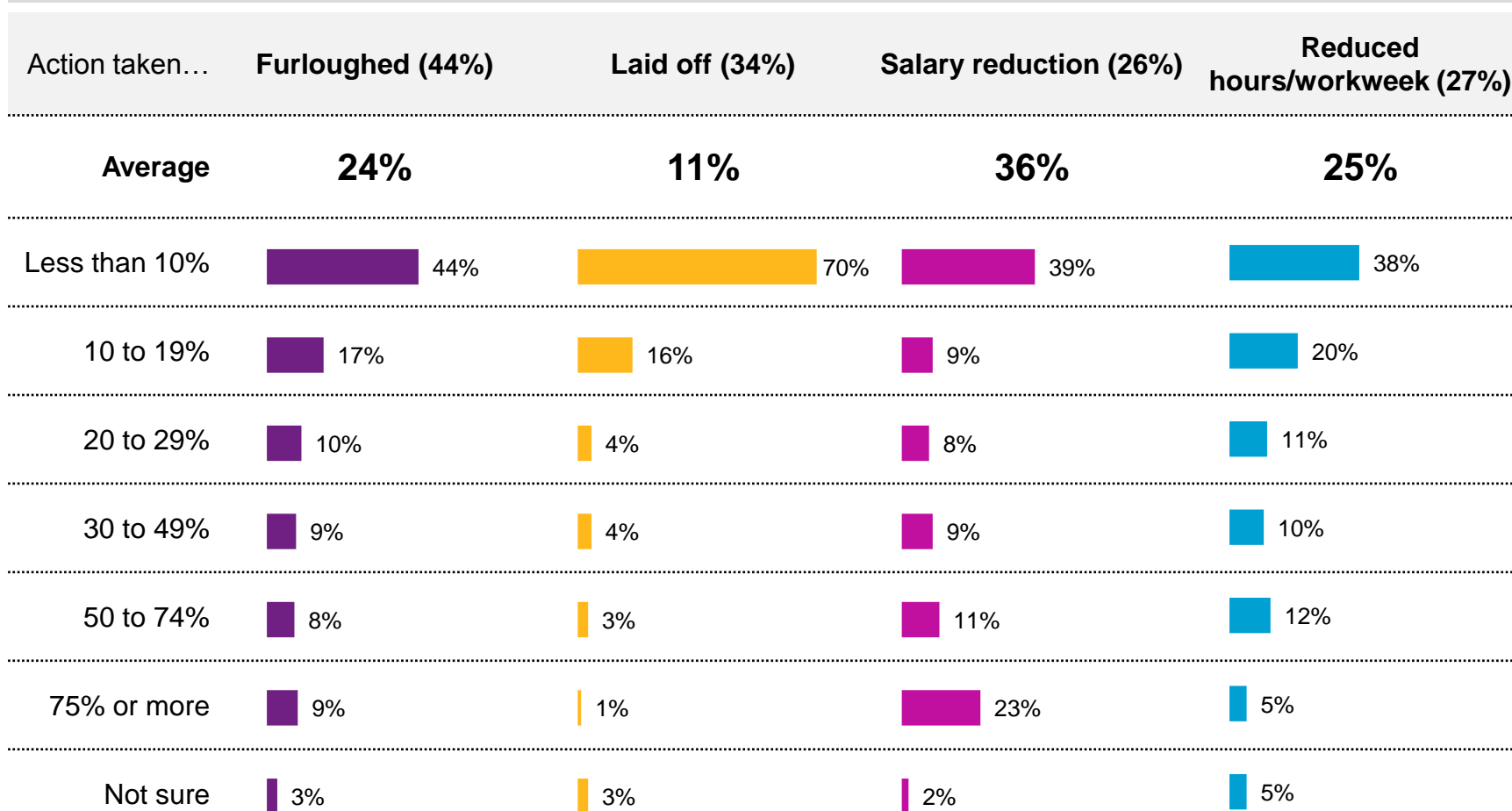


Note: Percentages indicate moderate or large negative impact.

Source: 2020 COVID-19 Benefits Survey, United States and Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Companies doing layoffs have reduced 11% of the workforce

Approximately what percentage of your workforce have faced the following due to the pandemic?



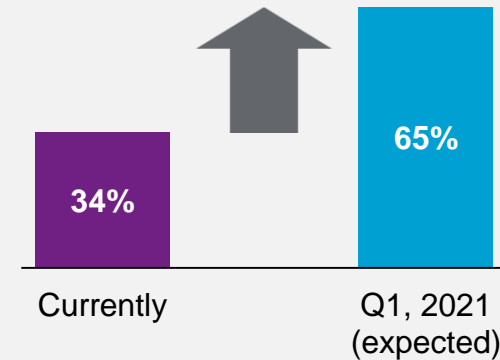
Note: Percentages are of workforces in those companies which took each action.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Employers expect to have two thirds of employees working onsite and one third of employees working remotely by the first quarter of 2021



Percentage of employees working onsite



Percentage of employees working remotely



Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Half of employers allow recurring reimbursements of home office expenses, while one third offer one-time stipends

Which of the following are features of your subsidy policy for office equipment?

Allow recurring reimbursements of expenses



Have a one-time stipend



\$200

(Median)

Have an annual cap on expenses



\$700

N=9 (Median)

Have a one-time use cap on expenses



\$250

N=9 (Median)

25%

Vary policy by employee subset

Sample: Employers who have offered employee subsidies to manage costs of working remotely.

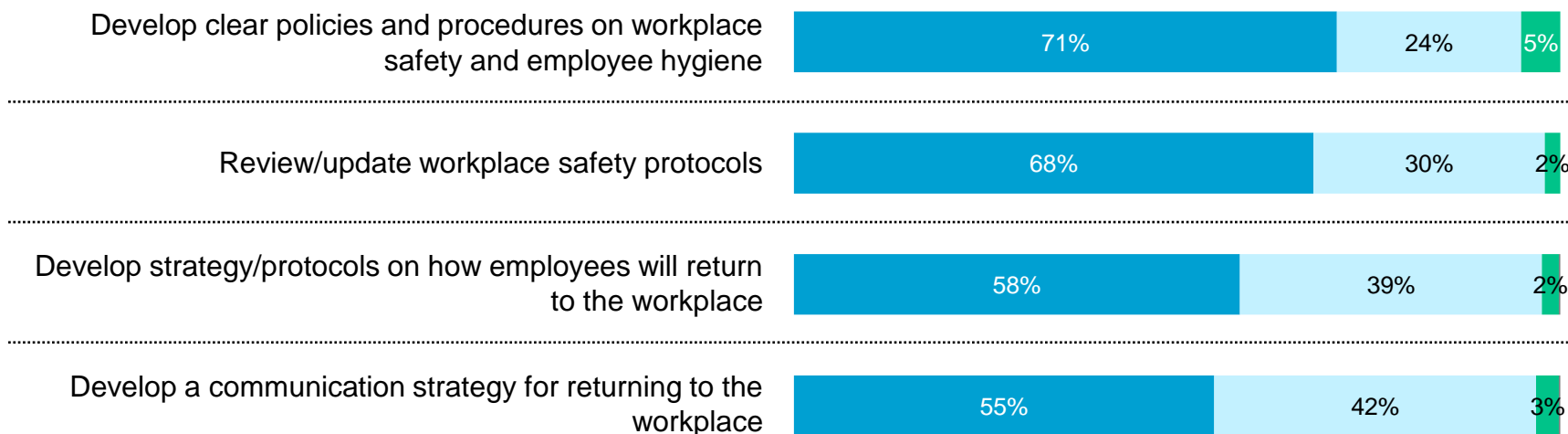
Note: Percentages indicate "Yes".

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

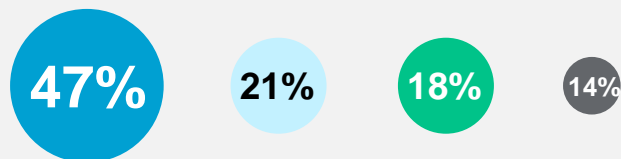
Safety

More than two-thirds of companies have already developed reopening procedures and updated workplace safety protocols

Has your organization taken or does it plan to take any of the following actions in preparation for when the COVID-19 travel and social distancing restrictions are removed/eased?



Use employee listening strategies (surveys, virtual focus groups) to identify safety concerns, wellbeing and workplace needs of employees to develop a return-to-work strategy



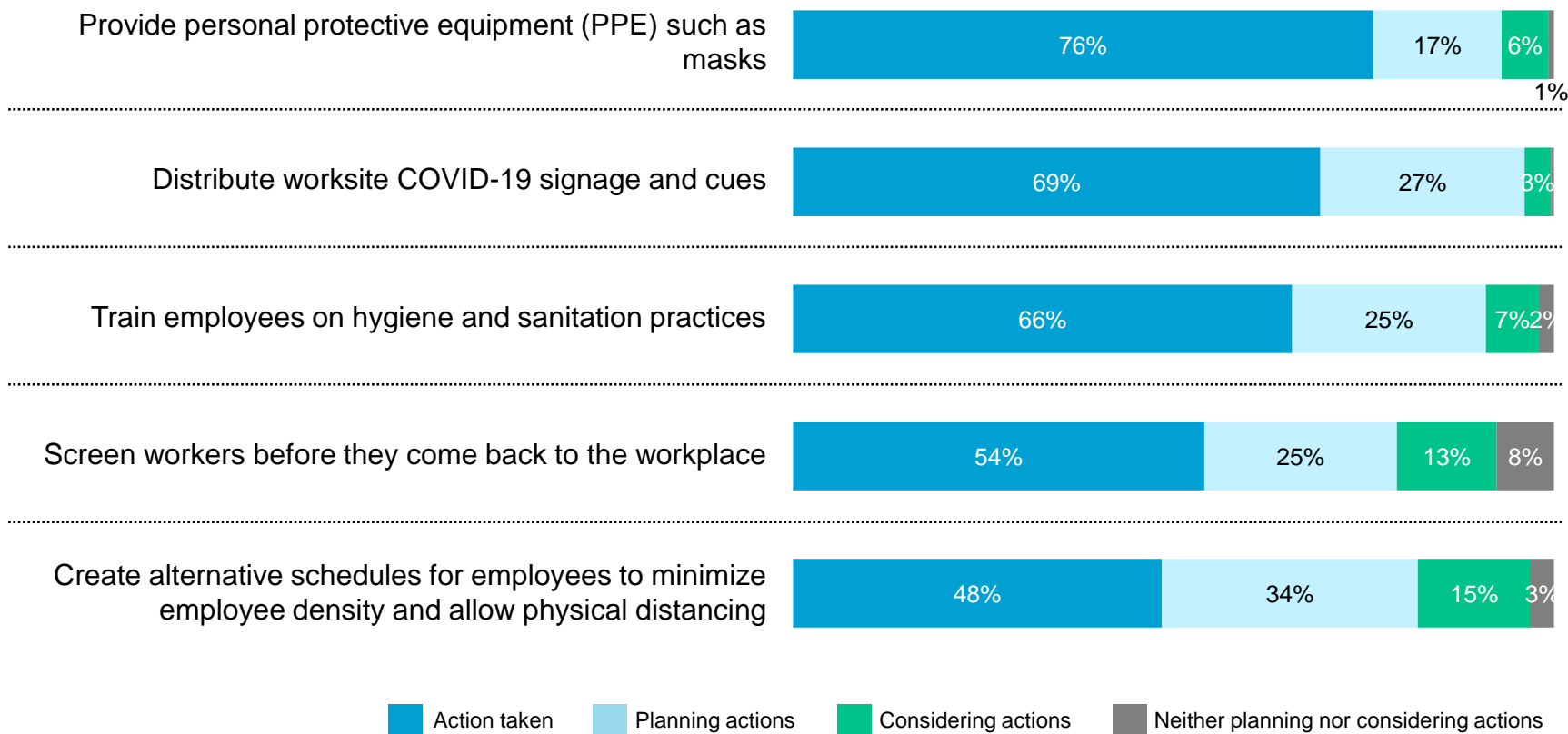
■ Action taken
 ■ Planning actions
 ■ Considering actions
 ■ Neither planning nor considering actions

Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Three-quarters of companies will provide PPE to employees

Has your organization taken or does it plan to take any of the following actions in preparation for when the COVID-19 travel and social distancing restrictions are removed/eased?

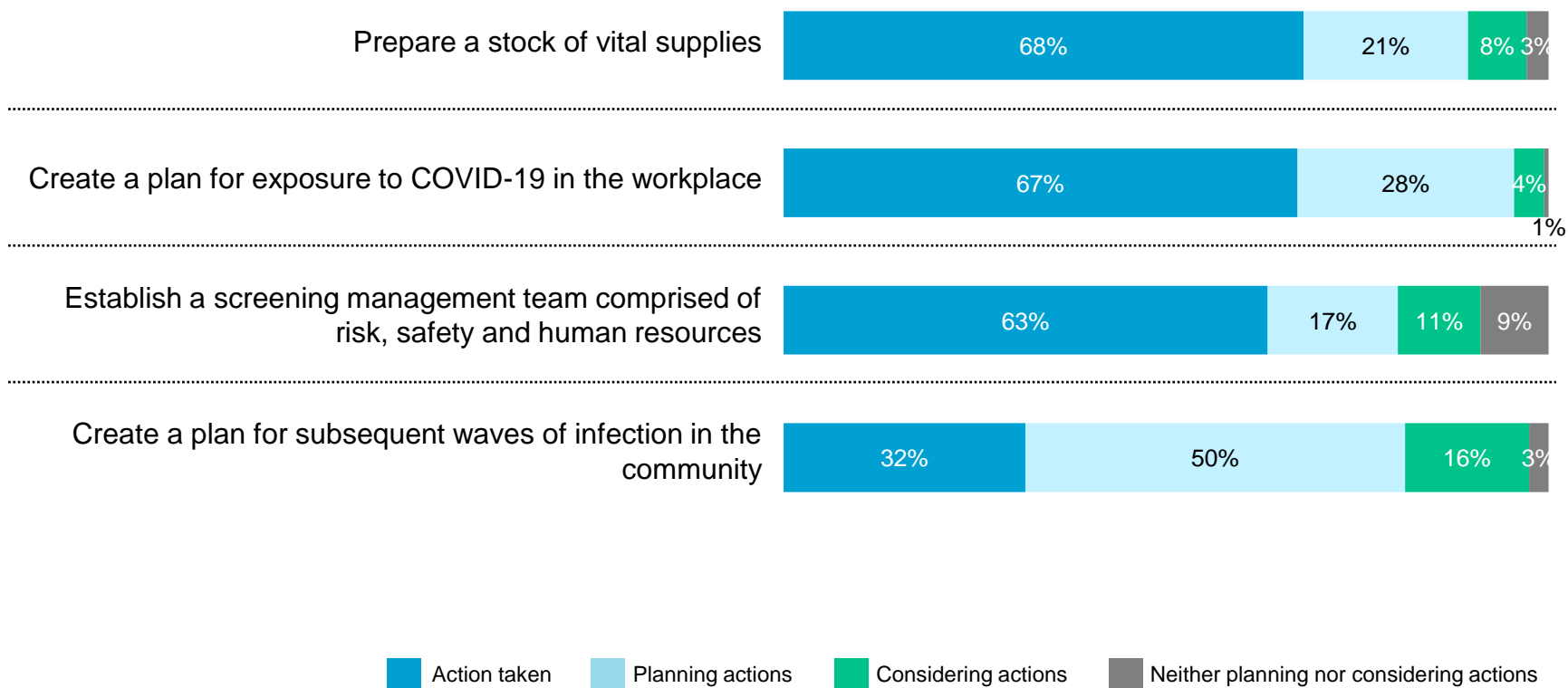


Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Two-thirds of companies have a process for dealing with a workplace exposure, yet only one-third have developed a plan for subsequent waves

Has your organization taken or does it plan to take any of the following actions in preparation for when the COVID-19 travel and social distancing restrictions are removed/eased?



Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Companies will largely use self-attestation and thermal scanning

Few companies are testing employees today but one in four are considering it

What method of screening are you using or planning to use?

Self-attestation:

Questionnaire to assess symptoms or exposure



Thermal scanning:

Temperature checks



PCR test:

Remote testing for active infection



PCR test:

On-site testing for active infection



Antigen test:

On-site testing for active infection



Antigen test:

Remote testing for active infection



Antibody test:

On-site testing for past infection



Antibody test:

Remote testing for past infection

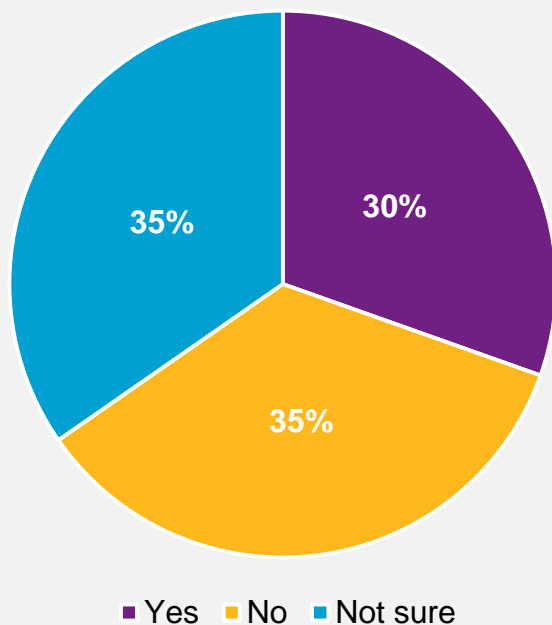


■ Action taken
 ■ Planning actions
 ■ Considering actions
 ■ Neither planning nor considering actions

Note: Based on action taken, planning or considering for screening workers. "Not sure" option excluded. Percentages may not add up to 100% due to rounding.
Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

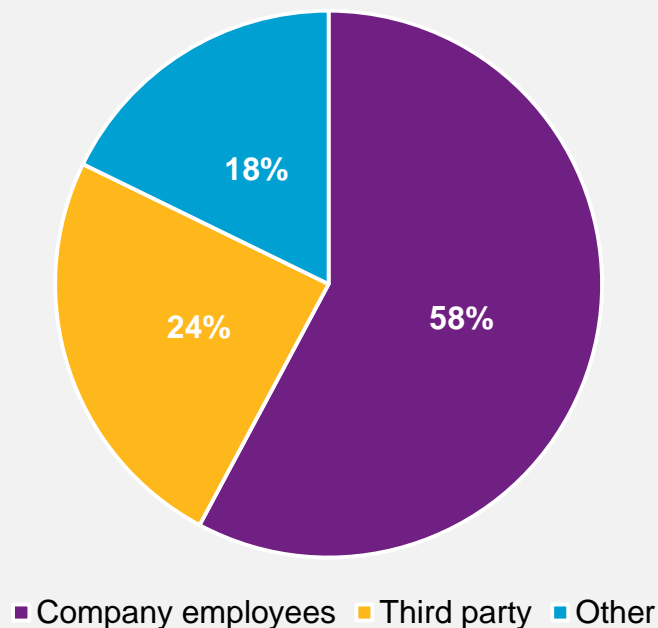
Most employers don't plan to use an app to administer self-attestation questionnaires and most plan to use company employees for screening

About one-third of employers use or plan to use an app to administer **the questionnaire to assess symptoms or exposure**



* Based on action taken, planning or considering for self-attestation.

More than half of employers use or plan to use company employees to administer for **thermal screening**



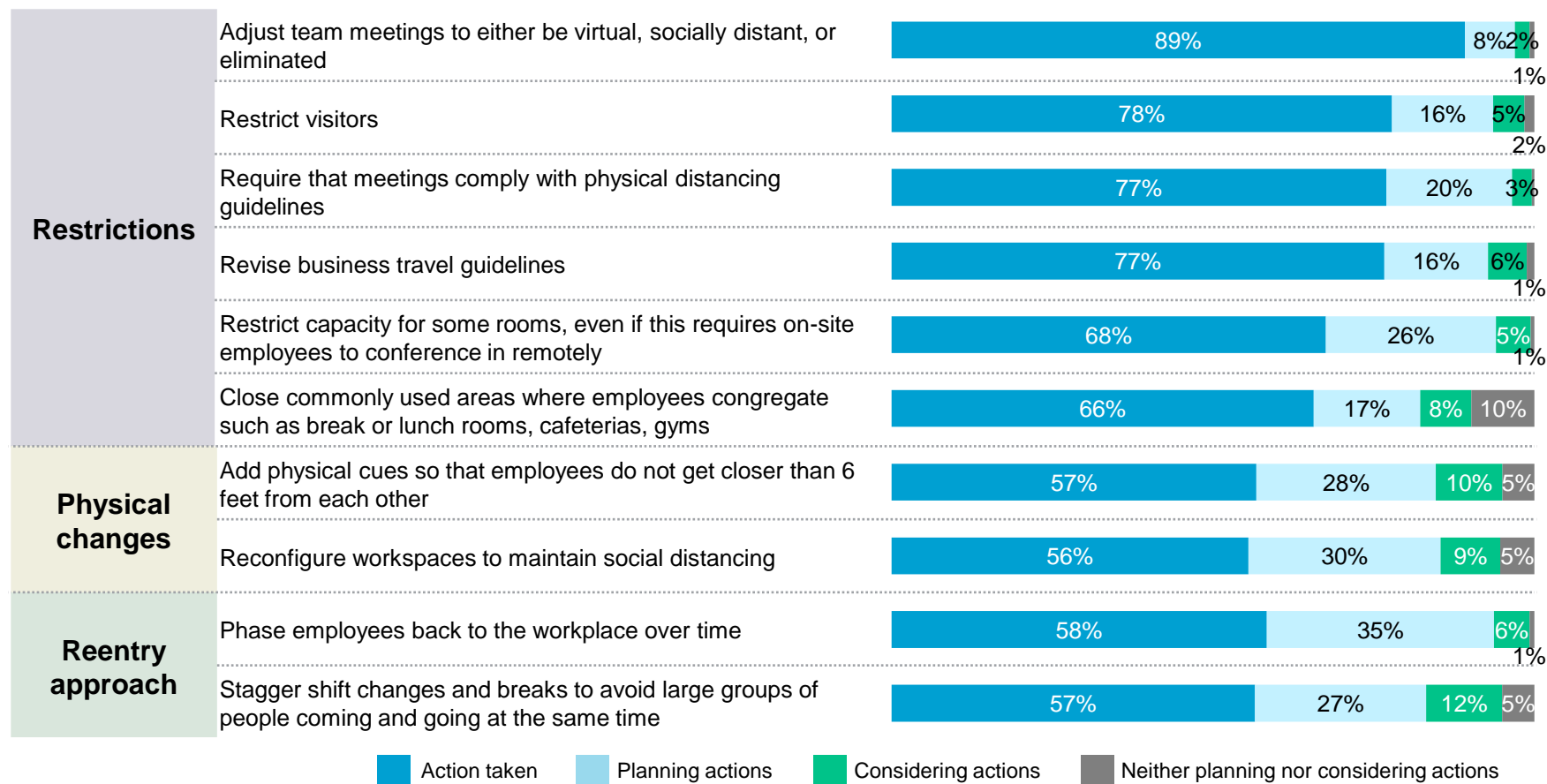
* Based on action taken, planning or considering for thermal-scanning.

Note: Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Employers have taken or plan to take a variety of actions to support physical distancing

Is your organization taking or planning to take any of the following actions?



Note: "Not applicable" and "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

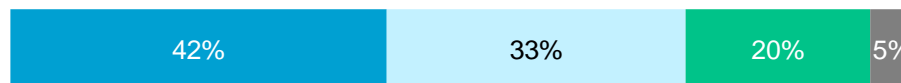
Two-fifths of employers have accommodated at-risk employees by creating more flexibility and half are planning/considering such actions

Is your organization taking or planning to take any of the following actions?

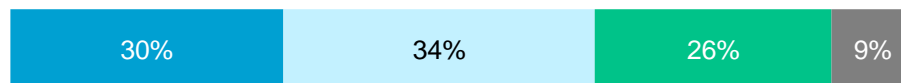
Accommodate at-risk employees (medical condition, age, etc.) whose jobs cannot be done remotely by creating more flexibility



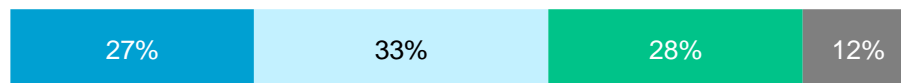
Assess employee concerns/fears/anxieties related to returning to places of work



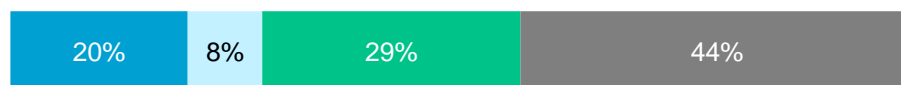
Develop policies and provide tools and resources for employees who may work remotely longer term



Change policies to encourage more remote work



Offer employee subsidies to manage costs of working remotely (e.g., cost of equipment, internet access, other bills)



■ Action taken ■ Planning actions ■ Considering actions ■ Neither planning nor considering actions

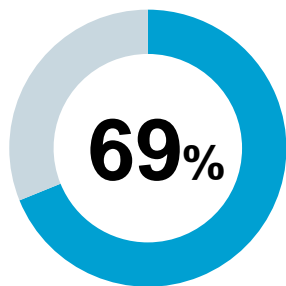
Note: "Not applicable" and "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

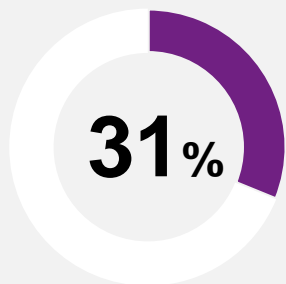
Most employers will provide flexibility for all employees who can complete their work remotely for longer periods

For whom will your organization provide flexibility to work remotely for longer periods?*

For **all employees** who can complete their work remotely



For **select employees** who can complete their work remotely



Which employees will be offered increased flexibility to work remotely for longer periods?

High risk workers

100%

Select employees
(manager discretion)

94%

Working parents

89%

Caregiving role

89%

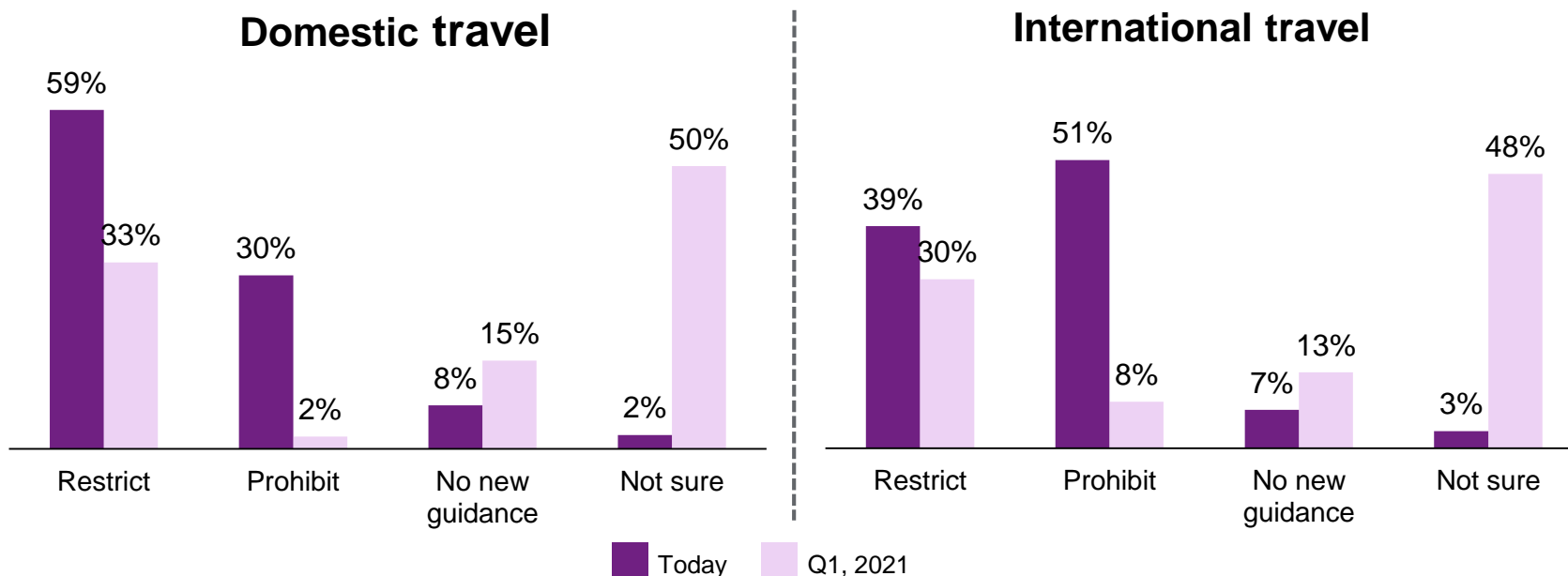
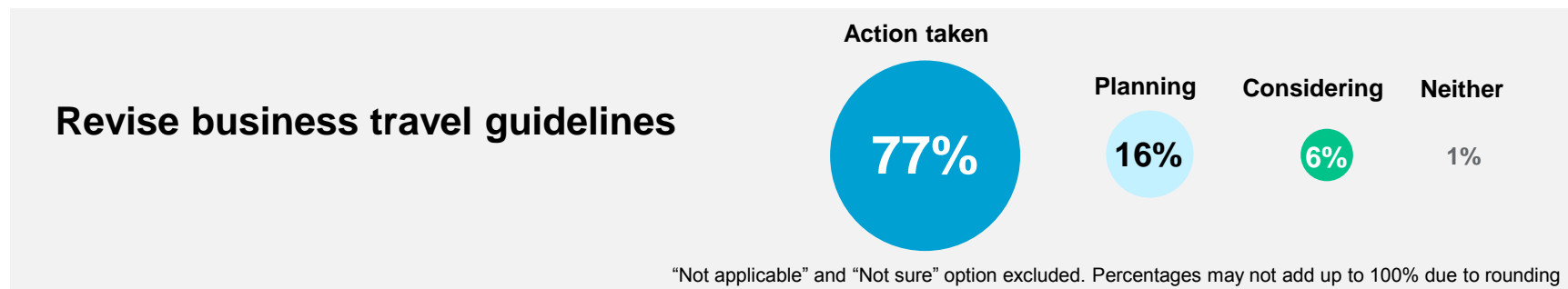
"Not sure" option excluded.

Sample: Employers who have changed policies to encourage more remote work.

Note: *"Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Most employers restrict or prohibit business travel today, and many employers remain uncertain about business travel in 2021

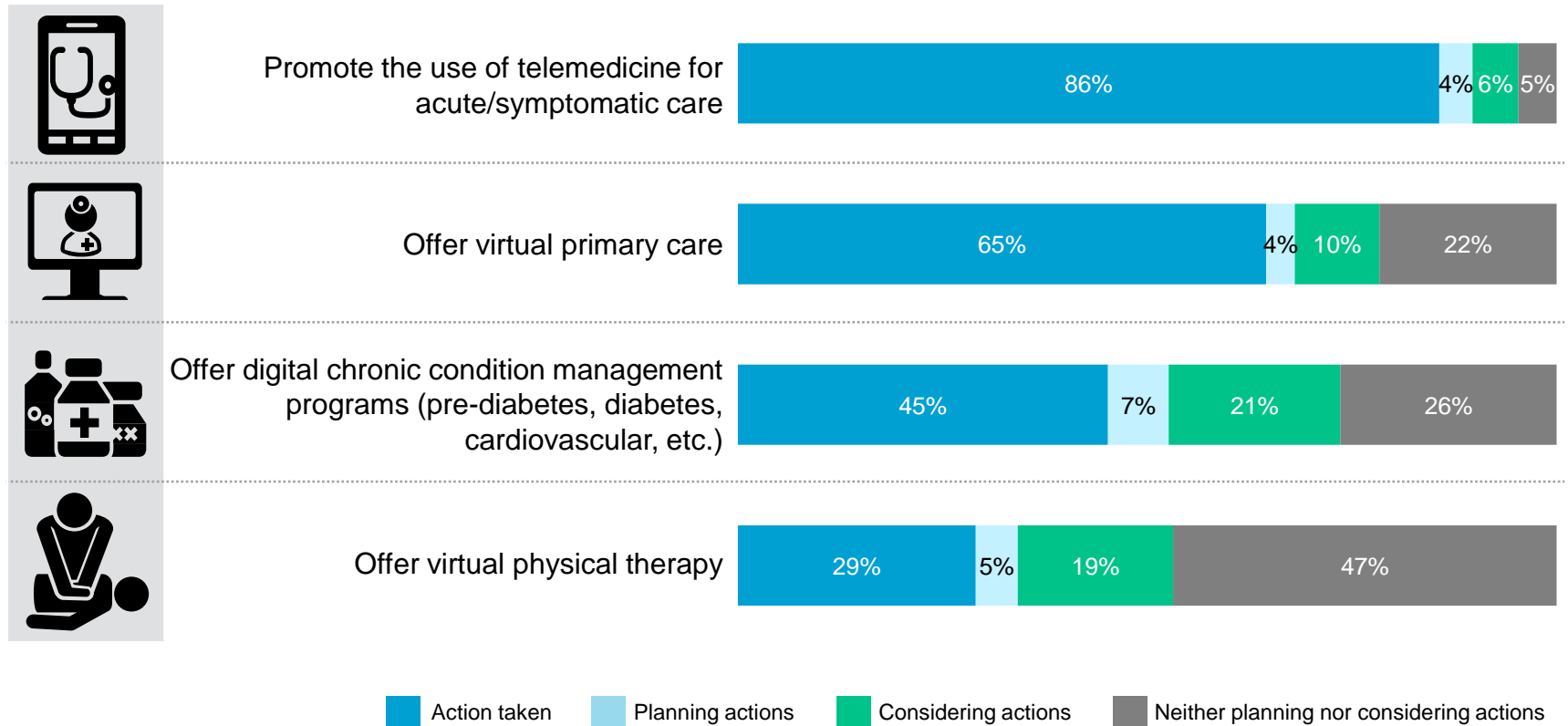


Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Wellbeing

Companies have taken significant steps to promote telemedicine and many are looking to expand virtual care to chronic condition management and physical therapy

Is your organization taking or planning to take any of the following actions?



Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Nearly half of companies offer mindfulness and resilience programs but less than a quarter of companies are convening vendor partners to support an integrated experience

Is your organization taking or planning to take any of the following actions?

Training

Provide unconscious bias discussions

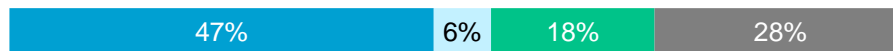


Offer emotional wellbeing training to managers

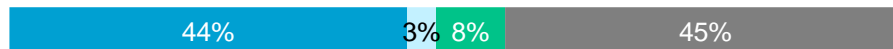


Programs

Offer mindfulness and resilience programs



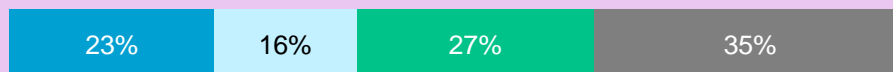
Provide grief counselling



Offer emotional wellbeing screening resources



Convene current vendor partners to discuss effective ways of leveraging all programs and resources for an integrated and coordinated member experience



■ Action taken ■ Planning actions ■ Considering actions ■ Neither planning nor considering actions

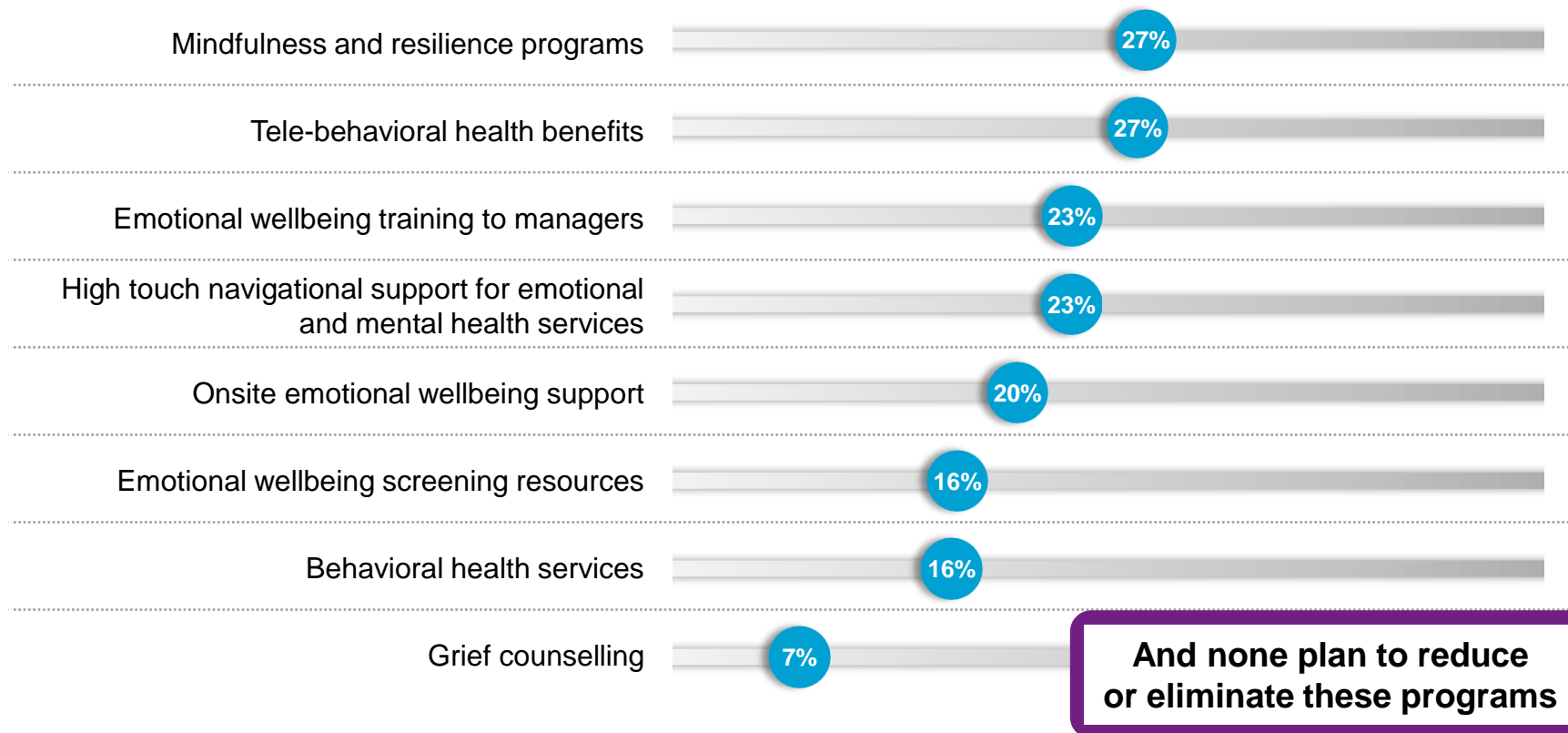
Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Employers are focused on enhancing resilience management and tele-behavioral health services over the next year

Has or will your organization enhance, maintain or reduce/eliminate any of the following programs in 2020 or 2021?

****Percent enhancing benefit***



Note: Based on actions taken on the items. "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Half of employers will enhance flexible hours in 2020 or 2021, while some consider enriching eldercare/childcare benefits

Has or will your organization enhance, maintain or reduce any of the following benefits in 2020 or 2021?

**Percent enhancing benefit*

Flexible hours

51%

Backup childcare benefits

28%

Onsite or near-site childcare services (as permissible by state and local government)

26%

Backup eldercare benefits

24%

Caregiving navigation resources

17%

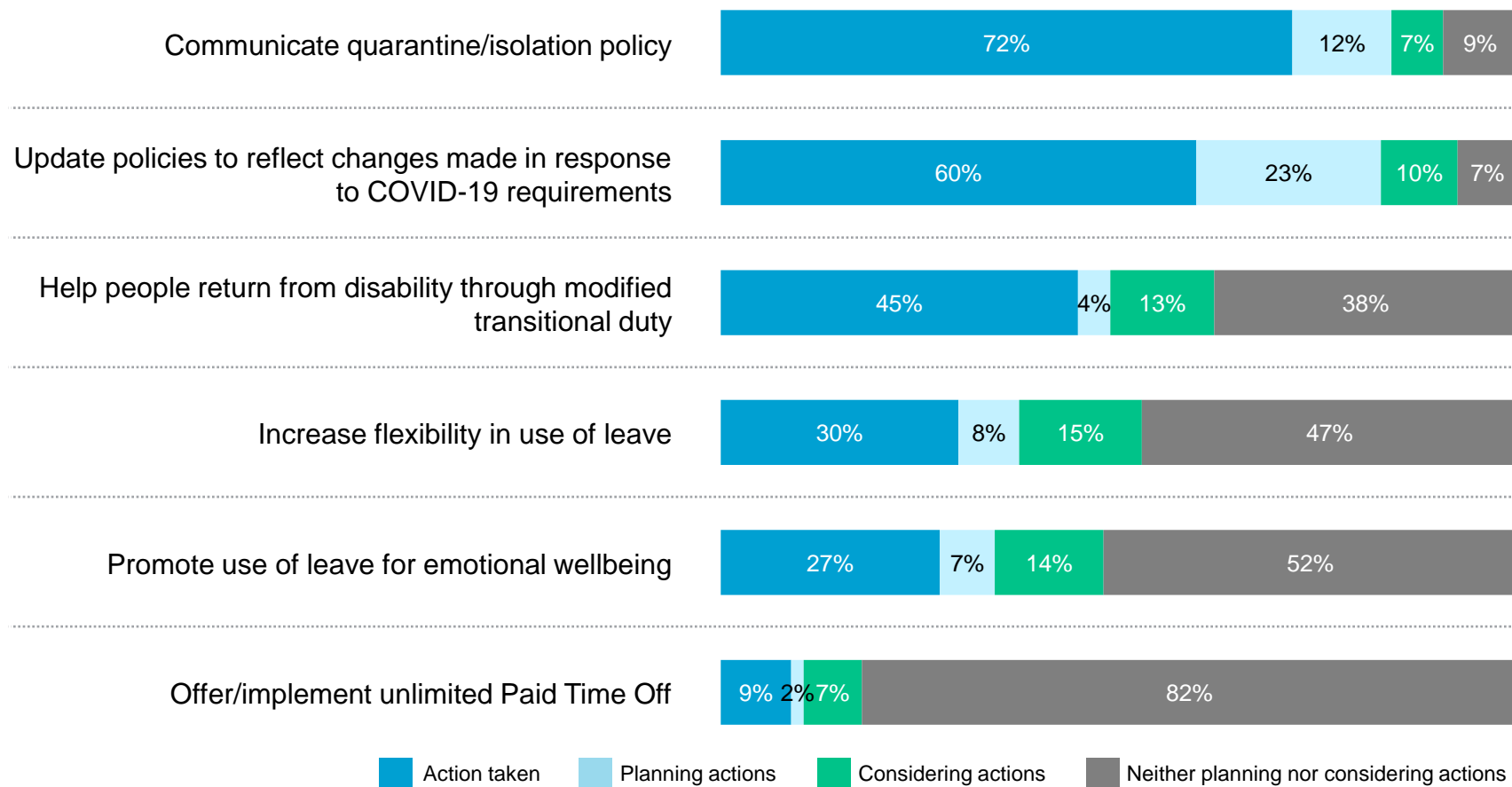
Few have reduced or will reduce these programs

Note: Based on actions taken on the items. “Don’t offer” and “Not sure” option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Over half of companies have increased or plan to increase flexibility in the use of paid leave

Is your organization taking or planning to take any of the following actions?

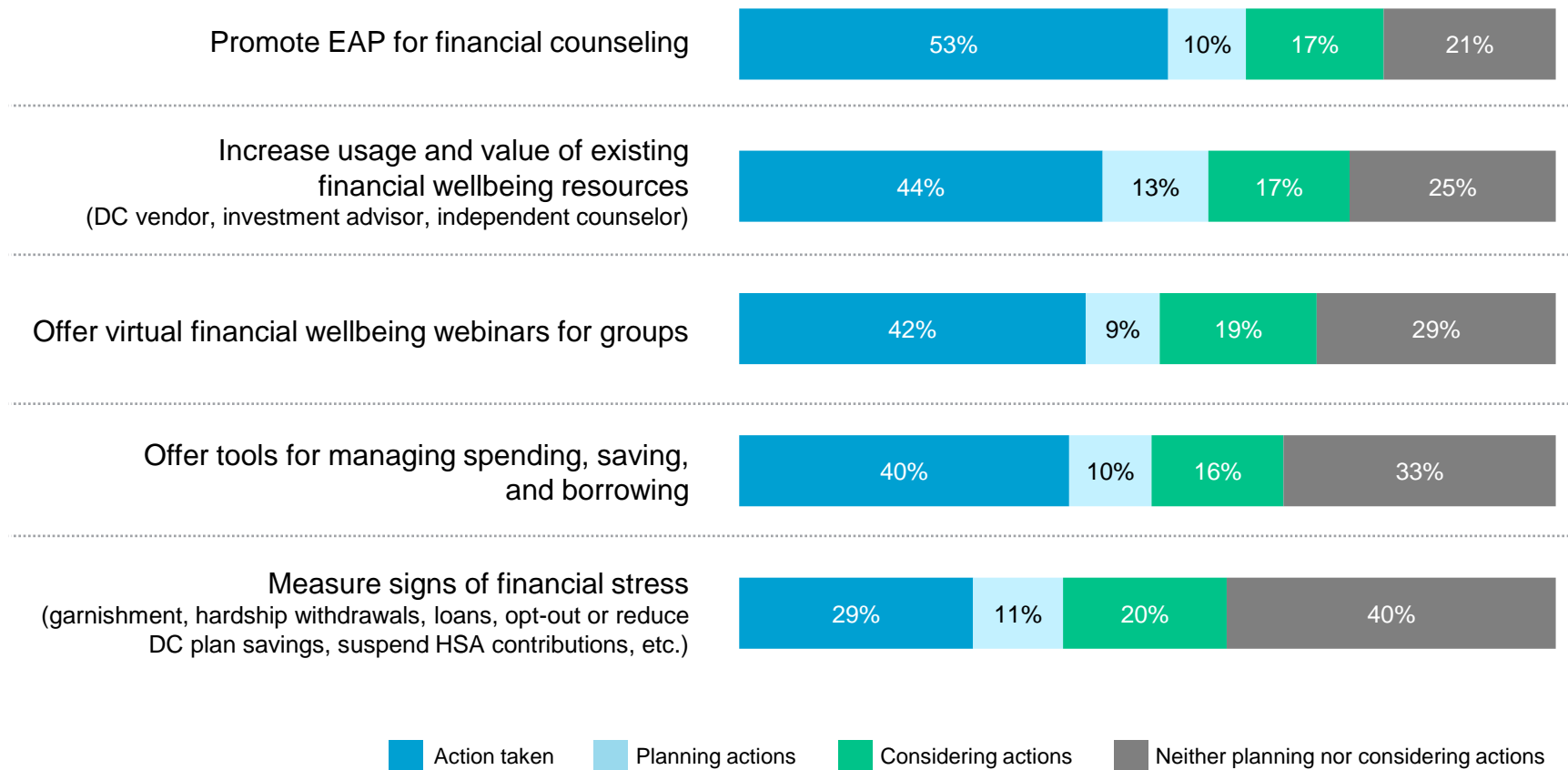


Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

More than half of companies are focused on getting value out of their existing financial wellbeing programs

Is your organization taking or planning to take any of the following actions?

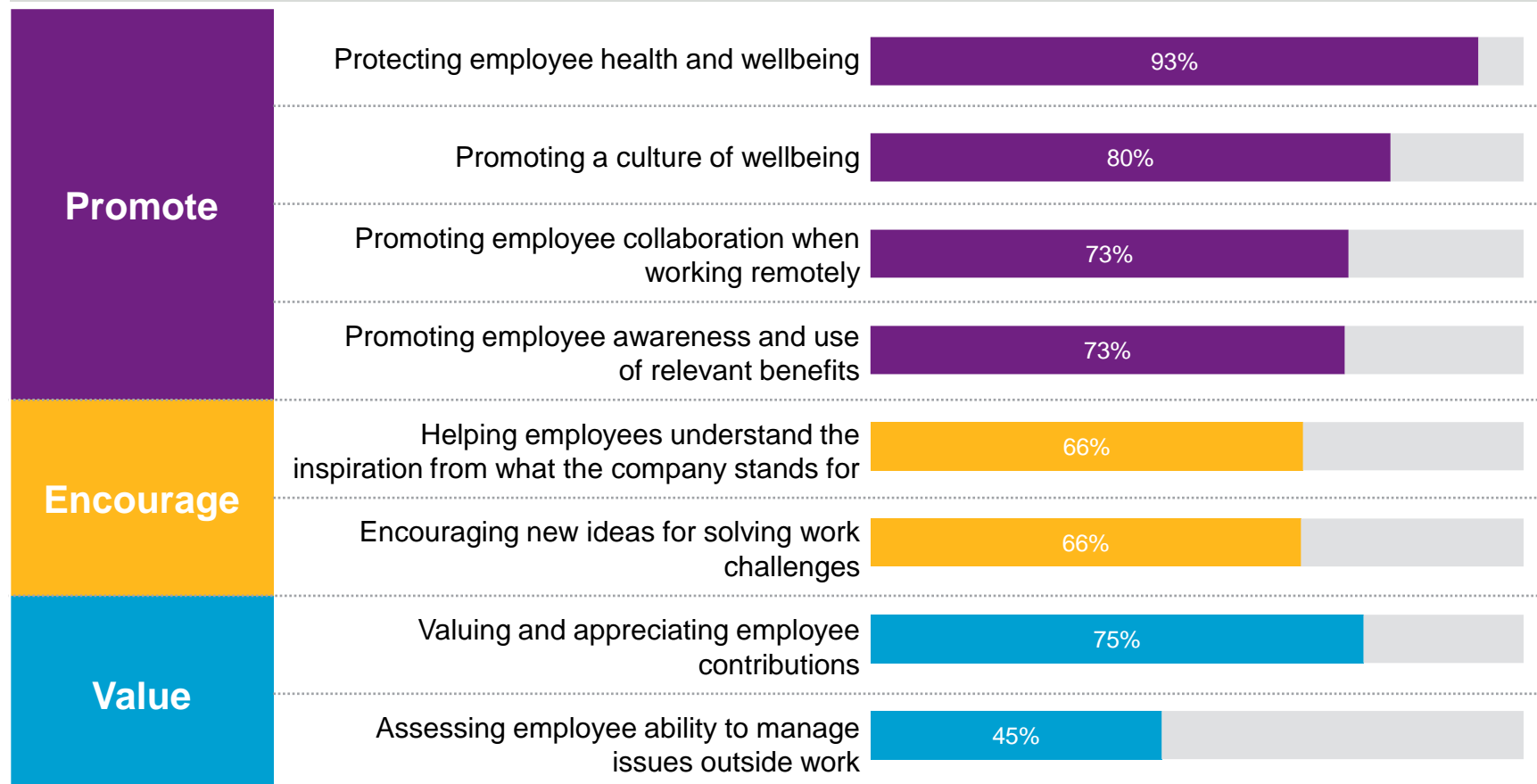


Note: "Not applicable" and "Not sure" option excluded. Percentages may not add up to 100% due to rounding.
Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Communication

Leaders at most companies are taking an active role to promote employee health, safety and wellbeing

To what extent are leaders focused on the following aspects of the workforce right now?



Note: Percentages indicate 4 and 5-to a significant extent in 5-point Likert scale.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

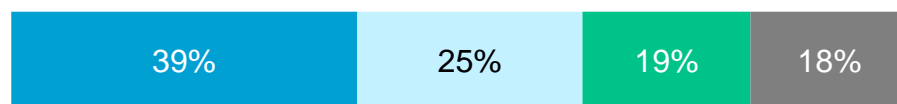
Nearly three-fifths of employers have already communicated the new day-to-day expectations

Is your organization communicating or planning to communicate on any of the following topics?

Describe the new day-to-day expectations
(e.g., social distancing requirements, who and
when to come to the workplace)



Reinforce company policies/communication
related to bias, stigma and discrimination



Develop an approach to measure employee
bias and/or workplace safety/hostility/violence



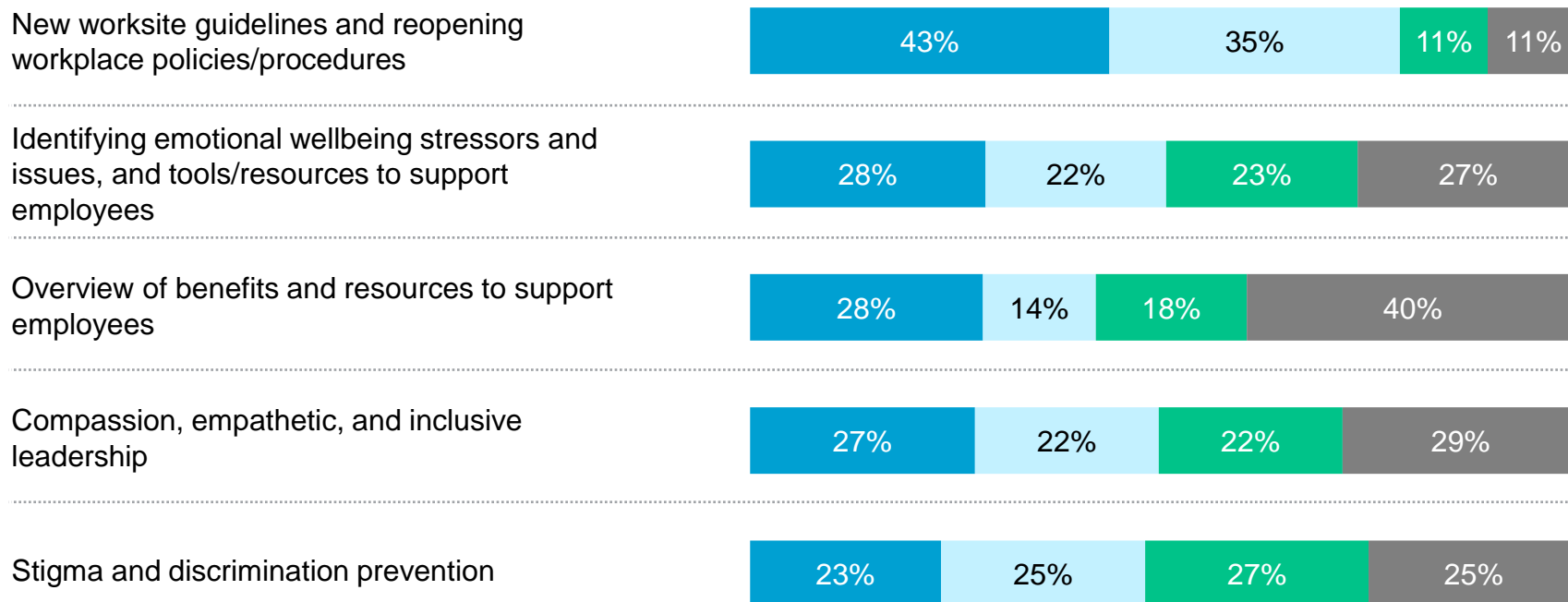
■ Action taken ■ Planning actions ■ Considering actions ■ Neither planning nor considering actions

Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Nearly one-quarter of employers are training managers on stigma and discrimination prevention and another half are planning or considering adding it

Is your organization offering manager trainings on any of the following topics?



■ Action taken
 ■ Planning actions
 ■ Considering actions
 ■ Neither planning nor considering actions

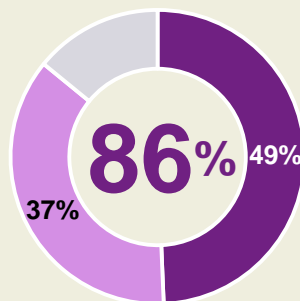
Note: "Not sure" option excluded. Percentages may not add up to 100% due to rounding.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Most companies will tailor their messaging and enhance their digital approaches to support this year's open enrollment

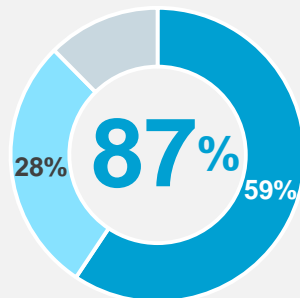
To what extent will your communication strategy take the following approach for this year's open enrollment?

Tailor messaging to the current environment noting any changes or specific considerations for employees as they make decisions for the next benefit year



- To a great extent (4 or 5)
- To a moderate extent (3)

Enhance the use of digital approaches to communicate with employees and dependents prior to and during the enrollment period



- To a great extent (4 or 5)
- To a moderate extent (3)

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.

Nearly one in five employers have adopted new technologies to communicate to employees – most are adapting their current tools

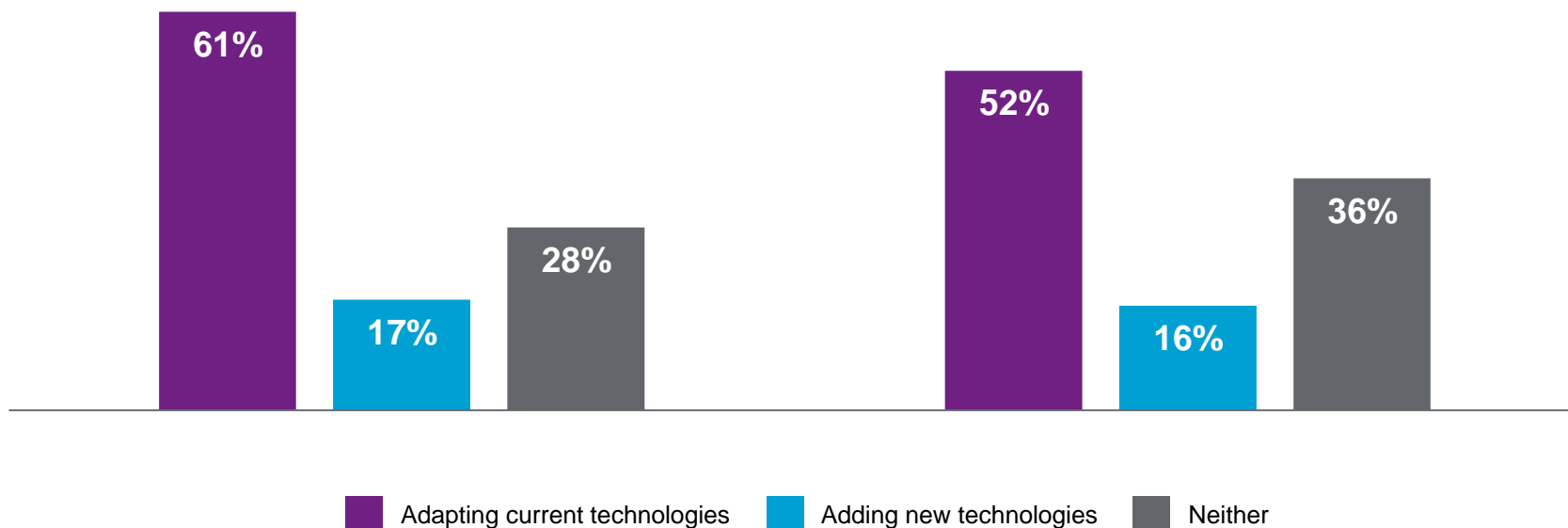
Is your organization adapting current technologies or adding/creating new technologies to support the following communication to employees?



To inform employees of changes



To receive employee feedback



Note: "Not sure" option excluded.

Source: Reopening the Workplace: Health, Safety and Wellbeing Survey and Assessment, United States.