



**Market Landscape Guide**

# **Wellness at Work Technology: 2024**

A look at the research around wellness, as well as existing and emerging categories of technology designed to support the workforce with Physical, Mental, Financial, and Lifestyle Concerns.



# About Aspect43

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Our team spends their days trying to identify why work isn't working for so many - talking to leaders, human resource teams, and employees in focus groups and 1:1 calls, surveying thousands of people each year, and meeting with hundreds of technologies and investors - to understand how we can utilize and design technology for the betterment of everyone.

Our Landscape Guides are designed to explain things in clear, simple language - no ratings, rankings, or recommendations - just an unbiased overview of the tech stack, business impact, and overview of the categories in the space so you can make decisions that are right for your business.

In addition to our research, we speak at many HR and business conferences and private events each year and partner with technology companies, service providers, and investors to help them understand the voice of the customer and employee, partnering to develop better strategies around product design and roadmaps, the buyer journey and internal market education for their teams.

Access all our research for free or sign up for our focus group panels at [Aspect43Insights.com](https://Aspect43Insights.com).

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# Introduction

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In 2021, we decided to add a question about burnout to our annual insights at work research. Little did we know it would send us on a multi-year journey focused on wellness at work.

At that point, 16% of the companies we surveyed felt that burnout was an issue at their company. This seemed great until we noticed that 50% of the employees in that survey reported being in active burnout; the number for Human Resources and Executives was over 64%.<sup>1</sup>

This huge disconnect started us on this broader research, and as we dove into the numbers, year after year, we realized that most people felt like they were the only ones struggling in their organization. As we conducted more and more surveys and focus groups, we noticed this trend went far beyond burnout into the stresses of caretaking, managing chronic illness, mental health, and financial struggles.

Since we started this research in 2021, we have seen a meaningful shift in how we are discussing health and wellness. Topics that were once taboo to discuss even with friends and family were making their way into social media channels, our movies and TV shows, and lunch tables at work.

In the fall of 2023, Sarah White, the founder of Aspect43, co-presented with Jessica Miller-Merril, CEO of [Workology](#), on stage at a major tech industry event - not about the research or best practices - but about their personal journeys with wellness at work - from grief to domestic violence, miscarriages to eldercare, wellness extends into every aspect of our life and career. Even with more voices talking about this, dozens of people from different backgrounds privately shared experiences following the event, and all consistently stated, "I was the only one" or "I didn't think it happened to other people like me."

The struggle with wellness is not isolated to a particular type of person, segment of the population, or group of workers. It impacts every race, gender, age, socioeconomic status, and every other label you can think of.

**Everyone feels alone in their struggle, including those in a position to make the change in their organization - so they don't.**



## Introduction, Cont.

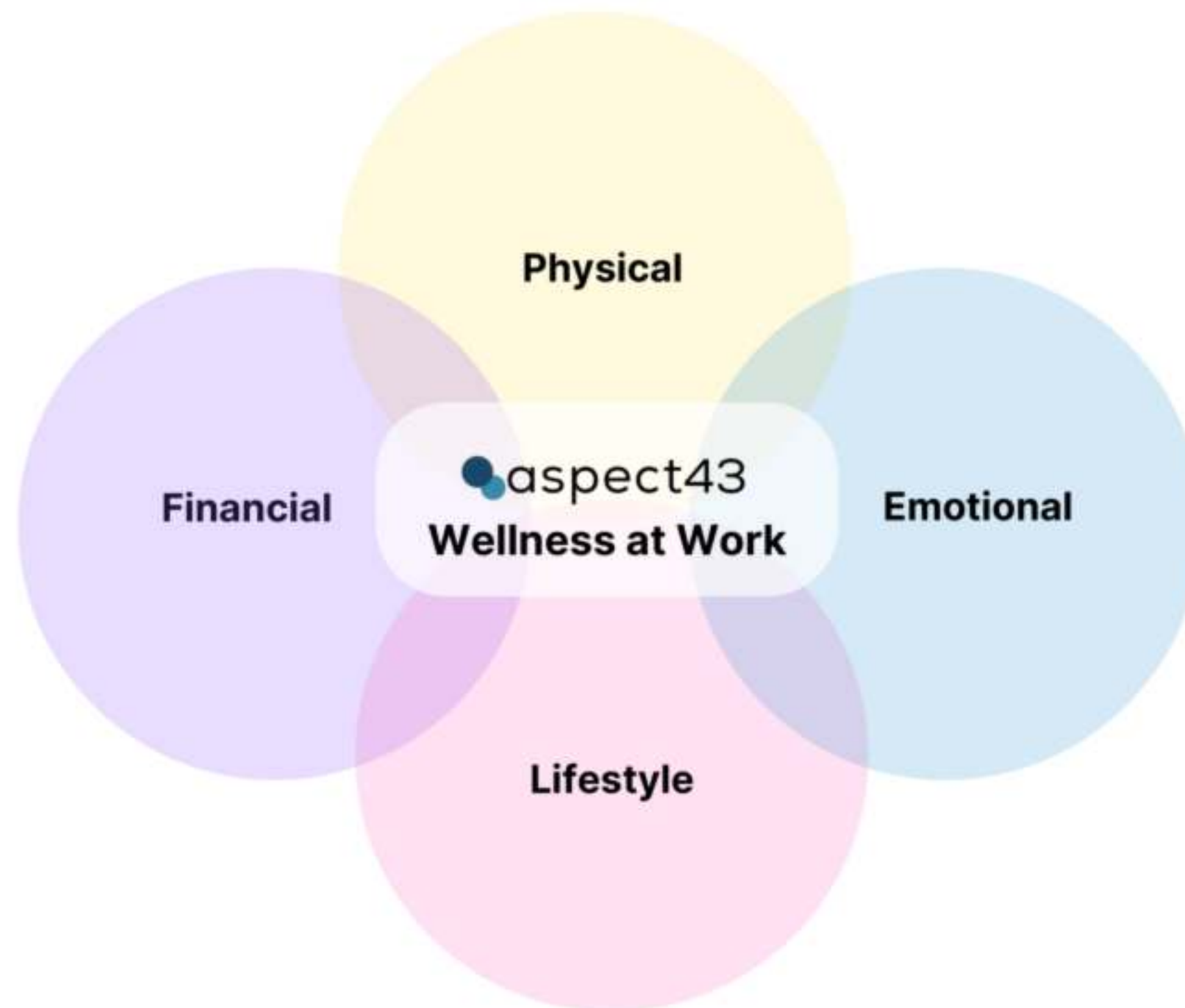
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The U.S. Surgeon General considers workplace mental health and well-being a critical priority for public health, with 76% of U.S. workers reporting at least one symptom of a mental health condition (such as anxiety or depression).<sup>2</sup> Financially, 1:4 Americans can not even rate their financial situation as “okay” - with 35% saying they were worse off than a year ago - the largest rate since the Federal Reserve Bank started asking nearly a decade ago.<sup>3</sup>

Many companies are realizing the impact of this on their business.

Companies are looking at how to support a broad spectrum of “wellness” related issues. As a result, we have an entire market emerging of technology and tools that can be rolled out at scale and support the employee in every aspect of their life - Physical, Emotional, Financial, and Lifestyle. These tools are no longer seen as “employee benefits” but are often bought and implemented as part of the broader employee experience and retention strategy.

As this business case with wellness at work is further defined with outcomes impacting customers, shareholders, and revenues, along with the ease of adoption of the technology available, we expect to see one of the fastest market segment growths and employee movements that has ever been seen in the HRTech/Worktech industry.







## Introduction, Cont.

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Our research for this project took place over a ten-month period in 2023 and included dozens of 1:1 conversations with business leaders, HR teams, health care professionals, and employees; meetings with nearly 30 technology and service providers with wellness tools; and surveys of more than 3,000 employees and business leaders.

We have identified four umbrella categories (Physical, Emotional, Financial, and Lifestyle) and more than 30 individual categories, each with a full selection of unique technology and tools designed to support the employee.

We plan to see significant market consolidation in this market over the next three years, creating a more platform approach common to other market segments - talent acquisition, employee experience, workforce management, etc. It would not be a surprise if the major HCM groups made acquisitions and included this in their tech stack, as wellness is so integrated with employee success at the core level. Until then, companies will need to understand and build a tech stack that best supports their workers through multiple-point solutions and can use our tech landscape guide to provide more insight into their options.

### **This comprehensive landscape guide covers:**

- Role of Wellness at Work Today.....6
- Why Wellness Matters.....8
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# Wellness at Work

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Wellness encompasses any situation or condition impacting an employee's ability to be at their best at work and at home. Today, we include topics like caretaking, grief, menopause care, domestic abuse, neurodiversity, and so much more. Wellness isn't about supporting "bad" or negative situations; in many cases, it can be neutral or factual stages of someone's life that are getting more support or assistance.

**Acknowledging the connection between employees' realities and their professional performance is essential in harnessing the complexity of a thriving workplace.**

What started as cost-saving measures around health care premiums became a focus around benefits enhancements for many organizations looking to get a competitive advantage when hiring and retaining. Today, it is shifting even further to be a key part of business strategy - ensuring wellness support on a much broader area of topics and understanding how that impacts productivity, revenue, and customer satisfaction rates - in addition to the employee experience metrics.

30% of companies we surveyed in 2023 expressed concern about employee burnout, nearly double what we saw in that first survey.<sup>4</sup> Today, almost 2:3 of companies are concerned about employee mental health and wellness, with 40% of companies saying it is a priority and more than 3:4 of employees recognizing their company is committed to their wellbeing.<sup>5</sup>

Organizations have expanded the scope and invested in wellness because they recognize its impact on every aspect of the business and their people.

## A43 Insight:

When assessing your company's wellness maturity, it is important to:

- Understand types of "wellness"
- Understand the widespread need at the employee level
- Understand the business impact at the stakeholder level.

From there, you can dive into the technology and solutions more effectively and efficiently to meet the needs of our workforce and business.





## Wellness at Work Categories

There are four broad categories of wellness - Physical, Emotional, Financial, and Lifestyle.

People may be managing one or multiple from different categories all at once, which is why more holistic approaches to supporting the workforce are vital. Understanding how vast the concept of "wellness" is helps organizations approach the solutions more strategically.

Addressing wellness at work can be supported through policy, promotion/encouragement of outcomes, monetary support, or technology.

An integrated approach addresses the four areas of wellness to support the whole person.

### **Physical Wellness**

Physical wellness programs focus on a healthy lifestyle's physical aspects - nutrition education, cooking programs, in-house chef/healthy meals, physical movement, weight training, stress management, medical condition support and more.

### **Emotional Wellness**

Emotional wellness programs focus on employees' emotional and mental wellness. It spans beyond mental health to include support for stress, grief, burnout, resilience, and more.

### **Financial Wellness**

Financial wellness programs - beyond pay equity and compensation strategies - support employees through education and process changes to create a more balanced financial picture, including areas targeting hourly or more entry-level workers vs traditional retirement planning services.

### **Lifestyle Wellness**

Lifestyle refers to pursuing and maintaining a balanced and fulfilling personal life. These are commonly supporting areas that promote work-life balance and supporting personal situations such as caregiving, home management, etc.



# Why Wellness Matters

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Despite medical advancements, issues like cancer, heart events, and reproductive health concerns persist - impacting people younger and younger than ever before. More than half of Americans with mental illness are not seeking treatment in part due to access to care.<sup>6</sup> A large percentage of people are working more than 40 hours a week,<sup>7</sup> many more holding second jobs, and yet we are still more than a trillion dollars in credit card debt as a nation.<sup>8</sup>

People are exhausted, fed up, and getting sick because of it.

We are having a wellness crisis on all fronts in our society, and it goes so much deeper than many of us realize daily. Companies can look at the ROI of doing these types of programs in the next section.

But first, we must look at the harsh reality of what is happening and why we are so passionate about this correction.

**51% of Americans making over 100k/year are living paycheck to paycheck**

**Suicide rates in 2022 were the highest ever recorded by the CDC**

**1:4 Women will experience “severe” physical trauma by a partner;  
Financial and Emotional abuse rates are significantly higher**

**60% of Americans have at least one chronic illness**





## Physical Wellness

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Physical wellness aims to maintain and improve the body's functionality, resilience, and overall fitness to enhance the quantity and quality of life. As we dig into this area, we encounter a multifaceted approach that goes beyond the conventional ideas of exercise and nutrition. It's a journey that encompasses sleep, disease prevention, fertility considerations, hormonal equilibrium, and cultivating health-conscious habits.

To fully appreciate the significance of physical wellness, we must understand today's challenges.

Stress levels, mental health issues, lack of time, education, money, healthy food access (food deserts), media influence, and social pressures all lead to unhealthy relationships with food, vice habits (alcohol, drugs, cigarettes), and exercise. In some instances, people take the "healthy" to the extreme, creating disordered eating and body dysphoria. In others, these patterns contribute to lifestyle-related health issues like obesity, diabetes, and heart disease, making unhealthy diets responsible for more deaths globally than smoking.<sup>9</sup>

Yet, in the United States, healthcare is tied to your job - leaving large percentages of this country not covered or unable to afford access to healthcare due to costly co-pays or monthly premiums. According to the CDC, construction workers, home health aides, farm workers, maintenance people, and those in hospitality and food service are the least likely to have no coverage or cannot afford coverage.<sup>10</sup>

The journey to physical wellness currently involves major obstacles occurring at shocking rates. 1:2 men and 1:3 women will be diagnosed with cancer in their lifetime,<sup>11</sup> bringing high medical bills and devastating side effects from treatment. In the United States, someone has a heart attack every 40 seconds, and 1:5 of those is silent, meaning the damage occurs, but the person is not aware of it.<sup>12</sup>

Women are less likely to be heard or addressed critically - even when facing life-threatening diseases and situations. More and more are sharing stories and encouraging advocacy on social channels to help save others' lives. Research has now confirmed that for women, physical issues are initially dismissed as mental health or weight-related at a significantly larger level.<sup>13</sup>

### Examples of Topics:

- Physical Wellness
- Disordered Eating
- Diet/Nutrition
- Fitness
- Disease Management
- Menopause
- Sleep
- Postpartum care
- Fertility
- Smoking
- Hormonal
- Health Habits





## Physical Wellness Cont.

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The exploration extends to areas that many experience but few discuss, like infertility, miscarriage, and menopause. These aspects, common and pivotal to physical health, resonate emotionally and financially, shaping the broader landscape of individual wellness. As we navigate this terrain, the interconnected nature of well-being becomes increasingly clear. 1:6 people (men and women) worldwide experience infertility,<sup>14</sup> which is primarily a physical condition but impacts emotional, financial, and lifestyle as well. For those women who become pregnant, 1:4 likely will experience a miscarriage (pregnancy loss before 20 weeks), also resulting in effects beyond just physical health.

More recently, menopause has come to the forefront of health conversations. Around 2:3 of women ages 40-64 have never talked about menopause with a healthcare provider, but this pattern is changing. Gen X women now experiencing the process are more open to discussing the wellness impacts, and there's been a boom of products to address them, called the Menopause Gold Rush.<sup>15</sup> The physical symptoms of this physical process cause fatigue, confusion, mood changes, depression, and anxiety, leading 17% to quit or consider quitting their job.<sup>16</sup> The reach of this situation highlights the complex connection between physical symptoms and their impact on professional lives.

As our understanding of physical health grows, we increasingly recognize its interconnectedness with other areas of wellness. Therefore, it is crucial to adopt an integrated approach that addresses all aspects of wellness to achieve lasting improvements.

**17% of women managing menopause have considered leaving the workforce due to the physical symptoms related to it, highlighting the severity and the impact rarely addressed by businesses and broader impact to society.**





## Emotional Wellness

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Emotional wellness involves understanding, managing, and expressing emotions effectively, fostering healthy relationships, and coping with life's challenges. Emotional wellness is a key component of mental health. It plays a vital role in shaping an individual's ability to manage stress, develop resilience, and maintain a positive perspective on life.

Feeling overwhelmed or stressed is a common refrain in today's world, where the possibility of shootings, terrorism, war, a pandemic, and everyday life has impacted our emotional well-being. When we explore the various aspects of emotional wellness, we observe an alarming increase in anxiety and suicide rates. Additionally, it is crucial to address less discussed but equally significant topics such as neurodiversity, domestic violence, and navigating grief.

As mental health challenges escalate, statistics paint a stark picture. The rise in suicides and anxiety reflects a growing crisis affecting millions of Americans. With **160 million people living in regions facing a scarcity of mental healthcare professionals**, the impact is far-reaching.<sup>17</sup> Suicide rates have surged by 30% since 2000, resulting in over 18,000 additional deaths annually. The number of Americans experiencing suicidal thoughts is even more: 12.3 million in 2021.<sup>18</sup>

Almost 1:5 of adults (over 50 million) suffer from some anxiety disorder, yet only 36% of those receive treatment,<sup>19</sup> and about 1:25 live with a serious mental illness, such as schizophrenia, bipolar disorder, or major depression.<sup>20</sup> Despite an uptick in those seeking help, the decline in self-reported mental health excellence among Americans raises further concerns.<sup>21</sup> This distressing reality becomes even more pronounced when examining the mental health challenges faced by teenagers.

**The fact that anxiety disorders have tripled since 2016<sup>22</sup> and that a staggering 60% of young people are experiencing major depressive episodes without receiving sufficient treatment<sup>23</sup> highlights the pressing need to address mental health on a larger scale.**

As we dig deeper, the impact of social media emerges as a key factor. Research highlights a correlation between increased screen time and elevated levels of anxiety and depression. Social media platforms enhance social anxiety, cyberbullying, FOMO (fear of missing out), comparisons, and the addictive nature of digital media. This phenomenon significantly impacts teenagers, as 95% use social media platforms while their brains undergo crucial developmental stages. The US Surgeon General issued an official advisory warning about the mental health impacts of content exposure and its negative effects on brain development.<sup>24</sup>

### Examples of Topics:

- Anxiety
- Suicide
- Mental Illness
- Neurodiversity
- Sabbaticals
- Grief
- Belonging
- Resilience
- Digital/Social Media
- Social Isolation
- Loneliness
- Depression





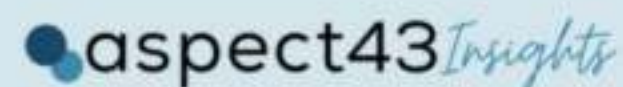
## Emotional Wellness Cont.

When we broaden our emotional and mental wellness scope, topics like grief and neurodiversity emerge. Neurodiversity describes those with distinctive cognitive functions that impact 15-20% of the population, including autism, ADHD, dyslexia, and more.<sup>25</sup> Recognizing neurodiversity allows for life-changing accommodations and adjustments that empower individuals to thrive in their roles.

Grief research also shows that the impact of a significant loss often lingers beyond employers' limited number of bereavement days. Some life changes that result in grief - divorce, death of a cherished pet, experiencing a miscarriage, or facing disruptions like losing a home, job, or a familiar lifestyle, do not qualify for any time at all. There's no standard timetable, with some individuals mourning for a short term and others lasting months or years. New service companies, like [Comfort Communications](#), are emerging to help employers plan processes and support workers more personally when a loss happens.

Emotional Wellness isn't a challenge faced by just a few; it's a widespread issue that touches all of us, and the workplace plays a central role. Over 75% of workers in the United States have reported having at least one sign of a mental health issue, leading to an annual average of 8 days absent from work. Half of full-time workers have left a previous job, at least partially due to mental health concerns.<sup>26</sup>

Moreover, work itself contributes to the issue, with 78% of employees reporting that workplace stress negatively affects their mental health.<sup>27</sup>



Traditionally, many companies have overlooked or stigmatized emotional or mental health in the workplace. It was not uncommon for employees to face discrimination, lack of support, or even negative consequences for disclosing their mental health challenges.

While we have moved past this approach in theory, much of the stigma remains in practice.

We need to make it okay, not to be okay.

One way to do this is to create an environment where mental health is discussed openly and people are respected. We can also develop policies and practices that support a healthy company culture and reduce work stress.





## Financial Wellness

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Financial wellness refers to the overall health and stability of an individual's financial situation. It goes beyond the traditional financial success or wealth concept and encompasses financial management, security, and planning elements. Financial wellness ties so closely to emotional, physical, and lifestyle that it is hard to separate this.

### **People are struggling to afford food and basic necessities while working full-time jobs.**

As of September 2023, 60% of adults report living paycheck-to-paycheck, including 49% of those making over 100k/year. 83% of Americans overspend every month; the rising costs of homes, cars, and consumable goods, along with the burden of student loans, have pushed people to use credit cards more over the past couple of years. The average credit card debt increased by 13.2% from 2021 to 2022 - And has now surpassed 1 trillion dollars in 2023 for the first time.<sup>28</sup>

While many companies offer “retirement planning,” **82% of employees lack basic financial literacy** and have never been taught basics like budgeting or how investments, predatory lending, and credit work.<sup>29</sup> In our 2023 research, financial strain is a top concern for more than half of the employees.

- More than half of all workers can't cover a \$500 emergency
- Hardship withdrawals from a 401k are at the highest levels ever
- 12 million Americans are relying on payday loans, paying \$9 billion in fees<sup>30</sup>

Focusing on the impact of financial issues on certain groups, we uncover a dimension often overlooked in discussions of pay equity. Factors like parenthood, age, disability, work hours, personality, and negotiation skills contribute to pay inequity, leaving some individuals in these groups without the opportunities they deserve for growth, advancement, and fair pay.

While we have to acknowledge that systemic issues exist, we also need to acknowledge that many of the people reading this have the ability to influence pay fairness and equity and change some of those systemic issues at their own companies - like offering same day pay.

### Examples of Topics:

- **Basic Financial Literacy**
- **Budgeting Apps**
- **Investment/Retirement**
- **Credit Card Education**
- **Student Loan Repayment**
- **Emergency Funds Access**
- **Fair Pay**
- **Pay Equity**
- **Charity Match**
- **Volunteerism**





## Lifestyle Wellness

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Lifestyle wellness refers to the mental load we all carry about our lives outside work, involving responsibilities, concerns, and emotional effort related to personal, family, and social aspects that often require careful management and consideration.

The constant sense of being overwhelmed by juggling work, home, and life highlights the misleading idea of work/life balance. It suggests that professional and personal responsibilities can be neatly compartmentalized.

**The boundaries between work and personal life are often fluid and interconnected.**

The expectation of achieving perfect equilibrium is unrealistic.

More than half of Americans in their 40s find themselves in the challenging position of being “sandwiched” between an aging parent and raising their own children.<sup>31</sup> Nearly 6:10 American workers struggle to balance work and caregiving responsibilities.<sup>32</sup> Caring for a young child, special needs individual, aging parent, or partner with disabilities places responsibility and stress upon employees that mark their daily lives with appointments, expenses, and exhaustion. Costs are soaring nationwide,<sup>33</sup> and the availability of long-term family and child caregivers is decreasing just as demand rises.<sup>34</sup>

Domestic abuse is not as uncommon as we like to pretend; **40% of women and 25% of men have experienced severe physical abuse, sexual violence, or stalking from a partner.**<sup>35</sup> This distressing reality extends to the workplace, manifesting as challenges in focus, decreased productivity, frequent absences, unexplained injuries or illnesses, or a reluctance to discuss personal matters. Unfortunately, this contributes to a staggering loss of 8 million workdays yearly.<sup>36</sup> Recognizing the impact of domestic abuse on individuals and the broader community demonstrates the interconnected nature and importance of lifestyle wellness.

Lifestyle wellness effectively arranges the multiple areas of your personal, professional, and social life. Traditional work/life balance falls short of capturing the complexities of topics such as caretaking, social connection, and domestic abuse. It's not merely about achieving equilibrium; it's about fostering an environment prioritizing flexibility, support, and recognizing our shared responsibilities.

### Examples of Topics:

- Caregiving
- Social Connection
- Parenting/Co-Parenting
- Personal Relationships
- Childcare Finders
- Childcare Stipend
- Emergency Support
- Domestic Violence Options
- Security Options
- Home Management
- Pet Care





## Emerging Areas to Watch

These topics will have expanded research over the coming years as we see a broader focus by individuals and organizations like WHO and the US Surgeon General's office.

The connection and impact of these areas to business outcomes and success are also being researched to help better identify programs and paths for companies to use while supporting different life stages, situations or experiences.

**Social connectedness** - about 1:4 of older adults face social isolation, and 5-15% of teenagers deal with feelings of loneliness. Social isolation increases the risk of conditions such as dementia, heart disease, stroke, and other chronic illnesses. The World Health Organization launched a Commission on Social Connection to address loneliness as a pressing health threat.<sup>37</sup> The US Surgeon General has named youth loneliness as one of the department's top priorities.<sup>38</sup>

**Neurodiversity** - 15-20% of the population is neurodiverse, including individuals with autism, ADHD, dyslexia, and more.<sup>39</sup> Many struggle with challenges to function on a daily basis at home and impacting work. Wellness programs can provide life-changing support that enables these individuals to thrive.

**Grief** - The impact of a significant loss often lingers beyond the employer's limited number of bereavement days. It's essential to recognize that numerous major life events - the death of a loved one, loss of a cherished pet, miscarriage, divorce, or disruptions like losing a home, job, or a familiar lifestyle - can cause profound grief.

**Menopause** - According to the U.S. Bureau of Labor Statistics, women over 40 makeup almost 30% of the workforce and could be experiencing menopausal complications at work. The physical symptoms of this process cause fatigue, confusion, mood changes, depression, and anxiety, leading 17% to quit or consider quitting their job.<sup>40</sup>

**Domestic Abuse** - 2:5 women and 1:4 men have experienced severe physical abuse, sexual violence, or stalking from a partner in their lifetime,<sup>41</sup> and the tragic consequences go well beyond the walls of the home. Many workplace violence issues and shootings stem from domestic abuse situations at home. Victims often find themselves constantly "on high alert," bearing the burdens of physical, mental, and emotional distress. In the workplace, this may look like a struggle to focus, decreased productivity, excessive absences, unexplained injuries, or illness, or a reluctance to discuss their personal life. This distressing reality contributes to a staggering loss of 8 million workdays each year.<sup>42</sup> Financial abuse is also very common, limiting access to funds for someone to leave, no matter how dangerous the situation.





Wellness isn't "one-size-fits-all" or contained in a set of programs. Companies should have an inclusive culture that values everyone's unique journey to wellness. However, even as a direct line leader, you have some things that you can encourage, support, and do to promote wellness among your team.

This includes some practical actions to take:

- Encourage breaks during the day
- Respect time off and work hours
- Enact pay equity and continuous pay
- Offer mental health first aid
- Provide mental health and substance abuse treatment through insurance
- Provide flexible schedules
- Address toxic workplace behaviors and situations
- Train employees and leaders to have productive and respectful difficult conversations
- Establish community and promote inclusion
- Equip managers with skills to lead people
- Offer development and opportunities for growth





# Business Impact of Wellness

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*It's not just about profits; it's about people.  
We are a family.  
Our people are at the center of everything.*

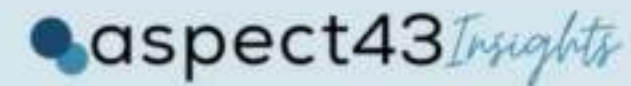
The business case of wellness should be that it is the right thing to do for our workforce, given how we talk about our “people” and our “talent.”

But we all know that isn't the reality, and we understand that quantifying the business impact is crucial for gaining buy-in to implement and scale the programs.

How companies approach employee wellness sends a clear message about their values and priorities, which is not going unnoticed by customers, employees, potential candidates, and shareholders. **Workplace wellness and employee mental health have rapidly become an "emerging investor priority," according to the Harvard Law School Forum on Corporate Governance,**<sup>43</sup> as stakeholders recognize the influence of emotional well-being as a significant driver of productivity, morale, recruitment, retention, and reputation.

According to an Oxford University study, well-being levels are not just a subjective measure of “feeling good”, but rather a powerful force that drives company values, return on assets, gross profits, and stock market performance.<sup>44</sup>

Businesses directly feel the impact of employee wellness - good and bad.



Employee wellness promotes compliance.

A workplace that prioritizes employee wellness not only values and supports individuals from diverse backgrounds but also aligns with important regulations such as the Equal Employment Opportunity Commission (EEOC), the Americans with Disabilities Act (ADA), and the Family and Medical Leave Act (FMLA).





## Business Impact Stats for Wellness

By prioritizing comprehensive wellness initiatives, organizations demonstrate a commitment to their employees' holistic health and strategically invest in their own success.

A workforce that feels supported and equipped to navigate life outside of work is likelier to be engaged and productive at work. This proactive approach not only fosters a positive workplace culture but also contributes to the long-term resilience and success of the entire organization.

### Productivity

- 80% of workers say fair pay policies make them more productive at work<sup>45</sup>
- Burnout, stress, chronic disease, toxic workplaces, and related factors cost US companies a staggering \$1.5 trillion annually in reduced productivity<sup>46</sup>
- Employees who strongly agree their employer cares about their well-being are 3x more likely to be engaged at work<sup>47</sup>
- The London School of Economics confirmed that higher employee well-being results in less sick days and lessens productivity loss<sup>48</sup>

### Hiring/Retention

- 1:3 companies recognize high-stress levels are a challenge to retention, a concern more sharply perceived by frontline supervisors than higher leadership<sup>49</sup>
- 75% would contemplate leaving if a company neglects their well-being<sup>50</sup>
- When deciding where to work, nearly half of potential candidates consider a company's commitment to work/life balance<sup>51</sup>
- \$322 billion in turnover and lost productivity costs from employee burnout<sup>52</sup>

### Cost Reduction

- 78% of HR leaders reported experiencing savings on healthcare expenses due to implementing their wellness program<sup>53</sup>
- Strong employee well-being correlates to reduced turnover rates, contributing to improved retention and significant cost savings associated with recruitment<sup>54</sup>



# 2024 Wellness Tech Stack

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The 2024 Wellness at Work tech stack represents one of the fastest expanding ones we have seen in over a decade - nearly doubling in the number of category offerings and breadth of area covered.

Many of the tools now incorporate the latest research from psychology, social behavior, and medical findings to promote behavior change and provide support that will sustain the long term. What started as a group of categories seen as an add-on to benefits is emerging as a strategic powerhouse for business and employee impact on multiple fronts.

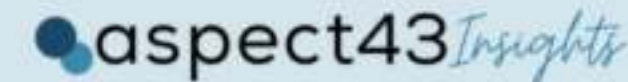
Some of these categories will also show up in our upcoming employee experience and talent acquisition tech stacks and overlap with other areas of HRTech. It further highlights the interconnectedness of wellness technology today.

The tech stack has 30 sub-categories across physical, mental, emotional, and lifestyle wellness.

We expect to see more focus on niche lifestyle tools emerge, a (much-needed) improvement in the business dashboards and enterprise maturity, and artificial intelligence (AI) and data analytics becoming even more prevalent in tools in 2024.

Global Wellness Institute finds wellness-related spending is expected to reach \$7 trillion by 2025.<sup>55</sup> Our 2023 research found that 46% of companies were interested in or actively buying wellness tools before the end of 2024.

This landscape report highlights the tech stack as of January 2024, an overview of the current and emerging categories, and dives into challenges and tips around adoption and selection.



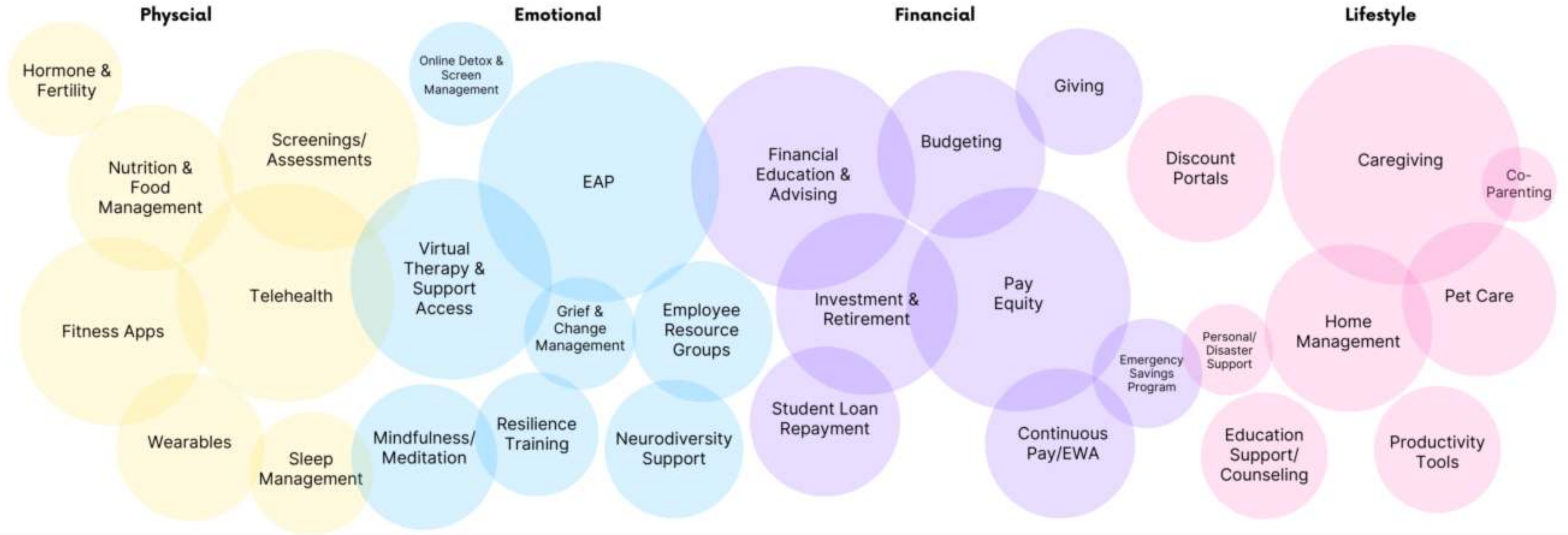
While the scope of wellness will continue to expand and mature in the next three years, the growth trend around new categories and stand-alone solutions in the tech stack is not sustainable. As with any rapid category development, we expect to see the consolidation of the numerous existing point solutions to create broader wellness platforms with expanded partnerships and strategic mergers and acquisitions (M&A) by the larger core HRIS players starting later this year and continuing through 2026.

These positive consolidations will result in a more streamlined and integrated approach, enhancing the overall user experience, analytics, and the overall effectiveness of well-being programs.



# Wellness at Work Tech Stack: 2024

Wellness Tech Point Solutions



## Foundational Functionality

Features that exist in point solutions



## Complementary Tech

Tools outside of wellness that have impact on employee wellness in high performing organizations.







## Challenges with the Adoption of Wellness Technology

**Wellness initiatives within companies face a unique challenge – the absence of clear ownership.**

Unlike Recruiting or Compensation, a clear department is not buying this technology today. Our research shows decisions being made and budgets for various solutions in Talent Management, Employee Experience, CHRO, and Benefits Teams. The selection, as well as the internal comms, adoption planning, and management of the programs, often require company-wide collaboration and are “company” solutions, not “benefit” solutions.

### Sample of Wellness Buyer Titles in Our Research

Chief Wellness Officer (CWO)	CHRO/VP HR
Coordinator of Employee Wellness	Employee Experience Director
Director of Talent Management	Health and Safety Manager
Learning & Development Manager	Benefits Manager

### Employee Privacy Concerns

Employees can hesitate to participate in wellness programs - especially financial or emotional wellness - because they are concerned about organizations tracking their personal information. To combat this perception, companies need to build trust. Not all of these tools provide an employer portal - and that is ok - it is just an offer of support you provide and don't need to track beyond overall usage rates. But as an organization, you need to be clear about what information is seen (or not) and then follow that.

### Executive Buy-In

By showcasing the positive impact of wellness initiatives on productivity, employee retention, and the company's financial health, these discussions can be elevated to the C-suite, leading to increased support and buy-in.





## Wellness Platforms

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Wellness platforms provide a centralized hub for users to access resources, tools, and support across multiple areas of wellness. Most of these platforms incorporate physical and emotional wellness, with a few adding pieces of financial or lifestyle, but we expect to see these expand scope as this tech area continues to grow.

Today's wellness (also known as well-being) platforms are highly focused on employee experience, and most have expanded beyond traditional wellness offerings to include community platforms with internal communications, celebration/recognition, groups/ERGs, resource sharing, and even employee feedback or pulse survey tools.

Customizable dashboards offer data snapshots of micro-learning, personal goal attainment, new resources, and actionable insights on reaching organizational goals. Targeted communications through these portals allow companies to reach specific groups of employees based on wellness factors without seeing the identifiable information in the group to protect privacy.

Designed with the user in mind, they often allow access to external solutions from a single dashboard and are some of the most intuitive and mobile-friendly in the HCM market.

We expect these platforms to continue to merge into the employee experience platforms and further from "benefits" in the coming years.

The increasing movement in this market has been highlighted by the M&A activities of the two leading platforms - [Limeade \(now part of WebMD\)](#) in August 2023 and the [Virgin Pulse, HealthComp](#) merger in November 2023. Expect more movement to happen with ongoing benefits to employees and companies using these solutions.

### Common Features Include:

- Virtual access to professionals
- Educational Resources
- Interactive Learning
- Games and Activities
- Goal-Setting
- Progress Tracking
- Standard & Custom Dashboards
- Targeted Communications





## Solution Categories Defined: Physical

Physical wellness bubbles represent the categories of technology focused on an individual's physical health and well-being - often prioritizing promoting a healthy lifestyle using science and psychology to back up approaches.

These tools often highlight a specific aspect of physical wellness, using wearables and/or mobile apps to track participation and provide community hubs to build social accountability for healthy habits. The hubs include microlearning, AI-driven coaching, or connecting the employee with certified professionals. All of these are designed to offer guidance, encouragement, and support in areas like nutrition, exercise, stress management, and overall health improvement.

The Consumer Electronics Show in Jan 2024 was filled with wearable devices focused on health and wellness. We expect to see this category boom over the coming years as technology (and cost) becomes more and more accessible.

Enterprise-level platforms include reporting and metrics to see usage and overall trending at a group level while retaining the confidentiality and privacy of the worker.







## Solution Categories Defined: Physical

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### Screening/Assessment

These tools evaluate an individual's health status, identify potential health risks, and deliver personalized recommendations for improvement. It often involves health risk assessments, biometric screenings, mental health assessments, and lifestyle questionnaires. AI-enabled smartphone technology has made this technology more accessible, which means that risk factors may be identified and treated sooner. It also allows individuals to keep track of ongoing known conditions.

### Nutrition and Food Management

This type of technology ranges from a focus on healthy eating to healthy food relationships to weight-loss tools. It includes online education, nutrition guidance, meal tracking, and access to healthy recipes, and may include pre-made meal kits. They support people coming out of disordered eating, those looking for weight loss or changing habits that lead to diabetes and other chronic illnesses.

### Wearables

This tech category covers a broad scope of specific topics, from glasses that help you hear better ([Nuance Audio](#)) to rings that track biometrics ([Evie](#)). Numerous biodata tools are rolling out to give more personalized access to health care in a way we have never seen.

### Telehealth

Remote delivery of healthcare and wellness services, including video or phone appointments with healthcare professionals and remote monitoring of health conditions. These tools provide convenient access to medical advice, diagnosis, treatment, and counseling from the comfort of one's home, eliminating geographic barriers.

### Sleep Management

Employees can identify sleep problems or inconsistencies using wearables or web and app-based questionnaires. The tools direct employees to resources that offer sleep-related content, exercises to promote natural sleep readiness, and soundtracks for sleep. These tools often overlap with stress management support.

### Hormone & Fertility Tech

Individuals can track their reproductive health, fertility, menopause, and other potential hormone disruptions by monitoring menstrual cycles, ovulation, temperature, emotional/physical responses, and other fertility-related factors using self-reported information or biosensors. These tools empower individuals planning to start or expand their families by providing valuable information about their fertility metrics, assisting in family planning, and achieving pregnancy goals. They also can help identify the underlying hormonal causes or employees going through peri-menopause or menopause.

### Fitness Apps

Online or smartphone-based apps provide easy access to workout plans, exercise tracking, and virtual classes. These tools promote regular physical activity, help in goal setting, and offer educational resources to enhance overall health and fitness levels. They also can include a coach, coordinate access to employer-paid fitness facilities, or track participation in employer-provided activities.





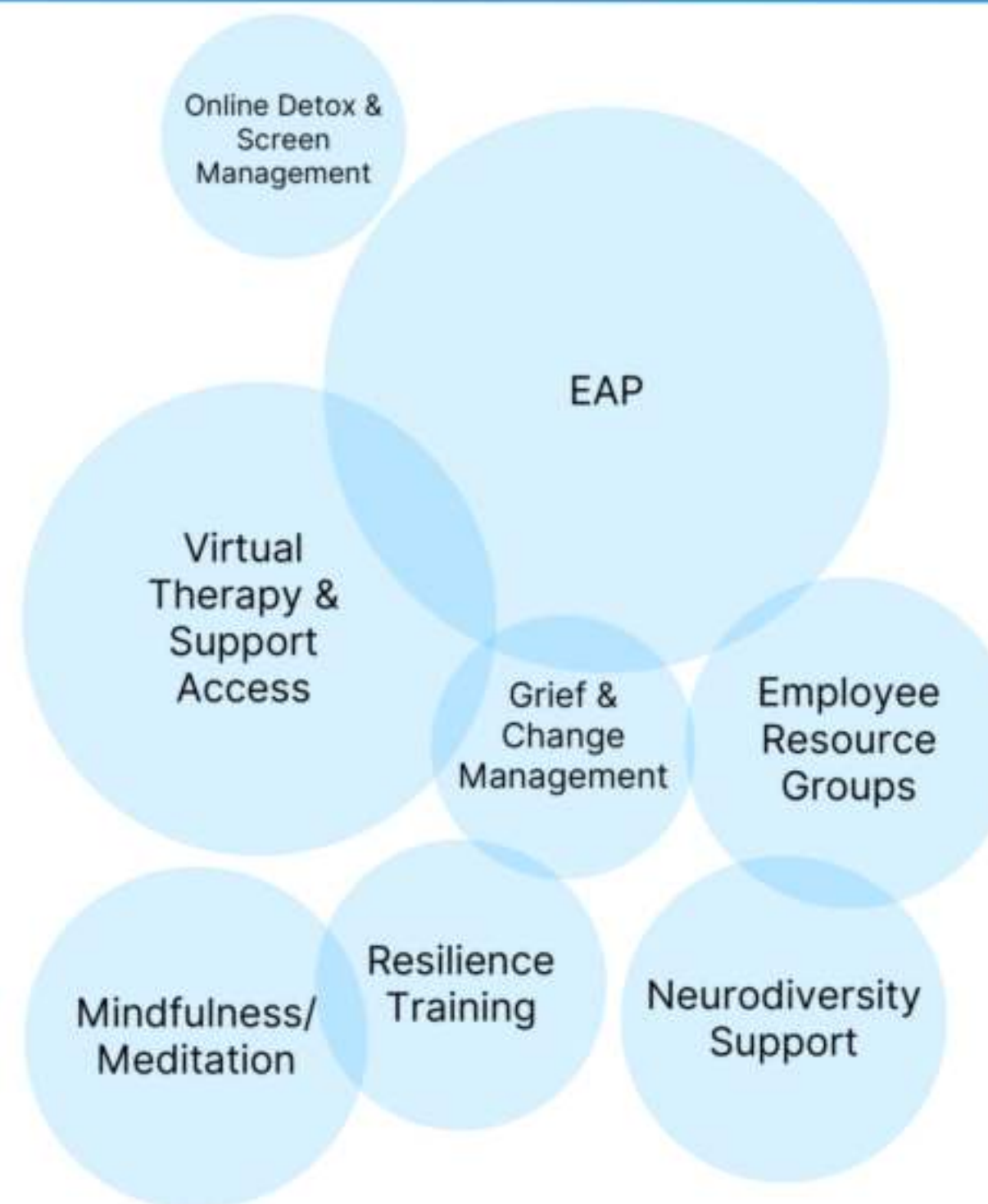
## Solution Categories Defined: Emotional

Emotional wellness categories include technology designed to support, monitor, and enhance an individual's emotional and mental well-being. These technologies leverage advancements in psychology, psychiatry, neuroscience, and information technology to address various aspects of mental health, from stress management to therapeutic interventions.

We specifically decided not to call this group of services and support "mental health" because it goes far beyond that. And while we would like to say there isn't still a stigma attached to that term, we know from research that there is.

These tools focus on helping individuals manage and support situations or lived experiences through educational content, activity-based retraining, therapeutic services, the use of communities to improve emotional wellness, mobile apps to increase easy access, and online communities to provide social connections.

Without exposing personal information, these solutions can aggregate data around stress, burnout, change readiness, and other critical issues for managers. This kind of insight and reporting can help leaders get out in front of organizational problems instead of just reacting to them.







## Solution Categories Defined: Emotional

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### **Mindfulness/Meditation/Sleep**

These apps started in the consumer sector and have been moved to enterprise tech to expand employee support. They often include multi-discipline functionality around mindfulness, meditation, and sleep support through guided programs, learning content, and interactive games designed to help them refocus, reduce stress, or support better sleep. [Headspace](#) and [Calm](#) are two well-known examples.

### **Resilience Training**

These focused, science-based, technology-enabled programs help develop individual and organizational resilience. Through apps or web-based tools, individuals can self-guide through content and behavioral change designed to build resilience. Additionally, many solutions provide team-based programs that facilitate effective communication and understanding among team members. These programs offer a common language to discuss work styles and emotions, enabling teams to collaborate more efficiently and allowing leaders to gain deeper insights into their teams.

### **Neurodiversity Support**

For individuals with neurodiverse conditions (roughly 15-20% of society), such as autism, ADHD, dyslexia, etc., the tools offer tailored resources for supporting life and work, such as task/time management, process flow, cognitive support, sensory adjustments, and customized communication tools.

### **Online Detox & Screen Management**

These tools promote healthy technology usage by educating employees on digital detox, screen time management, and maintaining a healthy work-life balance in the digital age. Some of these tools remind screen workers to walk every hour or limit the number of open browsers. Some tools also provide companies with analytics on their workforce's digital use to inform decision-making and improve company culture.

### **Grief & Change Management**

This technology guides employees through grieving, offers coping strategies, and connects them with support networks. These tools support anyone dealing with grief - those who lost a loved one, loss of a cherished pet, miscarriage, divorce, or disruptions like losing a home, job, or a familiar lifestyle.

### **Virtual Therapy & Support Access**

Virtual therapy platforms enable individuals to connect with licensed mental health professionals through video calls, chat, or phone sessions. This has become especially crucial for increasing accessibility to therapy services, particularly in remote or underserved areas.

### **Employee Resource Groups**

Often thought of in DEI conversations, ERGs are a key part of emotional wellness for all employees. They provide a place for community and connection with like-minded or similar-experienced people to come together and get support, mentorship, and more. Tech enables and manages these programs more easily - but they can be done without technology.

### **EAP**

These offer a free resource for a small number of visits for your employees with specific issues or challenges and were the pioneers in emotional wellness offerings.





## Solution Categories Defined: Financial

This group of technology focuses on the financial wellness of the worker. They extend beyond traditional retirement programs or financial advice to cover more basic needs like financial literacy, budget management, and day-to-day financial needs.

As organizations, the baseline for financial wellness is to guarantee that our compensation programs are fair and equitable to all workers.

Financial wellness tools use AI-driven technology and predictive analytics to provide personalized financial insights and recommendations based on individual spending patterns, financial goals, and life circumstances.

As a market segment, we expect to see further growth in this area with the huge increase in consumer-driven offerings being converted to enterprise or company offerings and rolled out at a broader scale.







## Solution Categories Defined: Financial

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### **Budgeting Apps**

These solutions help individuals easily create and manage their budget more effectively to help pay off debt faster, save for large purchases, and generally have a better understanding of where their money goes. Some connect with the bank, credit card, and loan accounts to automatically pull in transactions and balances to give one-stop views of finances they are very popular in the consumer market and are not offered for companies to track or have any insights - to cover the cost of programs for all employees at scale. [EveryDollar](#) and [YNAB](#) are two popular options following the closure of Mint in January 2024.

### **Investment & Retirement**

This technology provides a simple and convenient way for employees to plan, invest, and save for retirement. They offer valuable information and tools to help individuals understand investment options, estimate future retirement incomes, and set achievable savings goals. Some of these tools use employer-specific information to guide employees in retirement plan decisions or are used by the employer to make retirement plan contributions.

### **Student Loan Repayment**

Much like the technology used to manage retirement fund matching, US employers can make student loan payments for employees. These tools manage participation, handle payments, and calculate taxation impact for the individual and the employer.

### **Giving**

These solutions streamline the process of supporting causes for employees, automating corporate giving processes. The technology also facilitates seamless paycheck deductions for donations, integrates with payroll and time-tracking systems for tax benefits, and simplifies the tracking of volunteered hours for reporting purposes.

### **Financial Education & Advising**

This technology delivers education alongside other financial information like pay stubs or retirement statements and offers external financial advising to help employees make better financial choices. Placing these resources where employees already go to access financial info, rather than relying on external sources, increases exposure and provides in-the-moment advice.

### **Pay Equity**

This technology ensures you are paying people in similar roles for similar work. By looking at factors such as tenure, gender, performance reviews, and other criteria, it identifies any gaps, facilitates budget adjustments, and provides correction plans. These solutions also provide alerts to issues of non-compliance.

### **Continuous Pay/Earned Wage Access (EWA)**

This technology allows a worker to access the money already earned prior to the pay date. There is no additional work needed by your payroll team, as a third-party provider manages it, and with many payroll providers, there is no to low cost for employers to do. (do. will have a full report on Continuous pay options in 2024)

### **Emergency Savings Programs**

These solutions help you support employees when an emergency situation occurs to reduce the usage of high-interest or 401k loans. These may be used for various situations but are typically for needs beyond normal monthly expenses. [Securesave](#) is an example of this type of solution.





## Solution Categories Defined: Lifestyle

Lifestyle technology helps individuals manage various aspects of their personal lives and daily routines. These technologies aim to streamline and enhance the efficiency of tasks related to personal responsibilities.

These solutions often provide centralized platforms or hubs that allow users to coordinate and manage different activities seamlessly. They may include features such as goal-setting, tracking functionalities, and personalized recommendations to support users in various areas of their lives. Mobile applications, user-friendly interfaces, and integrations with wearable devices contribute to making these tools more accessible and user-centric.

The expansion of these technologies reflects a shift toward a more individualized approach, recognizing that a one-size-fits-all solution is not sufficient to address the unique situations that people face in their personal lives.







## Solution Categories Defined: Lifestyle

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### Caregiving

This technology helps users coordinate many of the administrative aspects of caregiving. From interviewing and selecting providers to managing payments, these solutions try to simplify and facilitate these important tasks. Moving beyond just child care, more and more providers are seeing the need for family care for children, senior adults, or family members with special needs. It can also include emergency backup care.

### Home Management

Similar to caregiving tools, this technology helps users pick, pay, and schedule the help they need, from scheduling plumbers and finding an HVAC repair service to house cleaning. Users can screen the skills and qualifications of providers and pay for them securely and compliantly.

### Pet Care

This technology offers a hub to keep up with your pets' information and access various services to make pet care simpler and easier. These tools often include access to pet insurance, pet-sitting services, on-demand vet advice, and expert resources, as well as a location to keep shot records, cleaning appointments, and purchase products at a discounted rate.

### Discount Portals

These platforms or portals offer employees access to discounted products, services, or experiences from various vendors and partners. The discounts may cover a diverse array of categories, including retail products, entertainment, travel, health and wellness services, technology, and more.

### Co-Parenting

This technology helps co-parents work together to care for shared children. These tools guide effective communication, conflict resolution, financial obligations, and scheduling. Some of these tools can be set up according to court-agreed terms and can provide reports to attorneys so that everyone involved works together and by the rules.

### Personal/Disaster Support

This technology helps individuals in coping and managing unforeseen personal crises and disasters such as a sudden loss, natural disaster, or personal crisis. These tools provide immediate access to counseling, emergency assistance, and support networks, helping users navigate challenging and often traumatic situations. They coordinate services and support from benefit providers, local charities, and co-workers, filling the gap where companies often want, but are not equipped to support employees.

### Education Support/Counseling

These tools help organizations manage and administer programs like tuition reimbursement and ongoing education incentives, and even help find or provide tutors and college counseling for family members.

### Productivity Tools

This software analyzes work habits, to-do lists, and calendars to optimize schedules for better work-life balance and increased effectiveness. For example, they can identify the usual times you get the most done or the times you fall into a slump and schedule your activities accordingly. This area of tech also includes note-taking software, time management, and task management tools.





## Tips on Selecting Wellness Tech

When building your wellness tech stack, it's important to focus on solutions tailored to the needs of your employees and organization.

**The best tech for you is the tech your people benefit from most and actually use.**

Remember: Well-being is not a quick fix; it's a personal journey. Make sure your implementation and success metrics consider long-term adoption.

**Privacy & Security** - Ensure that the solution prioritizes user consent and provides clear information about data collection practices. Wellness topics are personal, and employees want their information stays that way. Plus, much of this data is protected by GDPR, HIPAA, and other local regulations.

**Evidence-Based** - Most wellness technology should be grounded in research that provides evidence-based solutions, especially those in physical and emotional wellness. Ask vendors for this information, as it will give the project credibility with executives and employees alike.

**User-Friendly** - Make sure that the technology has a user-friendly interface that is intuitive. It should be accessible to all employees, regardless of technical skill, and provide a seamless user experience across different devices and platforms.

**Personalization** - Different employees have unique well-being needs, so the technology should offer flexibility in content, settings, and preferences, allowing individuals to tailor their well-being journey.

**Accessibility** - The tools should be available to employees anytime, anywhere, which includes remote access and mobile-friendly features. If household members are included in the wellness programs, then be sure they have access to the technology, as well.

**Integrations** - Consider how the tech will work with the organization's other systems and platforms. Seamless integration with HRIS, communication tools, and other relevant systems (benefits, LMS, etc.) can streamline data management and reporting and enhance the overall user experience.

**Analytics** - Many of the wellness solutions are designed for individual, not corporate, use. This means that they may not have a company/admin analytics that other HR technology provides. For those solutions that do offer enterprise-level, the most common reporting provided is high-level usage.





# Conclusion

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Life is messy.

Bills, stress, family obligations, loans, addictions, relationships, grief, and chronic illnesses.... don't stop when we turn on our computers or walk into the office in the morning.

The broadening dialog around wellness through media and social outlets increases the acceptance and focus on discussions and actions being taken around wellness at work. As organizations deepen their support of their workforce personally, they recognize that the benefits go beyond the employee and impact the entire business.

Physical, Emotional, Financial, and Lifestyle wellness are all top of mind and a concern for people - and so integrated they are often hard to fully separate them.

The technology landscape is rapidly moving from consumer driven technologies to employer sponsored offerings that enable people to support their whole self. But, wellness requires more than just technology; it must include foundational practices that recognize the humanity in your people. Equitable pay, flexible schedules, and a respectful workplace contribute to employee wellness.

The real benefit of supporting all aspects of your employees is that it will help bring whole humans into focus: flaws, struggles, brilliance, dedication, and more.







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