

Wearables at Work:

Results from 14 Large Employers

On October 19, 2016 Jiff presented a webinar with Willis Towers Watson on the current state of employer-sponsored wearables. The webinar represented the first unveiling of a major dataset on wearable usage in the workplace.

Employees are ready for wearables.

It's no secret that consumers care a great deal about their health and wellbeing. Just look at thriving industry sectors like weight loss, fitness, and sleep aid. Consumer wellbeing represents a \$135 billion market, more than 33 times bigger than corporate sponsored wellness.¹ Still, according to recent data from Willis Towers Watson, consumers are open to employer support on their journeys toward improved health.



of employees agree or strongly agree that **managing their health is a top priority in their life**



of employees believe **employers should take an active role** in encouraging them to live healthy lifestyles



of employees agree or strongly agree that the **wellbeing initiatives** offered by their employer have encouraged them to **live a healthier lifestyle**



of employees **participated** in any well-being activity or health-related management program in the last year

It's promising that employees increasingly see wellbeing as a top priority and welcome employer support. But most employers still face a serious challenge around engagement.

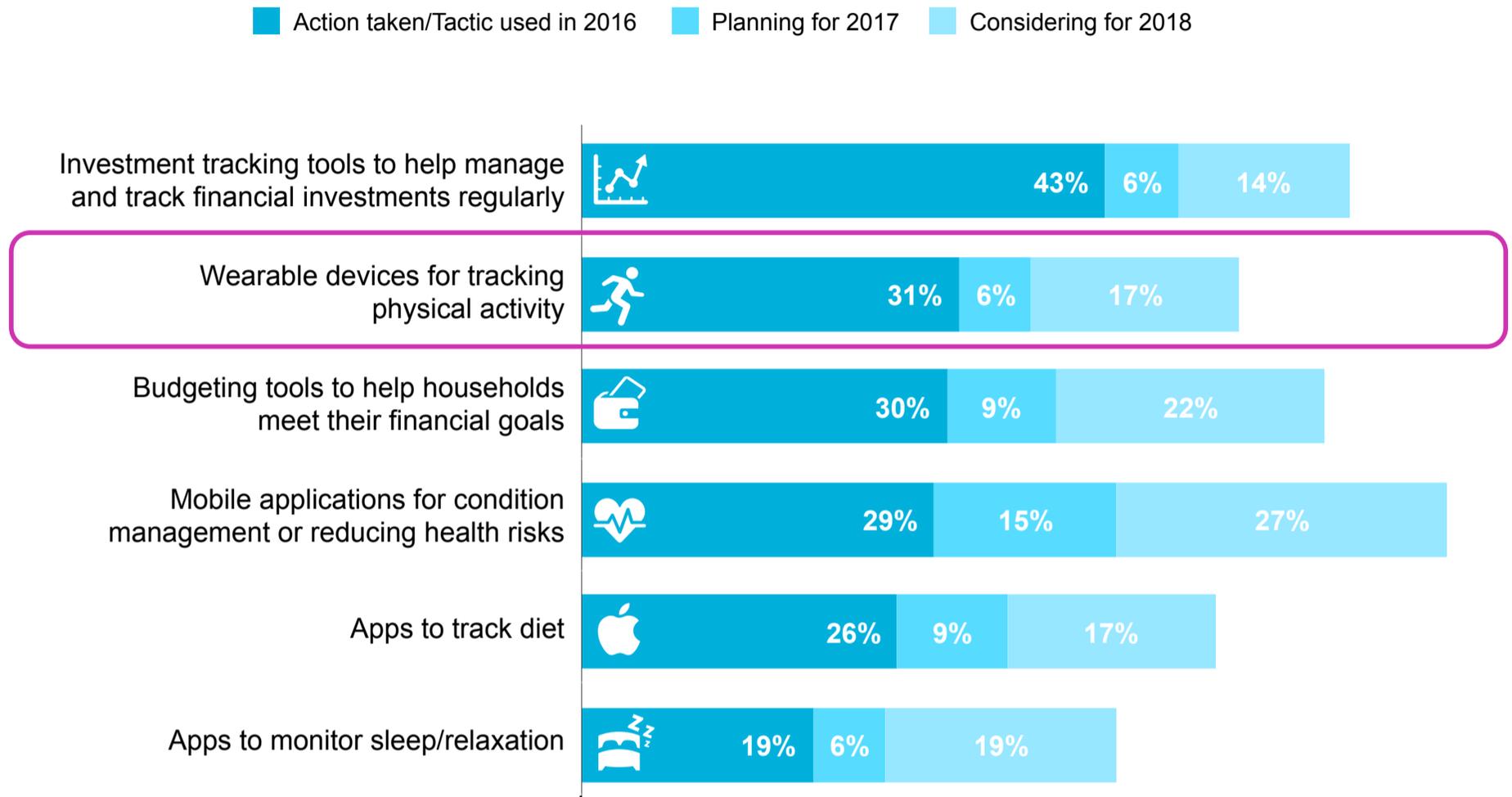
Shelly Wolff
Senior Consultant
Willis Towers Watson

¹ IBISWorld Market Research Reports, 2015

Source for charts: 2015/2016 Global Staying@Work Survey, United States; 2015/2016 Global Benefits Attitudes Survey, United States

Employer sponsorship of mobile apps and wearables is gaining momentum.

Wearable devices are an important part of employers' overall wellbeing strategy. Nearly one out of three large employers surveyed by Willis Towers Watson offered wearable devices for tracking physical activity in 2016, a number that could increase to more than 50% by 2018.



Employers are rethinking the role of technology in their benefit communications. As part of this change, they are reorienting from static program descriptions toward a more “marketing” mindset.

Joshua Ellison
Senior Consultant
Willis Towers Watson

Source: 2016 Willis Towers Watson Best Practices in Health Care Employer Survey
Sample: Companies with at least 1,000 employees

Many employers remain skeptical about wearables.

Despite the promise of wearables, many questions still remain. Some employers are concerned that only young and healthy people will adopt this new technology. Or they worry it's simply a passing fad that will fade away. Others doubt whether employers should even play a role in supporting wearables at all.

Question	Underlying Fear
Who will adopt?	Only young and healthy will adopt, not those who need it most.
Is engagement sustainable?	Wearables will be used only for a few months and then thrown away.
What is the employer's role?	Employers don't have effective tools to encourage sustained participation.

250,000

Employee lives represented

14

Large employers, U.S.-based, various industries

22

Months of continuous data collection

Jiff's proprietary dataset

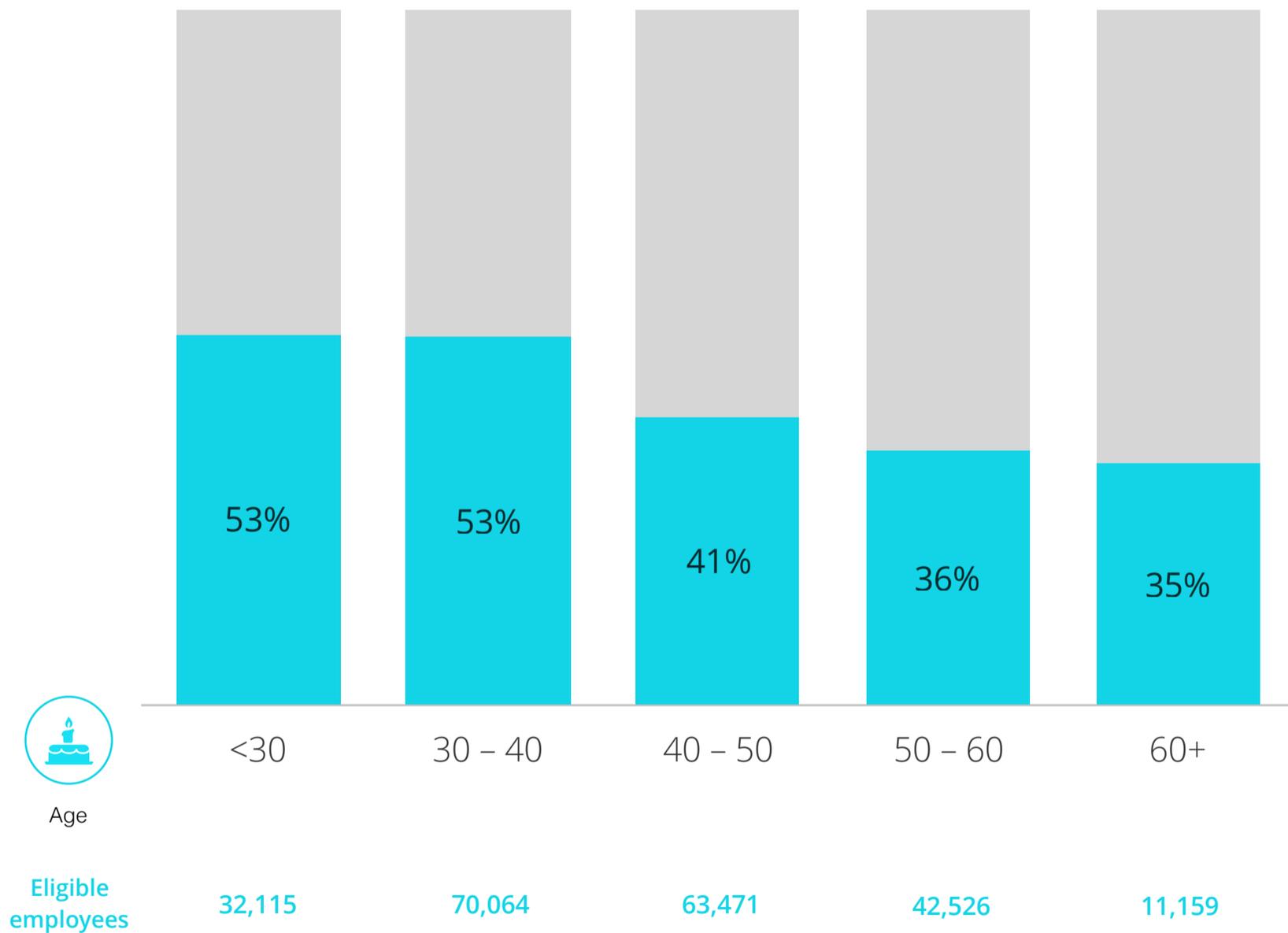
To address these questions, Jiff evaluated data from a subsegment of our customer base, representing more than 14 employers and 240,000 employees, spanning nearly a 2-year period. This is one of the largest and most comprehensive datasets on employer-sponsored wearable programs ever shared with the public.

Who will adopt?

Wearables are adopted by both young and old employees.

Jiff's data analysis shows that while younger employees are indeed more likely to participate in wearable programs, older employees also participate at significant rates. This dispels the myth that wearables are only for the young invincible population.

Percentage of Eligible Employees Enrolling In Jiff



Source: Jiff Employer Customer Base

Collected Q4 2016, n = 219,335 eligible employees with known birthdays, minimum six months post-launch
10 employers represented

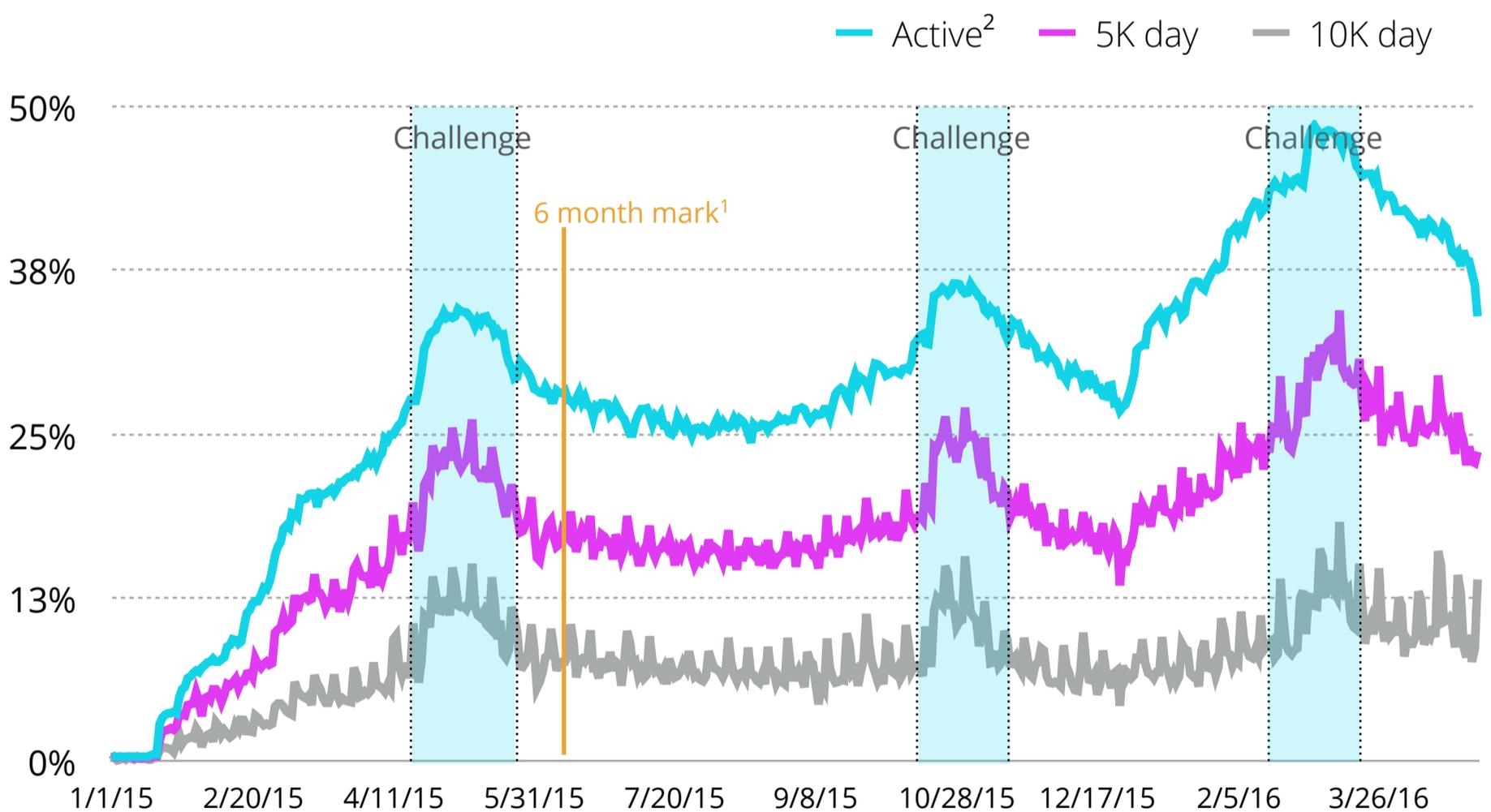
Is engagement sustainable?

Engagement can be sustained for longer than 18 months.

Industry analysts have noted that approximately one-third of wearables users abandon their devices after six months of use.¹ For employers, such low retention would be disappointing, considering it often takes much longer to get people to change their habits.

However, Jiff observed much more sustained participation in wearables among our customers. We attribute this in part to our periodic corporate-sponsored challenges, which created measurable and extended spikes in engagement.

Percentage of Enrolled Employees Achieving Step Threshold



1 Source: Endeavor Partners, *Inside Wearables Part 2*, June 2014 (one-third of wearable users abandon devices after 6 months)

2 User walked at least one step.

Source for chart: Jiff Employer Customer Base
Collected Q4 2016, aggregate enrolled = 51,791

What is the employer's role?

Employers have several tactics at their disposal to drive employee engagement. Our analysis revealed that employers can in fact make a significant impact on engagement. Three tactics stood out: employer-sponsored challenges, device credits, and behavioral incentives. While all of these do require some added investment, many employers believe there is additional VOI (value on investment) from maximizing participation.

Three Employer-Driven Tactics to Drive Engagement



Challenges

Time-bound immersive and social games that encourage healthy actions

Result

During challenge period at large medical products company, Jiff **platform adoption increased by 3x**, jumping from ~12k to 38k enrolled members in less than three weeks¹



Device Credits

Employer subsidies to offset the cost of purchasing wearables

Result

Employers that offer no subsidies averaged 31% employee adoption within three months. But employers that partially subsidize wearables saw their **adoption increase to 47%, a 1.5x improvement.**



Behavioral Incentives

Rewards for taking actions, such as walking a minimum number of steps per day

Result

An employer that offered incentives to walk 5k or 10k steps per day observed **clusters of employees that walked just more than these thresholds**, showing the motivational power of incentives.³

Source: Jiff Employer Customer Base

1 Total population is more than 100k employees

2 n = 190k employees, across more than 7 employers

3 n = 2,696 enrolled users

Employers are only just beginning to explore the promise of wearables.

It's still early days for employer-sponsored wearables, and employers that embrace this new technology often do so for very different reasons. These differences may in fact be justified, since wearables can provide many types of benefits to employers.

Willis Towers Watson has identified four major levers that influence employee productivity: Best Talent, Winning Culture, Right Rewards, and Wellbeing. Wearables have the potential to impact all of these. Over the coming months, Jiff will continue to evaluate wearables in the workplace, with an eye toward these levers.

To learn more, visit:

jiff.com/resources