

❖ one medical

ANNUAL RESEARCH STUDY & REPORT

The State of Workplace Health

Navigating a new reality for today's
employees.



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ABOUT ONE MEDICAL

One Medical is a membership-based primary care practice on a mission to make getting quality care more affordable, accessible, and enjoyable for all. We accomplish this through a blend of human-centered design, technology, and an exceptional care team.

Our members enjoy seamless access to comprehensive care at inviting offices in 25 major U.S. markets, as well as 24/7 access to virtual care. In addition to a direct-to-consumer membership model, we work with more than 8,000 companies to provide One Medical health benefits to their employees.

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Navigating a new reality

With the pandemic entering a new phase, employees are turning their attention to preventive care and improving their overall health. But some are struggling to make progress.

After a difficult few years, most Americans are learning to live with COVID-19 even as they admit it will likely never be fully gone.¹ In last year's study,² we examined how care avoidance during the pandemic affected people's health and well-being. This year, One Medical again partnered with independent research firm Workplace Intelligence to survey 800 HR leaders and employee benefits leaders as well as 800 full-time employees.

The goal of this year's study was to assess the current state of workplace health and understand HR leaders' and employees' priorities for the year ahead. The survey also asked employees about their expectations for their healthcare benefits, and both respondent groups were asked to weigh in on the role primary care providers (PCPs) can play in helping people make progress toward their health goals.

The survey found that 3 out of 4 employees felt their health worsened or stayed the same in 2022. Just one-quarter said their health improved. One reason for this is that some workers are finding it difficult to access the care and information they need – more than half (55%) reported feeling overwhelmed when navigating the healthcare system.

The survey also uncovered that while 64% of workers are struggling with mental or behavioral health issues, only 19% used their company's mental health care benefits in 2022. Similarly, only 37% used their plan to receive preventive care.

“3 out of 4 employees felt their health worsened or stayed the same in 2022.”





56%

of employers are adding solutions for primary care in 2023.

In 2023, mental health and preventive care remain top priorities for employees. **But in order to make progress in those areas, workers will need to overcome some significant barriers to receiving care – and that’s where care navigation solutions and primary care can assist.**

The vast majority of respondents agree it’s important to see a primary care provider on a regular basis.

PCPs play a critical role in helping people navigate their care and access the physical, mental, and behavioral treatments they need.

However, 55% of employees and 66% of HR leaders inaccurately believe these providers either play no role in treating mental or behavioral health, or they can only screen for these issues.

Meanwhile, 20% of workers don’t even have a PCP. This suggests that while employees may have resources available to take charge of their health, they’re not using them as effectively as they could be.

The good news is that many companies are enhancing their primary care benefit as a way to boost employee well-being and combat rising healthcare costs.

In fact, 56% of employers are adding solutions for primary care in 2023.

HR leaders are also responding to employee needs by prioritizing better care navigation, increasing awareness and communication around their benefits, and improving their mental health benefits.

Taken together, these enhancements could make a huge difference in helping workers make progress toward better health. And with so many employees and their families reprioritizing their well-being this year, there’s never been a more important time for companies to provide this type of support.



01 Employee health status and 2023 priorities



The current state of employee health

Employees' self-reported health status leaves room for improvement, and most workers struggled to improve their health last year.

At first glance, it might appear that employee health is at a generally acceptable level. However, just 31% of employees reported being in excellent physical health and only 25% said they're in excellent mental health.

Furthermore, around one-third of workers said their health worsened last year. Combined, roughly 75% of employees felt their health worsened or stayed the same in 2022. Just one-quarter said their physical health (25%) and mental health (26%) improved.

In stark contrast to what employees reported, around 6 out of 10 HR leaders said they believe their workforce's physical health (59%) and mental health (60%) improved last year. This indicates that leaders may not appreciate the extent to which their team members may be struggling with their health.

1 in 3

employees said their health worsened last year.

Physical Health

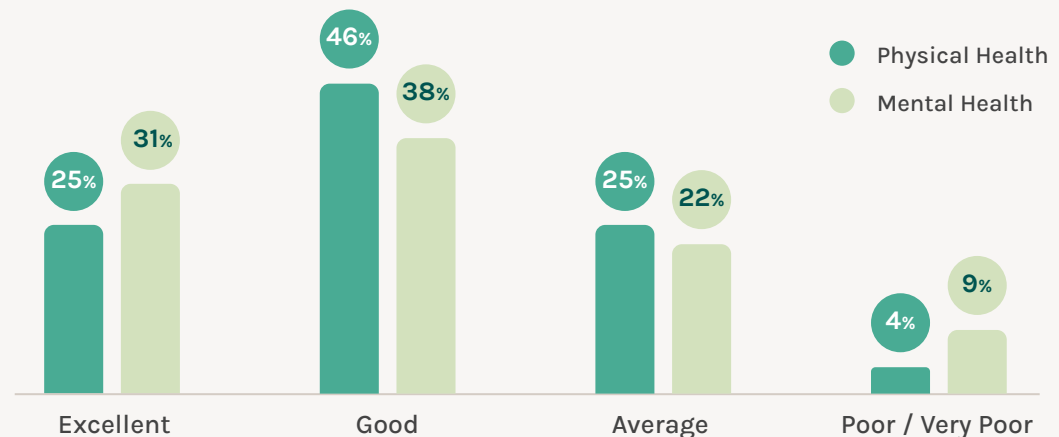
Worsened - 34%
Improved - 25%
Stayed the same - 41%

Mental Health

Worsened - 32%
Improved - 26%
Stayed the same - 42%

Overall health status

Employees: How would you rate your overall health right now?



Health priorities for 2023

Although employees are still invested in preventing short-term illness, workers are shifting their priorities to improving their overall physical and mental health.

Employees said their top focus for 2023 is to improve their physical health, including their activity levels, nutrition, and sleep. Workers also said they'll prioritize preventive care in 2023, including mammograms and cancer or cardiovascular disease screenings.

Notably, 2 of the top 5 employee priorities this year involve improving their mental health.

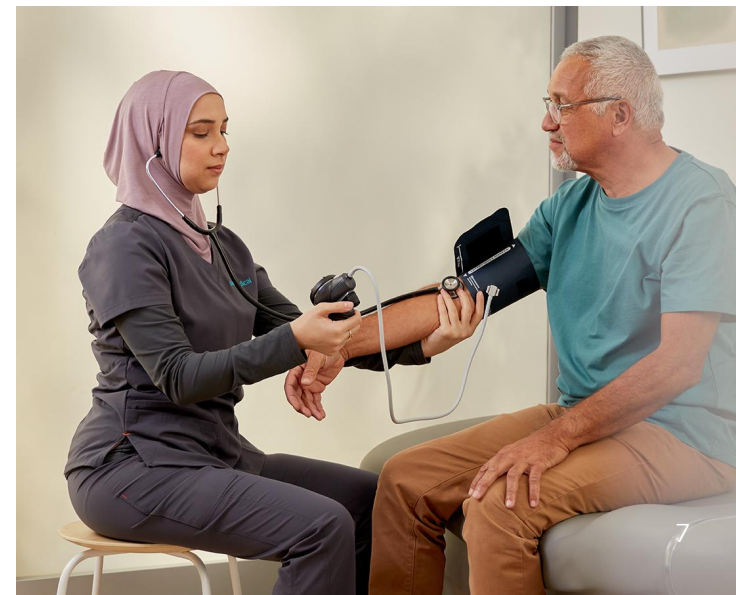
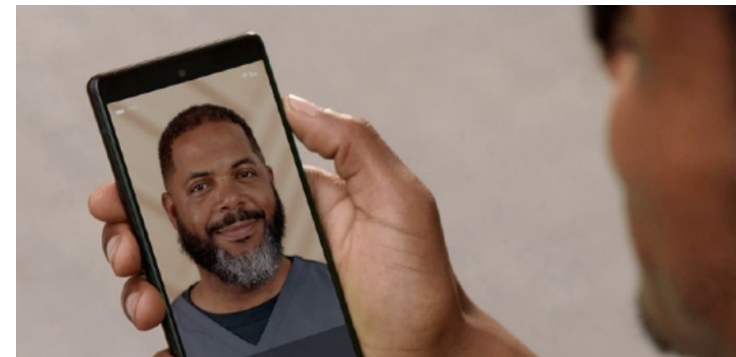
This encompasses managing general issues like stress (including work-related stress) and loneliness, as well as addressing mental health disorders (like depression or anxiety).

HR Leaders were also asked to indicate what health priorities they believe their workforce will be most focused on in 2023. They selected the same five priorities as employees, indicating alignment between leaders and their staff.

90% of workers have at least one priority for their health and well-being in 2023.

Their top 5 priorities include:

- 1 Improve overall physical health
- 2 Improve overall mental health
- 3 Prevent short-term illness
- 4 Get regular screenings
- 5 Address mental health disorders



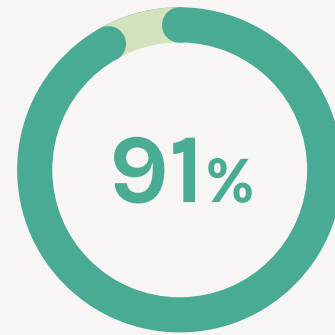
Some workers have struggled with their mental or behavioral health for years – and it’s costing employers more than they might realize.



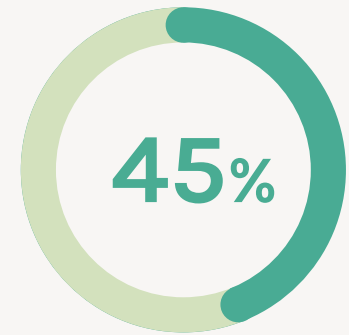
have struggled for at least 1 year



have struggled for over 3 years



said they’re less productive at work due to these issues



said they’re less productive for more than 5 hours per week

Nearly 2 out of 3 employees (64%) reported struggling with their mental or behavioral health, so it’s no surprise that mental health was selected as a top priority this year. The issues people reported included stress or anxiety (48%), feeling sad (33%), depression (32%), loneliness (25%), substance abuse (13%), other addictive behaviors (e.g., gambling, sex) (7%), eating disorders (6%), and self-harm or self-injury (4%).

There were some notable differences by age and gender. While 78% of Gen Z and 75% of Millennials said they’re struggling with their mental or behavioral health, less than half of Gen X (49%) and Baby Boomers (41%) said the same. Of the respondents polled, 70% of women reported struggling with mental health, compared to 57% of the male respondents.

Employers have come a long way in their support of workers’ mental health. They should continue to carry this momentum forward in 2023 since many employees reported that these issues are negatively affecting them at work. This includes their ability to focus (84%), their ambition (75%), their productivity (74%), and the quality of their work (69%). Workers also noted that their relationships with their co-workers and manager (61%) and their interactions with clients or customers (54%) have suffered.



02 Benefits use and barriers to care-seeking



Benefits use in 2022

Although 84% of employees used their healthcare benefits last year, they aren't making the most of them.

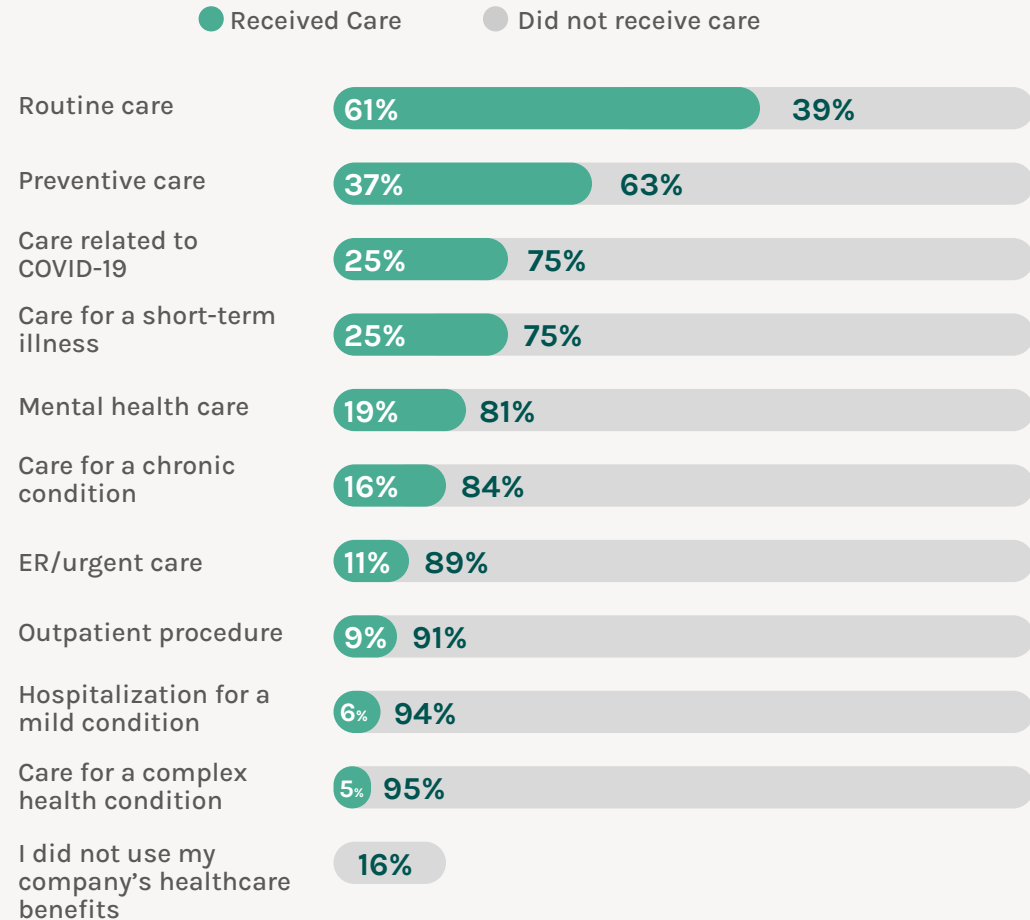
Care utilization plays an influential role in helping people maintain and improve their health. Preventive care is especially critical, as it reduces the risk of diseases and disabilities and decreases mortality.³

In 2022, routine care (e.g., check-ups) and preventive care (e.g., screening tests or immunizations) topped the list of care uses. However, these numbers could be higher, given that 39% of workers did not seek out routine care and an alarming 63% opted not to use their benefits for preventive care.

Just 19% of employees sought out mental health care last year, even though nearly two-thirds of workers said they're dealing with mental or behavioral health issues.

When asked why they've avoided getting care, respondents said they're too busy (45%), embarrassed (25%), or the care they need is too expensive (22%). In addition, less than one-third of workers (31%) indicated they plan to get treatment for their mental or behavioral health in 2023.

84% of employees used their company's healthcare benefits last year



Why aren't more employees seeking out care?

Employees reported being largely satisfied with their benefits, but many said they struggle to navigate the healthcare system.

The vast majority of workers said they're "extremely" or "somewhat" satisfied with their healthcare benefits, including:

88%

their ease-of-use

87%

the care they've received

86%

their relationships with providers

81%

the wait time to receive care or get an appointment

81%

the overall quality of their benefits

78%

the value of their benefits



However, **55% of employees said they're overwhelmed when they try to navigate the healthcare system.**

Nearly 4 out of 10 workers said it's "very" or "somewhat" difficult to find the information they need, and **one-third reported that they struggle to schedule an appointment with a provider.**

Employers can't eliminate all the obstacles, but they can take steps to improve care navigation. This is especially critical for workers struggling with their mental or behavioral health – 69% said they wouldn't know exactly where to start, if they wanted to seek out treatment for these issues using their company's healthcare benefits.



55%

of employees said they feel overwhelmed when they try to navigate the healthcare system.



39%

said it's difficult to find out what treatment options are available



38%

said it's difficult to find out the costs of their treatment options



33%

said it's difficult to schedule an appointment with a healthcare provider

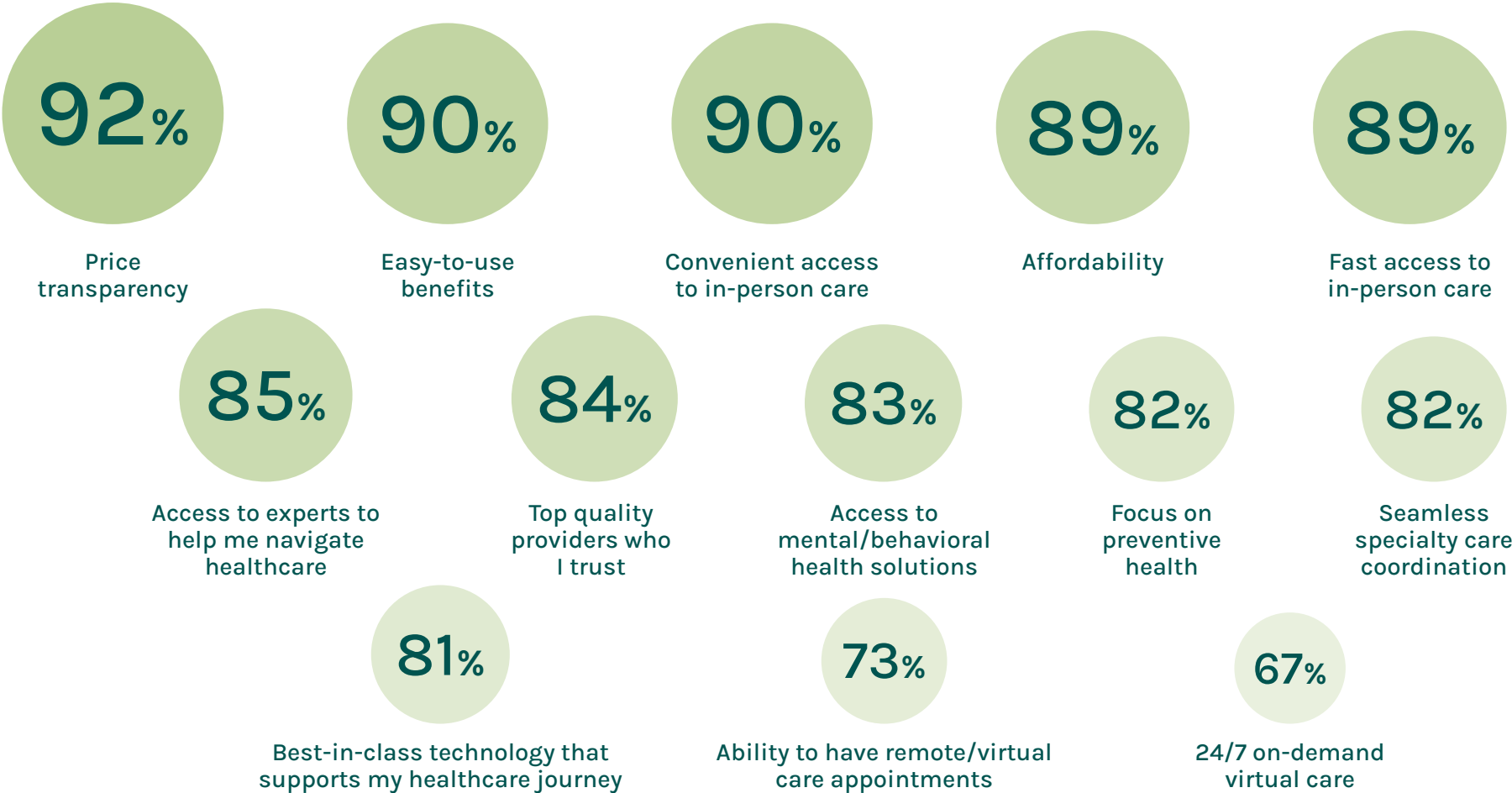


03 The path forward



Begin by understanding what best-in-class healthcare means for your employees

The healthcare features that matter most to employees:



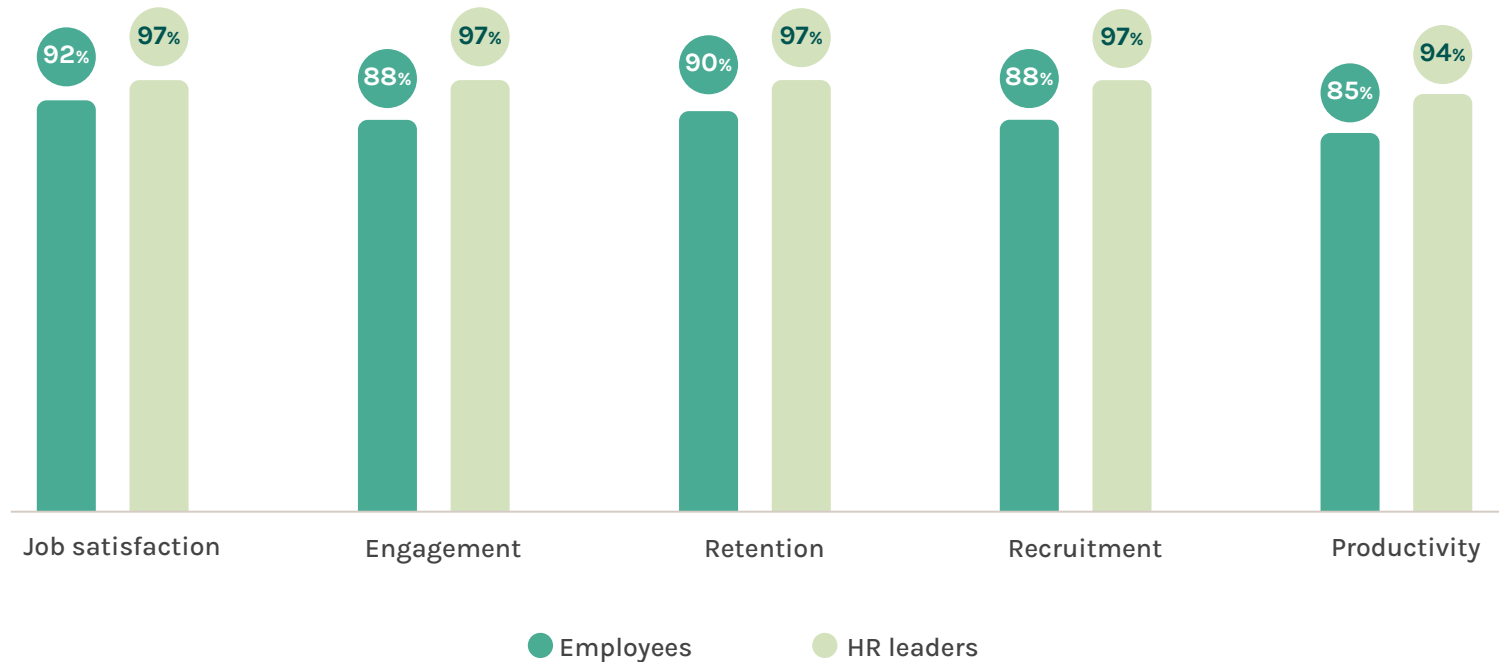
(% who selected "somewhat" or "very" important)



Align your strategy with employee needs and expectations

The vast majority of HR leaders and employees agreed that providing healthcare benefits that are high-quality, patient-centered, and a good value can impact key business outcomes.

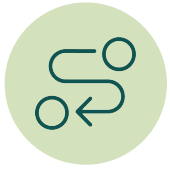
The bottom-line benefits of offering best-in-class healthcare:



(% who said these items increase when employees have access to healthcare benefits that are high-quality, patient-centered, and a good value)

It's clear that leaders recognize the importance of a best-in-class healthcare offering, and many are aligning their 2023 strategy around improving their current benefits.

HR leaders' top strategic priorities for 2023 include:



47% improving the healthcare experience for our employees through care navigation solutions



37% improving our family & reproductive health benefits



45% increasing awareness & communication around our benefits



36% enhancing our virtual care offerings



42% improving our mental & behavioral health benefits



29% focusing more on chronic care management



38% strengthening equitable access to healthcare for our employees



Focus on improvements that will yield the most value

As healthcare costs continue to rise, HR leaders should prioritize the benefits that matter most to employees — and those that will impact their bottom line.

8 out of 10 HR leaders predicted their benefits costs will continue to rise in 2023. There are a variety of external factors behind this trend,⁴ but the leaders we surveyed indicated they'll be taking a closer look internally in order to address rising costs. Many of them are getting this right by investing in healthcare features that can drive down costs and boost employee satisfaction and care utilization.

Among leaders who are prioritizing reducing healthcare costs, at least 4 out of 10 reported they'll make the following changes: analyzing employees' use of programs with care outcomes (48%), expanding/investing in primary care (44%), investing in virtual care or telemedicine (44%), identifying new services and benefits to address rising areas of cost (43%), and reducing administrative costs (40%).

HR leaders predicted rising employee healthcare costs:

In 2022

78% → **8.2%**
said costs increased average increase

In 2023

80% → **7.9%**
predicted costs will increase average increase predicted

82%

of HR leaders said they're increasing their healthcare budget this year.

The solutions they're adding include:

56%

Solutions for primary care

55%

Solutions for chronic disease management

53%

Solutions for telemedicine

50%

Solutions for care navigation

48%

Solutions for mental & behavioral health



Put primary care front-and-center

Primary care is often the first place people turn to for care, making it a critical part of a best-in-class healthcare plan.

The majority of employees (89%) and HR leaders (91%) said it's important to see a primary care provider on a regular basis. Both audiences cited numerous benefits of primary care (see graphic at right), and the vast majority of HR leaders said that when workers regularly see a PCP, they're less likely to work while ill (85%) and the company saves money in the long-run (84%).

Despite widespread agreement on the importance of primary care, 20% of workers said they don't have a PCP. And even among those who do have a provider, usage could be higher – only 72% reported that they see their provider at least once a year.

In addition, many employees and HR leaders don't understand the role primary care providers can play in treating mental and behavioral health issues. Although it's promising that 28% of workers who sought out treatment for these issues

last year met with a PCP, 55% of employees and 66% of HR leaders inaccurately believe these providers either play no role in treating these issues, or they can only screen for them.

In reality, PCPs can screen, diagnose, and treat many issues – including mental health – and they can further guide their patients to the right kind of specialty care as needed.⁵ Primary care providers also create “safe spaces” for people struggling with mental or behavioral health. In fact, employees said the #1 thing they look for in a health provider is someone they can trust and build a relationship with.

Leaders need to recognize that primary care can be the front door to effective mental health treatment for their people. **Communicating this information to employees and investing in comprehensive primary care benefits could be the key to unlocking a better state of workplace health in 2023 and beyond.**

The benefits of primary care*

Better physical health

92% of employees

89% of HR leaders

Better mental health

85% of employees

88% of HR leaders

Better overall well-being

90% of employees

92% of HR leaders

Long-term healthcare savings

79% of employees

93% of HR leaders

Fewer sick days

78% of employees

83% of HR leaders

Increased productivity

75% of employees

83% of HR leaders

*% who said they "strongly agree" or "agree" that regularly seeing a primary care provider has these benefits for employees.

Boost your communication efforts

Just 50% of employees said they're aware of "all" or "most" of their employer's healthcare offerings.

In our survey, more than 8 out of 10 employers said they're invested in their employees' holistic health and well-being (see chart below). But it's clear some workers aren't seeing these efforts, and a lack of communication could be to blame. In fact, at least 1 out of 5 employees said their employer never communicates with them about the importance of seeking out primary or preventive care (21%) or getting treatment for mental and behavioral health issues (33%).

More than one-quarter (28%) said they don't receive any general health advice from their company, and 17% said they never receive information about their healthcare benefits.

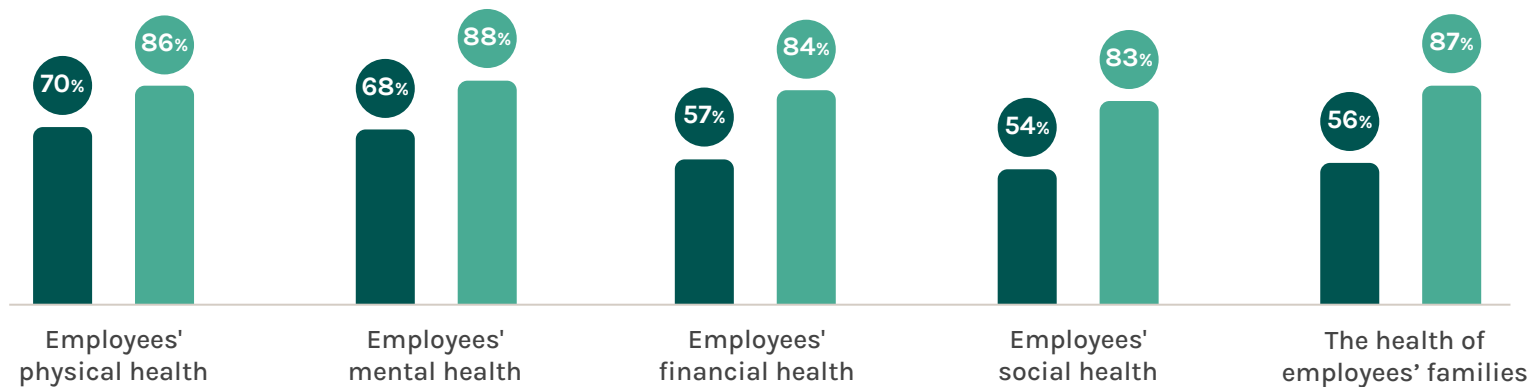
As we saw in 2022, half of workers reported they don't have a comprehensive understanding of their company's healthcare offerings.

This lack of awareness could be impacting care utilization and therefore workforce well-being, so employers should be doing more to move the needle on this. Fortunately, **45% of HR leaders said that improving awareness and communication around their benefits is one of their top strategic priorities for 2023.**

Company investment in employee health outcomes

● **Employees:** How invested is your employer in the following aspects of your health?

● **HR leaders:** How invested is your company in the following aspects of employees' health?



(% who said "very" or "somewhat" invested)



Employees are struggling to access the care they need. Will you meet them in this pivotal moment?

In 2023, employees are refocusing their efforts on improving their overall health and well-being. But workers are finding it difficult to navigate the healthcare system, and this is holding many of them back. Fortunately, employers are invested in turning things around – 82% of HR leaders said they're increasing their healthcare budget this year, and over half of companies are adding new solutions for primary care, chronic disease management, telemedicine, and care navigation.

For leaders who feel like they're behind, there's no better time than the present to get started. Start by understanding what your employees want and need when it comes to their healthcare benefits. Then align your strategy around the improvements that will yield the most value for them and your business. Remember to put special emphasis on primary care, since PCPs can play a key role in helping employees navigate the healthcare system and access the treatment they need.

Lastly, don't forget to communicate more about your company's benefits and the importance of seeking out care.

Navigating the path to a better healthcare offering will take time, effort, and investment – and it won't always be easy. However, businesses that take steps to improve their offering won't just be helping their people boost their well-being, they'll also reap the bottom-line benefits of a more engaged and productive workforce.

Methodology

Research findings are based on a survey conducted by Workplace Intelligence and Walr and paid for by 1Life Healthcare Inc. between December 6–December 19, 2022. The survey audience included 800 HR/Employee Benefits leaders and 800 employees who were working full-time, at least 18 years old, and living in the U.S.

Panel participants are recruited through several different mechanisms and sources, and have completed on average 300 profiling data points prior to taking part in any surveys. Respondents were invited to take part in this survey via email and were provided with a small monetary incentive for doing so. Results of any sample are subject to sampling variation.



Prioritize your employees' health with One Medical

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One Medical is a national, membership-based primary care practice. We are a modern healthcare benefit that delivers high-quality healthcare; from preventive care, chronic illness management, LGBTQ+ services, mental and behavioral healthcare, and COVID-19 screening and testing, One Medical is your team's healthcare home base.

With 24/7 access to virtual care nationally and offices in 25 major U.S. markets and growing, we're here when your team needs care.

We're here to help you build a healthcare strategy that will support your employees on their journey to better well-being.

Our model assists with:



Attracting & retaining employees with a benefit they'll love



Engaging employees so they can live healthier, more productive lives



Combining the best of primary care with innovative technology to lower costs over time

We're innovators in healthcare – elevating every aspect of the primary care experience to make it faster, easier, and more affordable for patients to get the care they need.

We use technology to strengthen the relationship between patient, provider, and if needed our hospital specialty partners, creating a seamless experience that saves time and leads to better outcomes.

We're proud to be an advanced primary care practice for more than 8,000 employers nationwide.



Let's talk

Curious about how primary care can be foundational to your benefits strategy?

Learn more about building a successful and engaging healthcare program with One Medical.

Get in touch

onemedical.com/business



Citations:

¹Axios-Ipsos. Most Americans not worrying about COVID going into 2022 Holidays.

<https://www.ipsos.com/en-us/news-polls/axios-ipsos-coronavirus-index>

²One Medical. Navigating the Deferred Care Crisis. <https://go.onemedical.com/report-navigating-the-deferred-care-crisis>

³Centers for Disease Control and Prevention. Are You Up to Date on Your Preventive Care?

<https://www.cdc.gov/chronicdisease/about/preventive-care/index.html>

⁴Peterson-KFF (Kaiser Family Foundation). An early look at what is driving health costs in 2023 ACA markets.

<https://www.healthsystemtracker.org/brief/an-early-look-at-what-is-driving-health-costs-in-2023-aca-markets/>

⁵One Medical. Amplifying Employee Behavioral Health through Primary Care.

<https://go.onemedical.com/amplifying-employee-behavioral-health-through-primary-care>

