

# Health on Demand

Comprehensive study reveals values, needs, desires, and trepidations of employees – 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 employee views with those of C-suite and senior decision makers across nine sectors

**Who** 16,564 Employees  
1,300 Senior Decision Makers

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

**When** Fielded in June 2019



## Six Key Findings and Implications for the UK

### 1 Strong Business Case for Digital Health

22%

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



66%

of employers believe an investment in digital health and well-being solutions will have a positive impact on staff energy levels and 5/10 believe promoting or sponsoring digital health solutions will aid staff retention



62%

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 energising employees

### 2 Employees Value Patient-Centered Solutions

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

28%

Individual and family medical records that are electronic and portable



29%

An app that helps me find the right doctor or medical care when and where I need it



29%

Self-managing health conditions using wearable technology



**Implication:** For employees, digital health solutions have a clear role in facilitating personalised health care

### 3 Low Barriers to Adoption; High Trust in Employers

66%



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

**Implication:** Employees are surprisingly willing to share health data to receive higher quality, more personalised and convenient care

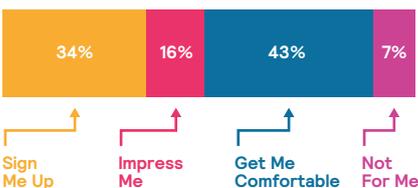
### 5 High Demand for a Pro-Health Culture



of employers and 31% of employees see the need for a favorable work environment for health

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

### 4 Four Different Employee 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

A third of employees are in Sign Me Up – the group that's most eager to try digital health solutions offered at work

**Implication:** Unique employee 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 employees in growth markets are ready for digital health now, but across all markets, employees are open to digital solutions that address their needs