

SHRM
CUSTOMIZED
**EMPLOYEE
BENEFITS
PREVALENCE
BENCHMARKING
REPORT**

**THANK YOU FOR ORDERING A
SHRM CUSTOMIZED
EMPLOYEE BENEFITS PREVALENCE
BENCHMARKING REPORT**

Your report is based on the following criteria:

SELECTION CRITERIA

Industry: Finance and Insurance

Staff Size: All Sizes

SHRM Customized Human Capital,
Health Care, Paid Leave and Talent
Acquisition Reports are also available.

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A GUIDE TO YOUR SHRM CUSTOMIZED BENCHMARKING REPORT

Understanding the Data

As you compare your own data against other organizations, please keep the following in mind:

1. This report is based on data derived from the SHRM Customized Benchmarking Database, which contains organizational data from a random sample of SHRM members. The report is designed to target companies that closely match the selected criteria to allow for a more focused and comparable analysis and interpretation. Therefore, any interpretations of these data should be kept within this context.

2. A deviation between your figure for any benchmarking measure and the comparative figure is not necessarily favorable or unfavorable; it is merely an indication that additional analyses may be needed. Benchmarking measures that relate more closely to the context of your organization's industry and staff size are more descriptive and meaningful than information that is more generic in nature, such as all industries combined. The larger the discrepancy between your figure and those found in this

report, the greater the need for additional scrutiny.

3. In cases where you determine that potentially serious deviations do exist, it may be helpful to go back and calculate the same benchmarking measure for your organization over the past several years to identify any trends that may exist.

4. The information in this report should be used as a tool for decision-making rather than an absolute standard. Because companies differ in their overall business strategy, location, staff size and other factors, any two companies can be well managed, yet some of their benchmarking measures may differ greatly. No decision should be made solely based on the results of any one study.

Working with the Data

The information in this report is designed to be a tool to help you evaluate decisions and activities that affect your organization. When reviewing these data, it is important to realize that business strategy, organizational culture, leadership behaviors

and industry pressures are just a few of the many factors that drive various organizational measures. Absolute measures are not meaningful in isolation—they should be compared with one or more measures to determine whether a satisfactory level exists. Other measures, for example, might be your organization’s past results in this area or comparatives based on organization staff size, industry or geographic location.

Each table in the report contains customized benchmarks in aggregated form. There may be discrepancies between your organization’s benchmarks and the average or median numbers for a particular category. It is particularly helpful to communicate to stakeholders that just because your organization has benchmarks that are different from the average or median, it does not mean they are favorable or unfavorable. Rather, it may be the result of a particular total organizational strategy, special circumstances or other business initiatives

that cause differences with your organization’s benchmarks.

Notes

The data in this report were collected from January to February 2017 and reflect the benefits offered in 2017.

The number of respondents, indicated by “n,” is composed of the organizations that responded to the specific benchmark. Therefore, the number of peer organizations may vary from benchmark to benchmark. The percentile is the percentage of responses in a group that have values less than or equal to that particular value. The median is the 50th percentile. The average, or mean, is the sum of the responses divided by the total number of responses.

Some benchmarks are less frequently collected by organizations or may be more difficult to obtain. Some data are not displayed when there are fewer than five organizations for a specific metric.

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

HEALTH CARE AND WELFARE BENEFITS

	n	Offered	Not Offered	Plan to Offer
Accident insurance ^A	290	32%	68%	0%
Accidental death and dismemberment insurance (AD&D) ^B	296	84%	15%	1%
Acupressure/acupuncture medical coverage	269	33%	67%	0%
Alternative/complementary medical coverage	265	12%	87%	0%
Bariatric coverage for weight loss ^C	262	30%	70%	0%
Cancer insurance ^D	290	32%	68%	0%
Chiropractic coverage	279	77%	23%	0%
Consumer-directed health care plans (CDHPs) ^E	295	29%	70%	1%
Contraceptive coverage	277	77%	22%	0%
Critical illness insurance ^F	289	35%	65%	1%
Dental insurance	298	97%	3%	1%
Egg freezing for nonmedical reasons	267	3%	96%	0%
Elective procedures coverage ^G	264	8%	91%	1%
Employee assistance program (EAP)	294	79%	19%	2%
Employer contributions to health savings accounts (HSAs)	297	47%	51%	2%
Exclusive provider organization (EPO)	289	7%	92%	0%
Experimental/elective drug coverage	265	7%	92%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

HEALTH CARE AND WELFARE BENEFITS

	n	Offered	Not Offered	Plan to Offer
Full replacement consumer-directed health care plan (CDHP) ^H	290	7%	93%	0%
Gender reassignment surgery coverage	264	13%	86%	2%
Genetic testing coverage for diseases like cancer	257	15%	84%	0%
Health care premium flexible spending account ^I	294	42%	58%	0%
Health care services provided by phone or video ^J	292	42%	57%	1%
Health maintenance organization (HMO)	294	32%	67%	0%
Health reimbursement arrangement (HRA)	292	20%	80%	0%
Health savings account (HSA)	298	66%	31%	3%
High-deductible health plan (HDHP) ^K	288	20%	80%	0%
Hospital indemnity insurance	287	24%	75%	1%
Indemnity plan (fee-for-service)	292	7%	93%	0%
Infertility treatment coverage other than in-vitro fertilization	270	22%	77%	1%
Intensive care insurance ^L	291	16%	83%	1%
In-vitro fertilization coverage	271	25%	75%	1%
Laser-based vision correction coverage	269	25%	74%	1%
Long-term care insurance	291	25%	74%	1%
Long-term disability insurance ^B	295	81%	18%	1%
Mail-order prescription program	294	87%	13%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

HEALTH CARE AND WELFARE BENEFITS

	n	Offered	Not Offered	Plan to Offer
Medical flexible spending account ^M	296	73%	26%	1%
Mental health coverage	293	79%	20%	1%
Mini-med health plan ^N	288	1%	99%	0%
Pharmacy management program ^O	292	19%	81%	0%
Point of service (POS)	291	22%	77%	0%
Preferred provider organization (PPO)	297	83%	17%	0%
Prescription drug coverage bundled with medical insurance	297	96%	4%	0%
Reimbursement for employees to travel abroad for medical care ^P	293	5%	94%	1%
Retiree health care coverage	293	19%	80%	1%
Short-term disability insurance ^Q	295	76%	23%	1%
Supplemental accident insurance	291	37%	63%	0%
Supplemental accidental death and dismemberment insurance ^R	293	63%	37%	0%
Supplemental long-term disability insurance ^R	293	46%	53%	1%
Supplemental short-term disability insurance ^R	295	51%	49%	0%
Vision insurance	296	92%	7%	1%
Wholesale generic drug program for injectable drugs	264	32%	68%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

PREVENTATIVE HEALTH AND WELLNESS BENEFITS

	n	Offered	Not Offered	Plan to Offer
24-hour nurse line ^A	296	49%	49%	2%
Annual health risk assessment	297	43%	53%	4%
Bike purchase or bike share subsidy/reimbursement	297	5%	95%	0%
Company-organized fitness competitions/challenges	296	37%	59%	4%
Company-provided fitness bands/activity trackers	298	12%	87%	2%
CPR/first aid training	297	35%	62%	2%
Fitness equipment subsidy/reimbursement	298	7%	93%	0%
Health care premium discount for getting annual health risk assessment	298	13%	84%	2%
Health care premium discount for not using tobacco products	293	14%	84%	3%
Health care premium discount for participating in a smoking cessation program	297	11%	85%	3%
Health care premium discount for participating in a weight loss program	296	6%	91%	3%
Health care premium discount for participating in wellness program	297	13%	83%	4%
Health fairs	300	32%	62%	5%
Nutritional counseling	293	20%	78%	2%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

PREVENTATIVE HEALTH AND WELLNESS BENEFITS

	n	Offered	Not Offered	Plan to Offer
Offsite fitness center membership subsidy/reimbursement	297	35%	64%	1%
Offsite fitness class subsidy/reimbursement	294	17%	82%	1%
Offsite meditation/mindfulness/contemplative program subsidy/reimbursement	292	3%	97%	0%
Onsite blood pressure machine	294	15%	83%	2%
Onsite fitness center	298	23%	76%	0%
Onsite fitness classes ^B	298	20%	78%	2%
Onsite health screening programs ^E	297	28%	68%	4%
Onsite massage therapy services	298	15%	83%	1%
Onsite medical clinic	296	5%	94%	1%
Onsite meditation/mindfulness/contemplative program ^C	296	6%	93%	1%
Onsite nap room	298	7%	93%	0%
Onsite quiet room for personal use ^D	295	17%	82%	0%
Onsite seasonal flu vaccinations	297	56%	43%	1%
Onsite sick room	299	14%	86%	0%
Onsite stress management program	297	10%	87%	3%
Onsite vegetable garden	298	2%	98%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

PREVENTATIVE HEALTH AND WELLNESS BENEFITS

	n	Offered	Not Offered	Plan to Offer
Personal or life coaching ^F	298	33%	63%	3%
Preventive programs specifically targeting employees with chronic health conditions	297	33%	64%	3%
Rewards or bonuses for completing certain health and wellness programs	301	41%	53%	5%
Smoking cessation program	298	37%	61%	2%
Standing desk ^G	295	53%	44%	3%
Weight loss program	300	34%	63%	3%
Wellness programs, general	301	65%	31%	4%
Wellness resources and information	299	74%	24%	2%
Wellness tips or information provided to employees at least quarterly ^H	300	64%	31%	5%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

RETIREMENT SAVINGS AND PLANNING BENEFITS

	n	Offered	Not Offered	Plan to Offer
Automatic enrollment into defined contribution retirement savings plan (current employees) ^A	302	25%	73%	1%
Automatic enrollment into defined contribution retirement savings plan (new employees) ^B	303	50%	49%	2%
Automatic escalation of salary deferral amounts for defined contribution plans ^C	301	24%	74%	2%
Defined benefit cash balance pension plan	296	9%	91%	0%
Defined contribution plan catch-up contributions ^D	302	78%	21%	1%
Defined contribution plans offer target-date funds in their investment lineup	296	52%	46%	2%
Defined contribution savings plan debit card ^E	298	4%	95%	1%
Defined contribution savings plan hardship withdrawals	300	68%	31%	1%
Defined contribution savings plan loans ^F	298	52%	47%	1%
Employer match for Roth 401(k) or similar defined contribution retirement savings plan	302	53%	46%	1%
Employer match for traditional 401 (k) or similar defined contribution retirement savings plan	307	83%	15%	2%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

RETIREMENT SAVINGS AND PLANNING BENEFITS

	n	Offered	Not Offered	Plan to Offer
Formal phased retirement program ^G	294	3%	96%	1%
Individual retirement investment advice offered one on one ^H	297	50%	48%	1%
Informal phased retirement program ^I	295	13%	86%	1%
Investment retirement advice offered in a group/classroom ^H	297	43%	55%	3%
Investment retirement advice offered online ^H	299	53%	46%	1%
Permit conversion of funds in traditional 401(k) account into Roth 401(k) account	295	37%	62%	1%
Retirement-preparation specific planning advice ^J	298	48%	49%	3%
Roth 401(k) or similar defined contribution retirement savings plan	308	69%	31%	1%
Supplemental executive retirement plan (SERP)	295	19%	80%	1%
Traditional 401(k) or similar defined contribution retirement savings plan ^K	307	95%	5%	1%
Traditional defined benefit pension plan ^L	298	12%	88%	0%
Traditional defined benefit pension plan (open to all employees)	306	22%	78%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FINANCIAL AND COMPENSATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
529 plan payroll deduction ^A	294	10%	88%	2%
Accelerated death benefits ^B	292	33%	67%	0%
Automobile insurance program	296	6%	94%	0%
Automobile subsidy for business use of personal vehicles	295	22%	78%	0%
Carpooling subsidy	292	4%	96%	0%
Company-owned business cell phone or smartphone	295	54%	46%	0%
Company-owned vehicle for business and personal use	293	15%	84%	1%
Company-paid group life insurance ^C	297	90%	9%	1%
Company-provided student loan repayment	296	2%	94%	4%
Credit counseling service ^D	294	16%	84%	0%
Credit union	295	19%	81%	0%
Divorce insurance ^E	294	4%	96%	1%
Donations for employee participation in charitable events ^F	293	43%	56%	0%
Educational loans for members of employees' families	294	3%	96%	0%
Educational scholarships for members of employees' families	293	12%	87%	1%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FINANCIAL AND COMPENSATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
Employee discount on company services	293	40%	60%	0%
Employee referral bonus	297	66%	33%	1%
Employee stock purchase plan	295	15%	84%	1%
Employer contribution or match for 529 plan	295	1%	98%	0%
Financial advice offered in group/classroom ^G	294	30%	67%	3%
Financial advice offered one-on-one ^G	293	43%	56%	1%
Financial advice offered online ^G	292	41%	58%	1%
Free commuter shuttle	292	1%	99%	0%
Free computers for employees' personal use	294	9%	91%	0%
Free onsite parking	296	80%	20%	0%
Free, discounted or subsidized home Internet service	294	5%	94%	0%
Full flexible benefits plan ^H	295	21%	77%	1%
Graduate educational assistance	296	53%	45%	2%
Identity theft protection	291	15%	84%	1%
Incentive bonus plan (executive)	294	71%	28%	1%
Incentive bonus plan (nonexecutive)	295	64%	34%	2%
Incentive stock options (ISOs)	294	14%	85%	1%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FINANCIAL AND COMPENSATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
Life insurance for dependents	295	62%	38%	1%
Loans for employees to purchase personal computers	292	7%	93%	0%
Loans to employees for emergency/disaster assistance	293	22%	78%	0%
Low-/no-interest loans to employees for non-emergency situations	294	12%	88%	0%
Matching employee charitable contributions	288	31%	68%	0%
Nonqualified stock options ¹	291	12%	87%	1%
Parking subsidy (either onsite or offsite)	293	14%	86%	0%
Payroll advances	297	14%	86%	0%
Personal tax services	294	1%	98%	1%
Purchase discounts for employee-owned technological device bought through company ¹	295	14%	86%	0%
Qualified transportation spending account	293	14%	86%	0%
Restricted stock options	292	16%	82%	1%
Retention bonus (executive)	288	23%	77%	0%
Retention bonus (nonexecutive)	289	17%	83%	0%
Safety bonus/incentive	294	3%	97%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FINANCIAL AND COMPENSATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
Service anniversary award ^K	295	61%	39%	0%
Shift premiums	296	24%	75%	0%
Sign-on bonus (executive)	291	47%	53%	0%
Sign-on bonus (nonexecutive)	295	28%	72%	0%
Spot bonus/award ^L	296	53%	45%	1%
Stipend for cell phone or smartphone purchase for employee-owned device	295	26%	74%	0%
Stipend/subsidy for using employee-owned technological device for work ^M	295	5%	95%	0%
Stock appreciation rights (SARs)	292	4%	96%	0%
Subsidy for cell phone or smartphone bill for employee-owned device	296	42%	58%	0%
Supplemental life insurance for employees ^N	297	80%	19%	1%
Transit subsidy	295	17%	83%	0%
Undergraduate educational assistance	298	55%	44%	1%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

LEAVE BENEFITS

	n	Offered	Not Offered	Plan to Offer
Company-paid time off for group vacations	289	3%	96%	1%
Elder care leave above any state FMLA leave ^A	287	7%	93%	0%
Elder care leave above federal FMLA leave ^A	289	8%	92%	0%
Emergency flexibility ^B	288	7%	92%	1%
Family leave above any state FMLA leave ^A	291	16%	84%	0%
Family leave above required federal FMLA leave ^A	291	17%	82%	0%
Floating holidays ^C	292	51%	49%	0%
Paid bereavement leave	290	83%	17%	0%
Paid day off for employee's birthday	289	11%	89%	1%
Paid holidays	294	99%	1%	0%
Paid jury duty ^A	291	68%	32%	0%
Paid military leave ^A	290	27%	72%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

LEAVE BENEFITS

	n	Offered	Not Offered	Plan to Offer
Paid sabbatical program	286	3%	97%	0%
Paid time off for volunteering	288	41%	56%	3%
Paid time off to serve on the board of a community group or professional association	289	30%	69%	1%
Paid time off to vote	289	45%	55%	0%
Parental leave above any state FMLA leave ^A	288	13%	88%	0%
Parental leave above federal FMLA leave ^A	289	13%	87%	0%
Religious accommodation paid holidays ^D	287	18%	80%	1%
Unpaid sabbatical program	287	7%	92%	1%
Unpaid time off to vote ^A	287	33%	67%	0%
Vacation purchase plan ^E	291	4%	95%	1%
Vacation stipend ^F	291	1%	99%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FAMILY-FRIENDLY BENEFITS

	n	Offered	Not Offered	Plan to Offer
Access to backup child care services ^A	299	5%	94%	1%
Access to backup elder care services ^A	298	4%	95%	1%
Adoption assistance	297	12%	87%	1%
Babies at work ^B	299	2%	98%	0%
Breast milk shipping ^C	298	2%	98%	0%
Bring child to work in emergency	299	23%	76%	0%
Child care referral service ^D	297	21%	78%	1%
Consortium child care center ^E	295	0%	100%	0%
Dependent care flexible spending account ^F	300	77%	22%	1%
Domestic partner benefits for opposite-sex partners ^G	298	27%	72%	1%
Domestic partner benefits for same-sex partners ^G	297	26%	72%	1%
Elder care assisted living assessments	297	1%	99%	0%
Elder care in-home assessments ^H	297	1%	99%	0%
Elder care referral service ^D	297	16%	83%	1%
Foster care assistance	298	3%	97%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FAMILY-FRIENDLY BENEFITS

	n	Offered	Not Offered	Plan to Offer
Geriatric counseling ^I	297	2%	98%	0%
Lactation support services ^J	297	7%	93%	0%
Nonsubsidized child care center ^K	297	2%	98%	0%
On-ramping programs for family members dealing with elder care responsibilities	298	6%	94%	0%
On-ramping programs for parents re-entering the workforce	298	9%	89%	1%
Onsite elder care fairs ^L	295	1%	99%	0%
Onsite lactation/mother's room ^M	298	51%	46%	2%
Onsite parenting seminars	298	2%	98%	0%
Onsite vaccinations for infants/children	298	1%	99%	0%
Subsidized child care center ^K	297	1%	99%	0%
Subsidized child care program ^N	298	4%	96%	0%
Subsidized cost of elder care	297	0%	100%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

FLEXIBLE WORKING BENEFITS

	n	Offered	Not Offered	Plan to Offer
4-day workweek of 32 hours or less per week ^A	295	11%	89%	1%
Alternating location arrangements ^B	292	7%	93%	0%
Break arrangements ^C	292	36%	64%	0%
Casual dress (every day)	294	37%	63%	0%
Casual dress (one day per week)	293	61%	38%	1%
Casual dress (seasonal) ^D	294	30%	70%	0%
Compressed workweek ^E	295	28%	72%	0%
Flextime during core business hours ^F	296	60%	39%	1%
Flextime outside of core business hours ^G	296	29%	71%	1%
Job sharing ^H	292	11%	89%	0%
Mealtime flex ^I	294	48%	52%	0%
Results-only work environment (ROWE) ^J	292	5%	95%	0%
Seasonal scheduling ^K	293	11%	89%	0%
Shift flexibility ^L	291	21%	78%	0%
Telecommuting on a full-time basis	292	32%	67%	1%
Telecommuting on a part-time basis	295	46%	53%	2%
Telecommuting on an ad-hoc basis ^M	297	68%	32%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

EMPLOYEE PROGRAMS AND SERVICES

	n	Offered	Not Offered	Plan to Offer
Break room/kitchenette	300	96%	4%	0%
Concierge services	299	5%	95%	0%
Dry cleaning services	299	14%	86%	1%
Electric vehicle charging station	298	9%	91%	0%
Employer-sponsored personal shopping discounts ^A	298	22%	78%	1%
ESL (English as a second language) classes	295	1%	98%	1%
Executive club memberships ^B	296	12%	88%	0%
Foreign language classes ^C	299	2%	98%	0%
Free coffee ^D	300	90%	10%	0%
Free or discounted uniforms	299	10%	90%	0%
Free snacks and beverages (company-paid) ^E	298	27%	73%	0%
Legal assistance/services ^F	297	27%	73%	0%
Onsite ATMs	299	35%	65%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

EMPLOYEE PROGRAMS AND SERVICES

	n	Offered	Not Offered	Plan to Offer
Onsite cafeteria (fully- or partially-subsidized)	298	18%	82%	1%
Onsite cafeteria (unsubsidized)	297	16%	84%	1%
Onsite convenience store	298	12%	88%	0%
Onsite haircuts	296	1%	99%	0%
Organization-sponsored sports teams	298	15%	83%	1%
Paycards ^G	299	14%	86%	0%
Personal grooming subsidy/reimbursement ^H	298	0%	99%	0%
Pet health insurance	295	12%	85%	2%
Postal services for employees	299	18%	82%	0%
Prepared take-home meals	297	2%	98%	0%
Self-defense training	298	3%	97%	1%
Snacks and beverages (employee-paid) ^I	300	60%	40%	0%
Travel planning services	298	11%	89%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

PROFESSIONAL AND CAREER DEVELOPMENT BENEFITS

	n	Offered	Not Offered	Plan to Offer
Career counseling	291	22%	77%	2%
Certification/recertification fees	293	86%	14%	0%
College selection/referral ^A	291	10%	89%	1%
Cross-training to develop skills not directly related to the job	288	49%	49%	2%
Executive or leadership coaching	296	44%	52%	4%
Mentoring program ^B	294	25%	67%	7%
Offsite professional development opportunities ^C	295	86%	13%	1%
Onsite professional development opportunities ^C	295	73%	25%	2%
Professional license application or renewal fees	294	86%	14%	0%
Professional memberships ^D	294	95%	5%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

HOUSING AND RELOCATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
Assistance selling previous home	297	7%	93%	0%
Cost-of-living differential	299	13%	87%	0%
Down payment assistance	298	2%	98%	0%
Home buyout program ^A	298	3%	97%	0%
Home insurance program ^B	296	6%	94%	0%
Housing counseling ^C	298	8%	92%	0%
Location visit assistance ^D	297	16%	83%	1%
Mortgage assistance	297	5%	95%	0%
Mortgage insurance	295	2%	98%	0%
Reimbursement for financial loss sustained from a home sale ^E	298	4%	95%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

HOUSING AND RELOCATION BENEFITS

	n	Offered	Not Offered	Plan to Offer
Reimbursement of closing costs ^E	298	5%	94%	0%
Reimbursement of realtor fees ^E	299	5%	95%	0%
Reimbursement of shipping fees ^E	295	12%	88%	0%
Relocation lump sum payment ^F	297	33%	67%	1%
Rental assistance	297	5%	94%	0%
Renter insurance program ^G	295	4%	96%	0%
Spouse relocation employment assistance	297	4%	95%	1%
Temporary relocation benefits ^H	299	20%	79%	1%
Third-party relocation plan ^I	298	7%	92%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

BUSINESS TRAVEL BENEFITS

	n	Offered	Not Offered	Plan to Offer
Employee keeps frequent flyer miles	288	70%	30%	0%
Employee keeps hotel points	288	71%	29%	0%
First or business class airfare for domestic travel	291	16%	84%	0%
First or business class airfare for international travel	290	14%	85%	0%
Mileage reimbursement for the use of personal car to travel to and from airport	292	79%	21%	0%
Paid airline club membership	291	3%	96%	0%
Paid child care expenses while an employee is on business travel	291	1%	98%	1%
Paid dry cleaning while on business travel	290	13%	87%	0%
Paid elder care expenses while an employee is on business travel	291	0%	99%	1%
Paid health club fees while on business travel	291	5%	94%	0%
Paid Internet access while on business travel	292	61%	39%	0%
Paid minibar snacks at the hotel	290	10%	90%	0%
Paid pay-per-view movies at the hotel	291	4%	96%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

BUSINESS TRAVEL BENEFITS

	n	Offered	Not Offered	Plan to Offer
Paid pet care expenses while an employee is on business travel	290	0%	99%	0%
Paid travel expenses for dependent children	287	1%	99%	0%
Paid travel expenses for opposite-sex domestic partner	292	1%	99%	0%
Paid travel expenses for same-sex domestic partner	292	1%	99%	0%
Paid travel expenses for spouse	293	2%	98%	0%
Parking reimbursement at airport while on business travel	294	89%	11%	0%
Per diem for meals ^A	292	74%	26%	0%
Reimbursement for personal telephone calls while on business travel	291	36%	63%	0%
Reimbursement for taxicab or car service to and from airport	294	90%	10%	0%
Rental car upgrades	290	17%	83%	0%
Travel accident insurance	289	47%	53%	0%

SHRM EMPLOYEE BENEFITS PREVALENCE CUSTOMIZED BENCHMARKING REPORT

OTHER BENEFITS

	n	Offered	Not Offered	Plan to Offer
Annual company outing ^A	276	68%	30%	2%
Community volunteer programs	277	59%	39%	3%
Company paraphernalia ^B	278	70%	29%	1%
Company-purchased tickets ^C	274	28%	72%	0%
Discount ticket services ^C	277	39%	60%	0%
Noncash companywide performance awards ^D	276	48%	50%	1%
Pets at work	273	7%	93%	0%
Take your child to work day	273	19%	79%	2%
Take your parent to work day	274	1%	99%	0%
Take your pet to work day ^E	274	2%	97%	1%

EMPLOYEE BENEFITS PREVALENCE GLOSSARY

Statistical Definitions

“n”

The letter “n” in tables and figures indicates the number of respondents to each question. In other words, when it is noted that $n = 25$, it indicates that the number of respondents was 25.

Offered

The percentage of respondents who selected “Yes,” to formally offering that benefit.

Not Offered

The percentage of respondents who selected “No,” to formally offering that benefit and have no plans to offer it in the next 12 months.

Plan to Offer

The percentage of respondents who selected “Plan to offer,” to offering that benefit within the next 12 months.

FOOTNOTES

Health Care and Welfare Benefits

^A Separate from travel accident insurance

^B Does not pertain to employee-paid supplemental insurance.

^C For example, stomach stapling or gastric bypass surgery.

^D Separate from critical illness insurance

^E Generally include three major components: a health reimbursement arrangement (HRA) or a health savings account (has), an underlying medical plan (typically a preferred provider organization (PPO)), and access to educational tools and information to help members navigate the plan.

^F Provides funds to help cover extra expenses upon diagnosis of a critical illness or condition.

^G Any nonemergency surgical procedure other than laser-based vision correction.

^H CDHP is the *only* health care plan offered.

^I IRC Section 125 Cafeteria Plan allowing for premium conversion.

^J Such as diagnosis, treatment or prescriptions, but *not* a nurse advice line (either separate from or part of a regular health care plan).

^K That is *not* linked to an HSA or an HRA.

^L Provides funds to help cover the extra expenses for accidents or illnesses that result in an admission to a hospital intensive care unit.

^M IRC Section 125.

^N Basic plan that limits the amount of payments or number of times that services will be covered.

^O Independent of medical plan management.

^P And/or reimbursement to employees to obtain medical care abroad. For example, medical tourism.

^Q Beyond any state-required programs.

^R Employee- or employer-paid.

Preventative Health and Wellness Benefits

^A Available to help employees make more informed health care decisions.

^B For example, yoga, aerobics.

^C Subsidized or unsubsidized.

^D For example, prayer, meditation.

^E For example, glucose, cholesterol.

^F Used to help employees change and better manage their health habits.

^G Provide or subsidize the cost of replacing a regular desk with a standing desk.

^H For example, newsletter, column, e-mail, tweets.

Retirement Savings and Planning Benefits

^A Current employees who are not participating are enrolled into the plan with a certain percentage from their paycheck unless they opt out.

^B New employees are enrolled into the plan with a certain percentage from their paycheck unless they opt out.

^C For example, annually, every two years.

^D Permits participants who are age 50 or older to make additional elective deferral contributions at the end of the calendar year.

^E Allows users to borrow up to \$50,000 or 50% of the value of their retirement savings, whichever is less, through the use of a debit card.

^F Allows participants to borrow from their retirement savings.

^G A formal program that provides reduced schedule and/or responsibilities prior to full retirement.

^H Any recommendation from a financial advisor that tries to educate, advise or guide an investor regarding a particular investment product or series of products.

^I An informal program that provides reduced schedule and/or responsibilities prior to full retirement.

^J Any recommendation from a financial advisor that tries to educate, advise or guide an employee regarding retirement.

^K For example, 403(b)s, 457s, Thrift Savings Plans.

^L Frozen for current employees and/or not open to new hires.

Financial and Compensation Benefits

^A Tax-advantaged savings plan designed to encourage saving for future college costs.

^B For terminal illnesses.

^C Does not pertain to employee-paid supplemental insurance.

^D Credit, debt consolidation, housing counseling, etc.

^E Discount on legal fees and services related to divorce; part of or separate from an employee assistance program.

^F For example, walkathons.

^G Financial advice is defined as providing employees with information on how to manage their financial resources effectively for a lifetime of financial well-being.

^H Ability to select from a variety of benefits.

^I NQSOs or NSOs.

^J Not a loan.

^K Based on the number of years of employment.

- ^L Unscheduled bonus/award for going above and beyond in some capacity.
- ^M For example, computers, tablets.
- ^N Employee- or employer-paid.

Leave Benefits

- ^A Beyond what may be required by law.
- ^B Fixed number of days off with pay for emergencies.
- ^C Other than personal days.
- ^D Paid days off for religious holidays not offered by employer.
- ^E Payroll deduction.
- ^F Money employees can use to pay for their vacation.

Family-Friendly Benefits

- ^A For an unexpected event.
- ^B Children under 1 year of age are allowed to come to work with a parent on a regular basis.
- ^C While on business travel.
- ^D Program that provides employees with the names of providers (separate from or part of an employee assistance program).
- ^E An onsite or near-site center sharing the costs and responsibilities with several organizations.
- ^F IRC Section 125
- ^G Not including health care coverage (e.g., wellness benefits, paid leave, retirement savings and planning benefits, financial and compensation benefits, professional and career development benefits).
- ^H Provides families with appraisals to determine care needs.
- ^I Counseling services to seniors and their families.
- ^J Lactation consulting and education.
- ^K An onsite or near-site center.
- ^L Provides an opportunity for employees to speak directly with elder care experts about the many types of elder care services.
- ^M A separate room that goes above and beyond the Patient Protection and Affordable Care Act's requirements that employees be "shielded from view" and "free from intrusion" during their break.
- ^N Other than flexible spending accounts.

Flexible Working Benefits

- ^A Applies to all employees for all or part of the year.
- ^B Allowing employees to work part-year in one location and part-year in a second location (e.g., "snowbirds").
- ^C Providing employees more flexibility over when they take breaks.
- ^D Allowing casual dress for extended periods during the year (e.g., summer months, holidays).
- ^E Allowing full-time employees to work longer days for part of the week or pay period in exchange for shorter days or a day off each week or pay period.

- ^F Allowing employees to choose their work hours during core business hours.
- ^G Allowing employees to choose their work hours within limits outside of core business hours.
- ^H Two or more employees share the responsibilities, accountability and compensation of one full-time job.
- ^I Making up time at some point during the day as a result of a longer meal break or allowing employees to leave early as a result of a shorter meal break.
- ^J Allowing employees to work wherever and whenever they wish as long as projects are completed on a timely basis.
- ^K Allowing employees to work only a certain number of months per year.
- ^L Allowing employees to coordinate with co-workers to adjust their schedules by trading, dropping or picking up shifts.
- ^M Situations that may occur intermittently throughout the year or as a one-time event.

Employee Programs and Services

- ^A For example, retail discounts.
- ^B For example, country club memberships, excluding airline memberships.
- ^C Non-English.
- ^D Fully subsidized coffee or coffee service.
- ^E For example, vending machine snacks and beverages.
- ^F Separate from or part of an employee assistance program.
- ^G Payroll debit cards that enable employers to pay employees through payroll direct deposit even if they do not have bank accounts.
- ^H For example, manicures, pedicures, haircuts.
- ^I Fully or partially subsidized by the company.

Professional and Career Development Benefits

- ^A Provides employees with information and helps link them to colleges.
- ^B Formal program.
- ^C Seminars, conferences, courses or training to keep skills current, etc.
- ^D For example, SHRM, etc.

Housing and Relocation Benefits

- ^A Employer purchases the relocated employee's home.
- ^B Discount on home insurance.
- ^C Advice on buying, renting, defaults and foreclosures.
- ^D House-hunting trips.
- ^E Employer covers some or all of the costs.
- ^F Single lump sum to the relocating employee.
- ^G Discount on renters insurance.
- ^H Helps temporarily relocated employees maintain two residences.

¹A company hires a relocation management company to buy and resell the relocated employee's residence.

Business Travel Benefits

^AIncludes reimbursements

Other Benefits

^AFor example, company picnic.

^BFor example, company apparel, mugs.

^CFor example, sporting events, cultural events, theme parks.

^DFor example, gift certificate, extra day off.

^EOnce a year as opposed to pets at work generally.

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Prepared take-home meals, *Employee Programs and Services*
Prescription drug program coverage, *Health Care and Welfare Benefits*
Preventive programs specifically targeting employees with chronic health conditions, *Preventive Health and Wellness Benefits*
Professional license application or renewal fees, *Professional and Career Development Benefits*
Professional memberships, *Professional and Career Development Benefits*
Purchase discount (not a loan) for employee-owned technological device bought through company, *Financial and Compensation Benefits*

Q

Qualified transportation spending account, *Financial and Compensation Benefits*

R

Reimbursement

Closing costs, *Housing and Relocation Benefits*
Employees to travel abroad for medical care and/or reimbursement employees to obtain medical care abroad, *Health Care and Welfare Benefits*
Financial loss sustained from a home sale, *Housing and Relocation Benefits*
Personal telephone calls while on business travel, *Business Travel Benefits*
Realtor fees, *Housing and Relocation Benefits*
Shipping fees, *Housing and Relocation Benefits*
Taxicab or car service to and from airport, *Business Travel Benefits*
Religious accommodation paid holidays, *Leave Benefits*

Relocation lump sum payment, *Housing and Relocation Benefits*
Rental assistance, *Housing and Relocation Benefits*
Rental car upgrades, *Business Travel Benefits*
Renter insurance program, *Housing and Relocation Benefits*
Restricted stock options, *Financial and Compensation Benefits*
Results-only work environment (ROWE), *Flexible Working Benefits*
Retention bonus
 Executive, *Financial and Compensation Benefits*
 Nonexecutive, *Financial and Compensation Benefits*
Retiree health care coverage, *Health Care and Welfare Benefits*
Retirement-preparation advice, *Retirement Savings and Planning Benefits*
Rewards or bonuses for completing certain health and wellness programs, *Preventive Health and Wellness Benefits*
Roth 401(k) or similar defined contribution retirement savings plan, *Retirement Savings and Planning Benefits*
ROWE. See Results-only work environment (ROWE)

S

Sabbatical program
 Paid, *Leave Benefits*
 Unpaid, *Leave Benefits*
Safety bonus/incentive, *Financial and Compensation Benefits*
SARs. See Stock appreciation rights (SARs)
Scholarships for members of employees' families, *Financial and Compensation Benefits*
Seasonal scheduling, *Flexible Working Benefits*
Self-defense training, *Employee Programs and Services*
SERP. See Supplemental executive retirement plan (SERP)
Service anniversary award, *Financial and Compensation Benefits*
Shift flexibility, *Flexible Working Benefits*
Shift premiums, *Financial and Compensation Benefits*
Short-term disability insurance, *Health Care and Welfare Benefits*
Sign-on bonus
 Executive, *Financial and Compensation Benefits*
 Nonexecutive, *Financial and Compensation Benefits*
Smoking cessation program, *Preventive Health and Wellness Benefits*
Snacks and beverages (employee-paid), *Employee Programs and Services*
Spot bonus/award, *Financial and Compensation Benefits*
Spouse relocation employment assistance, *Housing and Relocation Benefits*
Standing desk, *Preventive Health and Wellness Benefits*
Stipend for cell phone or smartphone purchases for employee-owned device, *Financial and Compensation Benefits*
Stipend/subsidy for using employee-owned technological device, *Financial and Compensation Benefits*
Stock appreciation rights (SARs), *Financial and Compensation Benefits*
Subsidized child care center, *Family-Friendly Benefits*
Subsidized child care program, *Family-Friendly Benefits*
Subsidized cost of elder care, *Family-Friendly Benefits*
Subsidy for cell phone or smartphone bill for employee-owned device, *Financial and Compensation Benefits*

Supplemental accident insurance, *Health Care and Welfare Benefits*
Supplemental accidental death and dismemberment insurance, *Health Care and Welfare Benefits*
Supplemental life insurance for employees, *Financial and Compensation Benefits*
Supplemental long-term disability insurance, *Health Care and Welfare Benefits*
Supplemental short-term disability insurance, *Health Care and Welfare Benefits*
Supplemental executive retirement plan (SERP), *Retirement Savings and Planning Benefits*

T

Take your child to work day, *Other Benefits*
Take your parent to work day, *Other Benefits*
Take your pet to work day, *Other Benefits*
Telecommuting
 Ad-hoc basis, *Flexible Working Benefits*
 Full-time basis, *Flexible Working Benefits*
 Part-time basis, *Flexible Working Benefits*
Temporary relocation benefits, *Housing and Relocation Benefits*
Third-party relocation plan, *Housing and Relocation Benefits*
Traditional 401(k) or similar defined contribution retirement savings plan, *Retirement Savings and Planning Benefits*
Traditional defined benefit pension plan
 Frozen, *Retirement Savings and Planning Benefits*
 Open to all employees, *Retirement Savings and Planning Benefits*
Transit subsidy, *Financial and Compensation Benefits*
Travel accident insurance, *Business Travel Benefits*
Travel planning services, *Employee Programs and Services*

U

Undergraduate educational assistance, *Financial and Compensation Benefits*
Unpaid time off to vote, *Leave Benefits*

V

Vacation purchase plan, *Leave Benefits*
Vacation stipend, *Leave Benefits*
Vaccinations, onsite
 Seasonal flu vaccinations, *Preventative Health and Wellness Benefits*
 Vaccinations for infants/children, *Family-Friendly Benefits*
Vision insurance, *Health Care and Welfare Benefits*

W

Weight loss program, *Preventive Health and Wellness Benefits*
Wellness programs, *Preventive Health and Wellness Benefits*

Wellness resources and information, *Preventive Health and Wellness Benefits*

Wellness tips or information provided to employees at least quarterly, *Preventative Health and Wellness Benefits*

Wholesale generic drug program for injectable drugs, *Health Care and Welfare Benefits*