Health Enhancement Research Organization

## Health, Performance, and Productivity Study Committee

# WEARABLES IN WELLNESS

## *EMPLOYER USE OF WEARABLE TRACKING DEVICES IN WELLNESS PROGRAMS*

JUNE 2015

The **Health Enhancement Research Organization** (HERO) is a non-profit corporation dedicated to the creation and dissemination of employee health management (EHM) research, education, policy, strategy, and leadership. HERO's vision is to promote a culture of health and performance through employer leadership.

The **Health, Performance, and Productivity (HPP) Study Committee** was created to inform HERO members on the state of the evidence about the influence of all aspects of workforce health on performance at work. The committee charter is to document what is known about the HPP connection, identify the gaps in the current evidence base, and identify new opportunities for innovation and research.

## Contributors to This Report

This report is a product of the HERO HPP Study Committee. Survey development, interpretation of key findings, and development of this report was led by HERO staff and members of the HPP Study Committee. Contributors to the report are listed alphabetically below.

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## Survey Partners

HERO administered the survey with promotional support from several partners. Special thanks to the following partners for their efforts to promote the survey to a diverse group of employers.

- Leaders Edge Magazine
- Preventure
- Intermountain Healthcare/SelectHealth
- Utah Council for Worksite Health Promotion

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## EXECUTIVE SUMMARY

The Health Enhancement Research Organization (HERO) monitors emerging trends in the wellness field to identify best practice drivers of employee engagement with their health and population-based health outcomes. One of HERO's major areas of focus is how improvements in employee health and wellness correlate with higher levels of workplace performance and productivity. The use of wearable activity tracking devices (trackers) is one of the most technology-driven approaches currently being used to promote employee health and well-being. HERO designed *The HERO Wearable Tracking Device Survey* to better understand how employers are incorporating wearable tracking devices into their health management or "wellness" programs as well as to identify gaps in the current evidence base and opportunities for further research and application.

This web-based survey addressed seven primary topics to explore employer objectives, methods and evaluation efforts around the use of trackers within a wellness initiative. The survey also assessed employee use and feedback regarding trackers. The survey was administered October 2014 through January 2015, collecting information from 188 responding organizations representing a range of organization industries and sizes (63% had fewer than 5,000 employees, and 29% had more than 10,000 employees). A detailed report follows the key findings summarized below.

- **Employer Sponsorship of Trackers** - Nearly one half of the 188 employers (46%) responding to the survey offered or sponsored some type of tracker as part of a wellness program, ranging from more advanced trackers such as Fitbit® devices (77%) to simple pedometers (near 24%).
- **Subsidizing Trackers -** A significant majority (83%) of employers subsidized trackers: fully (51%), partially (12%), or using alternative funding methods (20%), which are detailed in the full report. Most employers (91%) permitted an employee to use a tracker device they already owned.
- **Eligibility Policies -** Nearly three quarters (74%) of employers had eligibility policies that allowed both full-time and part-time employees to participate in tracker-supported

programs. One quarter (24%) of employers offered trackers only to full-time employees, and one quarter (24%) offered programs to both spouses and dependents.

- **Requirements for Eligibility** – Eligibility to receive a tracker ranged from nearly half (46%) of employers simply requiring employee registration for the tracker device, to 16% requiring completion of a health assessment survey or screening. In addition, 12% of employers tied eligibility to participation in another activity/program, and 18% had other requirements.
- **Registration and Activation of Tracker –** A majority of organizations (55%) reported that more than half of eligible employees registered to receive a tracker. Additionally, 68% of organizations reported that a majority of those receiving a tracker successfully activated and used their trackers.
- **Duration of Use -** Of initial device users, more than half the employers (59%) reported average employee use of a device for three months, and 54% of employers reported that more than half of their employees continued use of tracker device after six months.
- **Activities to Support Use -** Employers supported use of the trackers in several ways: through individual use (74%), team (71%) and departmental (35%) challenges, usage incentives (59%), and by setting organizational goals (48%) for tracker use.
- **Objectives for Use –** When asked why they incorporated trackers into their wellness program, 94% of employers aimed to increase physical activity. Additional objectives included increasing engagement with health (77%), adding excitement and fun to the wellness program (75%), improving wellness program participation (59%), improving employee performance and productivity (51%), and controlling health care costs (34%).
- **Measures to Assess Tracker Program –** When asked about their program reporting efforts, 65% of employers reported some assessment metrics were reported with the most common metrics being number of participants (84%), total and average steps (66%), participant satisfaction (57%), impact on health and health risks (50%) and duration of active use (39%).
- **Measures to Assess Program Impact –** In addition to aggregate reporting metrics, some employers are also capturing end-user data to support broader program evaluation efforts. Participation (95%) and completion (70%) data were two areas most

frequently captured in addition to user demographics (61%). More than half of employers that captured end-user health profile data focused on biometric screening data (57%), and participant satisfaction (57%).

- **End-User Perceptions –** When asked about end-user engagement and feedback, 53% of employers reported high initial and sustained interest in tracker-supported programs while 38% reported high initial with low sustained interest.
- **Data Privacy Concerns** - 82% of employers reported end-users did not raise any concerns regarding data privacy.

In summary, this survey-based effort indicates that both employers and employees have a strong and growing interest in using wearable tracking devices to enhance wellness programs. The majority of companies currently offering tracking devices intend to continue doing so, and many additional companies plan on beginning to offer the devices in the future.

Areas for future industry research include

- Understanding the types of individuals that are drawn to or opt out of programs that use trackers;
- Addressing perceived barriers by some employers, such as insufficient literature on the value and outcomes associated with trackers;
- Concern that the program may capture only those individuals already engaged in physical activity; and
- Uncertainty about the impact of using trackers and behavior change over time.

In addition, as the capabilities of these wearable devices continue to rapidly evolve, they will have features that may not be directly health related yet may have a significant effect on productivity and performance, and so understanding their impact will be essential.

## INTRODUCTION

The use of wearable tracking devices (trackers) in the workplace has increased substantially in the past few years. According to a 2013 survey by technology consultant Endeavors Partners,[1] one in ten Americans over age 18 owns a wearable physical activity tracker. Another report estimates US employers will integrate more than 13 million wearable health and fitness tracking devices into their employee wellness programs by 2018.[2] As trackers infiltrate our personal and professional lives, they offer a mechanism to engage the US workforce in healthy behaviors such as increases in physical activity and weight loss. Increasing consumer and corporate interest is generating substantial revenue for device manufacturers. A Deloitte study[3] predicted sales of trackers to reach 10 million devices in 2014 with projected revenue of $3 billion. By 2018, it is estimated that the wearable tracker market will be worth close to $13 billion dollars.[4] Fitbit alone was responsible for approximately 58% of tracker sales in 2014.[5] One of the reasons for this growth, according the 2014 Endeavor Partner report,[6] is continuous advancements in the technology of tracking devices, watches and clothing that will have stronger bio-sensing and processing capabilities allowing broader application to issues such as stress and anxiety.

Many employers have already made significant investments in trackers as a way to engage their employees in healthy behaviors. From subsidizing a portion of the cost of trackers as an incentive to employees to enroll in activities that promote health (e.g., exercise challenges), to giving trackers away as an incentive for participating, the possibilities to utilize trackers in a wellness program are substantial.

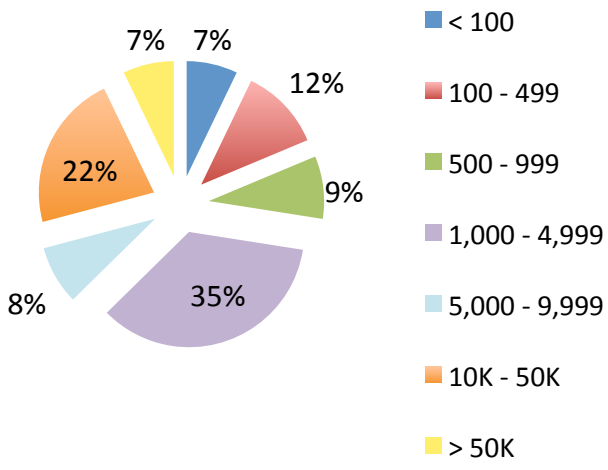
In order to understand how employers are using the technology of wearable fitness trackers as part of their health enhancement and wellness programming, HERO launched a web-based survey delivered to employers from October 2014 to January 2015. The purpose of this report is to communicate results of this survey and initiate a process to identify the gaps in the current evidence base, as well as uncover future opportunities for research and application.

## METHODS

In October 2014, HERO launched a web-based survey to understand how employers are using the technology of activity tracking devices (trackers) as part of their health enhancement and wellness programming. The survey was distributed to a convenience sample using a diverse array of promotional communications including HERO's contact database, 2014 HERO Forum attendees, readers of *Leader's Edge Magazine*—a professional industry publication by The Council of Insurance Agents and Brokers, and members of the Utah Council on Worksite Health Promotion. In addition, some HERO member organizations promoted the survey to their clients.

The survey was completed by 188 employers between October 2014 and January 2015. The majority of responding organizations (63%) employed fewer than 5,000 employees and the remainder (37%) represented organizations with more than 5,000 employees. A creditable minority (29%) of employers with more than 10,000 employees is represented in the findings.

**Figure 1. Number of full-time employees at surveyed organizations**



The survey addressed seven (7) primary topics including:

1. Prevalence, employer objectives, and evaluation technique for offering trackers as a wellness initiative
2. Type, brands and quantification of trackers currently being supported in the employer workplace
3. Presence of employer subsidy for tracker use by the employee population
4. The eligibility factors and requirements established by employers for employees to receive a tracker
5. Participation and relative use of trackers for those participants who have received them in accordance with the wellness initiative
6. Employee feedback to tracker use as part of the company's wellness program
7. Perceived primary barriers to offering trackers as part of employer well-being programs

## DETAILED FINDINGS

In recent years, some of the most innovative approaches in employee wellness have included the application of the fast-growing consumer market of wearable tracking devices. The tracking devices—often called "trackers," "wearables," or "wearable computing"— are being promoted as supportive technology to monitor and track fitness-related metrics such as distance walked or run, steps taken, calorie consumption, and sleep which ultimately are intended to help individuals improve their health.

The *HERO Wearable Tracking Device Survey* aimed to assess employer use of trackers as part of their wellness program, identify gaps in the current evidence base, and identify new opportunities for research and application. The efficacy of trackers—forecasted to exceed

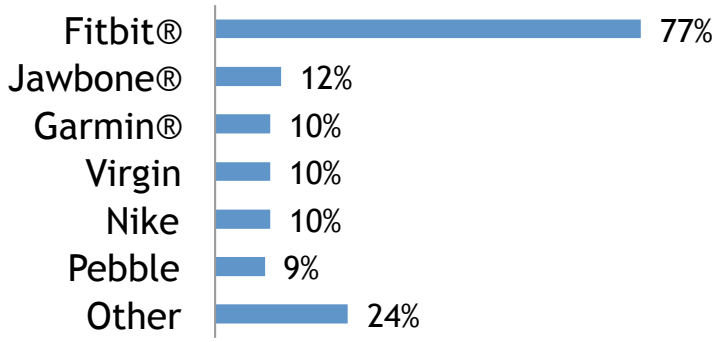
68.1 million units shipped in 2015 and grow to 91.3 million in 2016[7]—requires scrutiny to explore the connection to health, productivity, and performance.

### *Prevalence and Type of Device Used*

When respondents were asked to indicate a company's policy to offer or sponsor some type of tracker with their wellness program, the group was split, with 46% of organizations indicating that they currently include trackers in their wellness program and 54% indicating they do not include trackers in their wellness program. In an open-ended question asking organizations that do not use trackers why wearable trackers had not yet been adopted for use, employers cited cost as the number one reason. A Tech Pro Research survey[8] conducted in April 2014 found a much lower rate of tracker adoption than did the HERO survey, with only 11% of Tech Pro's respondents reporting use of trackers in their organization. Another 25% reported having plans to use trackers but had no budget allocated to them, while 64% had no plans to use trackers at their company.

Of the trackers listed as being used by the HERO survey respondents, the dominant tracker is the Fitbit (77%) with all others grouped closely. The "other" category was dominated by pedometer use but also included several others (Gold's Gym Health Tracker, GCC Pulse, BodyBugg, BodyMedia, Fitbug, MOV Band, and iFit Active Band).

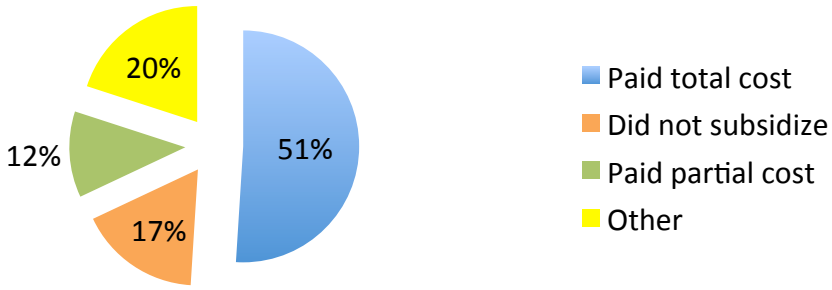
**Figure 2. Types of fitness trackers used by surveyed employers**



### *Subsidized Use*

The survey asked respondents to indicate whether or not their company contributed to the cost of the tracker for employees—a resounding majority (83%) said they subsidized either part or all of the cost of the designated device. About half of that group (51%) paid the total cost of the device, 12% paid a partial cost, and 20% provided other types of financial support towards trackers. Alternative forms of financial support included awarding wellness points and incentive rewards toward discounted cost of a tracker, raffle giveaways or prizes, and negotiated discounts. Additionally, 91% of respondents encouraged individuals to use a tracker that they already owned to participate in the wellness program.

**Figure 3. Employer subsidization of wearable fitness trackers**

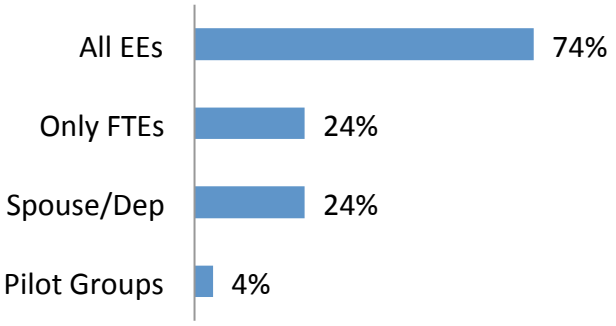



BYOD, or *Bring Your Own Device*, is common in the marketplace today, according to a number of sources. According to Acquity Group,[9] 22% of consumers now have or plan to get a device and that number is projected to double by 2019. BYOD creates a new challenge for Information Technology departments in an employer setting in terms of privacy and enterprise security, as well as a challenge for wellness program suppliers, with the question of how to upload, synchronize and analyze data from many sources. A benefit of the BYOD trend is its ability to allow for end-user choice per preferred features. According to Tech Pro Research,[8] 39% of users prefer trackers that are not visible, while 26% do want to flaunt their tracker fashion. More than a third of Tech Pro's survey group (35%) had no preference as to visibility.

### *ELIGIBILITY*

For companies supporting the use of trackers in their wellness efforts, the majority (74%) indicated they had an eligibility policy that included all full-time and part-time employees. Additionally, 24% of the responding organizations allowed dependents and spouses of their employees to participate in the tracker-supported wellness program. The remainder of the responding companies provided trackers only to full-time employees (24%) or to pilot groups (4%).

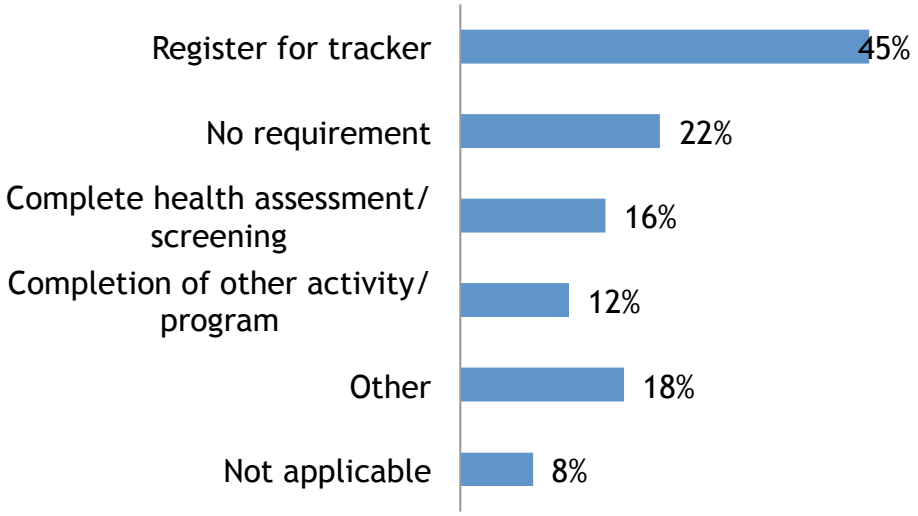
**Figure 4. Eligibility for employer-sponsored wearable fitness trackers**




N=68 Organizations, Check all that apply

In addition to being employed by the company or being a dependent / spouse of an employee, some organizations imposed additional requirements for individuals to receive a tracker. Nearly a fourth of responding organizations (22%) had no additional requirements to receive a tracker, however, 45% required eligible individuals to register to receive a tracker, and 16% required completion of a health assessment survey or screening. A less frequent requirement reported by respondents included requiring individuals to complete another activity or program. Employer responses to "other" requirements included enrollment in the employer-sponsored health plan, participation in the company wellness program, participation in a physical activity challenge, or signing a health-related pledge.

**Figure 5. Eligibility requirements to receive a wearable fitness tracker**



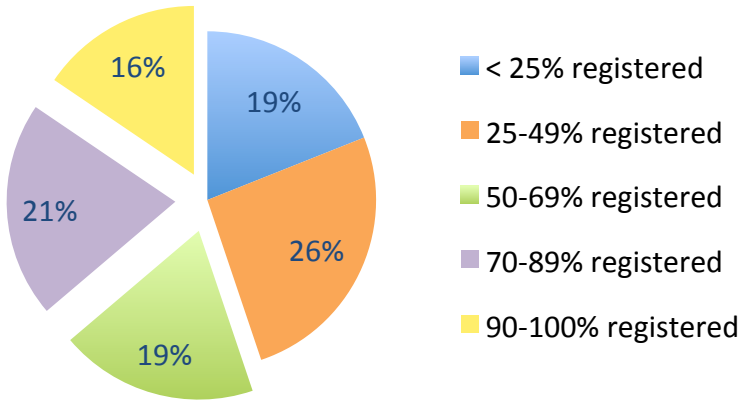

## *PARTICIPATION*

Participation in wearable tracker programs was assessed by asking responding organizations to provide information that included

- percentage of employees that registered to receive a tracker
- percentage of those receiving a device that activated and used it
- average length of time and sustained population use of a tracker

A majority of organizations (55%) reported that more than half of eligible employees registered to receive a tracker. However, this means that for most organizations, at least half of the employees that were eligible to receive a tracker did not register to receive one. There are many possible explanations for this finding, including the possibility that eligible employees decided to use a tracker that they already had rather than request the one offered to them by their employer. Other plausible explanations for this finding are that eligible individuals were not interested in the program, did not like the idea of wearing a device for a variety of reasons, or were concerned about data privacy.

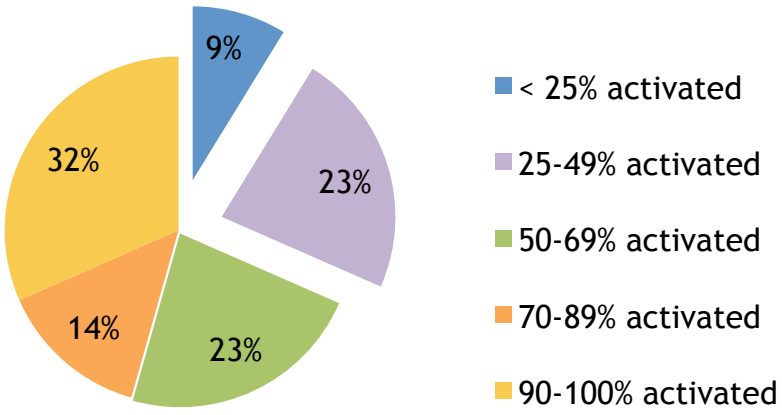
**Figure 6. Employer reports of tracker registration by eligible individuals**




Pie chart exceeds 100% due to rounding

A greater ratio of organizations (68%) reported that the majority of individuals registering for and receiving a tracker successfully activated and used it.

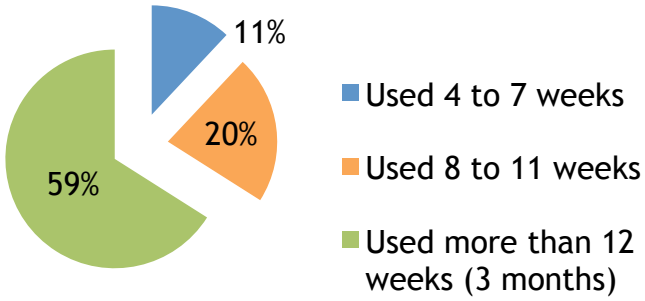
**Figure 7. Employer reports of registered users activating and using trackers**




Pie chart exceeds 100% due to rounding

Employers were asked to report the average duration of employee use of trackers and 59% of organizations reported that, on average, participants used their device for more than 3 months.

**Figure 8. Average end-user use of trackers**

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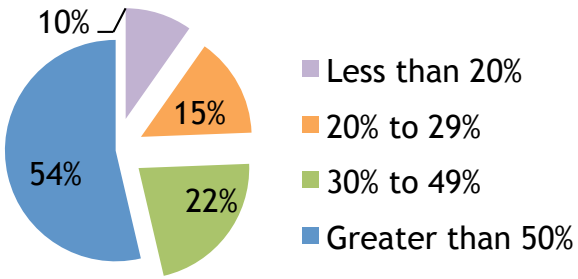
Employers were also asked about sustained use of trackers and 54% reported that more than half of their initial users were still using the tracker 6 months after the program began. These utilization statistics indicate that when offered as part of an employer-sponsored wellness program, individuals may use trackers for a greater length of time than observed in the general consumer marketplace. According to an Endeavour Partners survey, a majority of US adults stopped using a fitness tracker that they had been using and one-third of them did so within six months of activating the tracker.[6] The longer-term use of trackers observed in the HERO survey may be attributed to employer support of the tracker at work and integration of trackers into a broader wellness program, but more research is needed to substantiate this hypothesis.

**Figure 9. Reported use of trackers after six months**



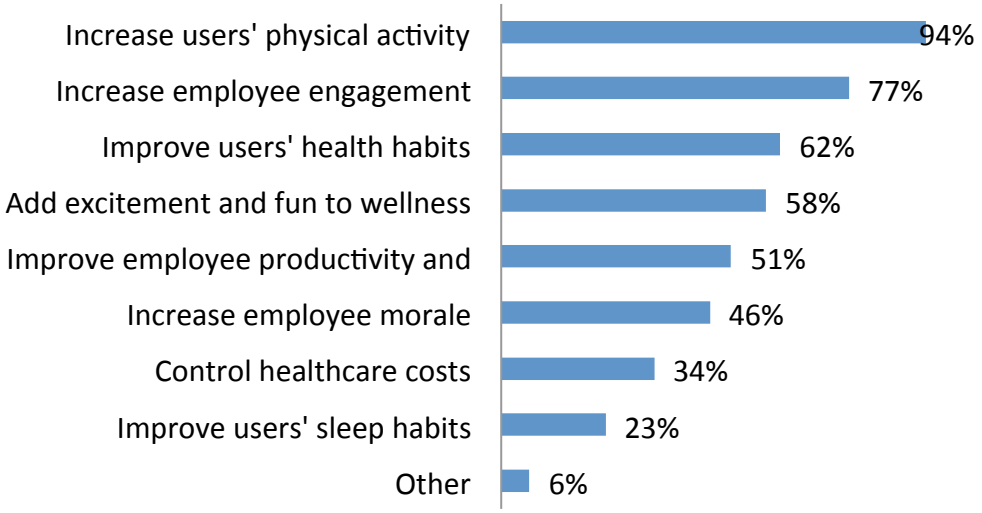

Pie chart exceeds 100% due to rounding

A majority of survey respondents indicated that to increase participation they had incorporated "individual challenges" (74%) as a support mechanism. "Team challenges" (71%) were also a dominant support feature. One respondent said: *"The best part was increased camaraderie and morale."* Additional strategies to encourage tracker use included: providing incentives for usage (59%), setting an organizational goal (48%) and departmental challenges (35%).

### *Organizational Objectives*

The survey included a listing of potential objectives or reasons why employers incorporate trackers into their wellness efforts. The most frequently identified objective was to "increase users' physical activity" (94%), followed closely by "increasing engagement with health" (77%), and "adding excitement/fun to the wellness program" (75%).

**Figure 10. Employer reasons for offering trackers**

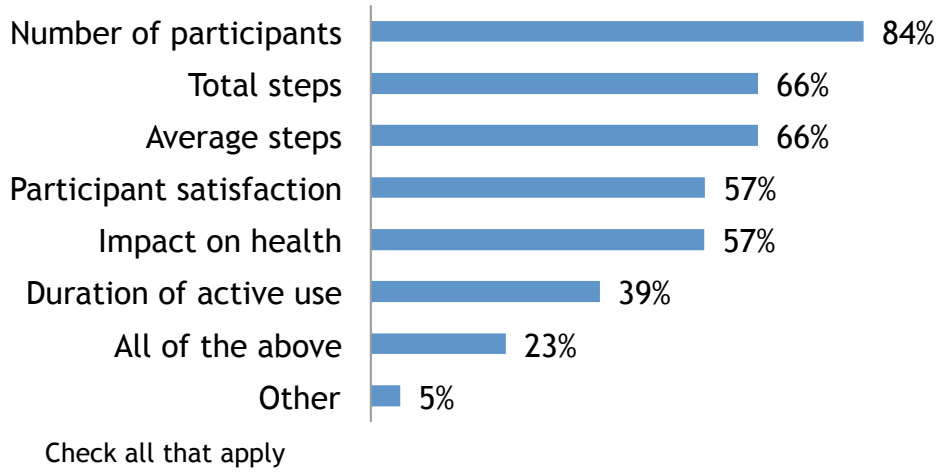



Most employers indicated that the tracker would help them validate employees' claims of activity; although one indicated that "you manage what you measure" applies, in that trackers increase employee awareness of their activity levels.

## *Evaluation Practices*

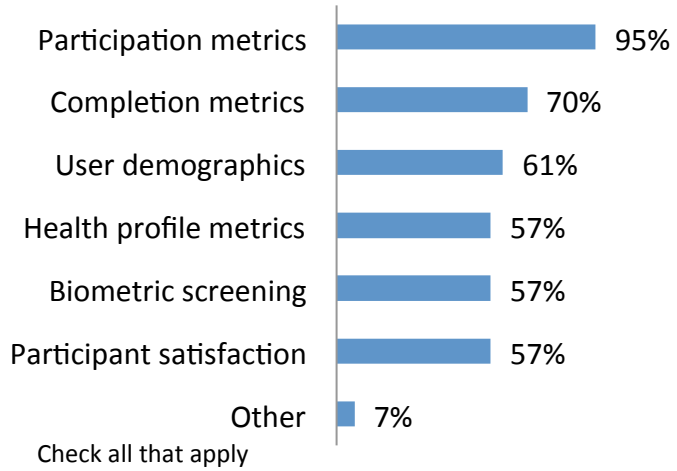
This survey asked employers about the evaluation methods applied to tracker-supported wellness programs in order to understand the metrics and outcomes currently being incorporated. While organizations reported a broad value proposition for investing in wearable trackers as a support to their wellness programs, evaluation efforts were more narrowly focused. Of the companies providing a tracker-supported wellness program, 65% reported that they measured the program impact, while 35% said they had no evaluation measures in place. Of the employers that said they were evaluating their program, the majority focused on participation, participant satisfaction, and physical activity measures.

**Figure 11. Evaluation measures for tracker-supported wellness programs**




Most employers rely on device manufacturers or wellness program vendor reports to provide evaluation metrics, but some employers are also capturing data to support their evaluation efforts. Most frequent reports of data capture focused on participation (95%) and completion (70%) metrics, but a majority are also capturing health-related metrics. In response to the "other" category, a few employers said they also capture information on readiness to change, end-user intent for future use, fitness testing data, and health care cost data.

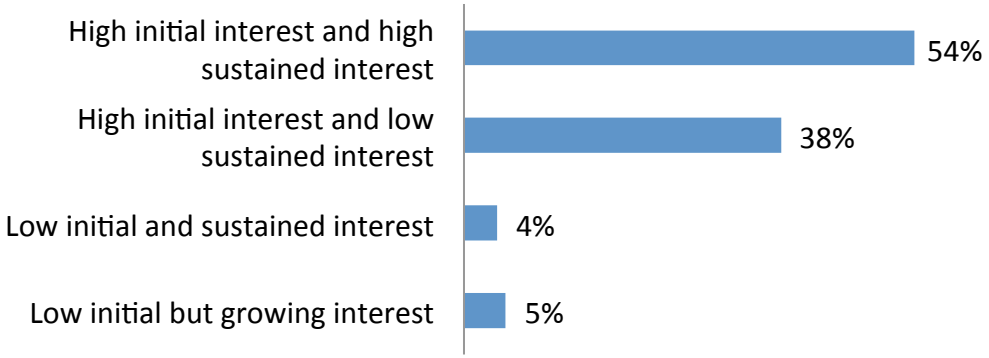
**Figure 12. Data captured to support program evaluation**



## *End-User Perceptions*

A final set of questions asked employers to share end-user feedback and perceptions concerning use of trackers as part of the company wellness program. A substantial majority of employers (82%) reported no end-user concerns about data privacy. In addition, more than half (54%) reported high initial interest and high sustained interest in the tracker-supported program.

**Figure 13. End-user interest in tracker-supported programs**




Employers were also invited to share some of the end-user feedback they had received regarding their programs. A sampling of comments is provided below.

- *Employees become frustrated by slow tech improvements of the device, that we do not fund replacement devices, that all known tracking devices are not compatible with the program, and that they cannot be worn in our secure locations (relatively small population). Yet, despite the complaints we have many that attribute the program to their weight loss and increased activity.*
- *People love it. One employee said it's the best thing the organization has done for her in her 25 years working here.*
- *Having a pedometer is appealing to people across the age and wellness spectrum.*
- *Those who want to participate have done so; we haven't been able to motivate those who are uninterested anyway.*
- *Devices tracked what people did rather than inspiring much more.*

## CONCLUSION

While the HERO survey is not necessarily representative of all employers using wearable tracking devices as part of their wellness programs, this descriptive study indicates that companies and their employees have a strong and growing interest in leveraging wearable devices as an enhancement to their wellness programs. More than 90% of organizations implementing programs that utilize these devices view them as a tool to help engage employees and improve their awareness of and participation in physical activity. To further demonstrate their desire to see employees use these devices, employers have made the barriers to entry quite low with 83% partially or fully subsidizing the cost of the devices and two-thirds of the employers in this study requiring nothing more than requesting or registering the tracker to gain access. Additionally, most companies offered incentives and sponsored individual and team challenges to promote ongoing participation.

Most companies (95%) offering devices plan to continue doing so and many additional companies plan on offering them for the first time in coming years. As described above, the vast majority of employers currently see trackers as an engagement or awareness tool. As a result, only slightly more than 30% measure their impact on health or health risks. What remains to be answered are questions about the types of individuals that are most attracted to using trackers over the long term and the impact of their use on behavior change over time.

One of HERO's major areas of focus is how improvements in health correlate to higher levels of performance and productivity in the workplace. The wearable device industry is evolving rapidly and an emerging trend is integration of fitness tracking capabilities into "smart watches" that have a variety of business-relevant features (e.g., calendar reminders, payment processing, enhanced communications, etc.). As these devices become a standard part of the workplace (like smart phones are now), much of the functionality in the wearables that are widely available for purchase will come for "free." In other words, physical activity and other health data will be captured in the background on the devices being worn for other functional purposes.

The impact of technology on workplace health and performance will continue to evolve, so HERO plans to continue to monitor trends in wearables and their inclusion in employer programs. The consensus from market research outside of this HERO study is that wearable technology will continue to evolve and be integrated into the workplace, with demand stemming from both employees and enterprises. The fitness tracker component of wearable devices will continue to be integrated into wellness programs and will enjoy more success as the various apps and platforms used to measure success are able to synchronize more universally with the many wearable trackers on the market. Additional socialization components, like games and contests, enabled within the wearable technology, will also enhance their growth.

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## APPENDIX: SURVEY QUESTIONS

1. How many full-time and part-time employees currently work for your organization in the U.S.?
   - Under 50
   - 50-99
   - 100-499
   - 500-999
   - 1,000-4,999
   - 5,000-9,999
   - 10,000-49,999
   - 50,000+

2. Does your company offer or sponsor some type of wellness program using trackers (i.e., Fitbit, Garmin, etc.)?
   - Yes
   - No [If no, skip to question 26]

3. Which tracker(s) are you using? (please check all that apply)
   - Fitbit®, Flex™, Zip™, One™, or Force™
   - Garmin vivofit®
   - Jawbone UP®
   - Nike + FuelBand
   - Pebble
   - Sonic Boom boomerang™
   - Virgin Pulse Max™
   - Other (please specify) _____

4. If you have used more than one tracker, which tracker was most frequently used by participants in the wellness program?
   - Fitbit®, Flex™, Zip™, One™, or Force™
   - Garmin vivofit®
   - Jawbone UP®
   - Nike + FuelBand
   - Pebble
   - Sonic Boom boomerang™
   - Virgin Pulse Max™
   - Other (please specify) _____

5. Did your company contribute to the cost of the tracker for employees?
- Company did not contribute to cost
- Paid the total cost
- 25% of the cost
- 50% of the cost
- 75% of the cost
- Other (please specify) _____

6. Did you allow spouses/dependents to participate in the wellness program?
- Yes
- No

7. If spouses/dependents were eligible to receive a tracker, what did they have to do to get a tracker?
- No requirements
- Completion of health risk assessment survey or screening
- Completion of some other activity or program
- Had a health condition
- Had to register to receive a tracker
- Spouse/partner had to purchase tracker
- Other (please specify) _____

8. Who was eligible for a tracker? (check all that apply)
- All full-time and part-time employees
- Only full-time employees
- Only certain departments
- Individuals with specific health risks (e.g., high blood pressure or cholesterol)
- Dependents/spouses

9. What were the requirements to receive a tracker?
- Completion of health risk assessment survey or screening
- Completion of some other activity or program
- Had a health condition
- Had to register to receive the tracker
- No requirement
- Not applicable
- Other (please specify) _____

10. Could a participant use a tracker they already owned to participate in the wellness program?
- Yes
- No
- Not sure

11. Approximately what percentage of your employees registered to receive a tracker?
- 90%-100%
- 70%-89%
- 50%-69%
- 25%-49%
- Less than 25%

12. Approximately what percentage of your employees received/earned a tracker?
- 90%-100%
- 70%-89%
- 50%-69%
- 25%-49%
- Less than 25%

13. Of the employees who received the tracker, approximately what percentage activated and began to use it?
- 90%-100%
- 70%-89%
- 50%-69%
- 25%-49%
- Less than 25%

14. What are your objectives in offering a tracking device supported wellness program? (check all that apply)
- Increase users' physical activity
- Improve users' sleep habits
- Improve users' health habits
- Control healthcare costs
- Increase employee engagement with their health
- Increase employee morale
- Improve employee performance and productivity
- Add excitement and fun factor to wellness program
- Increase participation in wellness programs
- Other (please specify) _____

15. Are you working with either a tracker manufacturing company or a wellness company to manage your program?
- Tracker manufacturing company
- Wellness company
- Both
- Other (please specify) _____

16. What program features have you incorporated to support the use of the tracker? (check all that apply).
- Individual challenges
- Team challenges
- Department challenges
- Whole organization goal
- Incentives for usage
- Other (please specify) _____

17. Are employees allowed to access the online tracking device platform and interact with other employees during working hours?
- Yes
- No

18. What was the average length of time a tracker was used?
- More than 12 weeks
- 8-11 weeks
- 4-7 weeks
- Less than 4 weeks
- Other (please specify) _____

19. Approximately what percentage of initial participants were still using the tracker six (6) months after the program began?
- Greater than 50%
- 30%-49%
- 20%-29%
- Less than 20%

20. Are you measuring the impact of the tracker supported wellness program?
- Yes
- No

21. What initial data are you capturing and/or measuring? (check all that apply)
- Demographic
- Participation metrics
- Completion metrics
- Health profile metrics (e.g., HRA and other survey data)
- Biometric screening data
- Participant satisfaction data
- Other (please specify) _____

22. What metrics are you using for evaluation? (check all that apply)
- Number of participants
- Total steps
- Average steps
- Duration of active use
- Participant satisfaction
- Impact on health and health risks
- All of the above
- Other (please specify) _____

23. Have concerns about data privacy been a significant issue with adoption of the program?
- Yes
- No

24. What general feedback have you had from your population about offering the trackers as part of your wellness program?
- High initial interest and high sustained interest
- High initial interest but low sustained interest
- Low initial and sustained interest
- Low initial interest but growing interest

Please describe the general feedback you have received on the program.

25. Do you plan to continue offering a tracker for future wellness programs?
- Yes
- No

26. If you do not offer a tracker as part of your wellness program, please provide the primary reasons.