

The 2018 edition of *The Sanofi Canada Healthcare Survey* tells us that employers who are more engaged in their health benefit plans and committed to supporting wellness stand to gain from employees who are not only healthier, but also more satisfied with and productive in their jobs. Plan sponsors and plan members alike are receptive to new possibilities in benefits coverage and focussed on personal health management, particularly in the area of chronic disease. And while the number of employers offering wellness programs appears to have plateaued, survey results suggest that employers may underestimate the positive impact of a wellness culture in the daily work environment.

These are just a few of the many connections drawn from this year's survey of plan members and plan sponsors. You'll find the full report at Sanofi Canada's website, www.sanofi.ca. As well, turn the page for an infographic that captures some of the key results, for use as a quick reference.

When members of the advisory board for *The Sanofi Canada Healthcare Survey* met to discuss the 2018 survey results, the notion of making new or stronger connections kept emerging as a way forward for health benefit plans. Perhaps the most powerful connection that can be made is between health benefit plans and business drivers. When benefits are linked with objectives for business success, their value—and untapped potential—becomes far more apparent.

Now entering its third decade, *The Sanofi Canada Healthcare Survey* is Canada's premier—and the longest running—annual survey capturing the opinions and behaviours of plan members and plan sponsors. Equally important, the resulting report strives more than ever to be an educational, actionable resource that can help guide decision-making for plan sponsors and benefit providers.

What you'll find in the 2018 edition of *The Sanofi Canada Healthcare Survey*:

Survey results from 1,503 plan members and 502 plan sponsors, presented in four main chapters:

1 HEALTH BENEFIT PLANS

2 HEALTH & CHRONIC DISEASE

3 WELLNESS TRENDS

4 LEADING PRACTICES

- Numerous breakdowns of data highlighting variations in results (e.g., by region, by size of employer, by quality of personal health, etc.).
- Analysis and recommended actions from the advisory board, made up of thought leaders representing plan sponsors, insurance carriers, benefit advisors and healthcare professionals.
- Profiles of innovative plan sponsors.

TOP 10 CALLS TO ACTION

- The advisory board's suggested Top 10 Calls to Action, developed as an educational tool to help guide discussions between benefit providers and plan sponsors.

Thank you to our Diamond Sponsors



QUALITY/VALUE STATS

WHO GIVE TOP MARKS FOR QUALITY

58% Describe the quality of their health benefit plan as excellent or very good



PLAN MEMBERS

48% Among members in poor health



45% Among members with household incomes of < \$30,000



HEALTH BENEFIT PLANS

FACTORS INFLUENCING QUALITY RATINGS

WELLNESS PROGRAMS

68% With workplace wellness programs say the quality of their plan is excellent or very good

COMPARED TO
50%

Among those without wellness programs



HEALTH SPENDING ACCOUNTS (HSAs)

68% With a HSA give top marks, compared to

51% Among those without a HSA



VALUE HEALTH BENEFIT PLAN MOST FOR ITS COVERAGE OF

PLAN MEMBERS

Regular or routine costs **51%**

Unexpected, possibly high costs **24%**

Both **25%**



MANAGEMENT/SUSTAINABILITY OF BENEFIT PLANS

SUSTAINABILITY: SMOOTH SAILING OR CAST ADRIFT?

PLAN SPONSORS

34% Have no major concerns about their health benefit plan



increasing to
48% Among small employers with fewer than 50 employees

AMONG THOSE WITH MAJOR CONCERNS, THE TOP 5 CONCERNS ARE

1. Sustainability of drug plan
2. Sustainability of dental plan
3. Levels of absence and disability
4. Utilization of paramedical service benefits
5. Inability to make major changes due to collective bargaining agreements

PLAN DESIGN HIGHLIGHTS

PLAN SPONSORS

33% Offer health spending accounts

23% Offer flex plans



MEDICAL CANNABIS OPINION POLL: SHOULD IT BE COVERED BY PRIVATE HEALTH BENEFIT PLANS?

PLAN SPONSORS

34% Yes/Already do

34% No

32% Don't know



PLAN MEMBERS

64% Yes

25% No

11% Don't know

CHRONIC DISEASE

MAJOR GAP IN AWARENESS FOR CHRONIC DISEASE



PLAN MEMBERS
58% Report they have a chronic disease or condition

PLAN SPONSORS
29% Estimate for percentage of their workforce with a chronic disease or condition

IMPACT THAT CAN'T BE IGNORED

PLAN MEMBERS
47% With a chronic condition who missed work and/or had difficulty performing job, **increasing to 72%** Among members with a mental health condition

LET'S DO MORE TO TACKLE CHRONIC DISEASE MANAGEMENT

PLAN MEMBERS
84% With a chronic disease would like to know more about their condition and how to treat it

PLAN SPONSORS
79% Would like their health benefit plan to do more to support plan members who have chronic diseases

GAPS IN EDUCATION AS WELL



PLAN SPONSORS
58% Receive claims data analyses that identify the main disease states in their workforce

19% Receive such data on a regular basis



TARGETED INFORMATION MUTUAL INTEREST IN TARGETED COMMUNICATIONS

PLAN MEMBERS
66% Would consent to receive information on personal health issues based on their use of benefits

PLAN SPONSORS
64% Are interested in their benefit provider sending targeted health information to employees based on personal claims utilization

HEALTH & CHRONIC DISEASE

PERSONAL HEALTH KEEPING TABS ON PERSONAL HEALTH

PLAN MEMBERS
68% Regularly keep track of their health, **increasing to 79%** Among those with wellness programs at work



DIGITAL TOOLS GIVE A HELPING HAND

PLAN MEMBERS
31% Use mobile apps to help track health, **increasing to 58%** Among those aged 18 to 34 years

WHO GOT THE SHOT?

PLAN MEMBERS
38% Got the flu shot for the 2017/2018 flu season
52% Got their flu shot at work¹



STRESS TAKING ITS TOLL

PLAN MEMBERS
33% Report high levels of stress on a typical day over the past three months, **increasing to 46%** Among those in poor physical health
50% Among those in poor financial health



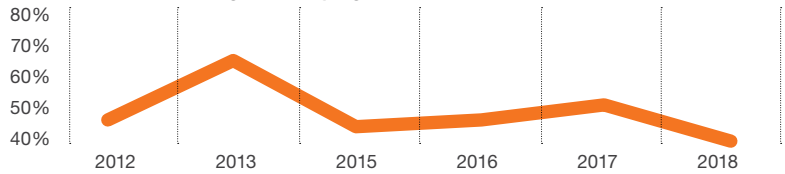
¹ Where workplace flu shot program was available.

WELLNESS TRENDS

CURRENT WELLNESS PROGRAMS

WORKPLACE WELLNESS LOSING STEAM?

PLAN SPONSORS offering wellness programs²



TOP 3 FACTORS FOR SUCCESS OF WELLNESS PROGRAMS

- 1 Healthy workplace culture **74%**
- 2 Sufficient budget **50%**
- 3 Senior leadership support **47%**

MENTAL HEALTH



MENTAL HEALTH ON THE RADAR, FOR SOME

PLAN SPONSORS

- 49%** With wellness programs who offer training to help managers recognize and respond to signs of mental illness
- 14%** Without wellness programs who offer such training
- 72%** With wellness programs who feel they effectively help employees manage stress
- 57%** Without wellness programs who feel they effectively help employees manage stress

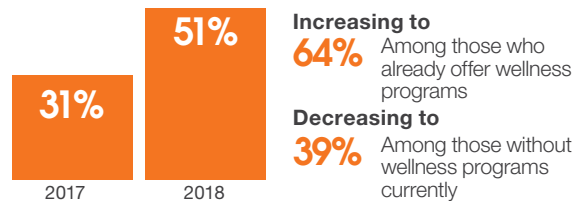
LOOKING AHEAD



FUTURE PLANS FOR WELLNESS

PLAN SPONSORS

Who plan to invest more in health education or wellness programs in next year



OBJECTIVES

A MATTER OF OBJECTIVES



PLAN SPONSORS

- 56%** Have specific objectives for their health benefit plans in 2018, **increasing to**
- 66%** Among those with wellness programs

LEADING PRACTICES

WHY OBJECTIVES ARE A GOOD THING

PLAN SPONSORS		
When they have specific objectives		When they don't
69%	Describe the quality of their health benefit plan as excellent or very good	46%
68%	Receive claims data analyses reporting on the top disease states	44%
89%	Would like their plan to do more to support members with chronic diseases	66%
68%	Plan to invest more in health education/wellness in the next year	30%

² Question wording revised in 2016 to give more examples of wellness programs, including wellness policies such as flex time.