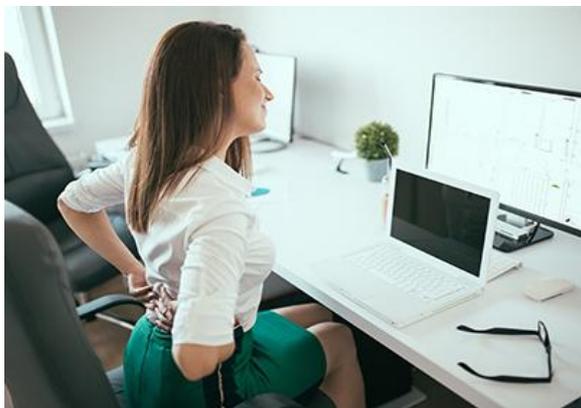


Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Health and wellbeing programmes can play a major part in helping the UK close the productivity gap and provide the B2B market with a great opportunity. If employees in a professional services environment enjoy work, they do better work, which is obviously beneficial to both staff and organisations.”

– Lewis Cone, B2B Analyst

This report looks at the following areas:

- How are workers’ financial difficulties adding to companies’ OH burden?
- How are changes to workforce demographics affecting absence rates and approaches to OH?
- How is the government responding to problems in the industry’s operating model?

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

Market size

Figure 1: UK Employment, by Sector, as of December 2017, (Million and % of Total)

Figure 2: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2013-2017, (£ Million)

Market trends

Technology helps employers gain real-time information regarding employee health

Average cost of absence is also on the decline

Figure 3: Average Annual Cost of Absence, Five-Year Average, 2012-2016, (per Employee per Year, by Sector, in £)

Figure 4: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2015/16, (£ Billion in 2015 prices)

Market factors

Highest number of workers aged over 50 presents challenges, but challenges posed by younger workers must also be acted upon

Fit for Work assessments scrapped following low referral rates

Industry structure

Forecast

Annual 3% to 4% growth expected until 2022

Figure 5: UK Occupational Health Market Segmentation Forecast, by Provider, 2018-2022, (£ Million at 2017 prices)

Rise in smartphone and app use could benefit market development

What we think

Key Insights

How are workers' financial difficulties adding to companies' OH burden?

How are changes to workforce demographics affecting absence rates and approaches to OH?

How is the government responding to problems in the industry's operating model?

Introduction

Definitions

Methodology

Abbreviations

Market positioning

Figure 6: Sickness Absence among UK Employees, 2012-2016, (Million, % and Days)

Figure 7: Sickness Absence among UK Employees, 2012-2016, (Millions)

Figure 8: Average Level of Employee Absence, 2013-2018, (Average Working Time Lost (%) and Average Days Lost per Employee per Year)

Figure 9: Average Level of Employee Absence, by Sector, 2013-2018, (Average Working Time Lost (%) and Average Days Lost per Employee per Year)

Economic conditions

Ethical

UK Economy

Key points

Overview

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Forecast GDP development 2017-21, (% Annual Growth)

Figure 11: UK GDP Quarterly Development, 2007-17, (% Quarterly Growth and GDP in £ Billion)

Inflation

Interest rates

House prices

Figure 12: UK House Price changes, 2006-2017, (12 month % change)

Consumer spending

Manufacturing

Figure 13: UK Manufacturing, 2014-17, (Index, 2013 = 100)

Business investment

Figure 14: UK GFCF, 2007-17, (£ Million, Chained Volume Measures, Seasonally Adjusted)

Imports

Exports

Market Factors

Key points

Highest number of workers aged over 50 presents challenges, but challenges posed by younger workers must also be acted upon

Slow progress in Brexit talks means uncertainty remains over future impact on industry spending and workplace legislation

Fit for Work assessments scrapped following low referral rates

Launch of new occupational health guides aim to promote OH programmes and the benefits of an active workforce

Poor use of data systems are limiting the value of employee benefits programmes

Other factors

Legislation

NICE quality standard

PAS (Publicly Available Specification) 3002 - code of practice on improving the health and wellbeing within an organisation

Market Size

Key points

Introduction

Workforce

Figure 15: Working Hours Lost Due to Sickness Absences, by Gender, 2012-2016, (%)

Figure 16: Working Hours Lost Due to Sickness Absences, by Gender, 2012-2016, (%)

Figure 17: Working Hours Lost Due to Sickness Absences, by Age Group, 2012-2016, (%)

Figure 18: Working Hours Lost Due to Sickness Absences, by Age Group, 2012-2016, (%)

Public sector

Employment structure

Figure 19: Analysis of Employment in Central and Local Government, by Size of Company, 2017, (000s)

Figure 20: Analysis of Employment in Central and Local Government, by Organisation Size, 2017, (% of Total Employment)

Private sector

Figure 21: Analysis of Employment in the Private Sector, by Size of Company, 2017, (000s)

Figure 22: Analysis of Employment in Private Sector, 2017, (Employees in 000s by Size of Company)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Overall market

Figure 23: Differences in Absence and Workforce Size, 2012- 2016, (Average Days Lost per Employee)

Figure 24: Differences in Absence and Workforce Size, 2012-2016, (Average Days Lost per Employee)

Statutory sick pay

Average cost of absence is also on the decline

Figure 25: Average Annual Cost of Absence, per Employee per Year, by Sector, 2012-2016, (£ per Year)

Figure 26: Average Annual Cost of Absence, 2012-2016, (per Employee per Year, by Sector, in £)

Figure 27: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2015/16, (£ Billion in 2015 prices)

Figure 28: Analysis of Cost of Workplace Illness and Injury, by Cost Bearer, 2006/07-2015/16, (£ Billion in 2015 prices)

Reasons for absence

Figure 29: Common Causes of Short Term Absence, 2018, by Sector, (% Identifying Top Three Most Common Causes)

Figure 30: Common Cause of Short-Term Absence, 2018, All Respondents, (% Identifying Top Three Most Common Causes)

Figure 31: Common Causes of Long-Term Absence, 2018, (% Identifying Top Three Most Common Causes)

Figure 32: Common Cause of Long-Term Absence, 2018, All Respondents, (% Identifying Top Three Most Common Causes)

Figure 33: Number of Days Lost Through Sickness Absence in the UK, by Reason, 2012-2016, (Millions)

Table highlights:

Figure 34: Estimated Working Days Lost Due to Work-Related Illness or Injury, by Illness or Injury, 2011/12-2016/17, (000s)

Stress

Figure 35: Causes of Work-Related Stress, 2018, (% of Respondents, Top Three Causes)

Figure 36: Methods Being Used To Identify and Reduce Stress, 2018, (% of Respondents That Take Steps To Manage Stress)

Flexible working trends

Regional analysis

Figure 37: UK Regional Employment 2015, 2016 and 2017, (000s and % of Total)

Figure 38: Regional Public Sector Employment, 2013-2017, (000)

Figure 39: Sickness Absence Rates, by Region, October 2015 - September 2016, (%)

Figure 40: Sickness Absence Rates, by Region, October 2015 - September 2016, (%)

Market development

Figure 41: The UK Market for Occupational Health Provision at Salary Costs for Non-Commercial Operators, 2013-2017, (£ Million)

Figure 42: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2013-2017, (£ Million)

Figure 43: UK Market Segmentation for Occupational Health Provision at Salary Costs for Non-Commercial Operators, by Type of Provider, 2013-2017, (£ Million)

Market Trends

Key points

Level of presenteeism in the workplace remains high

Wellbeing strategies are being introduced into companies at a higher rate...

... although evidence suggests wellbeing strategies are not always the most suitable

Technology helps employers gain real-time information about employee health

Lack of new OH professionals could undermine growth potential

Industry Structure

Key points

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Industry development and structure

HSE launches new occupational health campaign

Other recent industry developments

Major industry groups

Industry structure

Figure 44: Structure of the UK Occupational Health Industry, 2017, (£ Million)

Figure 45: Structure of the UK Occupational Health Industry, 2017, (% of Total Market Share)

Figure 46: Analysis of the Changes in the Structure of the 'Other Human Health Activities' Industry, 2013-2017, (Number of Outlets and Businesses)

Figure 47: Analysis of the Changes in the Structure of the 'Other Human Health Activities' Industry, 2013-2017, (Number of Outlets and Businesses)

Structure by employment

Figure 48: Analysis of the Employment Structure of the 'Other Human Health Activities' Industry, 2016 and 2017, (Number of Employees and Outlets)

Figure 49: Analysis of the Employment Structure of the 'Other Human Health Activities' Industry, 2017, (% of Total Outlets)

Structure by turnover

Figure 50: Analysis of the Financial Structure of the 'Other Human Health Activities' Industry, 2016 and 2017, (£000 and Number of Businesses)

Figure 51: Analysis of the Financial Structure of the 'Other Human Health Activities' Industry, 2017, (£000 and % of Businesses)

Company Profiles

AXA Icas Healthcare Occupational Health Services

Figure 52: Financial Analysis of AXA Icas Occupational Health Services, 2012-2016, (£ 000)

Company strategy

Bupa Occupational Health

New starter services

Figure 53: Financial Analysis of Bupa Occupational Health, 2012-2016, (£ 000)

Company strategy

Cigna Healthcare Occupational Health

COPE Occupational Health and Ergonomic Services

Duradiamond Healthcare

Figure 54: Financial Analysis of Duradiamond Healthcare, 2012-2017, (£ 000)

Company strategy

HCA International

Recent company news

Figure 55: Financial Analysis of HCA International, 2012-2016, (£ 000)

Company strategy

Roodlane Medical

Figure 56: Financial Analysis of Roodlane Medical, 2012-2016, (£ 000)

Company strategy

Health Management

Figure 57: Financial Analysis of Health Management, 2012-2016, (£ 000)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Occupational Health - UK - May 2018

Report Price: £995.00 | \$1343.55 | €1119.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

Iqarus (formerly International SOS)

Figure 58: Financial Analysis of Iqarus (formerly known as International SOS/Abermed), 2012-16, (£ 000)

Company strategy

Medigold

Figure 59: Financial Analysis of Medigold Health Consultancy, 2013-2016, (£ 000)

Company strategy

Occupational Health Care Limited

Figure 60: Financial Analysis of Occupational Health Care Limited, 2012-2016, (£ 000)

Company strategy

OH Assist (formerly Atos Healthcare)

Figure 61: Financial Analysis of OH Assist, 2012-2016, (£ 000)

Company strategy

People Asset Management (PAM) Group

Working on Wellbeing Ltd (formerly Serco OH)

Figure 62: Financial Analysis of Working on Wellbeing Ltd, 2013-2016, (£ 000)

Company strategy

Figure 63: Analysis of Profiled Companies' Combined Turnover, 2012-2016, (£ 000)

Forecast

Key points

Figure 64: UK Occupational Health Market Segmentation Forecast, by Provider, 2018-2022, (£ Million at 2017 prices)

Figure 65: UK Occupational Health Market Segmentation Forecast, by Provider, 2018-2022, (£ Million at 2017 prices)

Figure 66: Development of the UK Occupational Health Market, 2012-2022, (£ Million)

Rise in smartphone and app use could benefit market development

Council for Work and Health sets out its aims for the industry to 2022

Businesses must ensure OH programmes remain aligned with changing working environment...

... as well as the new challenge posed by the growing 'gig economy'

Further Sources and Contacts

Trade associations, regulatory authorities and independent professional bodies

Trade magazines

Trade exhibitions

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com