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US Corporate Wellness Market - Industry Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this US Corporate Wellness Market Report

The US corporate wellness market by revenue is expected to grow at a CAGR of over 9% during the period 2021–2026.

The outbreak of the COVID-19 pandemic in the US has infused high stimulus into the US corporate wellness market. With the workforce population largely affected by one or more chronic diseases or other comorbidities, it warranted supporting their health and wellbeing. It set high expectations from employers, driving companies to proactively manage population health with their programs. While businesses have found ways to protect their employees physically - providing tech support to aid with the social distancing to introducing new leave policies - the disruption caused by the virus in terms of mental health is expected to continue. From helping employees adjust to the new normal and be nimble to reducing health risks, employers are focused on preventively and proactively managing the same. This is expected to increase access to wellness and expand or improve the quality of already existing programs.

The following factors are likely to contribute to the growth of the US corporate wellness market during the forecast period:

Increased Role of Wellness Champions

Data Analytics Powering Wellness Programs

Use of Technology to Improve Outcomes

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Reigns of Artificial Intelligence

The study considers the present scenario of the US corporate wellness market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

US Corporate Wellness Market Segmentation

The US corporate wellness market research report includes a detailed segmentation by program, end-user, revenue model, delivery model, incentive program, type, industry, geography. The HRA segment is growing at a stable pace with preventive care gaining importance due to the increased healthcare costs and focus of organizations to inculcate healthy habits among employees. Vendors are working on making HRA programs more effective by integrating them with other programs, which provide the opportunity to address workplace ergonomic concerns. The use of biometric screening is increasingly becoming a large part of HRA processes, thereby improving the delivery of wellness programs.

The rise in corporate profits is increasing discretionary incomes for employers, thereby driving up their spending on corporate wellness programs. A major trend gaining momentum is being inclusive. While diversity is a hallmark of workplaces, providing diverse employee wellness programs is a natural choice. Revenues for this segment are expected to come from the integration of technology with data to develop personalized experiences.

While wellness programs associated with recurring revenues require a strong connection and constant motivation, those that are associated with seasonal warrant a one-time incentive that ramps up participation. However, recurring revenue programs are more predictable and work on a long-term strategy that warrants consistent investment. The recurring revenue segment is served by nutrition and weight management programs, tobacco cessation, employee coaching, and online wellness portals. Since dropout is common in this market, vendors focus on rotation or creation of initiatives throughout the year to keep employee interests soaring and participation intact, driving the growth of this segment. Nearly three-fourths of the revenue from the season revenue segment comes in the second half of the year. With nearly 20% of US

nationals catching the flu on an annual basis, costing a business up to $90 billion, employers have raked up their onsite clinic support. The use of medical self-help programs increases during the second half of the year owing to the onset of cold-related illnesses and allergies.

To provide fully integrated services that ensure maximum participation and engagement, vendors provide a host of both onsite and offsite services. While some programs are exclusively delivered via one model, others are delivered via a combination of the two. The onsite market for corporate wellness is undergoing a radical shift as the coronavirus pandemic has introduced a wave of changes, some of which are expected to stay put even once the pandemic dies down. Larger companies are likely to offer onsite services as they have access to more resources in terms of budgets, space, and personnel, which is driving the demand for onsite services.

To improve the benefits of wellness plans supported by incentives, some employers are looking at behavioral economics to enhance employee engagement during activities for health management. Vendors are using technology in incentive programs to motivate employers to drive participation rates in wellness programs. Vendors are designing incentive programs that are in sync with the goals and objectives of the company. Hence, they are popular with first-time employers that use them as an entry point into the workplace wellness realm. As a high number of employers get on board the corporate wellness bandwagon, participatory programs are expected to gain traction. They are also specifically witnessing success among small-scale workplaces.

As the safety, wellness, and protection of employees have become a priority during the COVID-19 pandemic, workplace wellness is becoming a corporate responsibility, driving the use of services. However, the demand has deaccelerated slightly, more so now, as the pandemic shifts focus on creating healthy habits. In 2019, technology solutions witnessed a massive surge as several tools and applications were released and became easier to implement. Further, while reducing healthcare costs has been a high focus for implementing workplace wellness programs, employee engagement is becoming a catch-all and buzzword for corporates. This is shifting the wellness focus on devices and software, further fueled by technology-influenced convenience

The pandemic is accelerating the need for a digitally connected world, driving the media, technology, and telecommunication sector into a high-growth pace. The industry is anticipated to witness long-term increased spending. The need for businesses in every sector to adopt high resilience and innovative strategies is bolstering the growth of wellness programs. Media and technology companies are more inclined to offer a

cross-section of services and alternative resources for employee wellness. Since media and technology companies are often more heavily digital-oriented, work-life balance programs are highly prioritized in the segment.

Programs

- Health and Risk Assessment (HRA)
- Nutrition and Weight Management
- Smoking Cessation
- Fitness Services
- Alcohol and Drug Rehab
- Stress Management
- Health Education Services
- Financial Wellness
- Others

End-user

- Large Private Sector Businesses
- Medium Private Sector Businesses
- Public Sector Companies
- Small Private Sector Businesses
- Non-profit Organizations

Revenue Model

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Recurring

Seasonal

Delivery Model

Onsite

Offsite

Incentive Program

Participatory Programs

Health-contingent Programs

Type

Services

Technology

Industry

Media and Technology

Healthcare

Financial Services

Manufacturing

Retail

Others

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Geography
US

INSIGHTS BY VENDORS
ComPsych, Wellness Corporate Solutions, Virgin Pulse, and Provant Health Solutions are the major key players in the US wellness program market. Since the Mid-Atlantic, West, and Southwest regions have the maximum number of large businesses, the probability of setting up wellness programs is high. Several vendors are setting up bases in these regions. In addition, areas that have a dense population and house major business centers such as New York, Texas, and California, along with states that have headquarters of large corporations such as Illinois are likely to be more lucrative for market vendors.

Prominent Vendors

COMPSYCH

Wellness Corporate Solutions

Virgin Pulse

Provant Health Solutions

Other Prominent Vendors

Active Wellness

Aduro

Alyfe Wellbeing Strategies

BSDI

American Specialty Health

Aquila

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AYCO

Bank of America Merrill Lynch

BaySport

Beacon Health Options

Best Money Moves

Castlight Health

Ceridian

Corporate Fitness Works

Elite Wellness

Exos

Fidelity Investments

Financial Finesse

HealthCheck360

HealthFitness

Healthtrax

Integrated Wellness Partners

Kareila Health

Kinema Fitness

Kersh Health

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LifeDojo

LifeStart

LIVunLtd

Professional Fitness Management

Power Wellness

Reach Fitness

Marino Wellness

Marathon Health

Mercer

Money Starts Here

Midtown Athletic Club

The National Institute for Fitness and Sport (NIFS)

OptumHealth

Orriant

PayActiv

Privia Health

Premise Health

Prudential Financial

Ramsey Solutions

StayWell

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Sonic Boom Wellness

WTS International

Vantage Circle

Vitality Group

Wellsource

WellSteps

Wisdom Works Group

Workstride

Woliba

Wellable

Sprout

Wellness Coaches USA

PDHI

Novant Health

Sum180

Transamerica

KEY QUESTIONS ANSWERED

1. What is the US corporate wellness market growth during the forecast period?
2. Who are the market leaders in the US corporate wellness market?
3. Which segment is likely to account for the largest share in the US corporate wellness market by end-user?

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4. What are the market opportunities and threats faced by the market players?
5. What is the impact of the COVID-19 pandemic on the US corporate wellness market share?

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