

Occupational Health - UK - June 2015

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"Many businesses still view occupational health as an uncertain investment in improving business performance, but the case for investing in OH has never been greater. Absenteeism costs the UK economy up to £31 billion a year, with the average UK worker taking an estimated 4.5 days off sick annually according to LFS data."
– Lewis Cone, B2B Analyst

This report looks at the following areas:

- What are the key determinants driving the occupational health industry?
- Was the industry affected by the financial crisis and the slow recovery? If so, how has it developed and changed since?
- How have government schemes influenced market demand and supply?
- How has the provision of occupational health services changed over recent times?
- What are the key issues that the industry needs to address to expand its service?
- What does the future hold for occupational health services?

The UK has emerged from the financial crisis with one of the strongest growing economies in the developed world, allowing unemployment to fall to a six-year low of 5.7% by the end of 2014. The higher amount of people in work coincided with the launch of the Fit for Work service nationally back in May, which aims to reduce the burden of sickness absence from the workplace and spending on health-related benefit claims. The service will provide another means of increasing company awareness of available occupational health initiatives and schemes, alongside the growing emergence of studies that show it can reduce companies' financial costs. However, with SMEs accounting for a large majority of businesses in the UK, the four-week component of the FfW service could present an entry barrier as they are more likely to need greater support to withstand that length of absence. Employees will also play a role in the development of the market as they must make their employers aware of potential health issues that could be helped by specific OH services, rather than employer-perceived OH services considered most effective.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Table of Contents

Executive Summary

Market size

Figure 1: UK Employment, 2014

Figure 2: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2010-14

Market trends

Figure 3: Average Annual Cost of Absence, 2010-14

Figure 4: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2013/14

Market factors

The launch of the Fit for Work service seeks to improve first contact and uptake of initiatives and schemes

Lack of clarity on the true value of the costs of workplace ill-health is still a large barrier to market development

The ageing working population will change the nature of ill-health in the workplace

Low supply of suitably qualified occupational health professionals amid lack of incentives to enter the profession

Industry structure

Consumer

Forecast

In 2015, the value of the UK occupational health market is forecast to increase by 4.4% at 2014 prices before demonstrating marginally stronger growth until 2019

Mental ill-health and stress continues to occur in the workplace

Technological advancements will help improve the base of occupational health networks and enable the formation of treatment benchmarks

What we think

Key Insights

Which factors are driving industry growth?

What kind of impact has legislation had on the market?

What are the implications of growth in the market? Will these barriers reduce future development?

OH workforce issues

Level of penetration of occupational health services

What innovations are we seeing in the market?

What does the future hold for the industry?

Introduction

Definitions

Methodology

Abbreviations

Market Positioning

Figure 5: Sickness Absence among UK employees, 2009-13

Figure 6: Sickness Absence among UK employees, 2009-13

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Figure 7: Incidence of Sickness Absence Among Employees, 2014

Figure 8: Government Estimates of Potential Savings from Establishing the Fit for Work initiative, 2013

UK Economy

Key points

Overview

Figure 9: UK GDP, 2003-14 Q2

Figure 10: Quarters after GDP Peak, 1979, 1990 and 2008

Inflation

Interest rates

House prices

Consumer spending

Manufacturing

Business investment

Imports

Exports

Market Factors

Key points

Legislation

Ethical

Economic

Cost effectiveness

Background political policy

Economic conditions

Workforce factors

Figure 11: Working Hours Lost Due to Sickness Absences, by Gender, 2009-13

Figure 12: Percentage of working hours lost due to sickness absences, 2009-13

Figure 13: Working Hours Lost Due to Sickness Absences, by Age Group, 2009-13

Figure 14: Percentage of working hours lost due to sickness absences, 2009-13, by Age Group

Legislation

Market Size

Key points

Introduction

Public sector

Figure 15: Analysis of Employment in Central and Local Government, by Size of Company, 2014

Figure 16: Analysis of Employment in Central and Local Government, 2014

Private sector

Figure 17: Analysis of Employment in the Private Sector, by Size of Company, 2014

Figure 18: Analysis of Employment in Private Sector, 2014

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Overall market

Figure 19: Differences in Absence and Workforce Size, 2011- 2014

Figure 20: Differences in Average Proportion of Absence, by Duration of Absence, 2013-14

Figure 21: Proportions of Organisations Monitoring the Cost of Employee Absence, by Type of Organisation and by Size of Company, 2014

Figure 22: Average Annual Cost of Absence, per employee per year, by Sector, 2010-14

Figure 23: Average Annual Cost of Absence, 2010-14

Figure 24: Analysis of Payment of Occupational Sick Pay, 2012

Figure 25: Segmentation of the Cost of Absence to the Economy, 2010

Figure 26: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2013/14

Figure 27: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2013/14

Industry analysis

Figure 28: Average Sickness Absence by Sector, 2010-2014

Figure 29: Proportion of Respondents with Organisational Sickness Reduction Targets, 2010-14

Figure 30: Industries Utilising the OH Advice Line, by Country, 2009-11

Reasons for absence

Figure 31: Common Causes of Short Term Absence, 2012

Figure 32: Common Causes of Short Term Absence, 2012-14

Figure 33: Percentage of respondents identifying most common cause of short-term absence, 2014

Figure 34: Common Causes of Long-term Absence, 2012-14

Figure 35: Percentage of respondents identifying most common cause of long-term absence, 2014

Figure 36: Number of days lost through sickness absence in the UK, by Reason, 2009-13

Figure 37: Causes of Work-related Stress, by Type of Organisation, 2014

Figure 38: Methods Being Used To Identify and Reduce Stress, by Type of Organisation, 2014

Regional analysis

Figure 39: UK Regional Employment 2013, 2014 and 2015

Figure 40: Regional Public Sector Employment in England, 2010-14

Figure 41: Average Sickness Absence by Region, 2009-14

Figure 42: Regional Sickness Absence, 2009-14

Market development

Figure 43: The UK Market for Occupational Health Provision at Salary Costs for Non-Commercial Operators, 2010-14

Figure 44: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2010-14

Figure 45: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2010-14

Market Trends

Key points

Government policy

Business practice

Health screening

The Consumer – Health Issues

Key points

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More than seven in every ten workers have suffered a health issue over the last year

Figure 46: Most Common Health Issues, April 2015

Figure 47: Most Common Health Issue, April 2015

Female millennials twice as likely as male millennials to suffer mental ill-health

Figure 48: Most Common Health Issues, by Gender and Age Group, April 2015

Figure 49: Most Common Health Issues, by Gender and Age Group, April 2015

Figure 50: Most Common Health Issues, by Company Size, April 2015

The Consumer – Company Initiatives and Benefits

Key points

Figure 51: Available Health Initiatives or Benefits at Work, April 2015

Figure 52: Available Health Initiatives or Benefits at Work, April 2015

SMEs lead length of leave, while more than half offer sick pay

Figure 53: Available Health Initiatives or Benefits at Work, in SMEs, April 2015

Figure 54: Available Health Initiatives or Benefits at Work, in SMEs, April 2015

The Consumer – Attitudes towards Health Initiatives

Key points

Flexibility in work and longer sanctioned holidays are most favoured by workers

Figure 55: Most Important Health Initiatives or Benefits at Work, April 2015

Figure 56: Most Important Health Initiatives or Benefits at Work, Top Five Options, April 2015

Industry Structure

Key points

Industry development and structure

Figure 57: Structure of the UK Occupational Health Industry, 2014

Figure 58: Structure of the UK Occupational Health Industry, 2014

Figure 59: Analysis of the changes in the structure of the 'Other human health activities' industry, 2010-14

Figure 60: Analysis of the changes in the structure of the 'Other human health activities' industry, 2010-14

Structure by employment

Figure 61: Analysis of the employment structure of the 'Other human health activities' industry, 2013 and 14

Figure 62: Analysis of the employment structure of the 'Other human health activities' industry, 2014

Structure by turnover

Figure 63: Analysis of the financial structure of the 'other human health activities' industry, 2013 and 2014

Figure 64: Analysis of the financial structure of the 'other human health activities' industry, 2014

Company Profiles

AXA Icas Healthcare Occupational Health Services

Figure 65: Financial Analysis of AXA Icas Occupational Health Services, 2009-13

Company outlook

Bupa Occupational Health

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Figure 66: Financial Analysis of Bupa Occupational Health, 2009-13

Company outlook

Capita Health and Wellbeing Solutions

Figure 67: Financial Analysis of Capita Health Solutions, 2009-13

Company outlook

Cigna Healthcare Occupational Health

COPE Occupational Health and Ergonomic Services

Duradiamond Healthcare

Attendance management

Employee health and wellbeing

Figure 68: Financial Analysis of Duradiamond Healthcare, 2010-2013, (£ 000)

Company outlook

HCA International

Figure 69: Financial Analysis of HCA International, 2009-13

Company outlook

Figure 70: Financial Analysis of Roodlane Medical, 2009-13

Company outlook

Health Management

Figure 71: Financial Analysis of Health Management, 2009-13

Company outlook

International SOS (formerly Abermed)

Figure 72: Financial Analysis of International SOS/Abermed, 2010-14

Company outlook

Medigold

Occupational Health Care Limited

Figure 73: Financial Analysis of Occupational Health Care Limited, 2009-13

Company outlook

OH Assist (formerly Atos Healthcare)

Figure 74: Financial Analysis of Atos Healthcare/OH Assist, 2009-13

Company outlook

People Asset Management (PAM) Group

Syngentis

Company outlook

Working on Wellbeing Ltd (formerly Serco OH)

Figure 75: Financial Analysis of Serco OH, 2008-12

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Figure 76: Financial Analysis of Working on Wellbeing Ltd, 2013-14

Company outlook

Figure 77: Analysis of profiled companies' turnover, 2009-13

Forecast

Key points

The market

Market development

The uncertainty surrounding the impact of the Fit for Work service

Policy gaps holding back development

Organisation approach to occupational health provision

Figure 78: Percentage of workers whose workplace is a risk to health and safety, 2010

The impact of the ever-ageing working population

Type of OH provider

Market forecast

Figure 79: UK Occupational Health Market Segmentation Forecast, by Provider, 2015-19

Figure 80: UK Occupational Health Market Segmentation Forecast, by Provider, 2015-19

Figure 81: Development of the UK Occupational Health Market, 2009-19

The growing emergence of mental ill-health and stress in the workplace

OH services helping the unemployed

Industry

Skill shortages and inability to attract suitably qualified OH staff

Technological advancements

Presenteeism

General occupational health perception

Financial pressures

Further Sources and Contacts

Trade associations, regulatory authorities and independent professional bodies

The Association of Occupational Health Nurse Practitioners

British Occupational Hygiene Society

British Safety Council

Commercial Occupational Health Providers Association

Employee Assistance Professionals Association

Health and Safety Executive

Independent Safety Consultants Association

Institute of Occupational Medicine

Institution of Occupational Safety and Health

Royal Society for the Prevention of Accidents

The Safety Assessment Federation

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