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Consumer Packaged Goods Practice

Future of Wellness 2027: Inside the $2.7 trillion takeover

More consumers are prioritizing their health and scrutinizing what they buy. Our latest Future of Wellness research explores the trends shaping where they spend and what they expect in return.

This article is a collaborative effort by Anna Pione, Eric Falardeau, Jon Medalsy, Kristi Weaver, Sara Hudson, Shaun Callaghan, and Stefan Rickert, representing views from McKinsey's Consumer Packaged Goods Practice.



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At a glance

— The global wellness market is now worth $2.7 trillion and the US market alone accounts for $700 billion.

— Wellness is becoming part of consumer identity. More than a third of US consumers say it is core to who they are, with a greater share prioritizing it versus last year. While Gen Zers and millennials still account for the greatest wellness spending of any generation, this year's survey shows baby boomers engaging with wellness more than ever before.

— AI is widely used but not fully trusted: More than half of consumers use it for wellness, yet 40 percent of US consumers worry its advice may be inaccurate, and reliance on friends and family and healthcare practitioners far outweighs AI chatbots in shaping purchases.

— The most prominent trends in wellness include the second-order effects of the glucagon-like peptide-1 (GLP-1) boom, which is lifting adjacent categories from food and beverage to beauty; recovery (think cold plunges and social saunas); biohacking (including protein- and creatine-"maxxing"); and self-testing and diagnostics (from at-home lab kits to biomarker panels).

The pursuit of wellness is changing what everyday life looks like. Someone experiencing stomach pain can mail in a gut microbiome sample and get a personalized report, synced to an app, detailing exactly which foods their body doesn't tolerate. Young consumers are trading their Friday nights out for sauna sessions with their gym crew. Friend groups are planning obstacle-race getaways.

A few years ago, these behaviors would have sounded fringe. Today, they describe what we call the wellness takeover: Two in three US consumers say they prioritize wellness more than they did a year ago. Across all consumers, wellness now ranks as their second-highest priority, behind family but ahead of professional success and friendships. The pursuit of better health has spilled out of the gym and supplement aisle into nearly every corner of consumers' lives—from relationships and community to dining, travel, and beauty—and is increasingly becoming part of their identity. Meanwhile, a third of new US consumer packaged goods (CPG) launches carry a wellness-related claim, and investors are pouring capital into the category.

In the fifth edition of our Future of Wellness research, we examine how the global wellness market is reshaping consumer behavior and adjacent sectors. This year, we surveyed more than 10,000 consumers across four markets—China, Germany, the United Kingdom, and the United States—to understand what's fueling the surge and where the market is headed.

The wellness market is now worth $2.7 trillion, reflecting both continued growth and an

expanded definition of the categories that make up wellness.[1] In this report, we unpack what's driving momentum, how sentiment and behavior are shifting across generations and consumer segments, and what it will take for brands, retailers, and investors to compete in the market.

Wellness has evolved from emerging trend to growth engine

Wellness spending is broadening beyond Gen Z and millennials to older generations. In the United States alone, the market is now worth more than $700 billion and is growing about 5 to 10 percent a year,[1] making it a powerful growth engine in the consumer sector. That momentum is attracting investor interest. The six largest deals with a health and wellness component since 2021 were all announced or closed in 2025 or later, with a combined value of nearly $89 billion.[3]

CPG companies are expanding their wellness offerings. Through September, 33 percent of new US CPG product launches in 2026 carried a wellness-related claim, up from 24 percent in 2021 (Exhibit 1). Meanwhile, the number of wellness products launched from January to September 2026 already equals roughly 95 percent of 2025's full-year count.

Among the fastest-growing CPG brands (growing at more than 20 percent annually), 53 percent have a health and wellness value proposition at their core, more than double the share among slower-growing brands. New product claims are concentrated in areas including weight management and muscle gain, prebiotics, stress and sleep, and brain and nervous system support—many of the same categories where consumers report unmet needs.

Yet the flurry of deal activity and new product launches hasn't satisfied consumer demand. In this year's survey, around 40 percent of consumers globally said current wellness offerings still fall short in areas such as longevity,[4] mental health, and mobility—gaps that have held roughly steady since 2024. One reason those gaps persist: the bar for what consumers consider effective keeps rising.

More than a third of consumers say wellness is core to their identity

Wellness information has never been more accessible to consumers. That accessibility has led more consumers to prioritize wellness and has raised their expectations for their own health as well as for the products and services they buy.

Across most age groups and wellness consumer segments in the United States (see sidebar, "The five wellness consumer segments"), the share of consumers who said they are prioritizing wellness has risen compared with a year ago (Exhibit 2). "Health and wellness" now ranks as one of the most important aspects of life overall across generations, second only to family.[5]

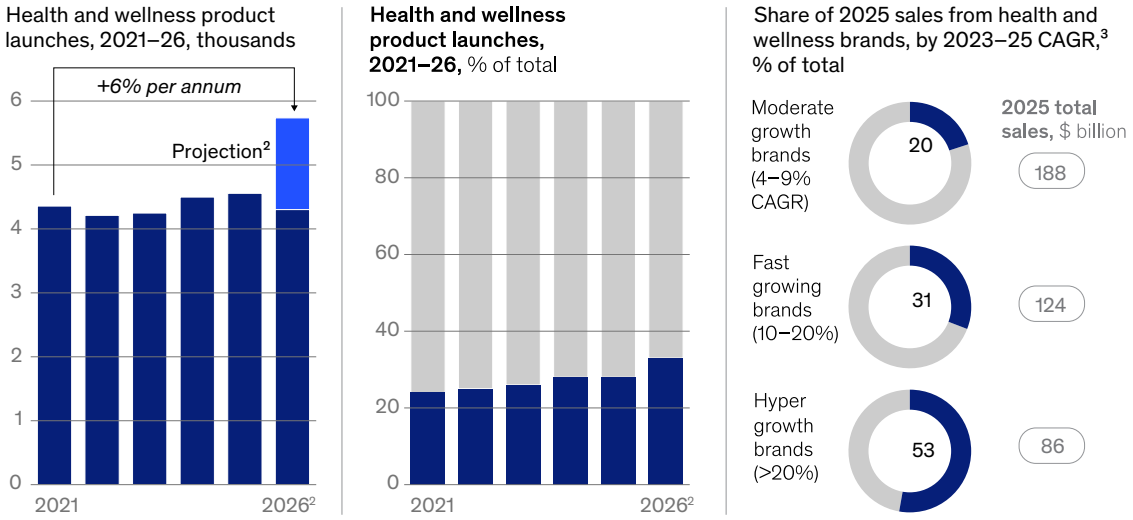
Wellness is also becoming part of how consumers define themselves: More than a third of US consumers described it as core to their identity. Increasingly, wellness is becoming a way for consumers to express that identity, much like luxury goods and other traditional status symbols.

[1] This year's $2.7 trillion figure reflects both underlying market growth and an expansion of the wellness categories included in our analysis to better capture the evolving landscape; as a result, it is not directly comparable to last year's $2 trillion estimate.
[3] Includes selected global transactions, announced or closed from January 2021 through September 2026, with a deal value of at least $300 million, in consumer-facing health and wellness categories: appearance, fitness, health, and nutrition. Includes private equity deals. Ranked by reported deal value.
[4] Longevity commonly refers to both longer and healthier lives. Research by the McKinsey Health Institute defines healthy longevity as living longer while maintaining good physical, cognitive, and emotional health—extending healthspan, the years lived in good health, not just lifespan. See Chris Anagnostopoulos, Hemant Ahlawat, Lars Hartenstein, and Rachel Moss, "Healthspan science may enable healthier lives for all," McKinsey Health Institute, August 29, 2025.
[5] Consumers are finding ways to bring community and relationships into their wellness practices: Thirty percent of all consumers said fitness had become a primary social outlet, 42 percent among Gen Z alone, while community-wellness offerings including run clubs and team-based fitness races such as Hyrox are growing in popularity.

Exhibit 1

The fastest-growing consumer-packaged-goods brands are more than twice as likely as moderate-growth ones to be built around health and wellness.

US health and wellness new-product launches in select consumer-packaged-goods categories[1]



[1]Select categories include breakfast cereals, dairy, snacks, beverages, skin care, hair products, color cosmetics, and vitamins and dietary supplements, among others. Products are counted if they carry 1 or more health and wellness claim, including functional claims (eg, immune, digestive, stress, and sleep), added nutrients (eg, protein, fiber, probiotics), and low/no/reduced claims (eg, sugar, fat, sodium).
[2]Assumes launches continue at the same pace through year-end 2026. Data through Sept 24, 2026.
[3]Brands are classified as health and wellness if they address a specific health need; support preventive wellness (eg, vitamins and supplements, performance nutrition, better-for-you hydration); make stress, relaxation, or cognitive claims; or are mainstream products with a meaningful health-oriented promise, such as high protein or clean label.
Source: Mintel GNPD; Numerator

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Fashion brands, for instance, are moving into wellness, and consumers are even sharing sleep scores as a badge of discipline.[6]

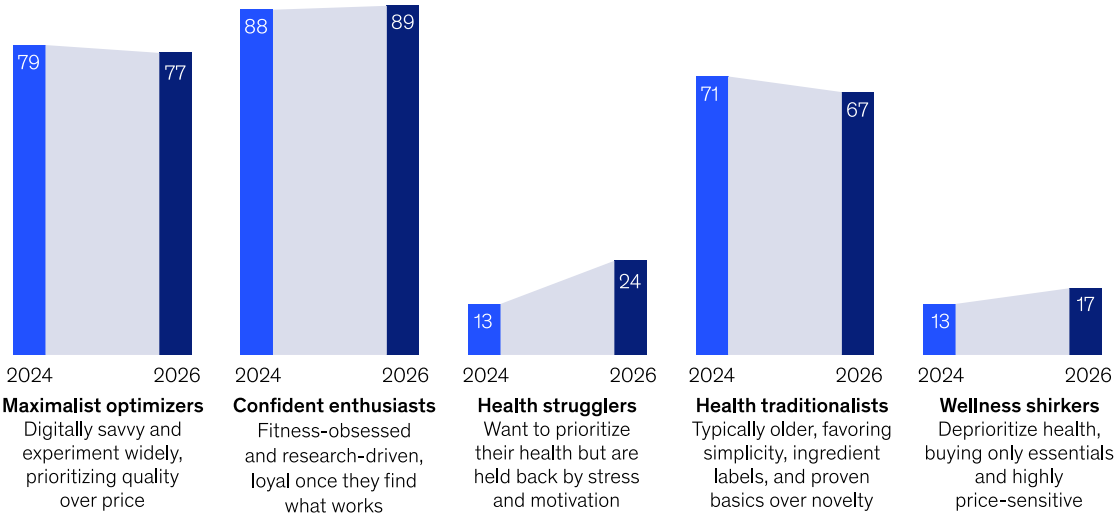
Although Gen Zers and millennials are still central to the wellness market's expansion (these consumers were most likely to say wellness is core to their identity), older consumers are now engaging in the space more deeply, too. The shift is particularly pronounced among baby boomers: the share who said they prioritize wellness climbed 11 percentage points, to 49 percent, compared with a five-percentage-point increase across generations overall. And baby boomers who prioritize wellness are spending across more categories, including hydration and electrolyte drinks, at-home fitness equipment, and skin care.

[6] Sara Ashley O'Brien, "Sleep scores have become a status symbol," *Wall Street Journal*, September 11, 2026.

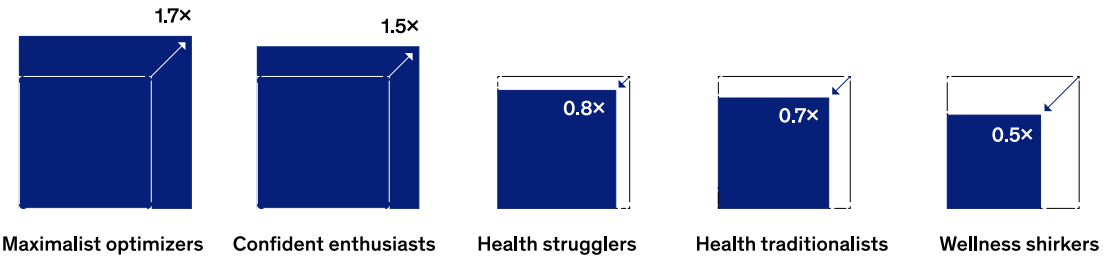
Exhibit 2

The share of US ‘health strugglers’ prioritizing wellness has nearly doubled since 2024, to 24 percent from 13 percent.

Wellness prioritization,[1] % of respondents (n = 4,002)



Share of spend, indexed to segment size,[2] multiples



[1]Share of respondents that say wellness is a top priority in their day-to-day life. Question: Thinking about how you prioritize wellness, how has your prioritization changed compared to 1 year ago? Responses: “I prioritize it a lot more now” or “I prioritize it a little bit more now.”
[2]Question: Approximately how much money have you spent on each of the following in the past 12 months? Responses aggregated across ~60 products and services; excludes healthcare spend (eg, dentist, doctor’s office).
Source: McKinsey Future of Wellness Survey, 2026 (n = 4,002)

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A broader mindset shift is also taking hold. About 30 percent of US consumers said they want to “operate at their peak,” not just “be well,” and more than 40 percent said they’re willing to “do whatever it takes to live as long as possible.” Among the most engaged wellness consumers—“maximalist optimizers” and “confident enthusiasts”—64 and 80 percent of US

The five wellness consumer segments

Our Future of Wellness research has revealed five consumer segments based on how they prioritize and spend on wellness:

— *Maximalist optimizers:* Digitally savvy and experiment widely, prioritizing quality over price (25 percent of wellness consumers, 40 percent of spend).

— *Confident enthusiasts:* Fitness-obsessed and research-driven, loyal once they find what works (10 percent of wellness consumers, 15 percent of spend).

— *Health strugglers:* Want to prioritize their health but are held back by stress and motivation (just under 30 percent of wellness consumers, roughly 25 percent of spend).

— *Health traditionalists:* Typically older, favoring simplicity, and proven basics over novelty (15 percent of wellness consumers, about 10 percent of spend).

— *Wellness shirkers:* Deprioritize health, buying only essentials and highly price-sensitive (20 percent of wellness consumers, 10 percent of spend).

Together, maximalist optimizers and confident enthusiasts represent just over a third of wellness consumers but more than half of all wellness spend.

respondents, respectively, said they were willing to do what it takes to live as long as possible. In China, 42 percent of all consumers said they want to operate at their peak, and 55 percent were willing to do whatever it takes to live longer.

The desire for more optimal wellness outcomes is pushing consumers toward products and practices that were nascent just a few years ago, such as GLP-1s or digital detoxes. Although spending on health data, diagnostics, and wearable services continues to climb, a growing subset of consumers, particularly younger ones, are wary of over-optimizing, turning instead to practices that help them disconnect from devices and be more present. Even for less widely adopted wellness practices (such as lymphatic drainage massage, sound baths, and visits to longevity clinics), more than 60 percent of US consumers said they intend to practice them as much or more in the next year.

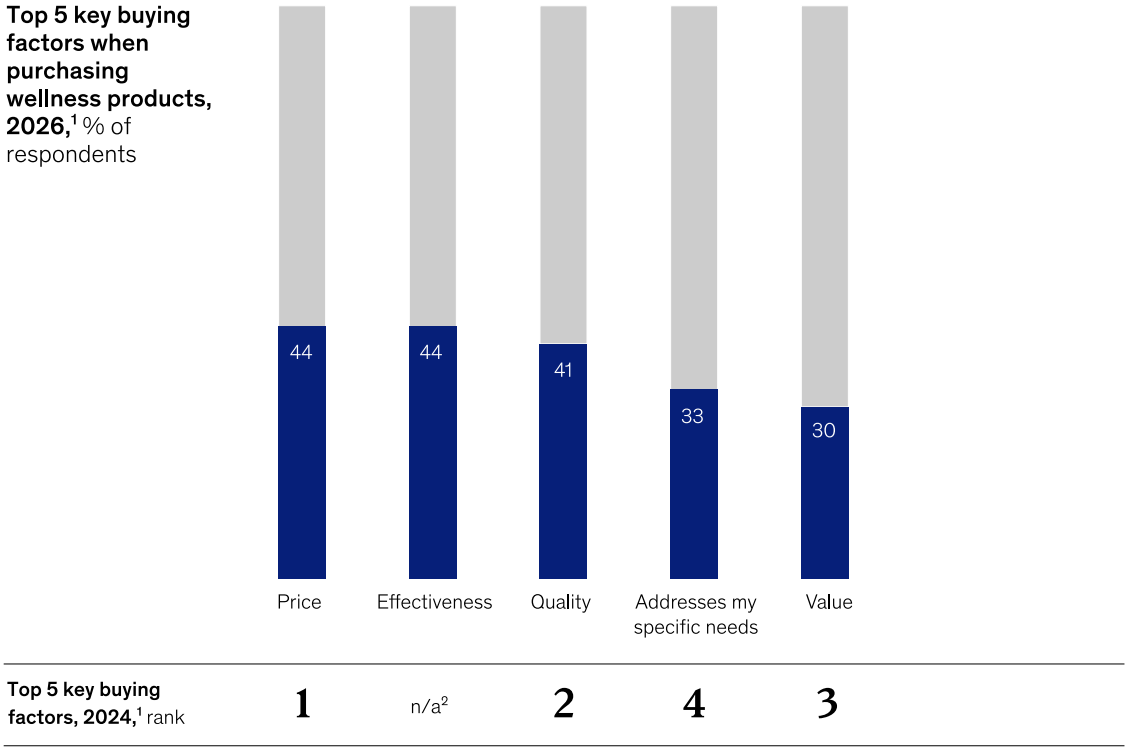
While consumers experiment with new wellness offerings, they want proof that these products and practices work. Effectiveness now ties price as consumers' top overall buying factor for wellness products, followed by quality (Exhibit 3). Maximalist optimizers and confident enthusiasts continue to rank effectiveness and quality *above* price, a signal that proof of efficacy matters most to the consumers who spend the most.[7] Product effectiveness also appears to

[7] Key buying factors also vary by category. In vitamins, minerals, and supplements and over-the-counter brands, for example, a clear ingredient label is now a top-five buying factor for "maximalist optimizer" and "confident enthusiast" consumers.

convert interest into purchases: in a separate McKinsey Health Institute survey of New Yorkers, the share of high-spending consumers who said they were likely to buy a longevity product was 11 percentage points greater when it came with evidence of effectiveness.

Exhibit 3

Price and effectiveness are tied as top factors driving US consumers' wellness purchases, followed by quality.



[1]Question: Now when purchasing [item], which of the following are the most important to you? Rank up to 5.
[2]Effectiveness was not an answer choice in prior year.
Source: McKinsey Future of Wellness Survey, 2026 (n = 4,002)

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Consumers use AI but still trust people

Most consumers in our survey said they want to take an active role in managing their own health and are consulting more sources to do so, including doctors, friends and family, and social media. For more than half of surveyed consumers, AI has become one of those sources, in part thanks to AI's ability to distill vast, scattered information into clear answers. Even so, many remain unsure how much to trust it.

Consumers said they are using AI to get product and service recommendations, summarize product reviews, and receive recipe suggestions, among other use cases (Exhibit 4). UK consumers were most likely to use AI for meal planning and symptom checking and triage, while consumers in Germany leaned on AI for more general lifestyle guidance, such as recipe suggestions. The more a consumer spends on health and wellness, the more likely they are to use AI for it: 84 percent of maximalist optimizers in the United States said they used AI for health and wellness, compared with just 29 percent of wellness shirkers.

AI's use in wellness is already widespread. More than 300 million people ask ChatGPT health and wellness questions every week, according to OpenAI, which launched a dedicated ChatGPT Health feature this year. So-called "datamaxxers" are building their own AI dashboards to turn scattered biometric data into a personal coach.[8] (Wearables makers are beginning to roll out their own AI-supported data dashboards for users.) These behaviors may not be widespread today, but they point to what the most engaged wellness consumers want from AI: a tool that can make sense of their health data and give personalized guidance.

For all its early promise, AI is not pulling consumers away from doctors. Only 14 percent of AI users said a chatbot's answer led them to skip a doctor's visit altogether; more often, consumers said they used AI to make sense of a diagnosis or treatment plan they'd already received for an ongoing health issue (a behavior more common among UK consumers than those in other markets). For consumer businesses, the implication is that clinical credibility—including doctor recommendations, science-backed formulations, and third-party validation—still carries real weight with consumers.

Doctors aren't the only human voices consumers lean on, though. When asked what influences their decisions to buy new wellness products, US consumers most often cited recommendations from friends and family (35 percent) and from healthcare practitioners (30 percent), well ahead of AI chatbots (8 percent). Social platforms play a meaningful role too, including YouTube (16 percent), well-known medical experts on social media (14 percent), and influencers (9 percent). These channels matter most to younger consumers: Gen Z is as likely to be influenced by YouTube as by healthcare practitioners (26 percent each), and its use of influencers runs about ten percentage points above the overall average.

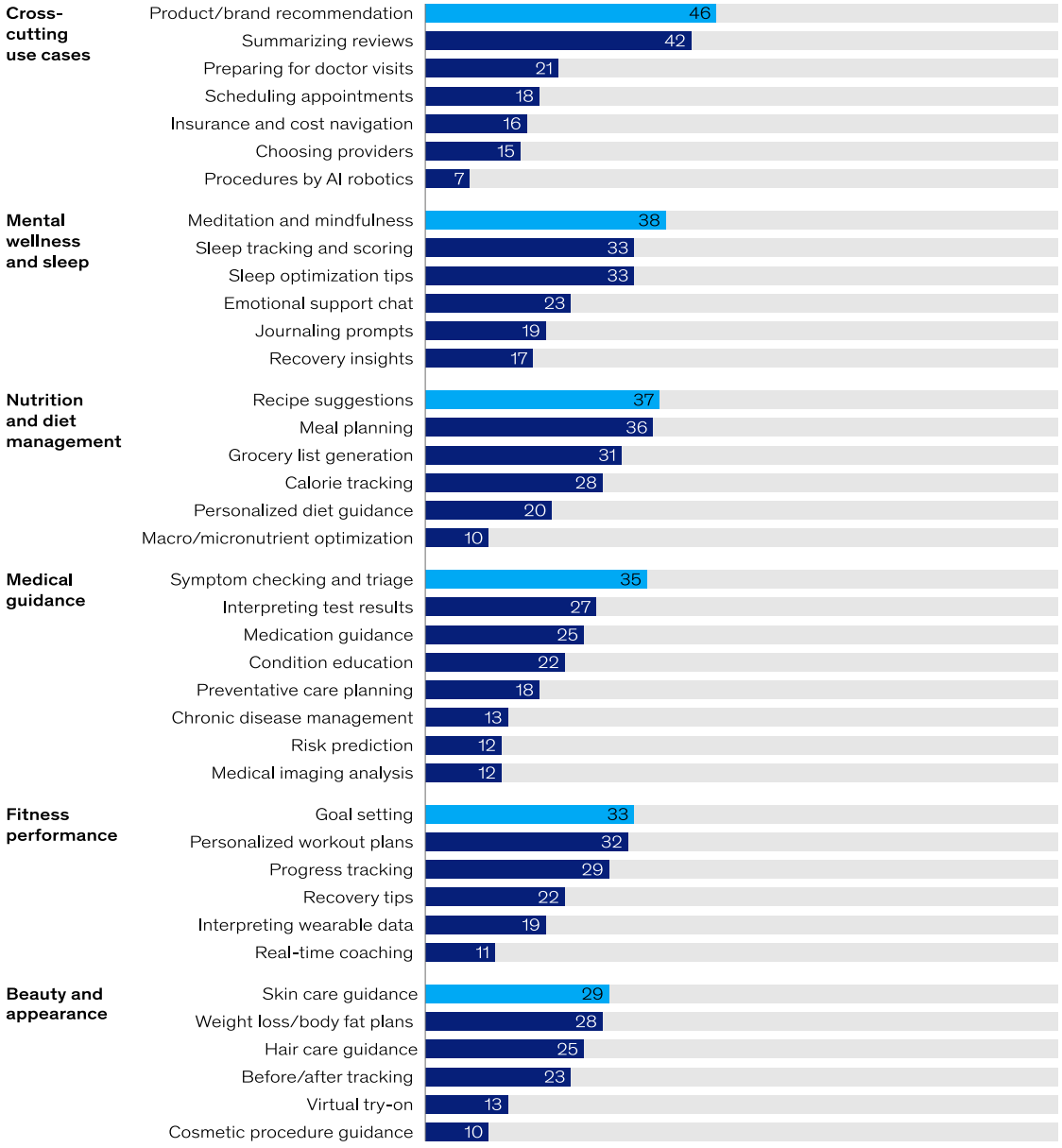
Credibility becomes even more important when considering consumers' trust (or lack thereof) in AI: Forty percent of US consumers said they worried AI-generated health advice might be

[8] Tina Li and Natalie Kaufman, "The datamaxxers feeding their every health move to AI," *Wall Street Journal*, August 11, 2026.

Exhibit 4

US consumers use AI most often for wellness product or brand recommendations, meditation and mindfulness, and recipe suggestions.

AI use cases for health and wellness, ranked by adoption within theme,[1]
% of respondents who have used AI for health and wellness (n = 2,290)



[1]Question: In what ways have you used AI tools for your health and wellness?
Source: McKinsey Future of Wellness survey, 2026 (n = 4,002)

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inaccurate. Gen Z, who are among AI's most prolific users but reported the highest accuracy concerns of any generation, often treat AI's outputs as a starting point rather than a final answer, and weigh them against other sources. Across all generations, a quarter of consumers said they wouldn't use AI for health and wellness at all in the coming year. Among this group, nearly half said this was because they preferred human expertise.

Use of and trust in AI differ across markets. In China, for instance, AI-powered wellness guidance is both widely used and widely trusted. This pattern is consistent with what our research found six years ago, when Chinese consumers were already among the most comfortable sharing personal data in exchange for more personalized wellness experiences (this is also true in other categories, such as beauty).

Consumers want more from wellness

This year, we analyzed the need states consumers are prioritizing, the products and practices they're adopting, and syndicated market data to identify both established and emerging wellness trends. What connects the trends is a shift in mindset: consumers are moving beyond managing their health to actively optimizing it.

Established wellness trends: The GLP-1 ecosystem and wearables

Over the past year, GLP-1 medications became more accessible to more consumers globally, driven in part by patent expirations, new oral formulations, and lower price points. As more people started taking them, some adjacent consumer categories, ranging from food and beverage to beauty and aesthetics, have expanded.[9] In our survey, 35 percent of consumers who said they took GLP-1s reported eating more protein, 19 percent added supplements to their routines, and 18 percent picked up strength training.[10]

That same appetite for optimization is fueling the market for wellness-first wearables—screenless devices that surface users' biometric data, such as smart rings.[11] US adoption of wellness-first wearables has held steady at roughly 29 percent, but the real growth is in paid add-ons: up to half of wearable users now pay for premium services such as biomarker testing, often offered through partnerships between device makers and pharmaceutical, diagnostic, and women's-health companies. By bringing together biometric data from multiple sources and translating it into clear recommendations, AI is helping consumers understand information that once required a higher degree of health literacy; wearables users report using these insights to change their exercise routines or diets. The next frontier: making that data usable by clinicians, not just consumers.

Emerging wellness trends: Recovery, biohacking, and diagnostics

Recovery may be the most accessible entry point into the optimization mindset because, unlike diagnostics or biohacking, it generally doesn't require testing or extensive data collection. For instance, cold plunging and contrast therapy[12] were once associated primarily with elite athletes

[9] While some consumer categories have benefited from the GLP-1 market expansion, others, such as chips and savory snacks, have shrunk.

[10] The adoption of GLP-1 weight-loss medications is also expanding and reshaping the medical aesthetics market. Aesthetic providers reported that 63 percent of GLP-1 patients seeking facial aesthetic treatments were not previously active users of these services.

[11] We distinguish wellness-first wearables from two other categories: activity-first wearables, which are sport and training devices featuring GPS, workout precision, and performance progression; and smartwatches, which are general-purpose devices that offer health tracking alongside messaging, payments, and other apps.

[12] Cold plunging is brief immersion in cold water; contrast therapy alternates between hot and cold exposure, such as moving between a sauna and a cold plunge.

[13] Social saunas are part of a growing category of sauna venues designed around group experience rather than solitary wellness, often featuring communal seating, hosted sessions, and programming (for example, sound baths and guided breathwork) that encourage conversation and connection among strangers.

but now have a broader user base, while the growth in "social saunas"[13] shows how consumers are combining wellness with relationships. Today, US usage rates for these offerings sit in the high single digits to high teens, yet up to three-quarters of consumers who use them said they intend to maintain or increase their use next year (34 percent of German consumers said they have tried or are currently using saunas and bathhouses, nearly double the US rate of 18 percent).

Biohacking, or using self-tracking, supplements, or DIY experimentation to optimize one's health, takes optimization a step further. Eighteen percent of consumers said they're actively biohacking, rising to 28 percent among Gen Z. Some practices remain niche: Only 6 percent have tried peptide injections,[14] although 71 percent of those have said they plan to maintain or increase their use. Other forms of biohacking are gaining broader interest, including "maxxing"—the practice of deliberately increasing intake of certain nutrients or supplements. More consumers said they plan to protein-, creatine-, and fiber-max in the next year compared with last year.

Finally, consumer diagnostics—including at-home lab kits, advanced imaging, and biomarker panels that let people order and interpret their health data without first going through a doctor—show ample room for growth. More than half of consumers surveyed who purchased one of these products or services in the last year said they plan to increase their spending on them in the year ahead.

Five actions can turn wellness momentum into market share

This year's research showed that adoption of cutting-edge wellness behaviors is no longer confined to the young and digitally fluent, and AI has become an increasingly important interface through which many consumers discover, evaluate, and buy wellness products and services. Brands, retailers, and investors that want to convert the sector's momentum into durable growth should consider five actions:

— *Make wellness a core growth lever.* Companies should treat wellness not as a line extension or marketing angle bolted onto an existing business, but as a structural bet with its own resourcing and road map. For brands, that means identifying the specific need states and claims they can credibly own, then committing the R&D and marketing investment to build a distinct identity around them. Wellness offerings that are part of broader lifestyle products or services (dining, travel, beauty, community) have an edge: they can fit into the life consumers are already living, rather than requiring consumers to make room for something new. For investors, it means building wellness credibility into diligence criteria rather than treating it as a branding checkbox. Investors should look for companies that can not only substantiate functional claims (for example, through efficacy data or evidence of clean-ingredient sourcing) but also build brands that have genuine emotional resonance.

— *Build beyond the obvious demographic.* Too many brands still design and market wellness

[14] Peptide injections deliver short chains of amino acids intended to influence specific biological processes, such as tissue repair or hormone regulation. Peptide injections are popular in the wellness and longevity space for recovery and antiaging, although most are not approved by the US Food and Drug Administration for these uses.

products and services with only the most visible, digitally fluent consumers in mind, overlooking groups that are often underrepresented yet engage more deeply in wellness. While Gen Zers and millennials still, on average, account for the largest share of wellness spend, baby boomers and health strugglers are prioritizing wellness more and increasing related spending. Reaching these consumers requires more than putting older faces on the packaging or in ads. Brands should design products and services around these groups' actual needs. Gyms, for instance, are widening their offerings beyond workouts and into recovery, mobility, and metabolic health programming—areas that an older or health-struggler member is more likely to prioritize.

— *Use AI to simplify wellness information, not complicate it*. Brands should build connected ecosystems, linking their products, services, and partners (such as wearables, testing, and coaching), with AI tying them together by translating consumers' data into personalized insights and recommendations. The brands that get this right will use AI to lighten a consumer's cognitive load, not add to it (think: a helpful nudge, not another stream of notifications to manage). Consider the difference between an app that sends a daily alert for every metric that moved (sleep score down, heart rate variability up, step count short) and one that connects those data points and delivers a single recommendation: "You've slept poorly three consecutive nights, so today is a good day for a lighter workout and an earlier bedtime."

— *Earn trust with clarity and efficacy.* As the wellness landscape grows noisier and more crowded with claims, earning consumer trust is nonnegotiable. Brands that win will be the ones consumers see as a credible, transparent voice, whether through more easily verifiable product or service claims, credentialed expertise, or proof of efficacy. Retailers can build trust with consumers by curating their assortments, setting clear standards for the products they carry, and helping consumers understand the claims behind those products.

— *Design for a fragmented decision journey*. A consumer's path to a wellness purchase now runs through AI chat tools, social platforms, creators, experts, retailer agents, and in-store validation. Brands need to invest in discoverability and influence across these channels, including through generative engine optimization, and ensure their products are included in the consideration set when agents curate products or services. But consumer skepticism toward AI-driven recommendations won't be overcome by discoverability alone. Brands that earn trust will be those that make it easy for consumers to verify an AI answer—for example, by showing where a recommendation comes from or giving consumers an easy way to reach a human expert when they want one.

In the five years since we published the first edition of our global wellness research in 2021, the market has grown both in value and scope. Consumers, too, have evolved—and they're now much more informed: AI gives them instant, on-demand access to information on nutrition, fitness, mental health, and lab results. As a result, they are harder to win over. Today's wellness consumer weighs a product's effectiveness as heavily as its cost. And because many see

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wellness as core to who they are, the products and services they choose also signal identity and status. The brands that thrive will be those that treat that scrutiny as an invitation to prove their value.

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