



# **HR's 2026 Budget Imperative:**

## **Why Employee Signals Must Drive Your HR Investments**



## Beyond Quantitative Insights... Employees' Needs Are Personal & Detailed

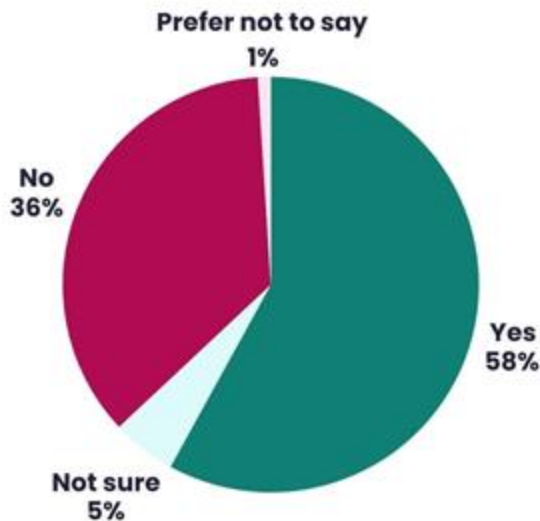
- Inclusively's **Q2 2025** survey reveals clear employee “signals” that demand strategic HR investments.
- With a convincing ***924 respondents***, quantitative results call out clear pain points with employers' investments to date.
- Respondents also offered over ***1,900 unique signals*** – or search queries – based on their personal needs and how they impact their work.
- This report analyzes what employees are experiencing and how targeted HR budget & investments for 2026 will transform work environment.

▶ Signals are defined as personal queries respondents input as part of this research.



## 58% of Employees Spend Out-Of-Pocket For Resources Their Employer Lacks

**In the past 12 months, have you personally purchased any tools, resources, or services to help you be more effective at work?**

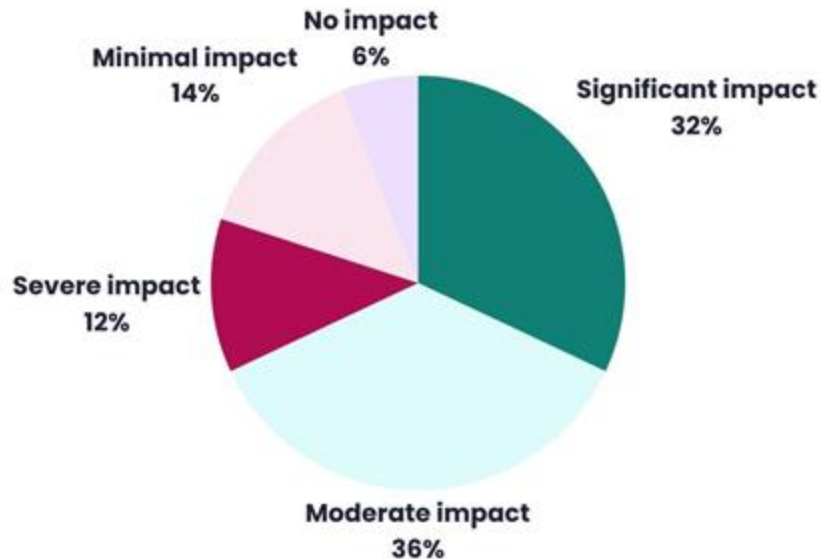


*Source: 924 respondents in Inclusively's Q2 survey*



# 44% Of Employees Cite A Severe-to-Significant Impact Of Personal Needs On Productivity

**How significantly do your personal needs impact your work productivity?**



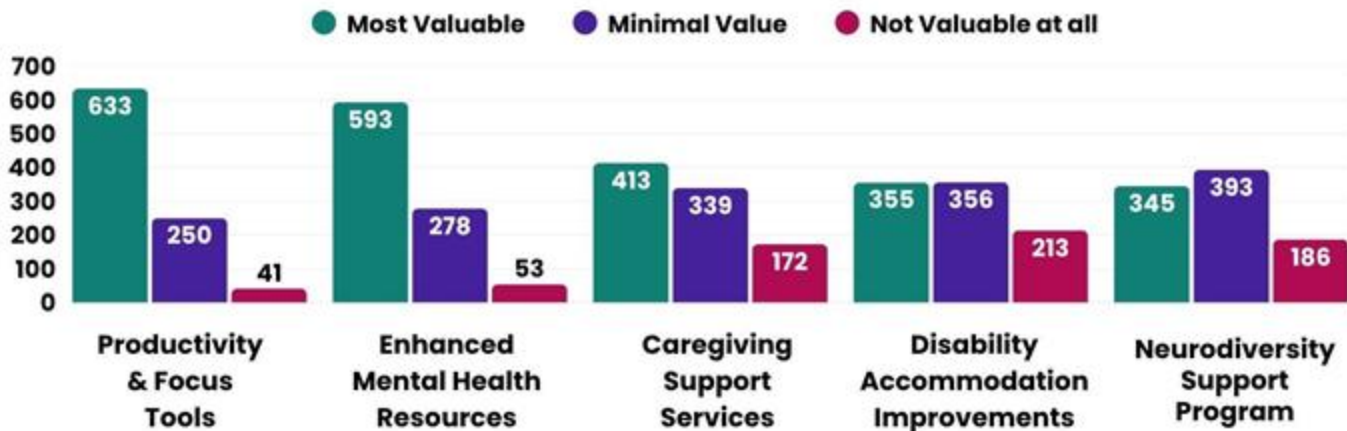
*Source: 924 respondents in Inclusively's Q2 survey*



# HR's 2026 Budget Imperative

## Productivity Tools & Mental Health Resources Rank As “Most Valuable” For Additional Investments

If HR had additional budget to invest, please rank the following potential investments in order of how valuable they would be to you:



Source: 924 respondents in Inclusively's Q2 survey



# Employee Priorities Vary By Function: Key Insights For Strategic Planning

- **HR/Recruiting:** Highest need for flexible work options and mental health resources
- **Marketing/PR/Design/Creative:** Significant focus on neurodiversity support and mental health
- **Computer/Engineering/IT:** Priority on technology tools and learning resources
- **Customer Service/Support:** Strong emphasis on workspace improvements and flexibility

*Source: 924 respondents in Inclusively's Q2 survey*



## Beyond Quantitative Insights... Employee Needs Are Personal & Detailed

▶ Signals are defined as personal queries respondents input as part of this research.

- As part of this research, Inclusively asked respondents to share how their personal situation is impacting their work.
- Specifically, the survey prompted respondents to describe something about themselves that they would like to get support from their employer.
- The survey provided examples like: "I'm a caregiver and need help & support; I struggle to stay focused at work; I need help with stress; I have difficulty hearing; I need mental health resources; I need flexible work options."
- The results yielded insights into the *"why"* of employee needs and how HR should map these back to investments.



# HR's 2026 Budget Imperative

## The Why Of What Employees Need Most: Personal Support Priorities Revealed

“Describe something about yourself that you would like to get support from your employer.”



Source: Over 1900 real-time signals by employees as part of Inclusively Q2 Research



# HR's 2026 Budget Imperative

## Detailed Personal Needs Map To Strategic Budget Targets

“What in your personal situation is impacting your work?”



### Flexible Work

Remote/hybrid work  
Work-life balance  
Commute sessions



### Mental Health Support

Stress/anxiety/burnout  
Mental health resources  
Counselling programs



### Career Development

Advancement  
Mentorship/Training  
Career Paths



### Productivity Tools

Focus/Concentration  
Time Management  
Productivity solutions



### Health & Accessibility

Accommodations  
Chronic conditions  
Neurodivergence  
support



### Caregiving Support

Family caregiving  
Child care assistance  
Family leave



### Benefits, PTO & Insurance

Health/dental/vision  
Paid time off  
Retirement plans



### Workplace Solutions

Office setup  
Software/hardware  
Team dynamics

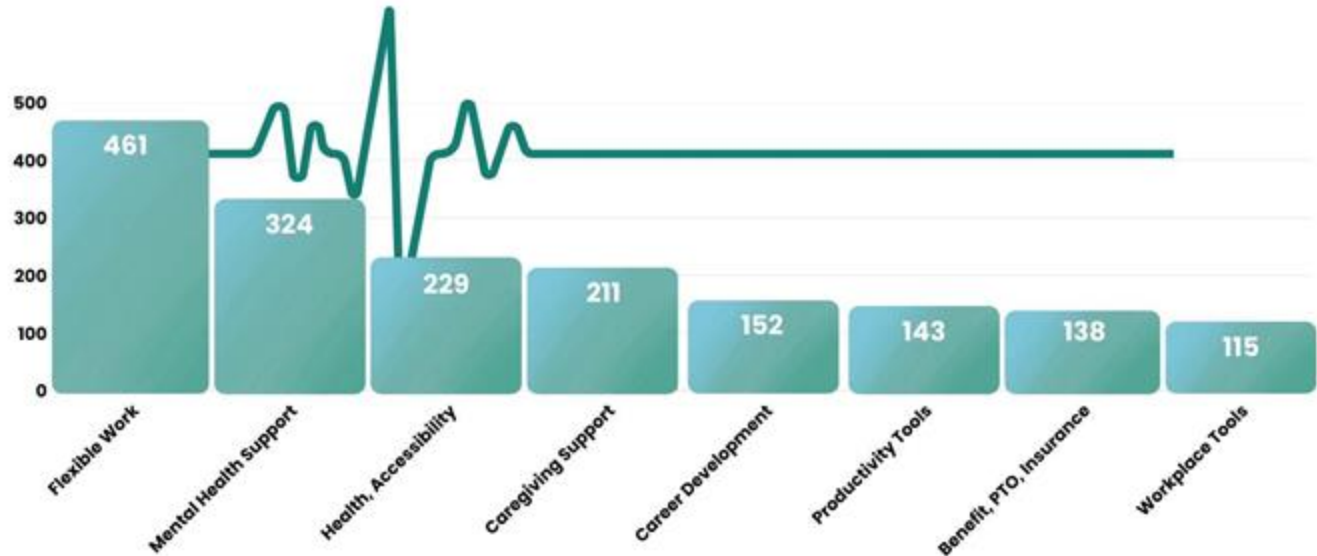
Source: Over 1900 real-time  
signals by employees as part  
of Inclusively Q2 Research



# HR's 2026 Budget Imperative

## The Pulse Of Employee Needs Are Persistent & Not Changing for 2026

“What in your personal situation is impacting your work?”



Source: Over 1900 real-time signals by employees as part of Inclusively Q2 Research



## HR's 2026 Budget Imperative

# Employee Signals Present Clear Investment Imperatives For 2026

**The challenge: creating reliable channels for employee feedback.**

**Companies offer** a range of support from super specific accommodations to general benefits and everything in between.

**All of these investments** are managed in silo by different buyers, departments and systems.

**Employees** don't know what they need, aren't sure what's available, and can't find it easily.



# Employee Insights Create Strategic Advantages Through Targeted Investments



## Employee Signals

What are employees searching for across HR platforms?

What are common pain points employees are trying to solve (i.e. ADHD, dyslexia, childcare, etc)?



## Alignment Data

Which investments are most effective?

What are the largest gaps between employee needs and what you offer?

Where are you over-investing?



## Employee Engagement

Which resources are employees engaging with and how are they being accessed?

What is the impact on performance, productivity, and retention?



# Retain Product

## Mainstream AI

solves for breadth, speed, volume and scale for generalized tasks.

## Retain AI

solves for relevance, context, and personal needs and nuance—bridging the gap between generalized systems and individualized use cases.

# Retain Can Help



**Retain's patented framework is the proprietary intelligence engine that powers our competitive edge—creating meaningful differentiation across AI and HR technology.**



## From Questions to Solutions

Employees don't need to know what to ask—natural language inputs are mapped by our proprietary Success Enablement Framework into personalized, cross-system recommendations, driving higher utilization and employee success.



## Real-Time, Actionable Intelligence

Retain captures live employee needs through daily interactions—not periodic surveys—creating a dynamic dataset companies can act on immediately to improve retention and engagement.




## Breadth with Built-In Precision

Retain covers everything from disability accommodations to general benefits, with one engine—the Success Enablement Framework—personalizing the full scope of resources to individual pain points for better outcomes and investment efficiency.



# HR's 2026 Budget Imperative:

## Why Employee Signals Must Drive Your HR Investments



Research Demographics included years in the workforce and work environment:

- 7+ years: 45% of respondents
- 4-6 years: 25% of respondents
- 1-3 years: 15% of respondents
- Less than 1 year: 15% of respondents
- Hybrid: 40%
- Fully remote: 35%
- Fully in-office: 25%