

US findings

# health on demand

Comprehensive study reveals the 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

### Where

Seven mature (U.S., U.K., Canada, Italy, France, Netherlands and Singapore) and six growth markets (Brazil, China, Colombia, India, Indonesia and Mexico).

### When

Fielded in June 2019

## Six key findings and implications

### Strong business case for digital health

**26%**

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

**7/10**

of employers believe an investment in digital health and well-being solutions will have a positive impact on staff energy levels and 4/10 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

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

### Workers value patient-centered solutions

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

**39%**

App that helps find the right doctor or medical care when and where I need it

**38%**

Personal individual and family medical records that are electronic and portable

**36%**

Tele-medicine (remote video-chat, text with a doctor or nurse) for a simple health issue like a rash or a cold

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

### Low barriers to adoption; high trust in employers



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

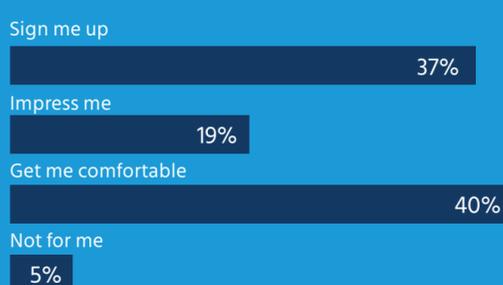
### High demand for a pro-health culture



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

### Four different worker segments to engage

“Sign me up” employees are the most eager to try digital solutions at work. Over a third of all US workers (37%) are in this segment.



The four segments are 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.

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

### Stark differences between growth & mature markets

**81%**

of growth market respondents say they would have greater confidence in a digital solution if offered by their employer



**48%**

of mature market respondents



**54%**

of growth market respondents say they are much less/less likely to move elsewhere if their employer promotes or sponsors digital health solutions



**27%**

of those in mature markets



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