September 2020

BUSINESS INSIDER INTELLIGENCE

HEALTH TECH'S ROLE IN THE NEW OFFICE NORMAL

How digital health firms are helping US employers facilitate return-to-work programs amid the coronavirus pandemic

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KEY POINTS

- **The coronavirus pandemic has left employers across the US scrambling to figure out when and how to best bring employees back to work.** More than 75% of US office employees were working from home as of June—twice as many as before the pandemic. Now, as states start to make headway on their reopening plans, many businesses are strategizing how to restore a sense of normalcy in operations and bring their workers back into the office.

- **Tech giants and digital health startups are developing the software and programs needed to help employers bring back workers as safely and efficiently as possible.** The need for a strong return-to-work strategy has thrust employers into uncharted territory: They've never dealt with a public health crisis of the same scale or impact as the coronavirus pandemic. This has created a massive opportunity for big tech and digital health firms—which come with immense data analytics and healthcare expertise—to help employers craft their reopening plans.

- **Big tech companies are using their analytics brawn and preestablished relationships with healthcare companies and employers to veer into the return-to-work space.**

    - **Alphabet's Verily** is using its lab testing prowess to connect employees with coronavirus tests and a monitoring platform.

    - **Fitbit** is leveraging its wearables to offer a continuous monitoring program.

    - **Microsoft** is working with UnitedHealthcare to provide its chatbot for a symptom screening platform.

- **Digital health benefits startups are making it easier for their employer partners already using their services to adopt their return-to-work platforms, too.**
    - **Collective Health** built a platform that can be customized based on employers' specific needs and includes contact tracing.
    - Meanwhile, **Castlight's** solution leans on machine learning to allow employers to forecast their workforces' health and productivity levels.
- **Other digital health firms are pivoting to workforce reentry solutions to boost their relevance amid the pandemic and nab new clients.**
    - **Healthcare delivery companies**—like primary care firm One Medical and telehealth vendor emocha—have rolled out solutions that come stacked with direct access to clinicians.
    - **Genetic testing companies** like Color are relying on their lab processing expertise to provide coronavirus tests and accompanying monitoring platforms to employers.
    - **Voice in healthcare startups** like Sonde Health are using vocal biomarkers to detect the coronavirus via voice and coughs, for instance.
    - **Digital clinical trial startups** like RxMx are leveraging their relationships with lab providers and existing patient monitoring tech to roll out platforms.

- **But hurdles like a changing legal landscape and privacy concerns are making both developing and investing in reentry programs difficult.** Laws surrounding the deployment of contact tracing have changed in recent months: For example, the Exposure Notification Privacy Act—which would limit the types of data that can be collected in contact tracing initiatives—won bipartisan support in June. And businesses have to contend with employees' concerns with being surveilled by their employers and using solutions that pass sensitive data along to third parties, like big tech companies—which could weigh on employers' willingness to deploy many of the return-to-work tools on the market.

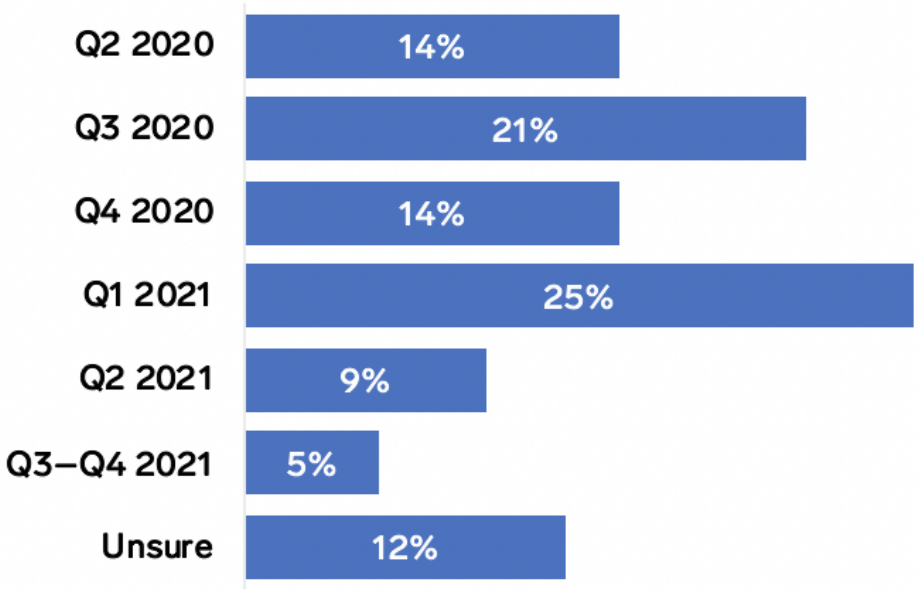
Download the charts and associated data in Excel »

INTRODUCTION

The coronavirus pandemic has thrown the US economy into a state of flux, forcing businesses into uncharted territory as they decide when and how to reopen. Before the pandemic, 39% of US office employees worked remotely—which nearly doubled to 77% during the pandemic, per a June PwC survey. Now, company leaders across the US are strategizing how to resume operations and restore normalcy by bringing their employees back into the office. In May, three-quarters of executives at US companies expected to be fully reopened by the end of Q1 2021, according to a McKinsey survey of 100 US execs. But since then, the volume of US coronavirus cases has soared, leading employers to push their start dates back even further: Facebook extended its work-from-home policy until July 2021, for instance. In order to reopen brick-and-mortar offices, warehouses, and stores, it'll be of paramount importance for employers to navigate how to do so safely and instate routines that curb the spread of the coronavirus. Otherwise, employers will risk creating sites of new outbreaks and being forced to shut their doors yet again.

Fewer Than Half Of US Execs Expect All Employees To Return To The Workplace By The End Of 2020

Expected time frame for 100% of employees to return to workplaces



Source: McKinsey, "How US companies are planning for a safe return to the workplace," June 26, 2020
Methodology: McKinsey surveyed executives from 100 US-based companies about their return-to-work protocols from May 8 to May 13, 2020. Executives surveyed work across 18 industres, and 94% work for companies with at least half of workforces based in the US.

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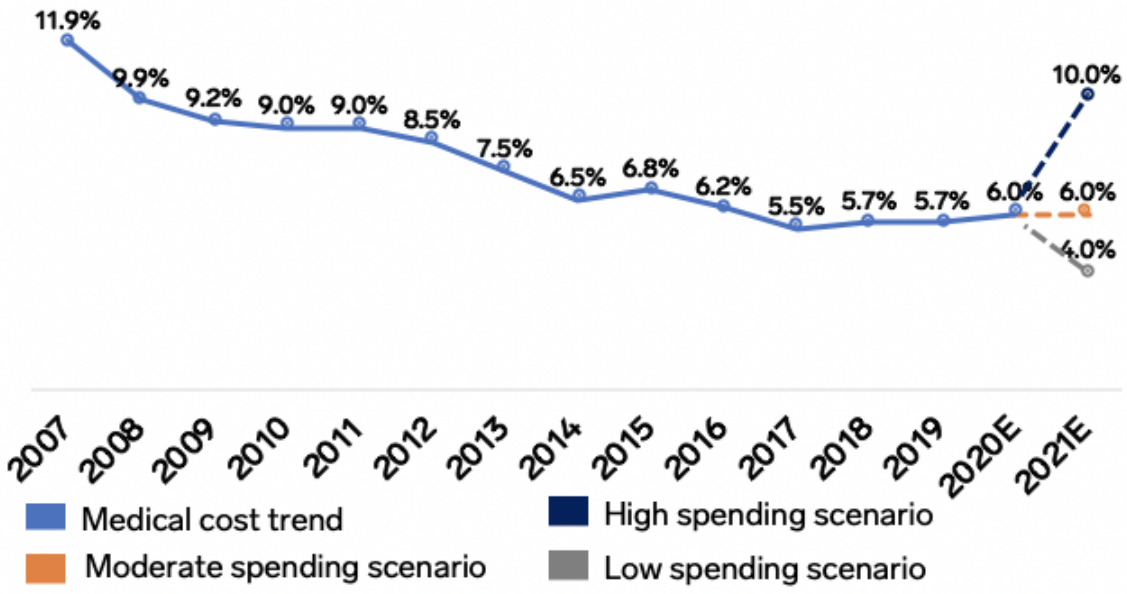
Further, the pandemic could hike up employer medical spending—creating an even greater sense of urgency for products that help ensure workers are in good health. The pandemic could increase self-insured employers' medical spending by as much as 10% in 2021, per PwC's estimates. For context, this estimate was calculated under the assumption that another wave of coronavirus cases would erupt in the spring of 2020, leading patients to defer care to 2021. So, investing in programs that will maintain the health and safety of workplaces will be top-of-mind for businesses looking to preemptively rein in medical spending now, considering it could tick up over the course of the year.

The Coronavirus Pandemic Could Spark A Surge In US Employers' Medical Spending

Change in health plans' per capita claims costs



Notes: 2020's figure is a PwC estimate calculated in June 2019 and does not take the coronavirus pandemic into account. The 2021 low estimate was calculated under the assumptions that coronavirus waves would hit in spring 2020 and early 2021, and that spending in 2021 would drop below what was expected pre-pandemic. The moderate estimate was calculated under the assumptions that a wave would hit in spring 2020, and spending in 2021 returns to what was expected pre-pandemic. The high estimate was calculated under the assumptions that a wave would hit in spring 2020, and care that was deferred in 2020 would be delivered in 2021.
Source: PwC, "Medical cost trend: Behind the numbers 2021," June 2020
Methodology: PwC Health Research Institute included medical cost trend forecasts from 2007 to 2020, and calculated three potential estimates for 2021 based on the coronavirus pandemic's severity.

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Tech companies and digital health startups are rolling out software to facilitate the return-to-work transition for employees. Return-to-work methods have made headlines, like Amazon's use of temperature checkpoints in its warehouses. But another wave of software developers—digital health firms—are designing platforms that focus on monitoring employees' symptoms and coronavirus status, and passing that information onto their employers.

Employers are taking different approaches to bring employees back to the office depending on factors like location or whether employees actively interact with the public. Seventy-seven percent of execs have implemented or are planning to implement temperature check systems for their employees, for instance, according to McKinsey, while 55% have already incorporated or have plans to incorporate contact tracing for employees. Establishing programs that add new tasks and programs into daily workflows will likely be time-intensive, so employers will need to carefully assess which solutions are best for their organization's specific needs.

In this report, Insider Intelligence will outline how tech giants and digital health companies are using their tech and clinical expertise to help US businesses with their reopening plans. We explore what the return-to-work health tech space looks like now—providing examples of the solutions on the market from both tech companies and fast-moving digital health companies, and unpacking the pros and cons of each. Finally, we shed light on some of the legal and privacy-related challenges that could hamper employers' implementation of tech-enabled return-to-work programs.

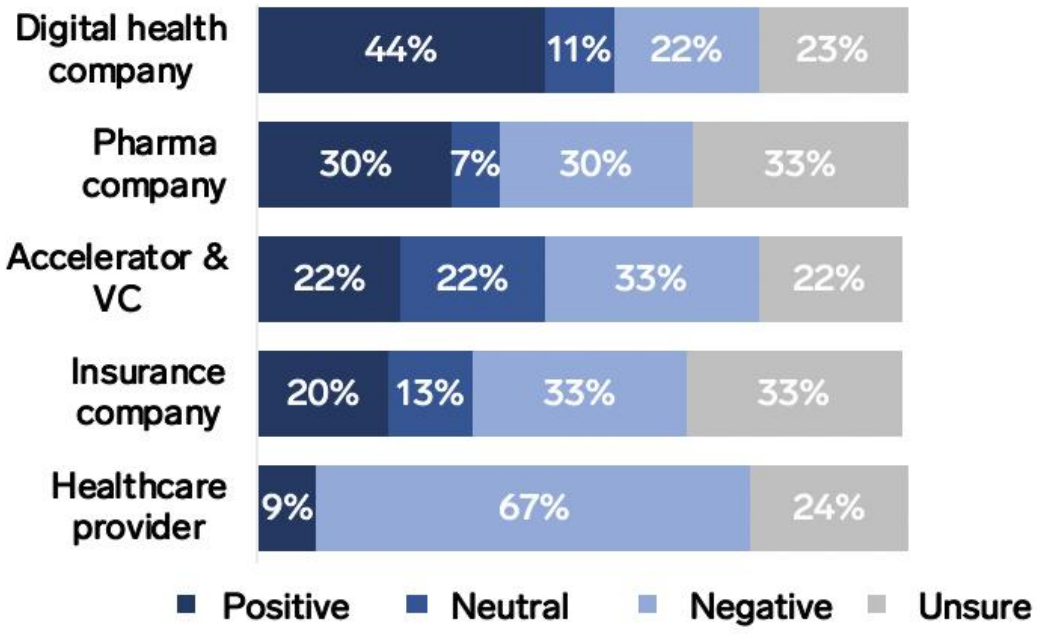
DRIVERS

Many businesses are trying to keep their doors open to soften the financial blow induced by the pandemic, but we've seen the drastic negative impacts inadequate reopening strategies can have on employee health. The pandemic has forced businesses to close their doors to mitigate the spread of the coronavirus, and many industries are taking a huge financial hit. The US saw the largest drop in volume of business owners when the pandemic struck, with more than 3.3 million businesses closing between February and April 2020, Axios reports. Many businesses are keeping their doors open to stay afloat amid a pandemic-induced recession—but doing so without proper health and safety protocols in place has dire consequences to employee health, as well as the ability to maintain operations. There have already been major outbreaks of the coronavirus within several workplaces across the US: At least 220 workers from the same Dole lettuce facility in Ohio contracted the virus, for example, while 92 workers at a single Amazon warehouse in Minnesota have tested positive. Creating individualized, effective strategies for reopening businesses will help employers begin to recoup revenue lost during the pandemic, as well as keep employees healthy to prevent outbreaks and the need to shut doors yet again.

The need for tools that ensure offices are safe for reopening has led digital health and big tech firms to shift gears and roll out tools that aid in these efforts. The digital health industry has landed in the spotlight amid the pandemic as companies with tools that enable virtual care and remote patient monitoring hold promise in enabling care delivery: Nearly half (44%) of digital health firm leaders globally said in April that the pandemic would positively impact business, according to a Research2Guidance survey. Now, some digital health firms are seeking to boost relevance and win new customers by launching return-to-work programs—some of which align with their core products, and others that stray from their original business models. And for tech giants, debuting return-to-work programs serves as yet another avenue to build out their relationships with legacy healthcare players and dig even deeper into the healthcare realm.

Nearly Half Of Global Digital Health Experts Think The Coronavirus Pandemic Will Positively Imact Business

Q: What will the impact of the coronavrus pandemic be on business?



Note: Values may not total 100% due to rounding.
Source: Research2Guidance, "How Coronavirus Impacts the Global Digital Health Industry," June 2020
Methodology: Survey of 513 healthcare company representatives was conducted by Research2Guidance from March 24 to April 8, 2020.

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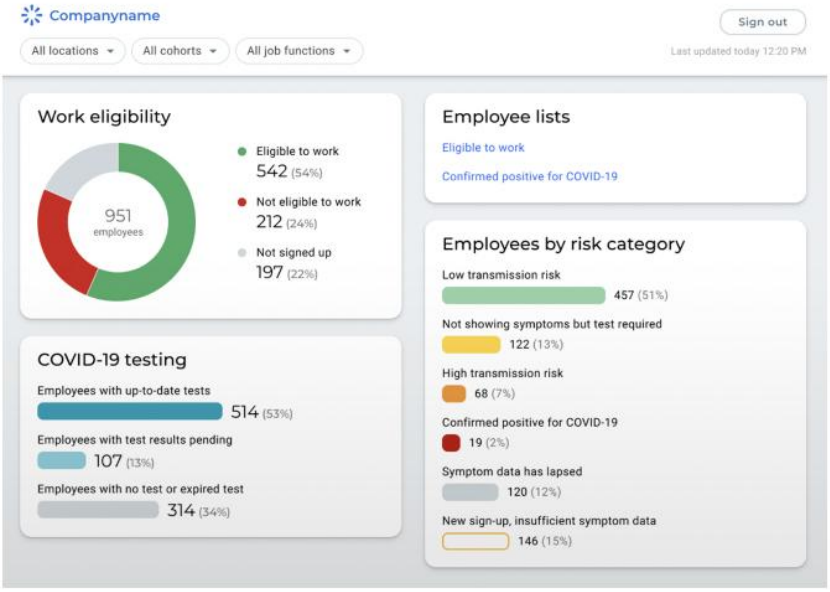
BIG TECH'S ROLE

Alphabet's Verily

Alphabet's life sciences division Verily rolled out an app-based screening program that provides employees with coronavirus tests and lets employers view the results. The product, dubbed Healthy at Work, will provide diagnostic nasal swab testing for employees and offer employers with recommendations about how often workers should be retested based on local health data and test results, according to The Verge. It also includes daily symptom screenings that can monitor employees, gauge whether it's safe for them to return to work, and alert employers if there's an indication of infection.

- **Pros: Verily is equipped with lab processing power to handle coronavirus testing.** Healthy at Work offers a handful of options for testing, including mobile test sites, home test kits, Verily's community test sites, or custom on-premise test sites—highlighting its brawn when it comes to facilitating and enabling fast testing services.
- **Cons: Its connection to Alphabet and Google may mute its impact if employers are concerned about putting employee privacy on the line.** Verily's affiliation with Google may inhibit it from establishing ties with employers, because employees may not be willing to share health info with the tech giant, despite its claim that data collected won't be shared with insurance companies or joined with data from other Google products: Only 10% of US consumers were willing to share health info with tech companies in 2019—only about half of whom pegged Google, Verily's sister company, as a trusted recipient.

Verily's Healthy At Work Program's Employer-Facing Interface



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Source: Verily, 2020

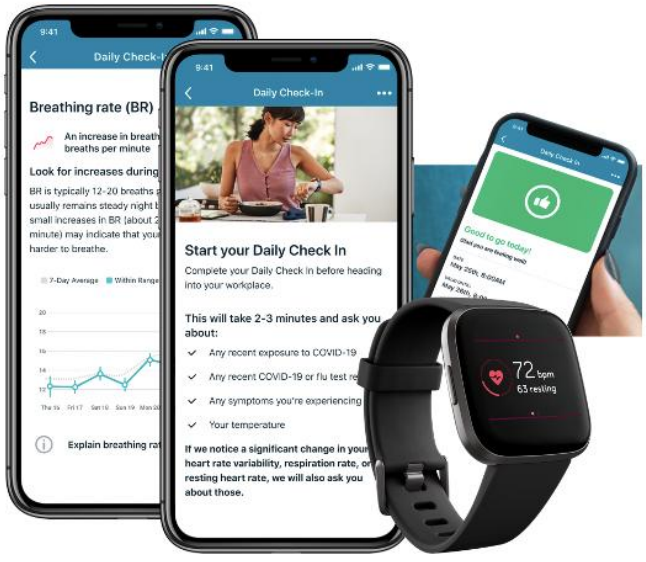
Fitbit

Fitbit is launching a service that collects health data via its wearables and uses a daily health check-in to report health and utilization data to employers. The wearable giant unveiled its Ready for Work solution—offered through its employer-facing health services arm, Fitbit Health Solutions—which includes daily health check-ins for employees and an analytics dashboard for employers that allow them to monitor trends in employee health. The app-based service has users log their coronavirus testing results and exposures, as well as symptoms, heart rate, and breathing rate—and the system offers advice on whether it's safe to attend work that day.

- **Pros: Fitbit's wearables could supplement self-reported employee data.** The health-tracking device can incorporate signs like breathing and heart rates—both of which may be impacted by coronavirus infections— into employee trend reports. This could make Fitbit's return-to-work solution an attractive option, as its results could be more accurate than solutions that rely solely on self-reported data. Additionally, the solution is embedded into Fitbit Health Solutions, meaning that implementing the platform will likely be easy for employers already offering the service and employees already used to engaging with it: As of last March, Fitbit Health Solutions counted more than 1,500 employer partners.

- **Cons: Fitbit's wearables may not be sufficient in determining infection, and privacy concerns and a potentially steep investment could deter employers.** Fitbit's devices may only bolster the value of the program slightly, considering coronavirus patients' symptoms vary so widely, and that some show no symptoms at all: The CDC estimates that 40% of coronavirus infections are asymptomatic. Still, seeing data on abnormalities in breathing patterns, for example, could help nudge employees to take the proper precautions and guide them to testing. Further, privacy will likely be an issue for Fitbit, considering it, too, is affiliated with one of the largest tech companies worldwide: Google bought Fitbit late last year. This could deter employers, especially since buying into Fitbit Health Solutions—and providing employees with the devices—could be a major expense they don't have room in their budgets for.

Fitbit's Ready For Work Employee-Facing App



Source: Fitbit, 2020

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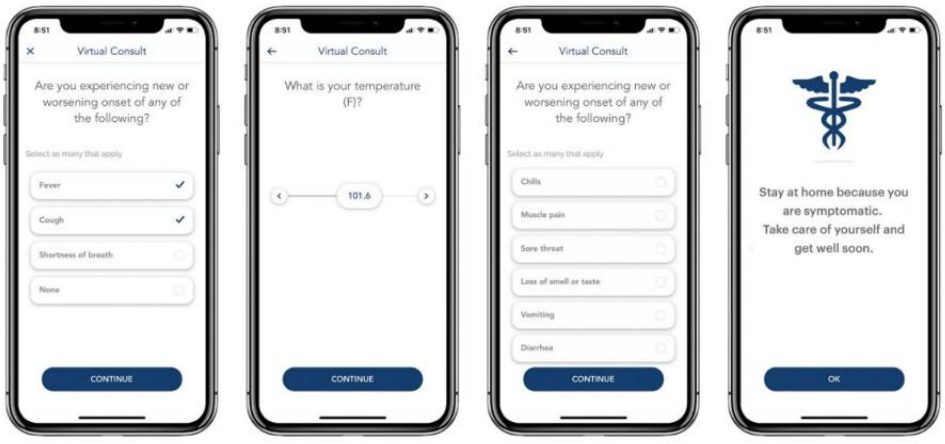
Microsoft

UnitedHealth Group and Microsoft teamed up to launch a new screening tool for employers called ProtectWell. The solution features a chatbot-led daily symptom screener to clear employees to return to work or direct them to be tested for the virus. If an employee is directed to receive a test, the ProtectWell app provides them with their test results and notifies their employer in the event of a positive test. While Microsoft's healthcare chatbot will steer the app's symptom screening, UnitedHealth will have control over the health data, per CNBC.

- **Pros: The service is free to employers and developed in part by a huge name in healthcare.** Microsoft and UnitedHealth—which are currently utilizing the service for their own employees—are offering the app to employers across the US at no charge. The fact that it was architected alongside healthcare titan UnitedHealth—which is the largest health insurer in the US by number of members enrolled—could lure in employers considering the insurer has a vested interest in satisfying its huge roster of employer clients.

- **Cons: A program powered by a tech giant and a massive health insurer may turn away some employers due to consumer privacy concerns.** Microsoft's proximity to sensitive health information may spark concerns, considering less than half of the 10% of US consumers willing to pass health info along to a tech company picked Microsoft as a trusted recipient in 2019, per Rock Health. It's worth noting that this survey was conducted pre-pandemic, and consumers may be more inclined to use systems designed by tech companies if it means stalling the spread of the coronavirus. Further, the fact that UnitedHealth's eyes will also be on sensitive health information could breed wariness: 52% of Rock Health respondents were willing to share health information with their insurance company—a significant drop-off from the 73% who would be comfortable sharing it with their providers, likely because health insurance companies have caught flak in recent years for using various types of patient data on lifestyle and health choices to determine premium costs.

UnitedHealth And Microsoft's ProtectWell App



Source: UnitedHealth, 2020

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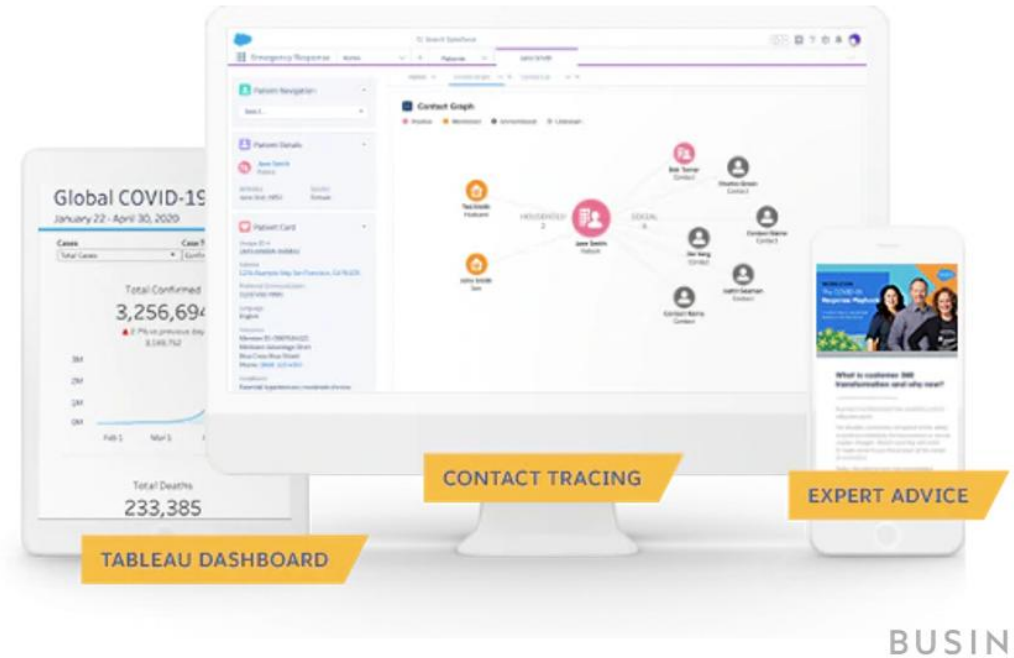
Salesforce

Salesforce developed a contact tracing app for corporations, giving employers access to employee interaction information and health data. The app records employees' proximity to one another and the duration of any interactions, as well as whether someone tests positive for the coronavirus. The contact tracing apps can notify other workers if they were exposed based on their contact history with the infected individual.

Salesforce's Return-To-Work Program, Work.com



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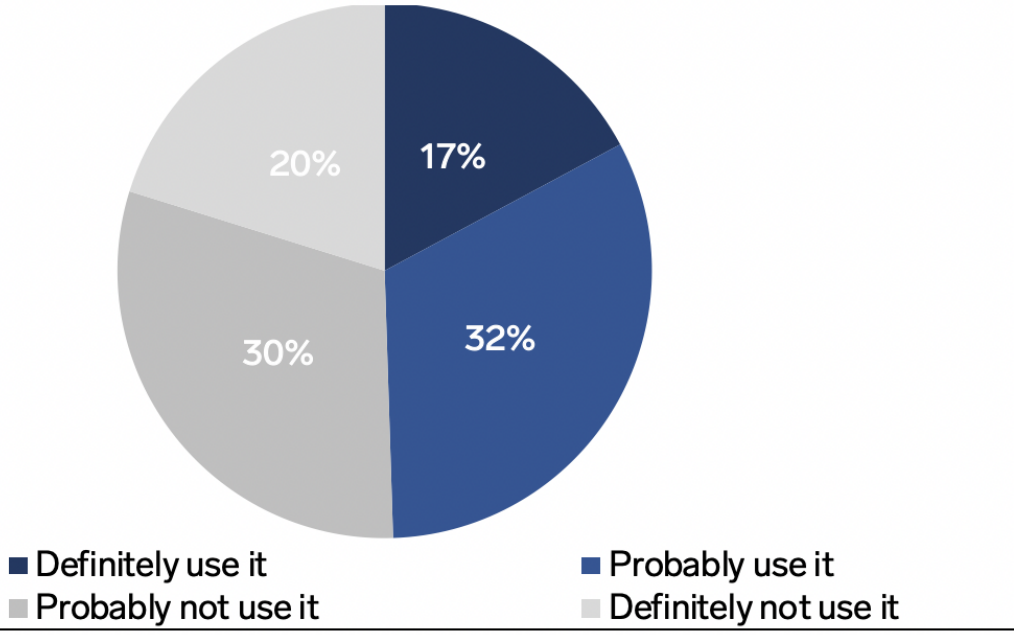
Source: Salesforce, 2020

- **Pros: Employees may be willing to put surveillance concerns aside for a method that could ensure their health and safety.** While employees may have concerns about employers surveilling their movements and interactions with other people, there are signs that individuals are becoming less wary: For example, 10% of employees said they were comfortable with their employer monitoring their email in 2015, but three years later, 30% of workers said they were comfortable with the practice, according to Gartner. We think employees may be more willing to share personal information now that it means it'll ensure their workplace is kept safe: Some experts believe that a central component of slowing the virus's spread is through contact tracing.

- **Cons: Widescale contact tracing programs haven't lived up to expectations.** Contact tracing can only be effective if adoption hits 60% of the population, according to one study—and as of mid-June, only three states had revealed plans to use the Google-Apple contact tracing program. But workplace contact tracing programs are different in that employers can mandate participation, which could make workplace programs more effective than opt-in programs. Another difference is that Apple and Google insisted on developing a decentralized contact tracing program to preserve privacy, whereas the centralized workplace contact tracing solutions developed by Salesforce give employers access to data from the program. The question that remains is whether employees will be willing to take part in such programs, or whether they'll breed distrust because of the sensitive information employers would be amassing, which would spell bad news for the over half of employers deploying or planning to deploy contact tracing.

Half Of US Adults With Smartphones Wouldn't Use A Contact Tracing App From Apple And Google

Q: If this smartphone app were available today, would you...



Source: Washington Post-University of Maryland national poll, n=827 smartphone users, May 21, 2020

Methodology: The poll was conducted by telephone from April 21–26, 2020 among a random sample of 1,008 US adults

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DIGITAL HEALTH'S ROLE

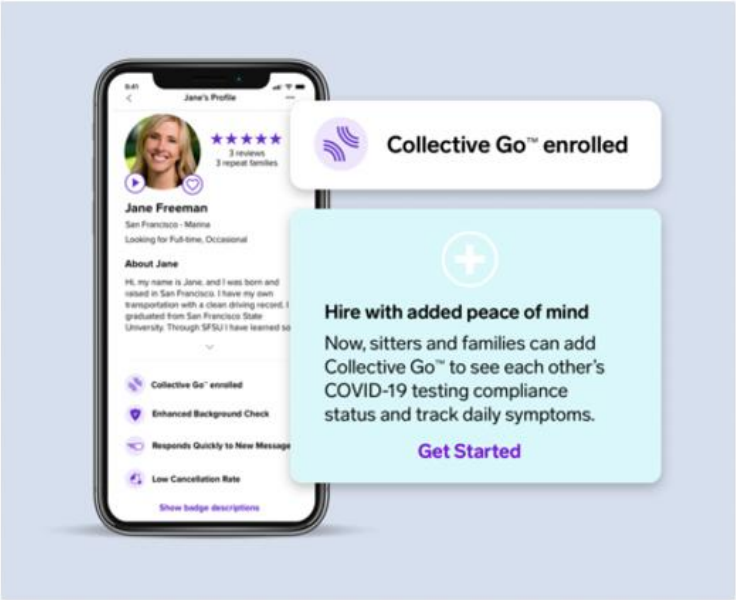
Employee Benefits Companies

Digital health companies already working in the benefits space were in prime position to pivot to return-to-work solutions. Startups that develop platforms that streamline health benefits administration for employers could make it simpler for partners using their products to deploy return-to-work programs since it would mean using platforms they're already familiar with and utilizing—which is enticing for employers not wanting to make an investment in a brand new partner.

Collective Health

San Francisco-based Collective Health launched a customizable workplace reentry program that uses the most recent coronavirus-related data to craft plans tailored to the specific needs and risks of specific employee bases. The tool, dubbed Collective Go, uses app-based exposure checking via contact tracing and test status monitoring to inform employers if it is safe for an employee to be working. And Collective Health counts a growing number of lab partners to process coronavirus tests.

Collective Health's Workforce Reentry Program Designed For Babysitting Service UrbanSitters



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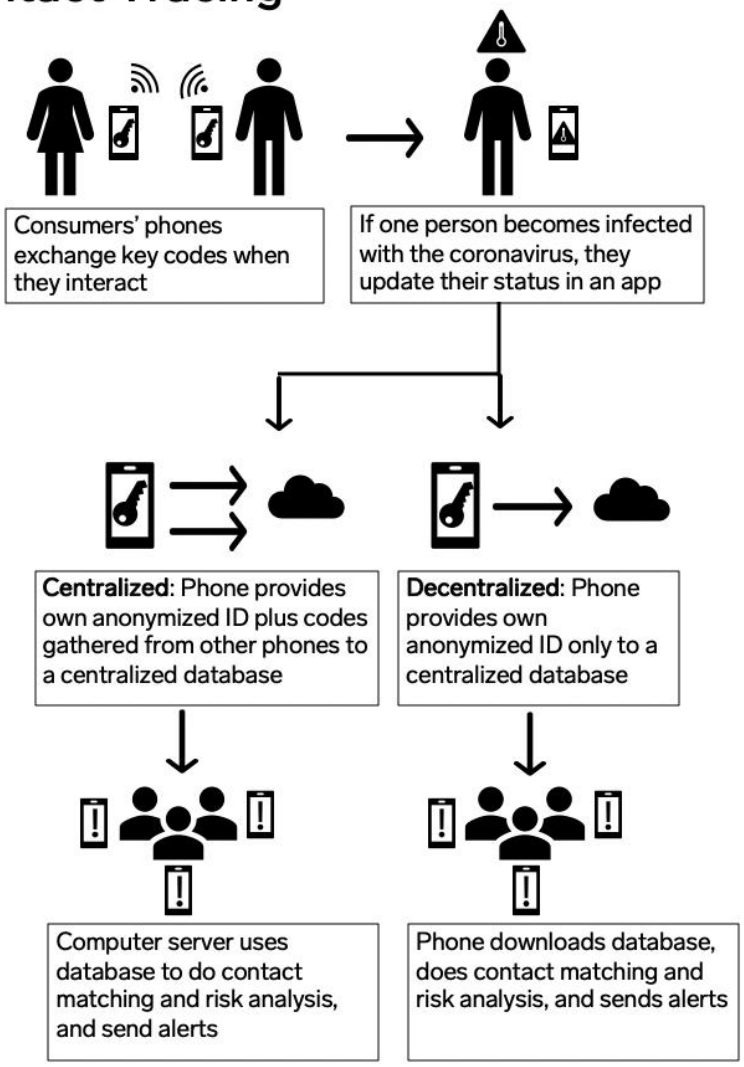
Source: FierceHealthcare, July 2020

- **Pros: The program can be tailored to employers' specific needs.** For example, UrbanSitter—an online platform that allows parents to find babysitters—customized the Collective Go platform available to its 150,000 workers to provide both parents and sitters support for symptom screenings and uploading test results, according to FierceHealthcare. US businesses have a broad range of needs when it comes to bringing employees back into work—the needs of an employer with a few dozen employees in an office space differ widely from one that employs essential workers who make contact with the public. Thus, a platform that's easily tailored to meet the unique needs of different organizations are likely to gain attention from a range of employers.

- **Cons: One element of Collective Health's program is contact tracing—which may raise surveillance concerns among employees and inhibit its adoption.** Employees may not want to pass along the information needed for contact tracing programs—like location and health info—to their employers. But we think employees would be more willing to let privacy concerns fall by the wayside to help mitigate the spread of the virus: In an August 2020 survey by Kronos Incorporated, 86% of employees globally are at least "a little" comfortable with employer-led contact tracing efforts—and about half (45%) of those employees are "very" or "a great deal" comfortable. It could come down to the duration that employers plan to use the programs: If contact tracing lasts longer, for instance, employees may become more concerned—which is likely, considering the second waves of outbreaks occurring in previous hotspots like New York City.

Modes Of Smartphone-Based Coronavirus Contact Tracing



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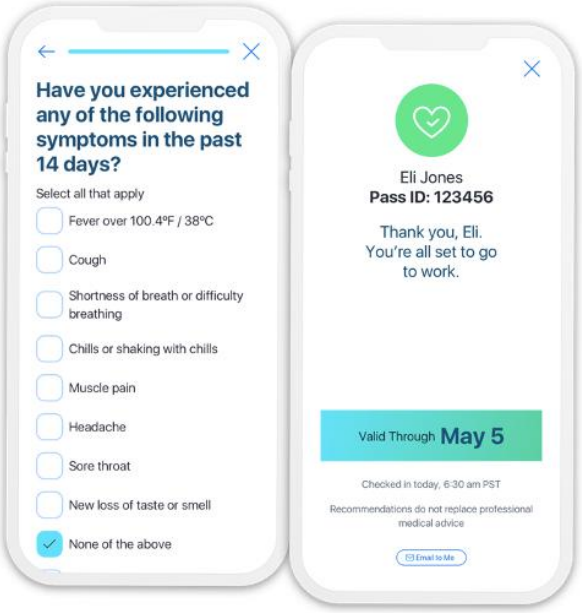
Source: BBC, May 2020

Castlight Health

Castlight's platform leverages machine learning to help employers forecast their workforces' health and productivity levels—and thus proactively prepare for outbreaks or spikes in absenteeism. The health benefits company's ability to create predictions about employee health trends—which it generates via a mix of symptom checking, contact tracing, and testing—could help employers better allot funds and resources for reentry plans. The Working Well tool—which, among other things, uses machine learning to let employers forecast trends in health and productivity—would be beneficial for companies instating full- or part-time work-from-home policies and wanting to maintain normal levels of productivity.

Castlight's Symptom Checker



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Source: Castlight, 2020

Other Digital Health Firms

Digital health companies outside the employee benefits space have also reacted swiftly to the needs brought on by the pandemic, building workplace reentry programs that help them maintain relevance and boost brand recognition. Health tech startups operating in a variety of markets—including telehealth, primary care, genetic testing, and healthcare administration—have launched tools to edge into the return-to-work space, which could help increase awareness of their other offerings and clear the way for sustained relationships with the employers they're partnering with.

Healthcare Delivery

Return-to-work solutions could help digital health companies diversify their offerings to either offset falling business or cater to an entirely new segment of customers. For instance, primary care disruptor One Medical reported seeing about half as many patients in April as it saw pre-pandemic, and it's putting off opening some of its new offices until next year to cut back on spending. So, its move into return-to-work can help it capitalize on a market with growing demand while its primary care business struggles: The company pivoted to virtual care and launched an employee reentry program that includes the standard features like online symptom screenings and a range of testing solutions. Meanwhile, telehealth company emocha is throwing its hat into the workplace reentry ring as part of a different diversification strategy. It launched a return-to-work program that has an asynchronous telehealth element to it: Employees record themselves completing daily check-ins, during which they report any symptoms and complete temperature checks over video. Insider Intelligence chatted with emocha CEO Sebastian Seiguer, who told us that "[Employers] who are trying to return to physical locations don't just want an app, they want human beings on the other end to close the loop." If emocha gets into the hands of employers now via its workplace reentry solution, it could lay the groundwork for future partnerships in which those employers offer their workers access to emocha's core telehealth product.

- **Pros: Healthcare delivery entrants can leverage their in-person and virtual doctors to bolster return-to-work programs with a layer of clinical expertise.** While One Medical's solution includes features similar to others on the market, like online screening, what sets it apart from other tech firms' is access to clinicians: Employees who have contracted the coronavirus can chat with One Medical doctors 24/7 or book remote appointments with them virtually. Access to clinicians can be a major draw since their personalized medical expertise could act as another layer of validity, and they may be able to guide employees better than a digital platform: Employees worried they may be expressing symptoms or have been exposed to an infected person can connect with an expert about next steps and prevent unnecessary trips to hospitals, for instance.

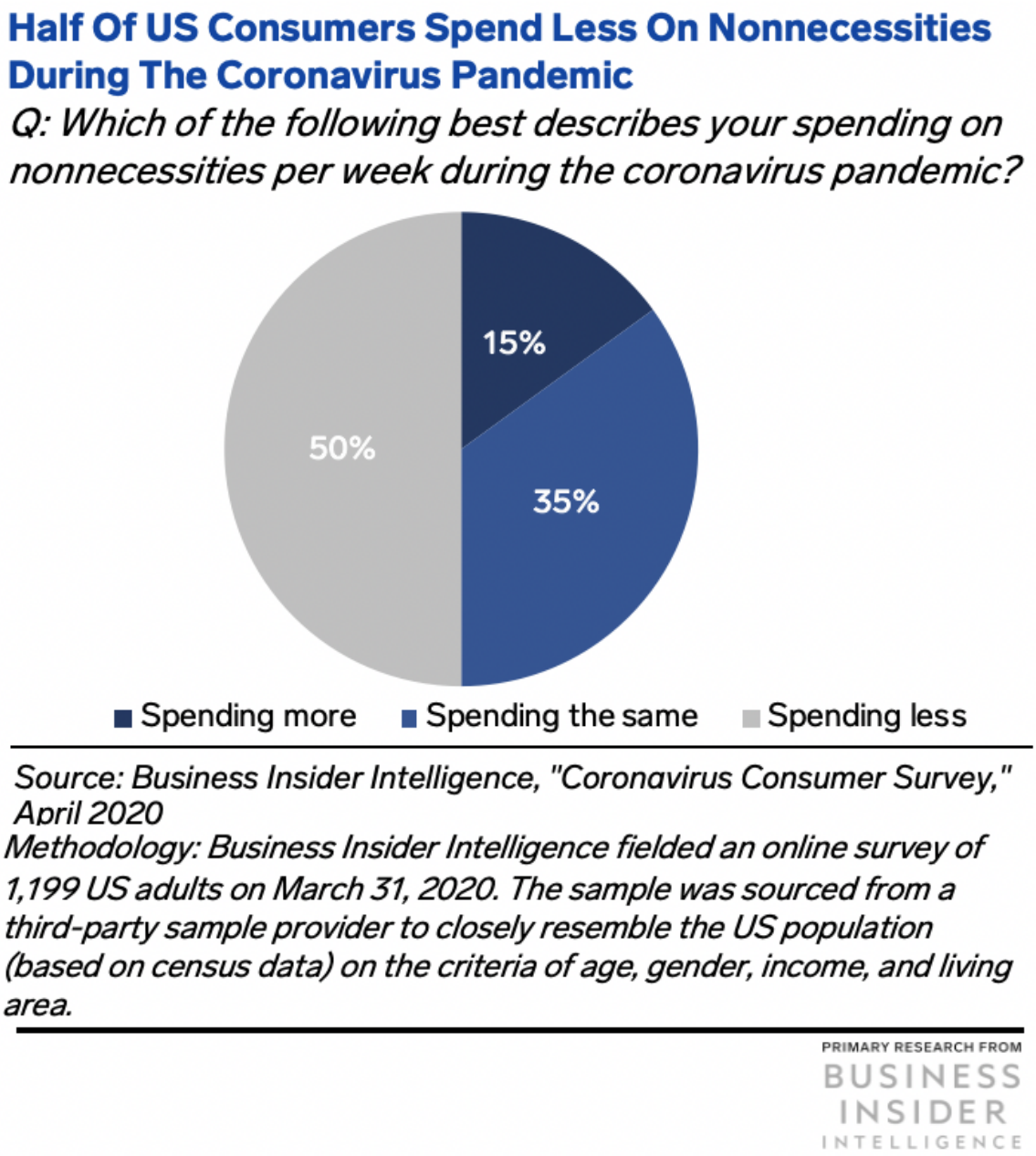
- **Cons: Healthcare delivery companies pivoting to new offerings may encounter some hiccups that could result in issues on the employer side, too.** It's possible that employers would be hesitant to turn to the solutions from digital health companies launching totally new tools that don't resemble their core products—especially those from smaller firms that'll likely need to go through some trial and error on the tech side.

Genetic Testing

Genetic testing startups are in a good position to roll out coronavirus testing due to their existing lab infrastructure—and it can help capture revenue amid declining sales. Genetic testing startup Color, for instance, pulled back the curtain on its Workforce Testing Program, which provides access to testing for all essential employees regardless of symptoms or exposure. The firm says this is the only way to reliably stay on top of employees' coronavirus status due to the high volume of asymptomatic carriers who unknowingly expose others. Those operating under a direct-to-consumer (D2C) model would be smart to dip their toes into the workforce reentry space given that an already shrinking market is likely being compounded by economic hard times: In a March survey conducted by Business Insider Intelligence, 50% of US respondents said they were spending less on nonnecessities.

- **Pros: Genetic testing firms have the lab equipment, infrastructure, and expertise to conduct coronavirus testing on a large scale, putting them in a prime spot to quickly shift to employer-focused initiatives.** Genetic testing companies are accustomed to processing large quantities of tests, so those that make testing a main component of return-to-work initiatives could attract employers that want to ensure tests are processed and analyzed efficiently. Plus, some genetic testing companies already work with employers: Color counts a large number of employer partners that include its genetic testing services in employee health plans—and the program could help it grow its base.

- **Cons: Partnering with a genetic testing company could breed distrust among employees.** Many consumers are generally wary of genetic testing companies and the ways in which they handle data: 40% of consumers who had never taken a DNA test cited privacy concerns as the driving reason they shied away, per a 2019 survey.

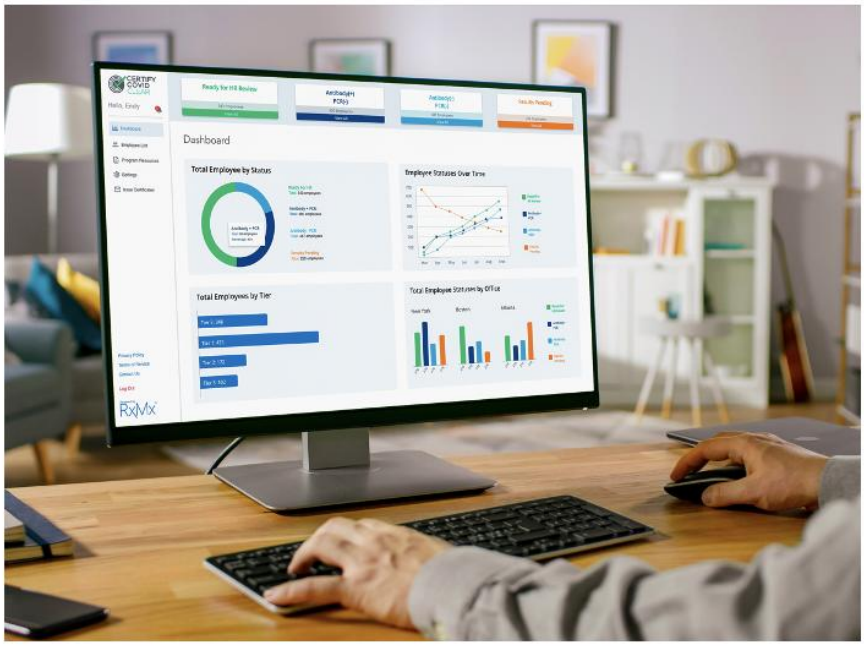


Digital Clinical Trial Management

New York-based RxMx announced a return-to-work solution that amasses clinical data from screenings and tests:

- **Pros: RxMx boasts established relationships with lab testing firms and is highly customizable.** The startup, which streamlines patient and clinical trial management, can be adjusted based on employers' specific needs or if public health guidelines shift. And it supports the addition of other integrated solutions that employers may want to invest in, like smart thermometers. Further, because the firm has preexisting relationships with labs, the testing process may be expedited and ensure it has access to newest tests.
- **Cons: While the program can incorporate disparate tools, that requires employers to forge multiple partnerships.** A downside may be that because RxMx doesn't force employers to invest in other tech and allows them to only add in what they see fit, it may require the management of multiple partnerships, which could make the integration process less seamless for both employers and workers.

RxMx's Monitoring Platform, COVID Clear



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Source: RxMx, 2020

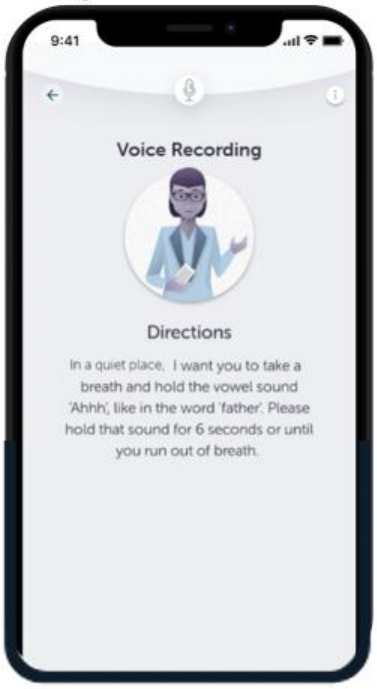
Voice In Healthcare

Companies that develop voice tools for healthcare purposes are using their tech to help monitor employee symptoms—but the jury's still out on the validity of vocal biomarkers when it comes to detecting disease.

Digital voice tech startup Sonde Health launched a return-to-work solution that will assess whether users have a respiratory illness through the sound of their voice, per MobiHealthNews. Employers that use the platform will also be able to use an accompanying app to collect worker information via a coronavirus questionnaire and employee-reported temperature readings.

However, vocal biomarkers shouldn't be relied upon for diagnosis—and, thus, tools that lean too heavily on them might not be worth the investment. There's a growing body of evidence suggesting that the human voice can be a useful biomarker for a range of conditions, including those that impact the lungs—like the coronavirus does—which can correlate with involuntary and often imperceptible changes to a patient's voice. Still, the research into the validity of vocal biomarkers is in its early stages, and we don't think employers will be quick to select this kind of tech when there are more comprehensive ready-to-work solutions on the market.

Sonde Health's Program Analyzes Users' Voices To Detect Possible Signs Of The Coronavirus



Source: Sonde Health, 2020

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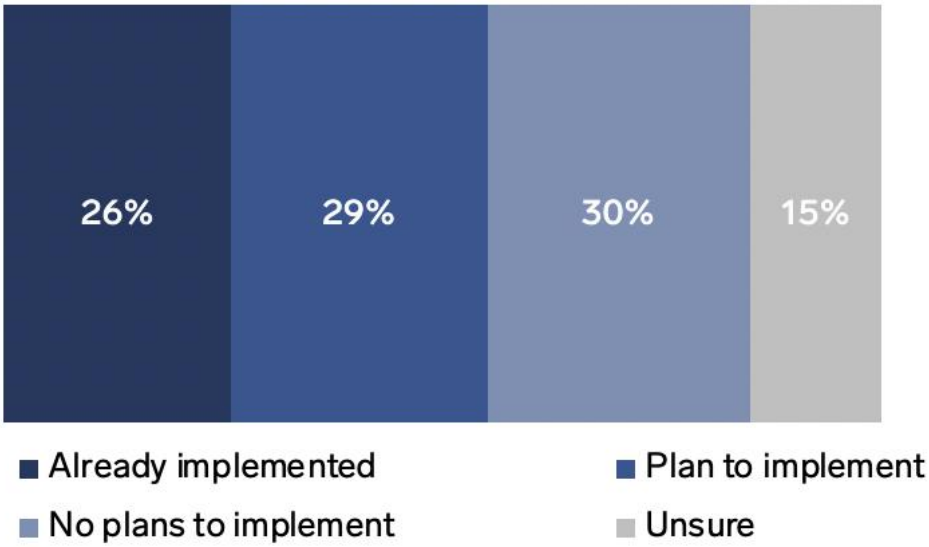
HURDLES TO DEPLOYING A RETURN-TO-WORK PROGRAM

Legal Barriers

The legal landscape of tech and practices included in return-to-work programs is constantly changing—and risk-averse businesses might not want to open their wallets for high-tech solutions that will later be deemed unusable. For instance, 26% of employers already have contact tracing programs up and running, McKinsey found, but changes in local, state, and federal regulation could hamper the utility of these programs. In early June, a bill called the Exposure Notification Privacy Act (ENPA) won bipartisan support: The bill would regulate the use of contact tracing apps—including making participation voluntary and limiting the types of data collected, according to National Law Review. But senators on both sides of the political aisle have introduced legislation that differs from each another and the ENPA in terms of consent, use, and enforcement policies—and it remains to be seen how those differences will be ironed out. Thus, employers struggling financially may not want to partner with a health tech company whose return-to-work solution relies on contact tracing until legislation about contact tracing is more set in stone. Further, a portion of the nearly one-third of McKinsey respondents who are planning to implement contact tracing may backpedal on those decisions to avoid unnecessary—and risky—investments, especially since a sizable chunk of employers are already planning to boost spending in other areas, like employee communication technologies and mobile services.

Most US Employers Embrace Contact Tracing For Employees With The Coronavirus



Source: McKinsey, "How US companies are planning for a safe return to the workplace," June 26, 2020
Methodology: McKinsey surveyed executives from 100 US-based companies about their return-to-work protocols from May 8 to May 13, 2020. Executives surveyed work across 18 industres, and 94% work for companies with at least half of workforces based in the US.

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Privacy Concerns

Many return-to-work solutions require employers to surveil their workers via contact tracing and other tech, which could breed privacy concerns among employees. Increased monitoring of employees raises privacy concerns, as employees may be concerned that their sensitive health info will be passed over to bad actors: 90% of US consumers were unwilling to share health info with tech companies in 2019. And fewer than one-quarter (23%) of US consumers would be comfortable sharing sensitive info like location with their employers, according to a recent Oliver Wyman survey. This could in turn breed concerns on the employer side about losing employee trust, steering employers away from tech firms' return-to-work solutions. Because of a murky legal landscape and rampant privacy concerns about overbearing surveillance, employers that feel they're able to monitor employees without the tech—like smaller employers that can have more touch points with their employees—may forgo any return-to-work options that utilize contact tracing.

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