

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

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 in Singapore

1 Strong business case for digital health

33%

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



78%

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



57%

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



Implication:

For employees, digital health solutions have a clear role in facilitating personalized health care

2 Employees value patient-centered solutions

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

37%

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



34%

Personal individual and family medical records that are electronic and portable



31%

An app that helps me find an expert doctor based on my diagnosis anywhere in the world



Implication:

For employees, digital health solutions have a clear role in facilitating personalized health care

3 Low barriers to adoption; high trust in employers

68%



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 personalized and convenient care

5 High demand for a pro-health culture



of employees



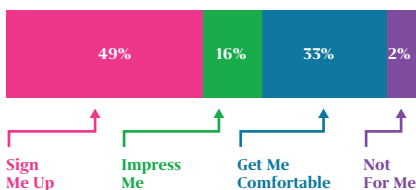
of employers

agree on the need for a more 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

About half 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 and 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