

Corporate Wellness Market in the US - Industry Outlook and Forecast 2019-2024

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Abstracts

The US corporate wellness market is likely to reach around \$15.5 billion by 2024, growing at a CAGR of approximately 8% during 2018–2024.

The US corporate wellness market is undergoing an enormous transformation. Opportunities such as the use of technology to improve outcomes, the growing reign of artificial intelligence, and the incorporation of social connectivity are hugely changing the perspective toward corporate wellness programs. Therefore, these factors are expected to propel the US corporate wellness market during the forecast period.

The growing awareness for healthy eating habits and exercise, the high prevalence of obesity, and the reduction of insurance and healthcare costs are a few major factors driving the growth of the US corporate wellness market. The increasing focus on work-life balance and the implementation of company-sponsored employee-centric healthcare campaigns that offer lifestyle coaching and employee benefits are likely to boost the US corporate wellness market in the coming years.

Further, leading vendors are adopting digital technology to host a virtual screening and disseminate the information through their company portals to attract more consumers and increase market shares.

This market research report on the US corporate wellness market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The study includes insights on segmentation by delivery model (onsite and offsite), programs (HRA, nutrition and weight management, smoking cessation, fitness services, alcohol and drug rehab, stress management, health education services, and others), end-user (large private sector businesses, medium private sector businesses, public

sector companies, small private sector businesses, and non-profit organizations), revenue models (recurring revenues and seasonal revenues), and incentive programs (participatory programs and health-contingent programs).

US Corporate Wellness Market: Segmentation

This market research report includes detailed market segmentation by revenue model, delivery model, program, end-user, type, and incentive programs. The US corporate wellness market by revenue model can be segmented into recurring revenues and seasonal revenues. The recurring revenues segment dominated the market and is expected to grow at a CAGR of around 9% during the forecast period. The integration of employee wellness programs into facility operations to make them permanent with the workplace culture is propelling the growth of the segment.

In 2018, the seasonal revenue model recorded accounted for \$2 billion. A majority of revenue came in the second half of the year primarily due to the onset of the cold season. Hence, due to increased seasonal health challenges, employers were provided onsite flu vaccinations, health and lifestyle coaching, and 24-hour nurse line, which drew the seasonal revenue for the US corporate wellness market.

The US corporate wellness market by end-user is classified into large private sector businesses, medium private sector businesses, public sector companies, small private sector businesses, non-profit organizations. Large private sector business is the largest end-user and is expected to grow at a CAGR of around 8% during the forecast period.

The US corporate wellness market by programs can be segmented into HRA, nutrition and weight management, smoking cessation, fitness services, alcohol and drug rehab, stress management, health education services, financial wellness, and others. The HRA program dominated the US corporate wellness market and is expected to grow at a CAGR of around 8% during the forecast period. Increasing healthcare costs have given prominence to preventive care, which is driving the HRA segment. Further, the HRA participation in sync with health insurance is an upcoming trend as most of the employees are using incentives for HRA completions and participation in biometric screenings and physical activity programs.

The US corporate wellness market by types can be segmented into service and technology. The service industry has captured nearly three-fourths of the market and is expected to grow at a CAGR of around 8% during 2018–2024. The segment includes health coaches, clinical interventions, and other such programs, whereas the

technology segment includes devices, health applications, and software. In the last few years, there has been growing integration between services and technology. For instance, Terryberry Wellness, a cloud-based employee wellness program, partnered with WellRight, a wellness program company offering biometrics, health assessments, and wellness education, to provide an integrated portal for wellness activities, education, social encouragement, and incentivizing healthy behaviors.

The US corporate wellness market by the delivery model can be segmented into onsite and offsite. The onsite delivery model has captured more than three-fourths of the market and is expected to grow at a CAGR of around 9% 2018–2024. The number of large employers providing on-site health clinics has grown in a bid to help increase participation and improve the overall health of the employee. The offsite delivery model is prevalent in small and medium-sized businesses and non-profit organizations.

The US corporate wellness market by incentive can be segmented into participatory programs and health-contingent programs. Participatory programs have captured half of the market and are expected to grow at a CAGR of around 10% during the forecast period. Vendors are designing incentive programs that are in sync with the goals and objectives of the company. Hence, with the legal landscape becoming murkier, participatory programs are offering a safe alternative, which is expected to drive the US corporate wellness market.

Market Segmentation by Delivery Model

Onsite

Offsite

Market Segmentation by Programs

HRA

Nutrition and weight management

Smoking cessation

Fitness services

Alcohol and drug rehab

Stress management

Health education services

Financial Wellness

Others

Market Segmentation by End-user

Large Private Sector Businesses

Medium Private Sector Businesses

Public Sector Companies

Small Private Sector Businesses

Non-Profit Organizations

Market Segmentation by Revenue Models

Recurring Revenues

Seasonal Revenues

Market Segmentation by Type

Services

Technology

Market Segmentation by Incentive Programs

Participatory Programs

Health contingent Programs

Key Vendor Analysis

The US corporate wellness market is highly fragmented, with the leading four vendors accounting for less than 15% of the market share. However, the market is witnessing consolidation albeit at a slow pace. The market is witnessing the entry of several external players such as in-house services by large businesses and other entities in the health and fitness space that offer membership discounts to drive up their share of the pie in the market. There are also a lot of health clinics, gyms, and fitness clubs that provide certain services hinged on tests and biometric screenings, memberships, health fairs, seminars, educational workshops, and incentives. Further, mergers and acquisitions are also gaining traction as players are looking forward to becoming more comprehensive in their offerings.

Prominent Vendors

ComPsych

Wellness Corporate Solutions

Virgin Pulse

Provant Health Solutions

Other prominent vendors

Active Wellness

Aduro

Aquila

Bank of America Merrill Lynch

BaySport

Beacon Health Options

Best Money Moves

Ceridian

Corporate Fitness Works

Exos, Fidelity

Financial Finesse

HealthFitness

Healthtrax

Integrated Wellness Partners

Kinema Fitness

LifeStart

LIVunLtd

Professional Fitness Management

Power Wellness

Reach Fitness

Marino Wellness

Mercer

Midtown Athletic Club

National Institute for Fitness and Sport (NIFS)

OptumHealth

Privia Health

Premise Health

Prudential Financial

WTS International

Vitality Group

Wellsource

Wisdom Works Group

Workstride

Key Market Insights

Offers market sizing and growth prospects of the US corporate wellness market for the forecast period 2019–2024

Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the US corporate wellness market

Includes a detailed analysis of market growth drivers, challenges, and investment opportunities.

Delivers a complete overview of market segments and the regional outlook of the US corporate wellness market

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the US corporate wellness market.

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