

Emerging Technology in Health Engagement

A Report by WorldatWork
and Buck Consultants
February 2013



research

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Executive Summary

This report summarizes the results of a survey conducted by WorldatWork and Buck Consultants in fall 2012 to research the use and effectiveness of emerging technology tools (gamification, mobile technology and social networking or social media) to engage employees in improving their health and well-being.

Today's health-care benefits require individuals to absorb an increasing share of expanding health-care costs. At the same time, the effect of poor health and unhealthy lifestyles is a major concern in many parts of the world — not only due to direct costs of medical care, but also due to indirect costs linked to absenteeism and productivity. Enhanced health also is integral to overall well-being, and many employers view their efforts as contributing to their employee value proposition.

Concurrent with these dynamics, the explosion of social media, mobile technology and gamification has created a new landscape in the daily lives of most people. Just as many organizations are exploring how to harness these emerging channels to engage with customers in new ways, many also are intrigued by the opportunity to use similar approaches to better engage employees in ways to improve their health.

Today's technology offers unprecedented ways for employers to motivate and enable employees to adopt healthier lifestyles and become more effective health-care consumers. Tools abound from vendors, but what works? Which methods drive the right outcomes for both employers and employees? What role can employers play in promoting use of these tools?

This survey provides insights into the latest trends in this rapidly emerging field. It also identifies challenges and opportunities facing organizations that seek to adopt this technology to improve the health engagement of their workforces.

High-Level Findings

Employee health engagement is an important objective for most employers, as underscored by this study:

- 73% of responding organizations have a health engagement strategy to encourage employees to improve and monitor their health. (See Figure 1.)
- However, two-thirds of respondents have conducted little or no assessment of employees' preferences for various types of communications technology. (See Figure 2.) This could represent a significant missed opportunity to tailor a more strategically focused approach to employee communications and engagement.

Across three specific categories of technology, some distinctions emerge:

- **Gamification** is the most prevalent (62%) and ranks highest in respondents' perception of effectiveness in achieving objectives. (See Figures 3b and 6.)
- **Mobile technology** is currently the least implemented (36%) but leads the pack as the highest priority for adoption or expansion. (See Figure 19.)

- ***Social networking or social media*** is used in some fashion by half (50%) of responding organizations, but ranks highest in concerns over confidentiality and privacy of personal information. (See Figures 3b and 18.)

Employers are not left on their own to implement these technologies. The external entities that most commonly communicate with employees or help employers communicate using these emerging technologies are:

- Health insurers for mobile technology (See Figure 9) and
- Wellness program providers for gamification and social networking or social media. (See Figures 4 and 14.)

Measurement and evaluation challenge many organizations:

- Only about 10%-20% of respondents evaluate the return on investment (ROI) of their efforts with emerging technology. (See Figures 7, 12 and 17.) This could hinder attempts to making the business case for investment. However, the trends shown by this survey suggest a rising appetite to try new solutions.

The following sections provide details on the three leading technologies being used in health engagement.

Gamification

Gamification refers to the use of game-like features in nongame situations to motivate a change in behavior. As defined for participants in this survey, gamification initiatives include games, contests, or game-like elements (e.g., lotteries, points, quizzes, leaderboards, avatars).

Overall, as shown in Figure 3b, 62% of surveyed employers report using one or more gamification elements to promote health engagement to employees, and 31% likely will adopt one or more new elements in the coming year. More specific findings include:

- 60% use contests for health engagement, such as weight loss or walking competitions. Many employers have embraced these activities to help provide social motivation across their workforces.
- 37% incorporate game-like features in health and wellness resources.
- Only 12% report using online or mobile games today, but 52% are considering adopting such features within the next three years.

Mobile Technology

In this study, mobile technology refers to mobile apps and other methods of communication or interaction via a smartphone, tablet or similar wireless device.

36% of surveyed employers report using one or more elements of mobile technology to promote employee health engagement, and 36% likely will adopt one or more new elements in the coming year. (See Figure 3b.) Further:

- 32% use mobile technology for health-care benefits (e.g., apps from health insurers, prescription refills, benefits enrollment), and an additional 52% may add this technology within the next three years.
- Only 17% use mobile technology for wellness or lifestyle tracking or improvement, but an overwhelming 63% may adopt in the next three years.

These responses follow a growing prevalence in use of smartphones, and a virtual explosion in mobile apps and mobile-optimized websites. For example, 85% of Americans have mobile phones and more than half have smartphones¹. For 2012, Apple alone reported 20 billion app downloads, equaling the number of apps downloaded in all previous years combined². More than 1,600 new apps debut daily³.

Social Networking or Social Media

Social networking or social media refers to a variety of technologies that support and/or mediate communication between organizations, communities and individuals. In the context of this study, it includes:

- Social networking platforms, both external (e.g., Facebook, LinkedIn, Twitter) and internal (e.g., Yammer)
- Collaborative content management (e.g., enterprise wiki, intranet knowledgebase)
- Blogs, podcasts, text messaging and RSS feeds (e.g., syndicated content, web feeds or channels)
- Other social media elements on health-related websites (e.g., employee testimonials).

50% of surveyed employers report using one or more social networking or social media elements to promote health engagement to employees, and 37% likely will adopt one or more new elements in the coming year. (See Figure 3b.)

- Social media elements, such as employee health testimonials, are the most prevalent element (31%).
- Only 7% of employers are currently using text messaging, but an additional 50% indicate they may do so within the next three years.

However, 43% of respondents currently block external social media sites, an impediment to encouraging use of externally available solutions. (See Figure 20.)

How Effective Are These Technologies?

The majority of respondents are not sure how effective these technologies have been in helping to achieve health engagement objectives or deliver a positive ROI.

¹ Pew Internet Research Center: "Mobile Health 2012," November 8, 2012.

² Apple press release: "App Store Tops 40 Billion Downloads with Almost Half in 2012." January 7, 2013.

³ NDICIO compilation of Q1-Q3 2012 statistics as reported by 148apps.biz, AppBrain, WP7 Applist and Amazon.com.

Though most employers are not yet attempting to measure ROI, gamification is the approach most frequently measured, with 21% of employers making an effort to determine ROI, compared to 11% measuring both mobile technology and social media. (See Figures 7, 12 and 17.)

As shown in Figure 6, the objectives for which gamification were most rated as “very effective” or “somewhat effective” included:

- Improving specific health/lifestyle behaviors (61%)
- Improving workforce health (49%)
- Enhancing the organization’s image (49%).

Participants also responded regarding a variety of other effectiveness metrics. Across a variety of objectives, roughly 50% to 75% are not sure how effective these emerging technologies are in achieving the various objectives. (See Figures 6, 11 and 16.) These results are consistent with the low use of ROI metrics.

Through write-in comments, survey participants further elaborated on which technology they believe has been most effective in their organizations. Representative comments include:

- Social networking or social media – because it allows employees to see how other employees in the organization are improving their overall health and may help inspire like behaviors. Online testimonials, support boards and so on are important motivators for change.
- Mobile technology – it applies to the entire workforce and nearly everyone uses it.
- Gamification – it's viewed as fun, easy, competitive and creative.

Barriers to Adoption

The greatest barriers per Figures 8, 13 and 18, as identified across all categories, include:

- Competition for budget with too many other high-priority issues (by far the most significant barrier)
- Lack of buy-in and support from senior management
- Lack of guaranteed ROI or a good way to measure effectiveness.

Social networking or social media ranks higher than the other technologies in employer concerns over confidentiality and privacy of information.

Less than one-third of respondents see a significant barrier due to lack of employee readiness or a poor fit with the organizational culture.

What the Future Holds

Of the three technologies specifically addressed in the survey, the rank order for adoption or expansion priorities among the HR leadership at participants’ organizations were:

- Mobile technology (40%)

- Social networking or social media (29%)
- Gamification (23%). (See Figure 19.)

This prioritization aligns almost perfectly with the respondents' reported beliefs as to which of the technologies will yield the strongest positive ROI for employers over the long term in engaging employees to improve their health. Only 3% of respondents cited a technology other than these three. (See Figure 21.)

Employers need to better understand the driving factors in their employees' lives to help achieve greater health engagement. This study demonstrates that employers increasingly perceive new and emerging technology as offering opportunities to better reach and support their employees in improving their well-being. Mobile technology appears in the lead as a means to capitalize on highly prevalent, employee-preferred channels and tools.

At the same time, challenges remain: from assurance of ROI to appropriateness of roles in supplying and monitoring these solutions (in light of potential confidentiality concerns). These same issues have challenged the tremendous recent growth of workplace health engagement strategies. As this new research shows, employers seem committed to move forward in pursuing new ways to successfully promote health engagement and achieve desired behavior change and results. Interest in these emerging technology avenues is likely to continue growing rapidly as employers seek to capitalize and leverage innovative technology solutions.

Survey Methodology

For the purposes of this research, the survey questionnaire defined the following terms:

- **Gamification** refers to games and contests, as well as game-like features incorporated into nongame situations (e.g., lotteries, points, quizzes, leaderboards, avatars).
- **Mobile technology** refers to mobile apps and other methods of communication or interaction via a smartphone, tablet or similar wireless device.
- **Social networking or social media** refers to a variety of technologies that support and/or mediate communication between organizations, communities and individuals.

On Oct. 17, 2012, survey invitations were sent electronically to WorldatWork members. Members invited to participate were randomly selected from those who indicated responsibility for benefits and work-life or compensation and benefits. Though the WorldatWork membership largely represents professionals located in the United States, members with responsibility for programs outside the United States were included in the invitation to participate. Additional survey invitations were sent to a large number of Buck Consultants' general contacts as well as to organizations participating in Buck's Global Wellness Survey.

The survey closed on Nov. 19, 2012, with 408 responses. To provide the most accurate data possible, data were cleaned and analyzed using statistical software. After cleaning and duplicates were removed, the final data set contained 368 responses.

The demographics of the survey sample and the respondents are similar to the WorldatWork membership as a whole. The typical WorldatWork member works at the managerial level or higher in the headquarters of a large company in North America.

Survey participants represent a broad cross-section of industries. The median employer size is approximately 2,500 employees, though 11% have more than 100,000 employees and 7% have less than 100 employees. 51% of the participants are multinational organizations.

The frequencies or response distributions listed in the report show the number of times or percentage of times a value appears in a data set. Due to rounding, frequencies of data responses provided in this survey may not total exactly 100%.

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Survey Results

Health Engagement Strategy

Figure 1: Existence of a Health Engagement Strategy

“Does your organization have a health engagement strategy to encourage employees to improve and/or monitor their health?” (n=367)

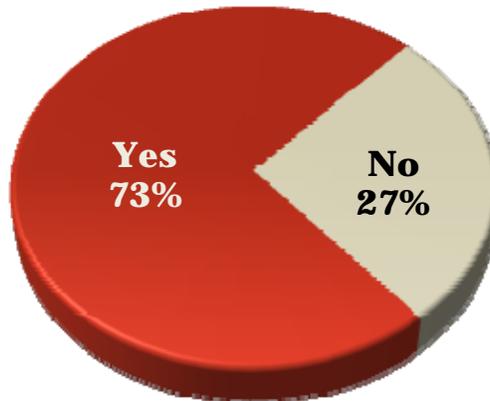


Figure 2: Assessment of Employee Preferences

“To what extent has your organization assessed employee preferences for various types of communications technologies?” (n=368)

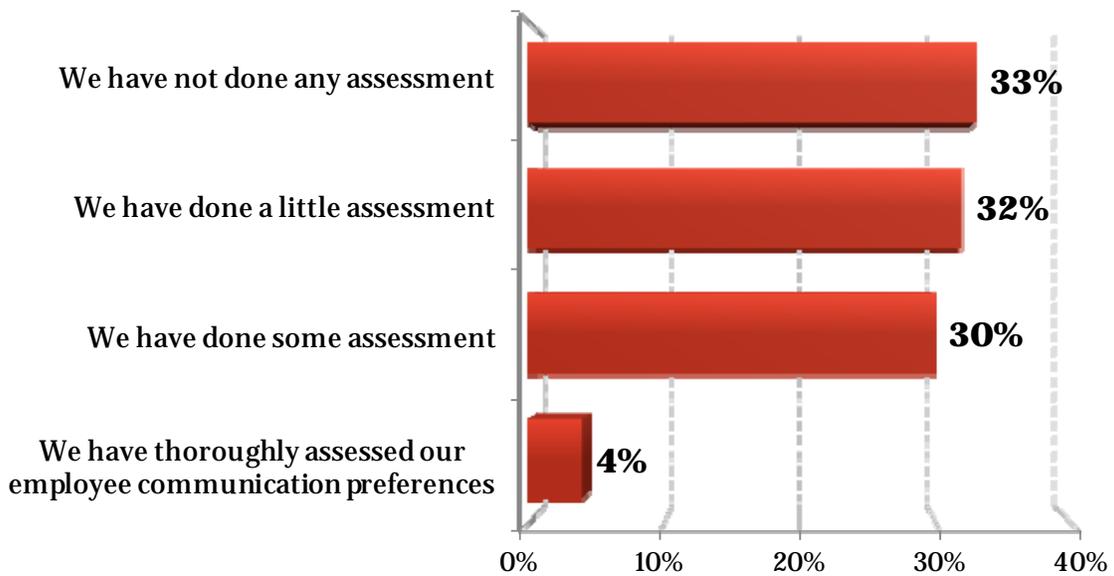
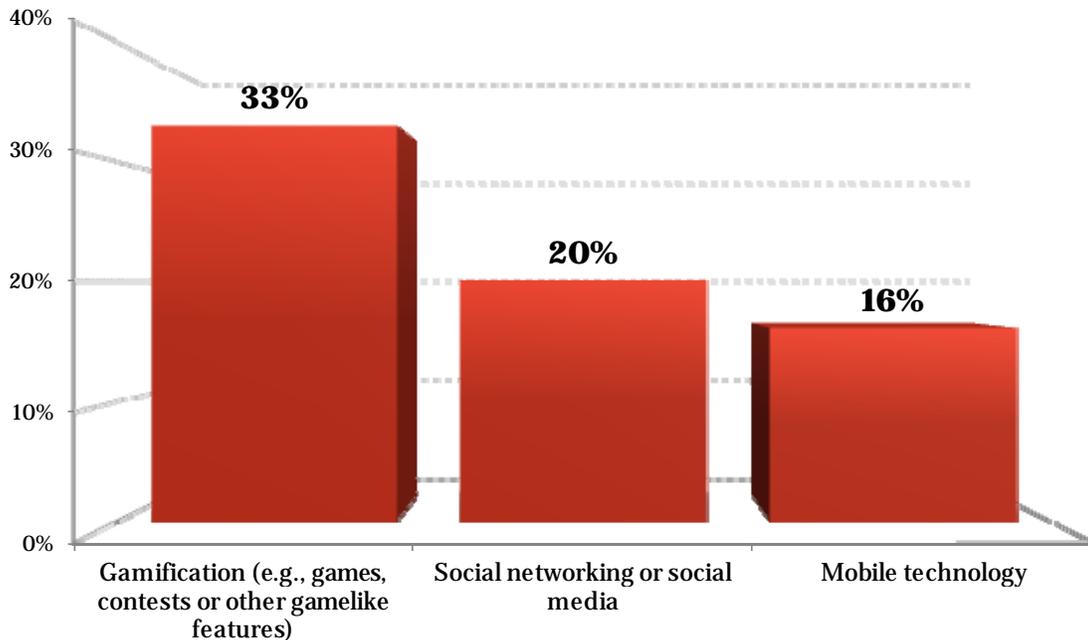


Figure 3a: Categories of Elements Used in Health Engagement Promotion

“Which of the following does your organization use to promote employee health engagement? (Choose all that apply.)” (n=367)



Note that gamification was defined to survey participants as:

Games and contests, as well as game-like features incorporated into non-game situations (e.g., lotteries, points, quizzes, leaderboards, avatars).

This definition correctly implies that gamification is not always technology-based; however, answers to the question above may have reflected the use of mainly technology-driven approaches. Though the overall survey is focused on technology-based engagement approaches, this survey recognized and reinforced that gamification takes many forms. The question reflected in Figure 3b helped further refine gamification approaches, to include activities not driven by technology.

Figure 3b: Specific Elements Used in Health Engagement Promotion

“Through which of the following has your organization promoted health engagement to employees – either directly or through a third-party provider?” (n=328)

	In use now	Will likely adopt within the next year	May adopt within the next 2-3 years	Not adopted now and unlikely to adopt in the future
GAMIFICATION				
Contests (e.g., weight loss, walking)	60%	17%	14%	10%
Game-like features in health and wellness resources (e.g., lotteries, points, raffles, quizzes, leaderboards, avatars)	37%	17%	26%	21%
Games (online or mobile)	12%	15%	37%	37%
One or more of the <u>gamification</u> elements above	62%	31%	48%	8%
MOBILE TECHNOLOGY				
Mobile technology – for wellness or lifestyle tracking or improvement	17%	27%	36%	20%
Mobile technology – for health-care benefits (e.g., apps from health insurers, prescription refills, benefits enrollment)	32%	22%	30%	16%
Mobile technology – for other health-related purposes	14%	24%	37%	25%
One or more of the <u>mobile technology</u> elements above	36%	36%	48%	15%
SOCIAL MEDIA/NETWORKING				
Collaborative content management (e.g., enterprise wiki, intranet knowledge base)	27%	13%	29%	31%
Social networks – external (e.g., LinkedIn group, Facebook, Twitter)	12%	15%	37%	37%
Social networks – internal (e.g., proprietary, Yammer)	19%	15%	31%	35%
Other social media elements on health-related websites (e.g., employee testimonials)	31%	17%	29%	23%
One or more of the <u>social networking or social media</u> elements above	50%	37%	59%	12%
EMAIL MESSAGING	83%	6%	6%	5%
PODCASTS (downloadable audio or video clips)	19%	19%	33%	29%
BLOGS	16%	15%	34%	36%
RSS FEEDS (e.g., syndicated content, Web feeds or channels)	11%	10%	35%	45%
TEXT MESSAGING	7%	11%	39%	43%

Gamification

The questions associated with Figures 4-8 were asked only of those participants that answered “in use now,” “will likely adopt within the next year” or “may adopt within the next 2-3 years” to the following items in Figure 3b:

- Contests (e.g., weight loss, walking)
- Games (online or mobile)
- Game-like features in health and wellness resources (e.g., lotteries, points, raffles, quizzes, leaderboards, avatars).

Figure 4: Parties Communicating with Employees Through Gamification

“Which of the following types of organizations (if any) are communicating directly with your employees, or helping you communicate with employees, through gamification? (Select all that apply.)” (n=294)

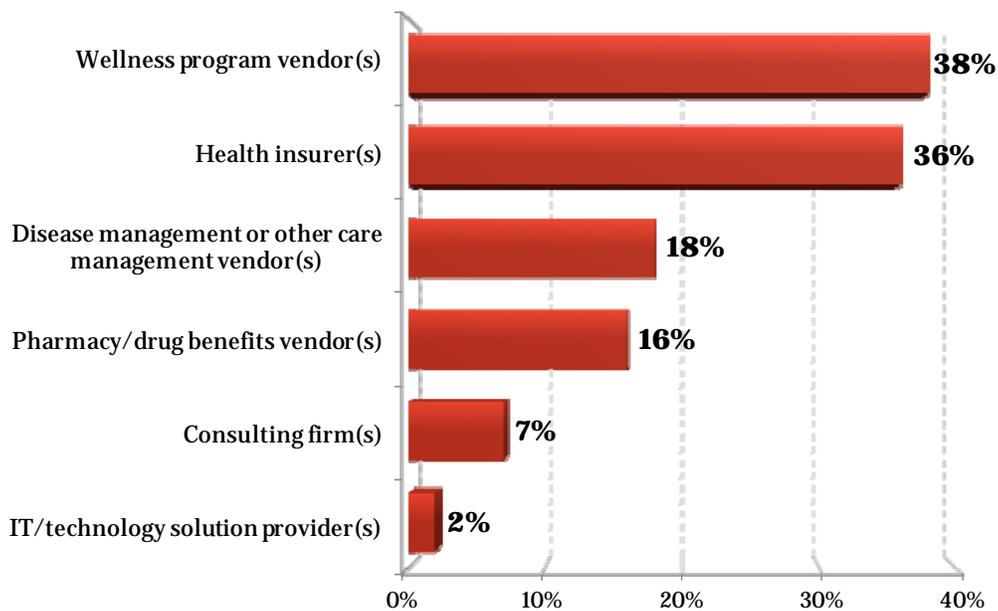


Figure 5: Gamification Audience Targets

“Which audiences is your organization specifically targeting with gamification? (Select all that apply.)”
 (n=211)

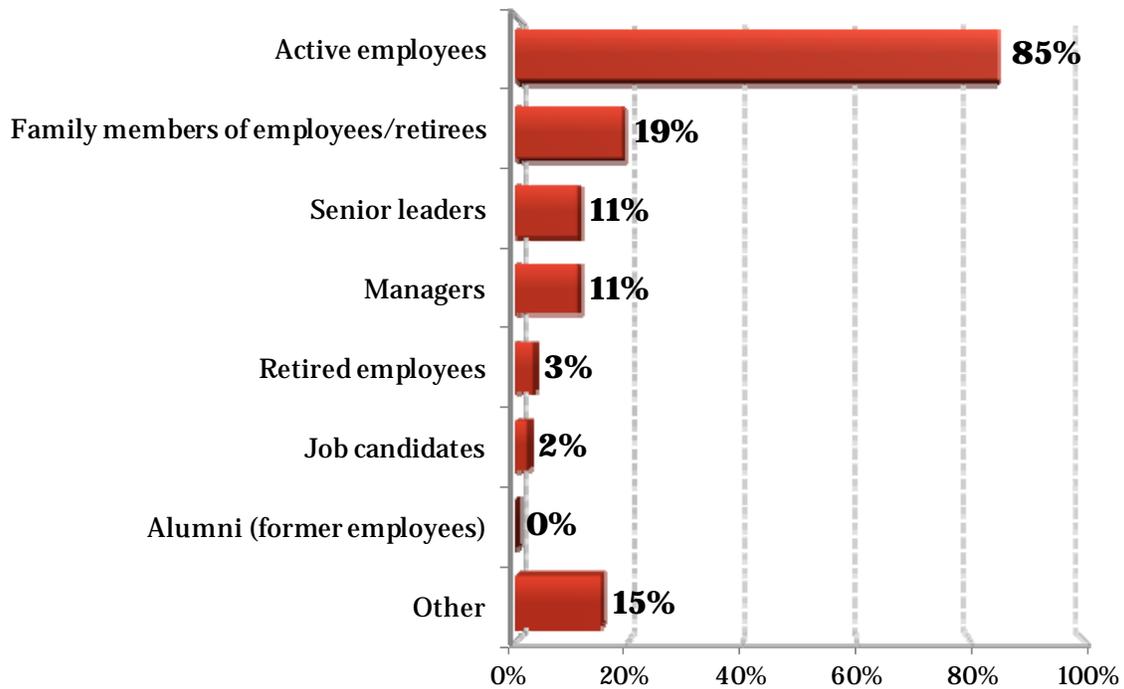


Figure 6: Effectiveness of Gamification

“In your organization’s experience, how effective has gamification been at helping to achieve each health engagement objective below?”

	Very effective	Somewhat effective	Not effective	Not sure
Reduce health-care costs (n=145)	3%	24%	8%	66%
Improve specific health/lifestyle behaviors (n=153)	7%	54%	3%	37%
Help employees become better consumers of health care (n=144)	4%	37%	6%	54%
Get employees’ family members more involved in health and wellness (n=126)	5%	31%	10%	54%
Improve workforce health (n=153)	4%	45%	2%	49%
Improve workforce productivity (n=147)	4%	29%	4%	63%
Enhance attraction and retention of employees (n=142)	5%	23%	6%	67%
Expand existing communications channels (n=139)	9%	37%	7%	47%
Keep up with competitors (n=136)	7%	30%	5%	57%
Enhance organizational image (n=141)	12%	37%	4%	48%

Figure 7: ROI Measurement of Gamification

“Is your organization attempting to measure the return on investment (ROI) of using gamification to improve employee health engagement?” (n=247)



Figure 8: Barriers to Gamification

“How big a barrier has each of the following been in preventing your organization from using gamification to improve employee health engagement?”

	Big barrier	Small barrier	Not a barrier
Too many other higher-priority issues competing for budget (n=97)	71%	19%	10%
Lack of buy-in and support from senior management (n=97)	52%	34%	14%
Lack of guaranteed ROI or a good way to measure effectiveness (n=97)	55%	31%	14%
Concerns over confidentiality and privacy of information (n=97)	35%	44%	21%
IT infrastructure challenges (n=96)	37%	35%	28%
Perception that employees are not ready for such technologies (n=96)	32%	28%	40%
Perception that most employees don't yet have smartphones (n=96)	18%	32%	50%
Perception that these technologies don't fit with the culture of the organization (n=96)	31%	34%	34%
Just never considered it (n=99)	29%	27%	43%

Mobile Technology

The questions associated with Figures 9-13 were asked only of those participants that answered “in use now,” “will likely adopt within the next year” or “may adopt within the next 2-3 years” to the following items in Figure 3, specific to mobile technology for the following:

- Health-care benefits (e.g., apps from health insurers, prescription refills, benefits enrollment)
- Wellness or lifestyle tracking or improvement
- Other health-related purposes.

Figure 9: Parties Communicating with Employees Through Mobile Technology

“Which of the following types of organizations (if any) are communicating directly to your employees, or helping you communicate to employees, through mobile technology? (Select all that apply.)” (n=243)

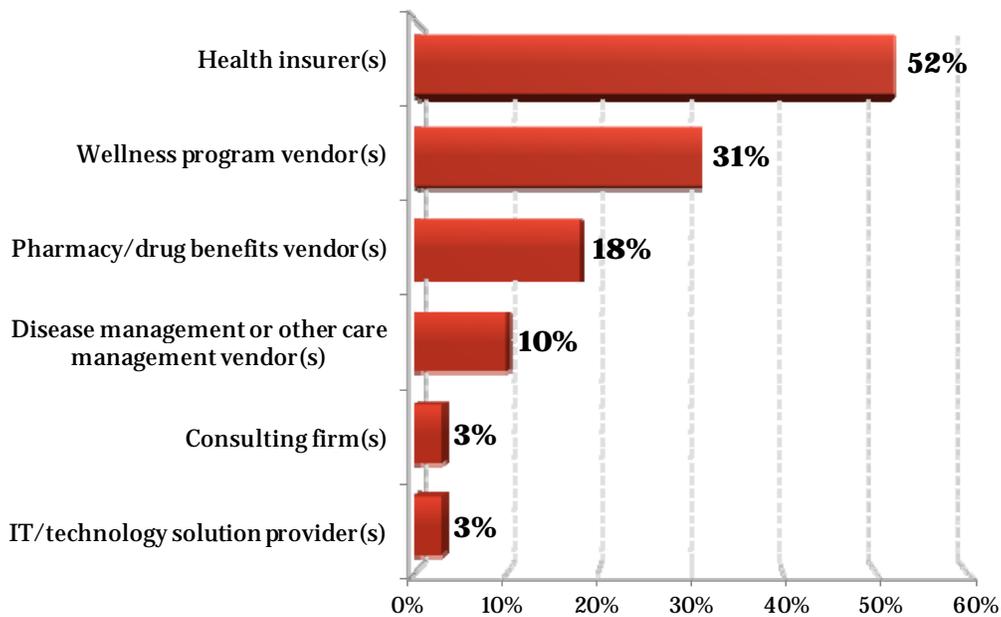


Figure 10: Mobile Technology Audience Targets

“Which audiences is your organization specifically targeting with mobile technology? (Select all that apply.)” (n=193)

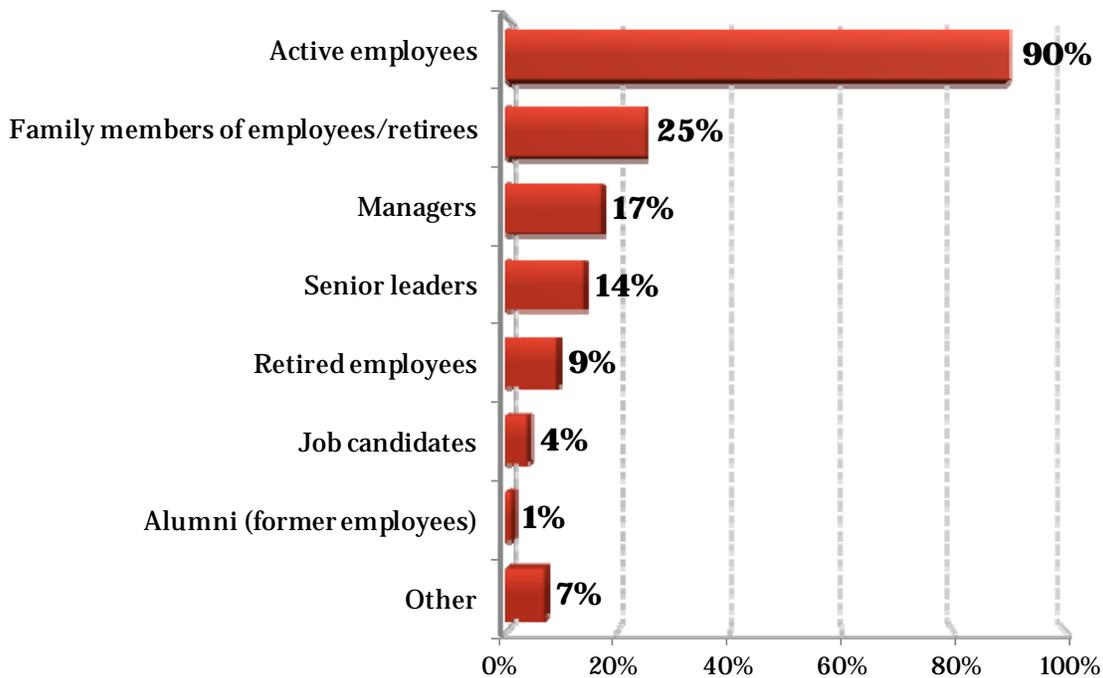


Figure 11: Effectiveness of Mobile Technology

“In your organization’s experience, how effective has your mobile technology been at helping to achieve each health engagement objective below?”

	Very effective	Somewhat effective	Not effective	Not sure
Reduce health-care costs (n=147)	2%	14%	4%	80%
Improve specific health/lifestyle behaviors (n=149)	5%	23%	1%	72%
Help employees become better consumers of health care (n=145)	3%	25%	0%	72%
Get employees’ family members more involved in health and wellness (n=144)	4%	19%	1%	76%
Improve workforce health (n=148)	4%	17%	3%	76%
Improve workforce productivity (n=148)	2%	11%	4%	83%
Enhance attraction and retention of employees (n=149)	2%	12%	3%	83%
Expand existing communications channels (n=150)	9%	26%	2%	63%
Keep up with competitors (n=143)	5%	18%	5%	73%
Enhance organizational image (n=148)	5%	21%	5%	68%

Figure 12: ROI Measurement of Mobile Technology

“Is your organization attempting to measure the ROI of using mobile technology to improve employee health engagement?” (n=265)

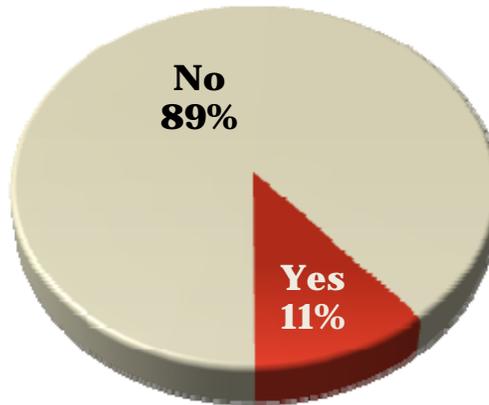


Figure 13: Barriers to Mobile Technology

“How big a barrier has each of the following been in preventing your organization from using mobile technology to improve employee health engagement?”

	Big barrier	Small barrier	Not a barrier
Too many other higher-priority issues competing for budget (n=70)	73%	13%	14%
Lack of buy-in and support from senior management (n=70)	43%	36%	21%
Lack of guaranteed ROI or a good way to measure effectiveness (n=70)	48%	34%	19%
Concerns over confidentiality and privacy of information (n=71)	39%	34%	27%
IT infrastructure challenges (n=70)	44%	27%	29%
Perception that employees are not ready for such technologies (n=70)	21%	35%	43%
Perception that most employees don't yet have smartphones (n=70)	17%	33%	50%
Perception that these technologies don't fit with the culture of the organization (n=69)	28%	26%	46%
Just never considered it (n=68)	27%	28%	45%

Social Networking or Social Media

The questions associated with Figures 14-18 were asked only of those participants that answered “in use now,” “will likely adopt within the next year” or “may adopt within the next 2-3 years” to the following items in Figure 3:

- Social networks — internal (e.g., proprietary, Yammer)
- Social networks — external (e.g., LinkedIn group, Facebook, Twitter)
- Collaborative content management (e.g., enterprise wiki, intranet knowledge base)
- Other social media elements on health-related websites (e.g., employee testimonials).

Figure 14: Parties Communicating to Employees Through Social Networking or Social Media

“Which of the following types of organizations (if any) are communicating directly to your employees, or helping you communicate to employees, through social networking or social media? (Select all that apply.)” (n=237)

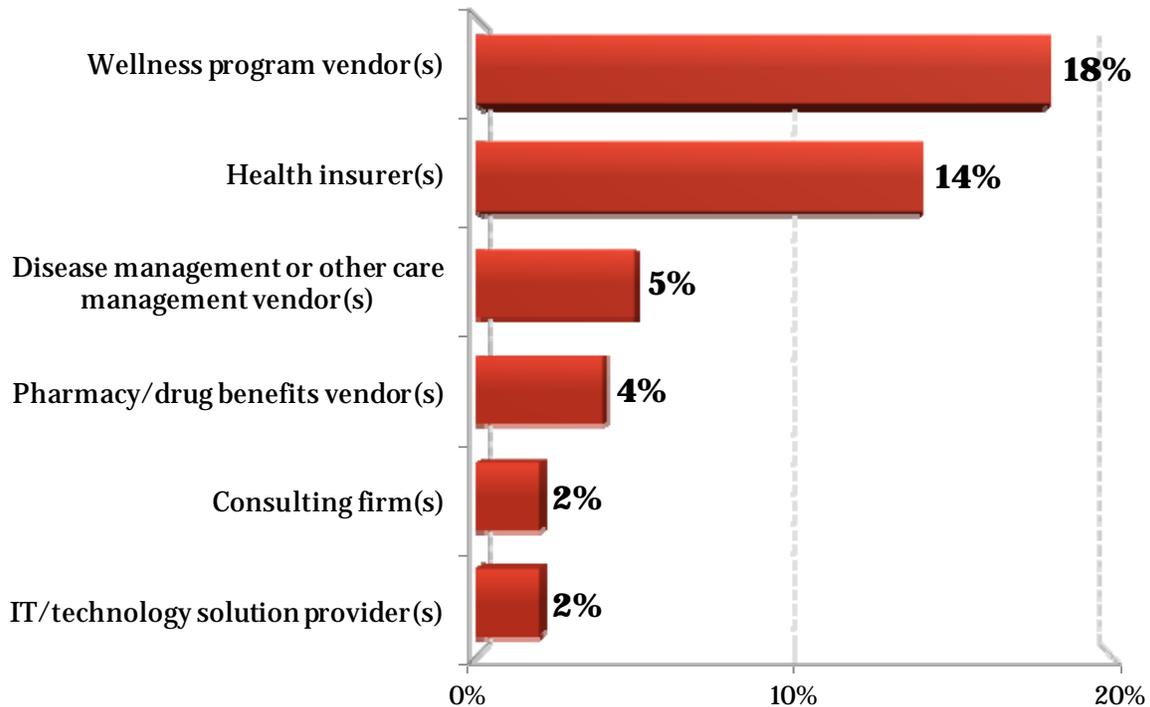


Figure 15: Social Networking or Social Media Audience Targets

“Which audiences is your organization specifically targeting with social networking or social media? (Select all that apply.)” (n=134)

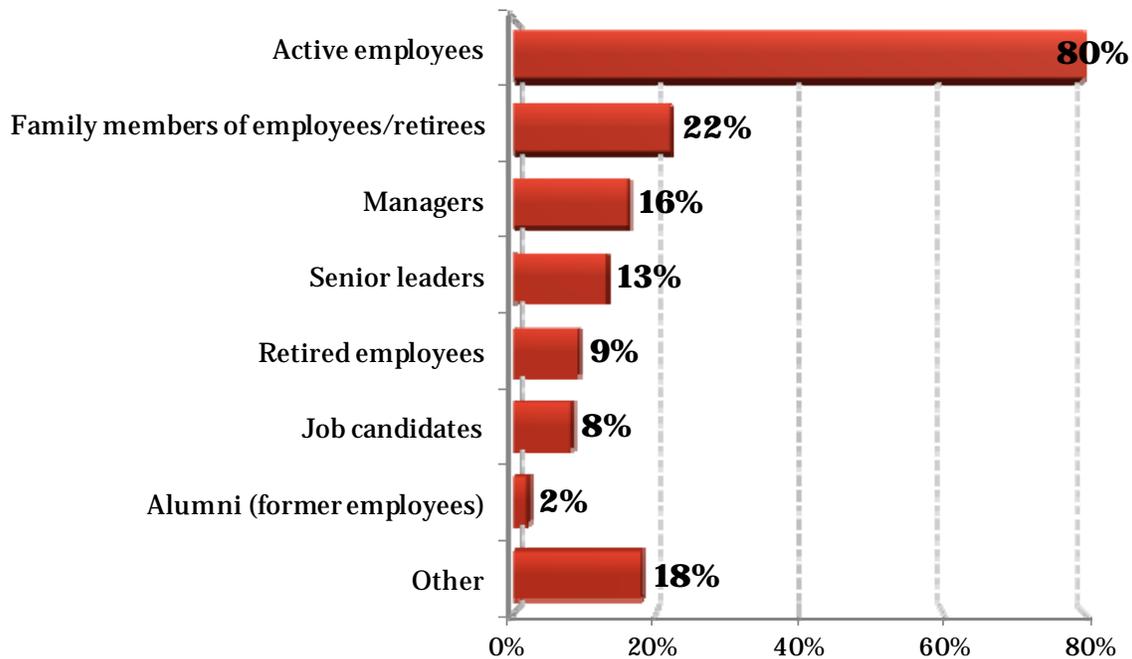


Figure 16: Effectiveness of Social Networking or Social Media

“In your organization’s experience, how effective has your social networking or social media been at helping to achieve each health engagement objective below?”

	Very effective	Somewhat effective	Not effective	Not sure
Reduce health-care costs (n=93)	2%	15%	4%	79%
Improve specific health/lifestyle behaviors (n=96)	4%	31%	2%	63%
Help employees become better consumers of health care (n=93)	5%	28%	1%	66%
Get employees’ family members more involved in health and wellness (n=88)	5%	23%	2%	71%
Improve workforce health (n=95)	4%	19%	4%	73%
Improve workforce productivity (n=92)	5%	13%	3%	78%
Enhance attraction and retention of employees (n=99)	3%	19%	2%	76%
Expand existing communications channels (n=99)	9%	30%	1%	60%
Keep up with competitors (n=96)	4%	24%	2%	70%
Enhance organizational image (n=97)	8%	26%	2%	64%

Figure 17: ROI Measurement of Social Networking or Social Media

“Is your organization attempting to measure the ROI of using social networking or social media to improve employee health engagement?” (n=206)

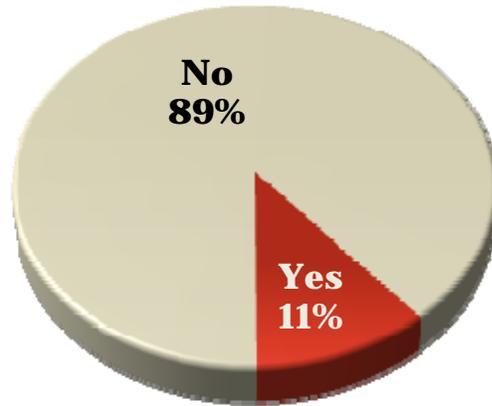


Figure 18: Barriers to Social Networking or Social Media

“How big a barrier has each of the following been in preventing your organization from using social networking or social media to improve employee health engagement?”

	Big barrier	Small barrier	Not a barrier
Too many other higher-priority issues competing for budget (n=138)	68%	18%	14%
Lack of buy-in and support from senior management (n=138)	53%	30%	17%
Lack of guaranteed ROI or a good way to measure effectiveness (n=138)	57%	34%	19%
Concerns over confidentiality and privacy of information (n=139)	51%	27%	22%
IT infrastructure challenges (n=135)	50%	22%	28%
Perception that employees are not ready for such technologies (n=139)	30%	29%	42%
Perception that most employees don't yet have smartphones (n=139)	21%	25%	55%
Perception that these technologies don't fit with the culture of the organization (n=138)	31%	33%	36%
Just never considered it (n=138)	21%	20%	59%

Organizational Priorities

Figure 19: Technology Adoption/Expansion Priorities

“Which of the following technologies would you say is the highest priority by your organization’s HR leadership for either adoption or expansion, specifically to improve employee health engagement?” (n=253)

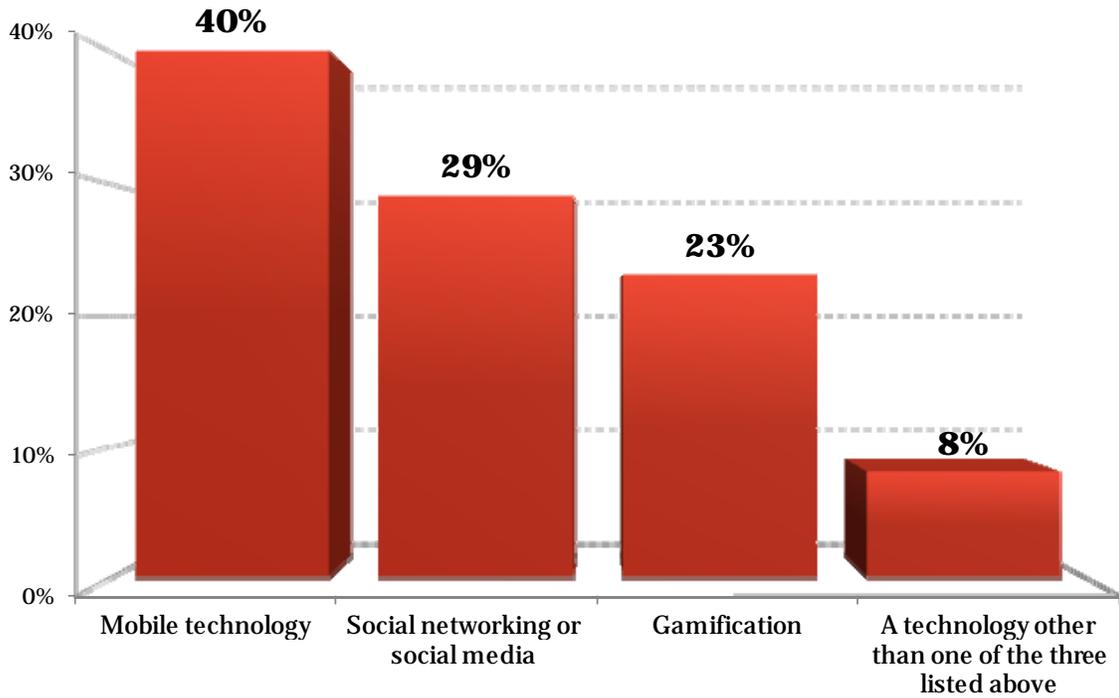


Figure 20: Employee Permission/Encouragement to Use Social Networking or Social Media and Websites for Health Engagement

“Which, if any, of the following applies to your organization?”

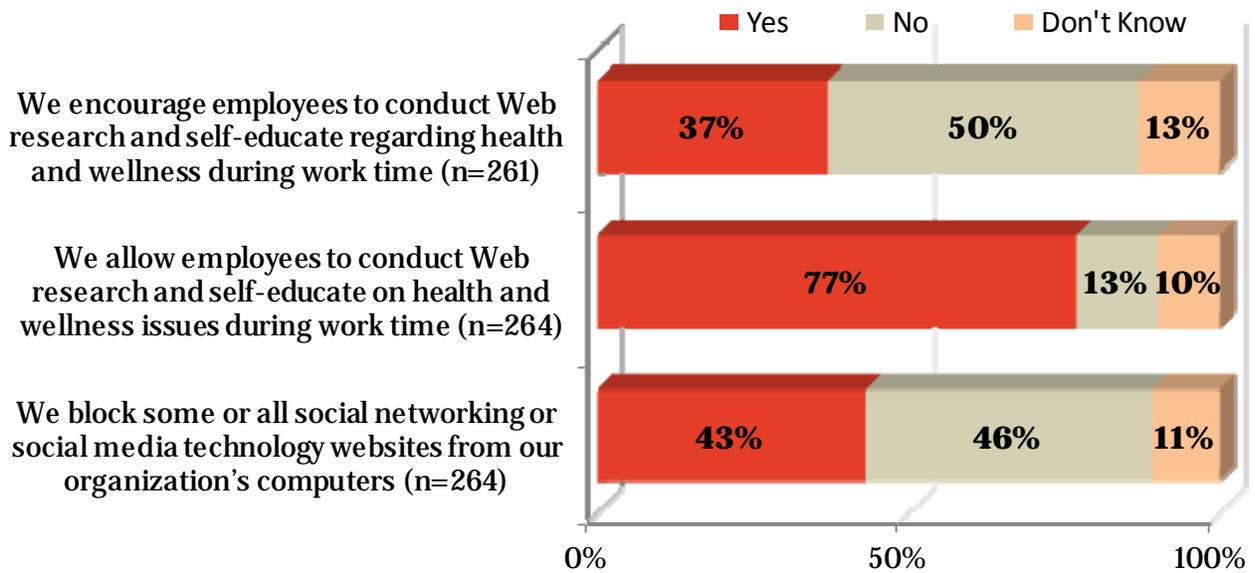


Figure 21: Belief About Future Growth of Technology in Health Engagement

“Which of the following do you believe will be the most frequently adopted technology by employers during the next two years as they engage employees to improve their health?” (n=257)

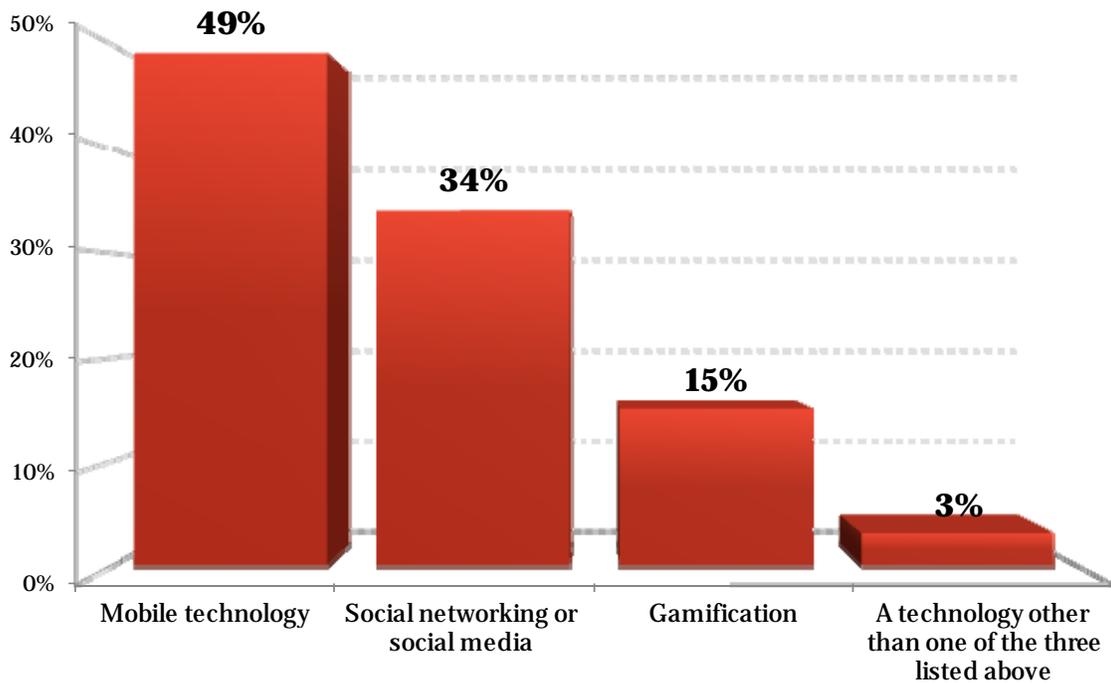
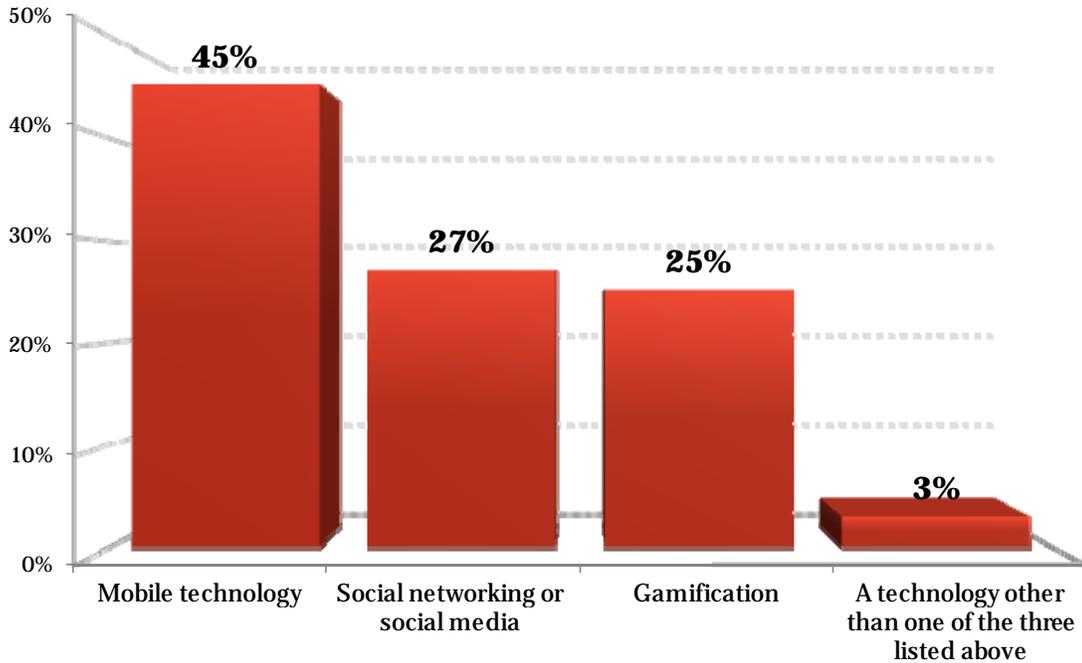


Figure 22: Belief About Strongest Positive ROI Among Technologies
“Which of the following do you believe will yield the strongest positive ROI for employers over the long term as they engage employees to improve their health?” (n=252)



Participant Profiles

Figure 23: Respondents' Responsibility for Health and Wellness Strategy or Communications
“What is your responsibility for organizational benefits or health and wellness strategy or communications?” (n=260)

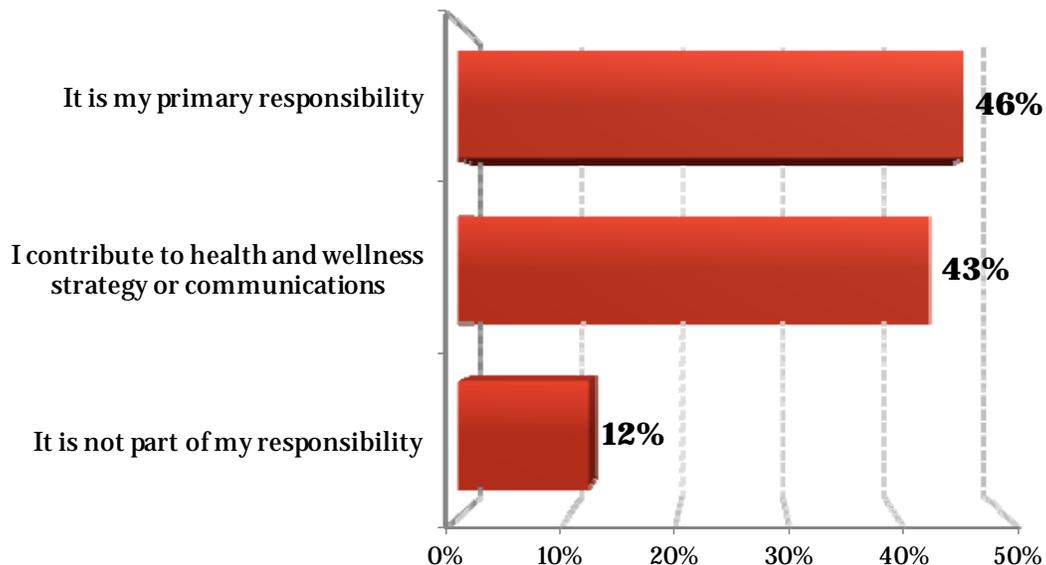


Figure 24: Organization Revenue

“What was your organization’s approximate revenue during the most recently completed fiscal year?” (n=232)

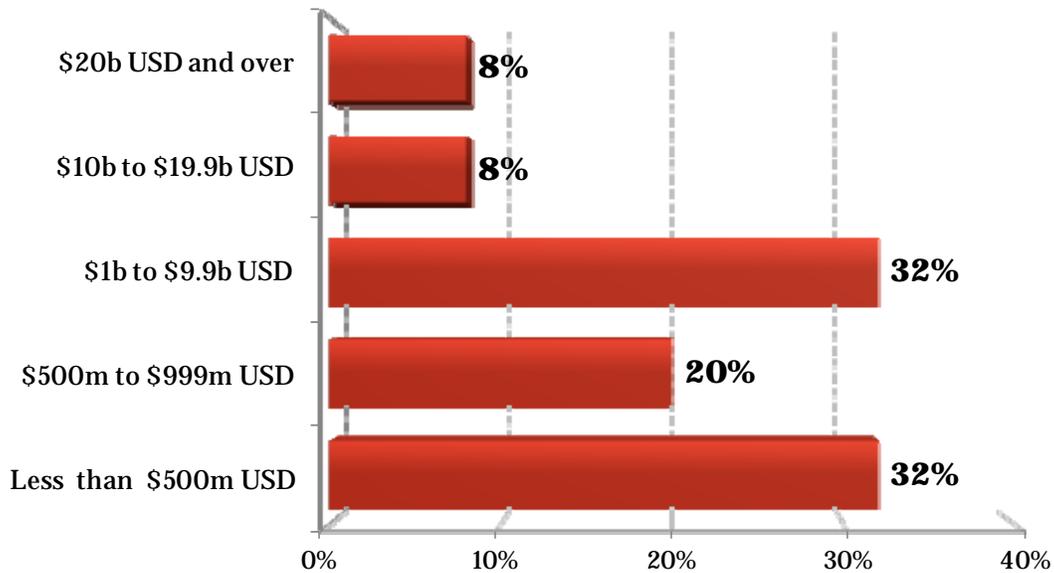


Figure 25: Organization Operational Reach

“Which most accurately describes your organization’s scope of operations?” (n=260)

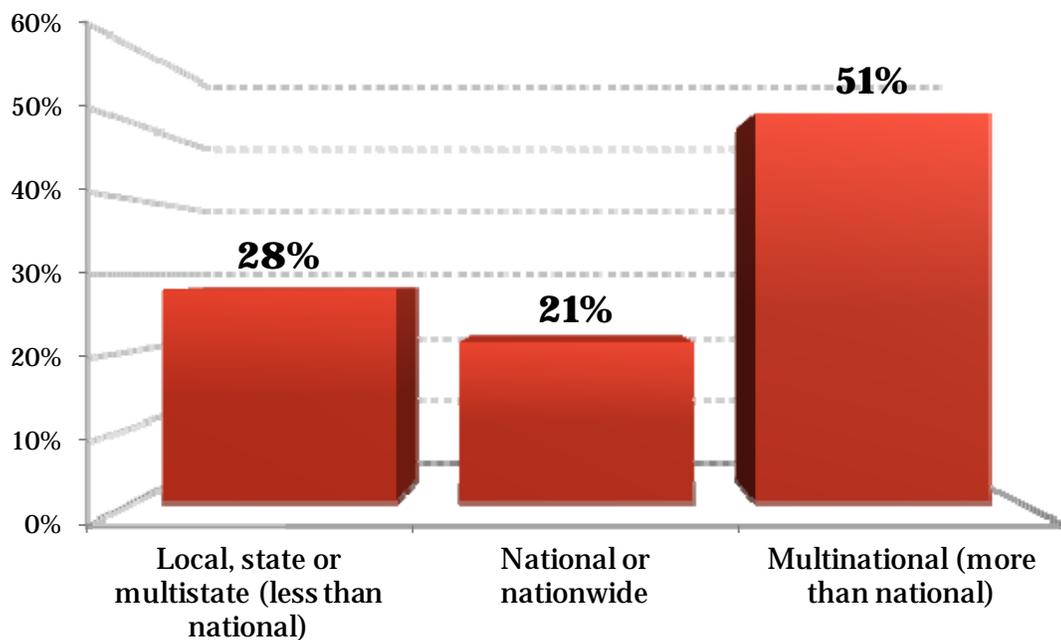


Figure 26: Organization Sector
 “Your organization is:” (n=261)

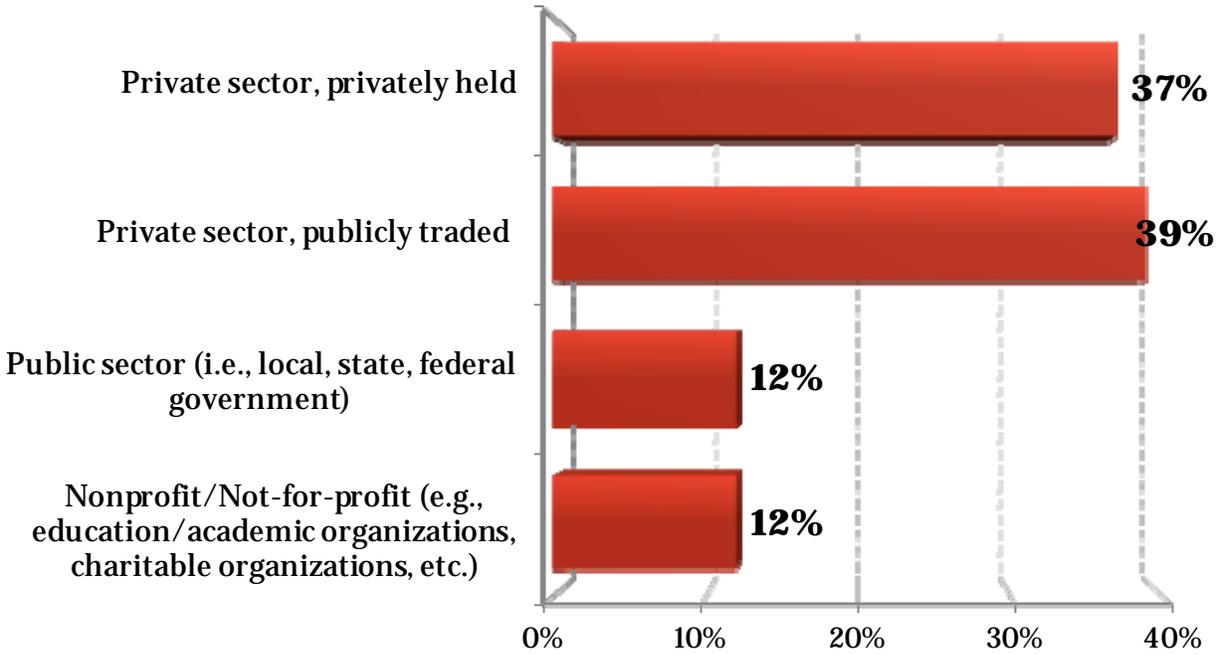


Figure 27: Number of Full-Time Employees
 “Please choose the total number of full-time employees (FTEs) your organization employs worldwide:” (n=259)

	Percent
Less than 100 employees	7%
100 to 499	9%
500 to 999	10%
1,000 to 2,499	20%
2,500 to 4,999	15%
5,000 to 9,999	9%
10,000 to 19,999	9%
20,000 to 39,999	7%
40,000 to 99,999	4%
100,000 or more	11%

Figure 28: Industry
 “What is your industry?” (n=263)

Industry	Percent
All Other Manufacturing	12%
Finance & Insurance	11%
Health Care & Social Assistance	8%
Consulting, Professional, Scientific & Technical Services	7%
Retail Trade	7%
Computer & Electronic	6%
Utilities, Oil & Gas	5%
Information (includes Publishing, IT Technologies, etc.)	4%
Public Administration	4%
Accommodations & Food Services	3%
Educational Services	3%
Other Services (except Public Administration)	3%
Wholesale Trade	3%
Arts, Entertainment & Recreation	2%
Pharmaceuticals	2%
Real Estate & Rental & Leasing	2%
Agriculture, Forestry, Fishing & Hunting	1%
Construction	1%
Mining	1%