

# 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** 1,066  
Workers

100  
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

## Five Key Findings and Implications for Canada

### 1 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



64%

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



54%

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

42%

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



41%

Canadians would like access to electronic and personal health records (not surprising given most Canadians do not have direct access to their own medical information and it is likely located in various places)



36%

of Canadians want access to telemedicine for simply health issues and tools for self-managing health conditions through wearable technology



**Implication:** For workers, digital health solutions have a clear role in facilitating personalized health care as well as more patient centric care (which doesn't exist in our care system today)

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

69%

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

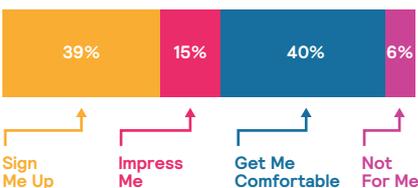
### 5 High Demand for a Pro-Health Culture

29%  
of employers  
38%  
of workers

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

### Global Differences Between Growth & Mature Markets

81%  
of growth market respondents globally report greater confidence in the digital and well-being solutions from employers



VS.



48%  
of mature market respondents

54%  
of growth market respondents globally 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