

Health on Demand

Comprehensive study reveals values, needs, desires, and trepidations of workers – and employers – when it comes to the future of health in general and the role of digital health in particular.

Designed to help companies make critical health care investment decisions over the next five years.

About the Study

What Compares and contrasts worker views with those of C-suite and senior decision makers across nine sectors

Who 16,564
Workers

1,300
Senior Decision
Makers

When Fielded in
June 2019

Where Seven mature and six growth markets; 13 countries across North America, Europe, Latin America, and Asia



Six Key Findings and Implications

1 Strong Business Case for Digital Health

40%

of workers say they are much less/less likely to move elsewhere if their employer promotes or sponsors digital health solutions in the workplace



76%

of employers believe an investment in digital health and well-being solutions will have a positive impact on staff energy levels and **6/10** believe promoting or sponsoring digital health solutions will aid staff retention



68%

of employers are very/somewhat likely to invest more in digital health in the next five years



Implication: Digital health and well-being solutions will be of increasing importance in retaining, engaging and energizing workers

2 Workers Value Patient-Centered Solutions

Out of a list of 15 digital health innovations, these three were rated valuable by the most workers

51%

App that helps find the right doctor or medical care when and where needed



49%

App that helps find an expert doctor anywhere in the world



47%

Portable and electronic individual and family medical records



Implication: For workers, digital health solutions have a clear role in facilitating personalized health care

3 Low Barriers to Adoption; High Trust in Employers

73%

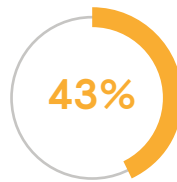


of workers have some or a great deal of trust in their employer's ability to keep their personal health information secure

Implication: Workers are surprisingly willing to share health data to receive higher quality, more personalized and convenient care

5 High Demand for a Pro-Health Culture

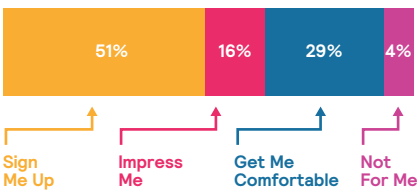
43%



of both workers and employers agree on the need for a more favorable work environment for health

Implication: Workers value a pro-health work culture – which has important implications for digital health solutions

4 Four Different Worker Segments to Engage



Distinguished by attitudes towards digital health innovations; level of confidence in employer-sponsored digital health solutions; and the likelihood of staying with an employer offering these solutions

About half of workers are in Sign Me Up – the group that's most eager to try digital health solutions offered at work

Implication: Unique worker segments have different attitudes towards health innovation and require tailored approaches

6 Stark Differences Between Growth & Mature Markets

81%

of growth market respondents report greater confidence in the digital and well-being solutions from employers



VS.



48%

of mature market respondents

54%

of growth market respondents say they are much less/less likely to move elsewhere



VS.



27%

of those in mature markets – if their employer promotes or sponsors digital health solutions

Implication: More workers in growth markets are ready for digital health now, but across all markets, workers are open to digital solutions that address their needs