Evolution of EAP:
Historical Trends and What Purchasers Want Today

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June 26, 2018 Minneapolis
(FINAL with N = 155)

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Abstract: This brief presentation shares the results of a recent survey study conducted on behalf of the Employee Assistance Society of North America (EASNA). It asked about two issues: 1) How the employee assistance program industry has evolved over the past 30 years (to bolster reflections on the 30th anniversary of the annual EASNA Institute in 2018); and 2) What themes should be featured in the update to the first edition of the Purchaser's Guide to EAPs - published by the Employee Assistance Society of North America in 2009. Discussion of the implications of the major findings for NBC member companies will be encouraged.

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Overview of the Study

- In May of 2018 the Employee Assistance Society of North America (EASNA) held the 30th Annual Institute.
- Eleven areas of change identified from a preliminary one-page survey at the Institute luncheon.
- These areas were then used in broader sample survey and rated for how accurate they were today.
- Also assessed reasons driving purchaser choices today.
- The results of a survey of 155 professionals in EAP field.

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Study Recruitment and Sample

Recruitment

- A non-random sample voluntarily responded to an online questionnaire distributed via EASNA twitter, LinkedIn (500+ views), direct e-mails to researcher contacts in EAP and editorial board of *Journal of Workplace Behavioral Health: EAP Practice and Research*
- Incentive = Chance to win $100 honorarium
- Response Rate = unknown

Profile of Sample N = 155:

- Country: 78% US / 21% Canadian / 1% Other
- Sex: Male 51% / Female 49%
- Type: Vendor 52% / Other 13% / Purchaser 12% / Internal 9% / Broker 7% / Specialty 6%
- Size: Boutique or Regional 40% / National 36% / Global 34%
- Age: 56 years (range 30s to 60+)
- Experience: 23 years of experience with field of EAP

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Question #1:

How accurate is each of the following statements concerning how the EAP industry has changed compared to 30 years ago (1988 or compared to as far back as you can remember)?

Data collection done to reflect on 30 Years of the Annual EASNA Institute

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How accurate is each of the following statements concerning how the EAP industry has changed compared to 30 years ago (1988 or compared to as far back as you can remember)?

1: Mass Market of External Vendors and Technology

2: Full Service EAP with Integration and Prevention Role

3: Commoditization = Low Cost + Low Value

% = average for sub-items rated as important or very important

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Theme	Changes for Employee Assistance Industry in last 30 Years	Accurate	Somewhat Accurate	Not Accurate
1 Mass Market Modern Vendors	More mature market with fewer but larger EAP external vendors after acquisitions and mergers of EAP providers.	74%	25%	1%
	Almost all large and most medium-size employers now have some kind of EAP.	74%	21%	5%
	More technology-based EAP services (phone, website, online video, mobile apps).	85%	15%	-
	Shift from internal staff model to mostly external vendor affiliate models of delivery of EAP counseling services.	75%	23%	2%

N = 155 with average of 23 years in EAP field. 2018 Survey by Employee Assistance Society of North America – By Mark Attridge, PhD 7

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Theme	Changes for Employee Assistance Industry in last 30 Years	Accurate	Somewhat Accurate	Not Accurate
2 Full Service Integrated Partner	EAPs have greater role in preventing and managing behavioral health risks in employee population.	44%	39%	17%
	More integration of EAP into other parts of organization (work/life, wellness, disability, safety).	65%	31%	4%
	Greater recognition of mental health and addiction issues in general (less stigma).	59%	33%	8%
	Greater range of different services offered beyond traditional focus on employee alcohol and substance abuse problems.	94%	6%	-

N = 155 with average of 23 years in EAP field. 2018 Survey by Employee Assistance Society of North America – By Mark Attridge, PhD 8

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Theme	Changes for Employee Assistance Industry in last 30 Years	Accurate	Somewhat Accurate	Not Accurate
3 Low Cost Low Value	Competition from "Free EAP" limited programs bundled into other employee health insurance products.	75%	19%	6%
	Stagnation of price for core EAP services.	63%	29%	8%
	Longer-term follow-up by EAP for more severe cases (alcohol or depression) rarely happens today.	28%	56%	16%

N = 155 with average of 23 years in EAP field. 2018 Survey by Employee Assistance Society of North America – By Mark Attridge, PhD 9

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Changes in Last 30-Years: Three Themes

N = 155 with average of 23 years in EAP field. 2018 Survey by Employee Assistance Society of North America – By Mark Attridge, PhD 10

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Question #2:

Today how important are the following different features and kinds of services, in general, to

WHY employers purchase EAPs?

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Today how important are the following different features and kinds of services, in general, to **WHY employers purchase EAPs?**

1: Support the Employee's Work & Behavioral Health (84%)

2: Support the Work/Life & Family of Employee (65%)

3: Support the Work Organization (57%)

% = average for sub-items rated as important or very important

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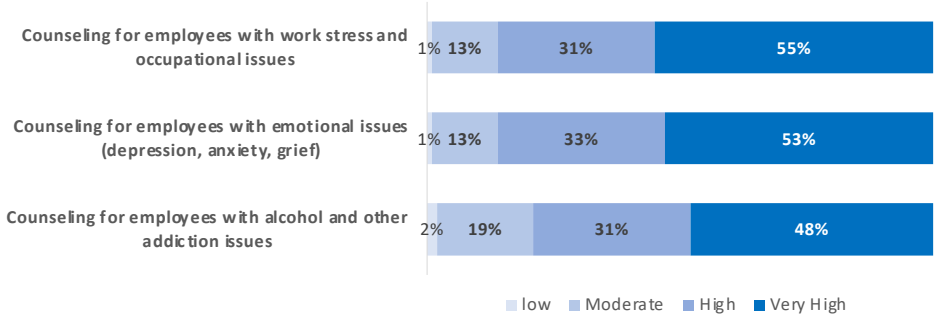
Today how important are the following different features and kinds of services, in general, to **WHY employers purchase EAPs?**

Theme 1: Supporting the Employee's Work & Behavioral Health



N = 144

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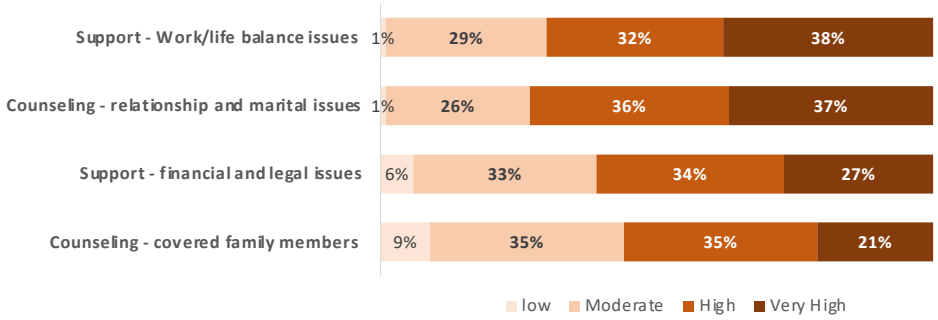
Today how important are the following different features and kinds of services, in general, to **WHY employers purchase EAPs?**

Theme 2: Supporting Work/Life & Family of the Employee



N = 144

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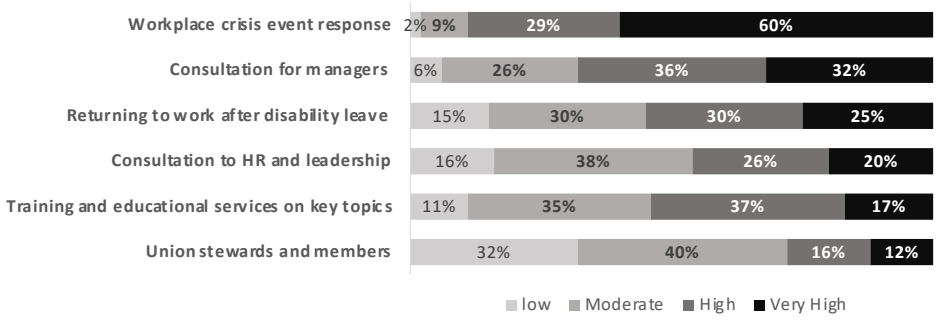
Today how important are the following different features and kinds of services, in general, to **WHY employers purchase EAPs?**

Theme 3: Supporting the Work Organization



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Question #3:

In today's market, how important are the following factors to why employers

decide to purchase one EAP over other EAPs?

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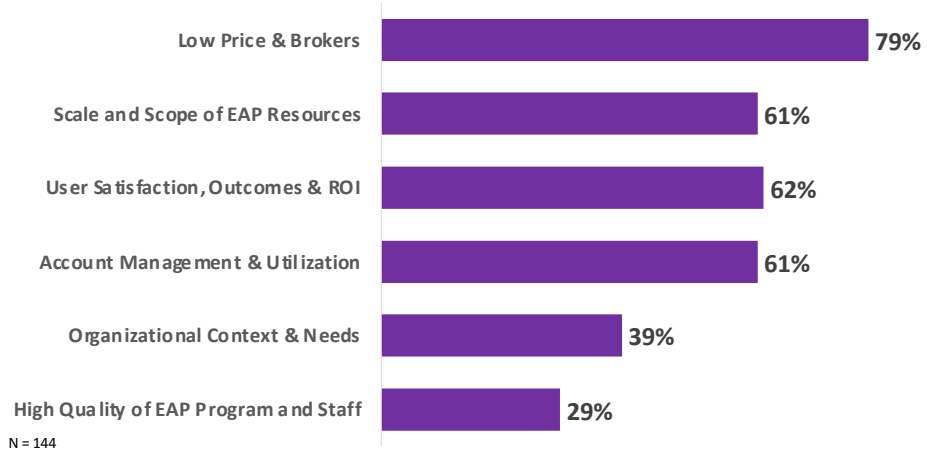
In today's market, how important are the following factors to why employers **decide to purchase** one EAP over other EAPs?



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Question #4:

So What Do We Do About It?

<u>EASNA Purchasers Guide to EAP (2009)</u>
How Familiar?
Which Parts Most Used?
What is Most Useful Format for 2018?

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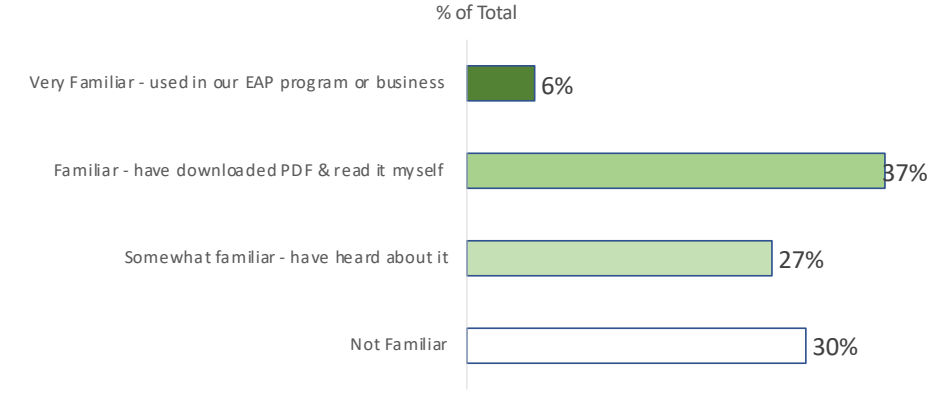
The Purchaser's Guide to EAPs was released in 2009. It is 58 long, features contributions from 11 authors and has over 150 research- based references. It has three sections: The Case for EAPs; How to Select an EAP; and How to Strengthen an EAP. It is available at no-cost from the EASNA website as a PDF.



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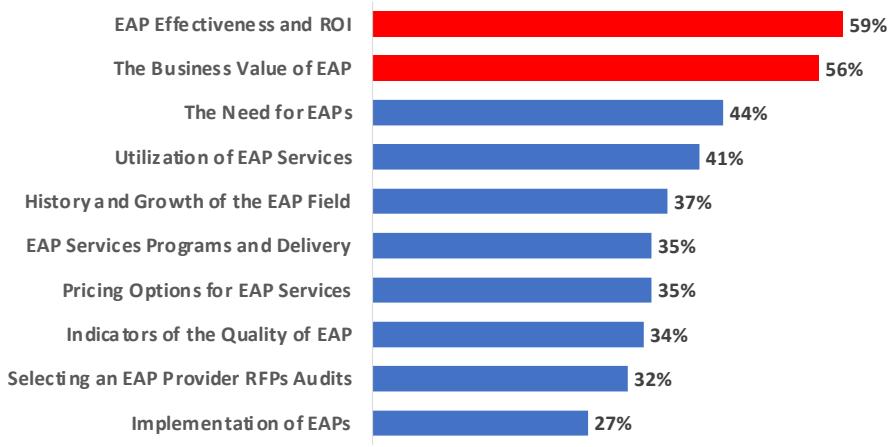
Ever Shared Chapter from Guide with Customers or Colleagues? EASNA Research Notes Series 2009 / 2010



N = 99 with at least some familiarity with 2009 Purchaser's Guide

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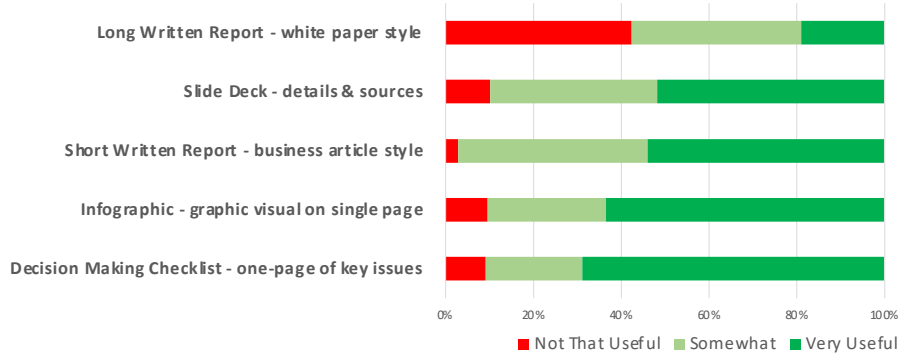
Which Format of Purchaser Guide 2.0?



N = 132 - 137

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