

# 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 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**

**51%** of employees agree on the need for a more favorable work environment for health

**48%** 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**

**49%** Sign Me Up  
**16%** Impress Me  
**33%** Get Me Comfortable  
**2%** Not For Me

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

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

**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

**54%** of growth market respondents say they are much less/less likely to move elsewhere

**27%** of those in mature markets — if their employer promotes or sponsors digital health solutions

**48%** of mature market respondents

**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





