

# **US On-Site Preventive Care Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Service Type (Acute Care, Chronic Disease Management, Wellness and Coaching, Nutrition Management, Diagnostic and Screening, and Others), Management Model (Outsourced Management Model, In-House Management, and Hybrid Management Model), and Geography**

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## **Abstracts**

The On-Site Preventive Care Market is expected to reach US\$ 6.92 billion by 2031 from US\$ 4.46 billion in 2024; the market is estimated to grow at a CAGR of 6.5% during 2024–2031. Major factors driving the market growth include rising focus on reducing healthcare costs and claims and increasing corporate wellness programs for reducing stress and absenteeism. Further, strategic initiatives by companies are likely to boost the market during the forecast period. However, cost concerns regarding implementation of programs among the market deterrents.

The unhealthy work environment is rising across the country, affecting the lives of many employees. Workplace-associated conditions such as stress and mental health issues are rising due to long working hours, sedentary work environments, and high-pressure job demands. The presence of stressed employees results in reduced innovation, negative employer brand, and low worker efficiency. These conditions not only affect employee well-being but also lead to absenteeism and decreased productivity, prompting companies to seek preventive care solutions to mitigate these issues.

The increasing absenteeism rate and human resource management costs impact the economy. The rate of absences increases rapidly from 3.2% in 2021 to over 6% in 2022 in the US, as per the data from wellbeing solutions provider Workplace Options. Additionally, about 7.8 million workers missed work because of an illness, injury, or medical problem or appointment, in January 2022. The rising absenteeism rates are increasing concern for employers and governments, leading to a persistent slowdown in productivity. The cost of absences can add up to direct payroll costs and indirect costs, such as overtime for co-workers covering the work of absent employees or payment for temporary workers to cover the absence, thus increasing healthcare costs for the company. A healthier workforce is more productive, engaged, and present. On-site preventive care leads to reduced absenteeism, lower healthcare-related interruptions, and increased employee satisfaction, positively impacting overall company performance and revenue growth. Organizations are adopting on-site preventive care programs to improve employee well-being. Employers are increasingly offering on-site clinics that provide preventive services to help employees stay healthy and reduce absenteeism.

Mental health conditions, such as stress, anxiety, and depression, pose significant risks to workplace productivity. Many employers are increasingly focusing on employee on-site preventive care programs (wellness programs) to improve employee well-being, increase productivity, and reduce absenteeism. Offering on-site preventive care is a key component of these programs. For example, Google integrated health and wellness into its corporate culture by providing employees accessing on-site healthcare services and stress-relief programs. As published in Vorecol's article in November 2024, a study found in the American Journal of Health Promotion reported that companies with health and wellness initiatives experienced an average 28% reduction in absenteeism, along with improvements in employee satisfaction and engagement. Similarly, Google's Mental Health Days initiative allows employees to take dedicated time off for their mental well-being, and a study from the National Institute for Occupational Safety and Health suggests that such programs can reduce absenteeism by as much as 30%.

Workplace wellness programs are a cost-effective way to promote health. Wellness programs yield a happy, healthy workforce for the employer that witnesses decreased absenteeism rates, increased retention, and improved company culture. There is a positive connection between employee wellness and business performance. As per the Employer Health Benefits 2020 survey by KFF (Kaiser Family Foundation), among large companies, most employers (81%) offered some type of workplace wellness program, as of 2020. Additionally, according to the RAND Employer Survey report for the US, 50% of employers in the country are promoting wellness initiatives, and larger

employers have top-level wellness programs, which often include wellness screening activities, identifying health risks, and interventions reducing risks and promoting healthy lifestyles. 72% of the employers offering wellness programs in the US substantiate their programs by combining screening activities and intervention support. The RAND Employer Survey data also states that employers direct their employees toward preventive intervention through workplace wellness programs, and 80% of employers offering wellness programs arrange screening programs for their employees for the primary identification of existing health risks.

Thus, increasing corporate wellness programs to reduce stress and absenteeism propels the US on-site preventive care market growth.

The comparative company analysis evaluates and categorizes the on-site preventive care market based on product portfolio (product satisfaction, product features, and availability), recent market developments (merger & acquisition, new product launch & enhancement, investment & funding, award, agreement, collaboration, & partnership, recognition, and expansion), and geographic presence that aids better decision-making and understanding of the competitive landscape. The report profoundly explores the recent significant developments and innovations by the leading vendors in the on-site preventive care market. The key market players are Premise Health Holding Corp, Medcor Inc, Concentra Inc, OccuMed, Marathon Health, LLC, United HealthCare Services, Inc., Mobile-Med Work Health Solutions, Inc., The Cigna Group, My Health Onsite, ProgressiveHealth

Based on service type, the on-site preventive care market is segmented into acute care, chronic disease management, wellness and coaching, nutrition management, diagnostic and screening, and others. In 2024, the wellness and coaching, segment held the largest share of the market. Based on management model, the On-Site Preventive Care Market is segmented into outsourced management model, in-house management, and hybrid management model. In 2024, the outsourced management model segment held the largest share of the market.

Various organic and inorganic strategies are adopted by companies operating in the On-Site Preventive Care Market. The organic strategies mainly include product launches and product approvals. Inorganic growth strategies witnessed in the market are acquisitions, collaboration, and partnerships. These growth strategies allow the market players to expand their businesses and enhance their geographic presence, along with contributing to the overall market growth. Furthermore, strategies such as acquisitions and partnerships helped strengthen their customer base and extend their product

portfolios. A few of the significant developments by key players in the On-Site Preventive Care Market are listed below.

In August 2023, Marathon Health announced the acquisition of Cerner Workforce Health Solutions (WHS), a group of dedicated onsite and near-site health clinics. The acquisition expands Marathon's footprint, accelerating the reach of its unique population health model to more employers, locations, and members. The transaction closed on August 1, 2023.

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