

Consumer Packaged Goods Practice

What's new in consumer wellness trends?

A closer look at the \$1.8 trillion global market for consumer wellness products reveals shifting preferences in certain categories—and growing opportunities for companies and brands.



Pass the probiotics and the clinically effective products instead of the “clean and natural” ones: McKinsey’s [latest research](#) on the future of wellness provides a snapshot of how consumers worldwide, across all geographies and generations, are approaching their health and wellness and the types of interventions they are prioritizing. On this episode of *The McKinsey Podcast*, McKinsey partner [Anna Pione](#) joins editorial director Roberta Fusaro to discuss what’s trending, why, and where innovation is needed.

In our second segment, sometimes well-intentioned counsel misses the mark. McKinsey senior partner [Gayatri Shenai](#) shares how she failed to recognize a colleague’s cry for help.

This transcript has been edited for clarity and length.

The McKinsey Podcast is cohosted by Roberta Fusaro and Lucia Rahilly.

Understanding the consumer wellness space

Roberta Fusaro: I have so many questions for you today. Like why I have become addicted to my fitness tracker, for one. But let’s start with the numbers. McKinsey recently published its [latest research](#) on the future of wellness. We talked to 5,000 consumers in the US, the UK, and China about how they’re thinking about wellness. What were we looking to measure with this report?

Anna Pione: We started this research back in 2020, because we were getting a lot of questions from investors and companies about this concept of wellness. Is it something that would be sustaining? Is it something that they should think about investing behind? So we decided to launch this

research to really understand how consumers around the world are approaching their health and wellness and how that’s evolved, what they’re looking for, and therefore how companies and brands can better evolve their offerings to meet consumer needs.

Roberta Fusaro: What are the main categories consumers are investing in, and how much are they investing?

Anna Pione: We’re seeing a lot of investment by consumers, and we’re seeing that prioritization continue to grow. We segment wellness across six different dimensions: better health, fitness, sleep, mindfulness, appearance, and nutrition.

Roberta Fusaro: Is wellness a big deal equally for citizens across the globe, or are there huge regional differences?

Anna Pione: We knew that consumers were increasingly treating wellness as a priority. What surprised us and continues to surprise us every year is how much of a priority it is. Just to give you some numbers against it, this year, 82 percent of consumers in the US, 73 percent in the UK, and 87 percent in China reported wellness as a top or very important priority in their lives. And what we find even more striking is that the focus keeps increasing. More than half of consumers say they prioritize wellness more than they did a year ago.

Roberta Fusaro: Do these wellness priorities and the wellness spending vary by age or demographic? Do we see differences between, say, Gen Z and millennials and baby boomers?

Anna Pione: All the consumers we interviewed are thinking about and prioritizing their wellness. That said, what we have seen consistently in our research is that millennials are the most

enthusiastic generation when it comes to both spend and participation across different types of product and service offerings. But this year, what we were really interested to see was Gen Z really stepping into prominence, and we think this is a group to watch going forward.

Roberta Fusaro: Interesting. The report is rich with data on current trends and identifies seven areas in which we're seeing technological advances and increased consumer interest and innovation. We only have so much time today, so we're focusing on four of these areas in particular: healthy aging, weight management, gut health, and sleep. How much of a consumer priority is healthy aging, based on our research results?

Healthy aging

Anna Pione: Healthy aging is a really big priority. What we've seen is this matters from both a societal and consumer perspective. From a societal perspective, the old-age dependency ratio will have tripled between 1950 and 2050. The McKinsey Health Institute suggests that boosting quality of life, while managing age-related diseases, will be critical and that in order to do this, we're really going to need a holistic approach to move the needle. On the consumer side, we see that over 60 percent of people have said it's extremely or very important to purchase longevity products, and 70 percent are planning to buy more products in the future.

Roberta Fusaro: What are the types of interventions or products that we're talking about?

Anna Pione: We see a lot of this in the supplement space, in particular. Products like CoQ10 might be geared more toward an older demographic,

whereas different types of supplements might be geared toward younger consumers aiming for longevity. We also see it in the beauty space and in different types of services that are more cutting-edge across the health space. Particularly when targeting an older consumer, what we've found to be the essential thing to keep in mind is to focus on the need state or the aspiration of what is being accomplished through the offering versus the process itself. Whereas for a younger consumer, a focus on prevention tends to be a more effective angle to help consumers feel like their needs are being met.

Roberta Fusaro: I'm curious whether the research suggests why we're seeing a little bit of an uptick among younger consumers in their attention to this topic. Is it better marketing?

Anna Pione: Our hypothesis and what we've heard from consumers would suggest that there may be some element of the COVID-19 pandemic coming into play. There was this massive shock to many people's lives and in such a way that it really made people much more conscious of their health and what they could do to be proactive about taking their health into their own hands and living a long and healthy life.

This is something that had been gaining momentum even prior to COVID-19. But what we saw during the pandemic was that a lot of these concepts really took hold and accelerated in a way we hadn't seen previously.

Roberta Fusaro: What are the implications for companies that are trying to reach consumers with these healthy-aging products? How should they look at these data, and what should they do differently?

On the consumer side, we see that over 60 percent of people have said it's extremely or very important to purchase longevity products, and 70 percent are planning to buy more products in the future.

Anna Pione: There are a couple of implications. One is revisiting their portfolio of products and services and thinking about what types of offerings they have and where there might be gaps from a healthy-aging or longevity perspective that they could bring to market. The second one is really thinking critically about how they manage their messaging and communications to consumers—especially, again, for an older consumer, messaging about how they are getting older is not one that really resonates. It's much more about what you're going to help that consumer do and what are the things that you're going to help them improve in their life. That tends to resonate.

Roberta Fusaro: I know I don't want to be reminded constantly that I am getting older, so that makes perfect sense. Anna, according to the report, one in three adults struggle with obesity in the United States. What did the research show in terms of its importance?

Weight management

Anna Pione: This was one that had come up time and time again in our research as a need state that is critical for consumers. It's one that, again, matters from both a societal and consumer perspective. In our survey, we see that 60 percent of consumers are seeking a weight management solution and over half of them are looking to lose ten or more pounds. This is something that people have top of mind, and they want to prioritize it, but it's just really hard to act upon it and make those changes. And so that's where we see opportunities for companies and brands to step in and help consumers achieve their goals.

Roberta Fusaro: What kinds of opportunities are we talking about? Which weight loss interventions are resonating with folks?

Anna Pione: Fitness has always been near the top of the list in terms of things that people try when they're seeking to lose weight, and that's something we've seen in the past and expect to continue. It's a very established link between those two categories.

Historically, the other types of interventions in the category were a bit more mature. We saw things like weight loss programs and weight loss supplements as much more established, mature categories—fairly sizable, but not in a growth stage.

Maybe five to ten or more years ago, we saw some new offerings for things like juice cleanses becoming much more mainstream and easily accessible, as well as healthier meal kits.

What has changed more recently is prescription medication. There's been a real evolution of the category in the past couple of years. When we did our research, prescription weight loss offerings, in the US at least, were the most highly regarded in terms of effectiveness.

It'll be interesting to look out for the complementary product and service offerings that may spring up to help consumers meet their health and nutrition needs while they're taking GLP-1 prescription medication, as well as supplements: things like nutrition bars that help consumers meet their macro needs, lifestyle coaching services that help consumers ensure they're getting the right nutrients, or fitness routines around their medication.

In parallel, this is where I'd link a few of the trends that we saw in our research, like consumers using biomonitoring to really understand their health and tailor their activities to better optimize for that, as well as personalization and, in particular, generative AI [gen AI] as a tool to help companies better personalize their offerings. One of the biggest manifestations of this is in the wearables category.

Wearables are incredibly popular right now as they track your health, fitness, and sleep. What we've seen in our research is that consumers would love to have a wearable that helps them with their

nutrition or with weight management, but there just aren't offerings on the market today that are as easy to use as the ones for health, fitness, and sleep.

If companies can come up with some kind of wearable offering that helps consumers with nutrition in a meaningful way that is much more passive than what's on the market today, that could be really interesting and really help people move the needle. The other thing that could be interesting and that we're already starting to see is weaving gen-AI-equipped recommendations into things like diet plans, coaching regimes, and fitness plans to really help tailor those plans to individual consumers.

Gut health

Roberta Fusaro: OK. I'm going to shift us away to one of our other categories or topics: gut health. That honestly wasn't an issue I had expected to find in the report. I'm not sure why. I guess I don't think a lot about gut health. Why is this a popular topic right now?

Anna Pione: It is really interesting to see that gut health and digestive supplements are some of the subcategories seeing more consistently strong growth within that space. If we go back to our survey data, over 80 percent of consumers in China, the UK, and the US consider gut health to be important, and over 50 percent anticipate making it a higher priority over the next few years.

What we see in the US and China is that probiotic supplements in the form of a vitamin or pill are the most popular form of treatment. In the UK, it's more of a nutrition-based approach, so we see consumers prioritizing probiotic-rich foods such as yogurt or kombucha.

Over 80 percent of consumers in China, the UK, and the US consider gut health to be important, and over 50 percent anticipate making it a higher priority over the next few years.

As we think about what the category could look like in the future, what we do see is quite a few companies coming to market with at-home microbiome testing that helps inform consumers of what their unique gut health and gut needs are. And then they link that with more health-based offerings to meet those needs. In many cases, these companies partner closely with medical professionals to help inform their recommendations, and that links again with the trend that we saw on the increasing importance and influence of the doctor's recommendation when it comes to consumers deciding what products to buy.

Sleep

Roberta Fusaro: Excellent. So [now sleep](#). This is something that I constantly think about and never get enough of. And I imagine others are feeling that way. What did you see in the research?

Anna Pione: Yeah, this one is very much “do as I say, not as I do,” because I will be the first to admit that I think sleep is so important, and I do not prioritize it nearly as much as I should in my life. The challenge we've seen with consumers tackling their

sleep, and one I'm sure we're both well familiar with, is just the sheer number of factors that can affect a good night's sleep.

You have diet, exercise, caffeination, screen time, stress, and other lifestyle factors. We've seen that it's really hard for any one brand to bring an offering to the market that helps consumers move the needle across all of those things. They're so interlinked.

This is where we get excited and say it's not something that is necessarily fully fleshed out on the market today. There is a massive opportunity, if a company is able to really help consumers figure that out in a much more holistic and comprehensive way.

Roberta Fusaro: What are some examples of interventions or treatments that are becoming more popular? How are companies starting to tackle the sleep problem?

Anna Pione: We see some relatively mature subcategories within the sleep market. Think of things like melatonin supplements or mattresses. There are quite a few categories already that are

sizable in scale and have a number of players. There is probably some room still for innovation; we could see companies coming in with new or different offerings that try to tweak what's available and either message consumers or incorporate new science that helps them meet their needs. We've also seen a lot regarding things that help consumers create the environment that's most conducive to a good night's sleep: a dark room without distractions, the right type of lighting or lack thereof. So we are seeing a lot of interesting innovation in the space, and it's one we find so compelling because sleep is the second-most-prioritized dimension behind health and because of how much consumers expressed that what's available on the market today isn't quite enough to meet their needs.

Roberta Fusaro: Taking the research as a whole, which of the trends did you find most surprising?

Anna Pione: What we were really surprised by when we first did the research back in 2020 was that “clean and natural” was actually beating out clinically backed products in many subcategories. In supplements globally, for example, consumers were more likely to say they'd prioritize clean and natural over clinical effectiveness, if they were forced to choose between the two. What we've been surprised by in more recent years is that the pendulum has really swung in the other direction. The more recent research we saw is moving toward clinical effectiveness and science backing being the most important priorities that consumers have.

Roberta Fusaro: Any hypothesis for why that is the case?

Anna Pione: It's just a recognition by consumers that they want the product they're taking to work. And that they're taking it for a good reason. There are a few subrends underlying this.

One is that the inflation environment over the past couple of years has made consumers increasingly conscious of what they spend their money on. They want to make sure it works. The other subtrend we're seeing is there is an element of a baseline standard of clean ingredients.

We see, especially in the supplement and beauty spaces, that what consumers expect is almost more table stakes at this point. But then, when they're thinking about what's going to motivate them to make a purchase of this brand over another, clinical effectiveness is going to move the needle.

In-home care

Roberta Fusaro: Yeah. That makes sense. Bottom-line results. What's changing with the trend toward in-home care and at-home testing? I feel like it's been discussed for years.

Anna Pione: This concept of [in-home care](#) is one that gets me particularly excited. If you think about what in-home care looked like prior to the pandemic, it was a much more narrow, specific need state. You have over-the-counter medicine and then you have things like insulin tests or blood pressure cuffs. Whereas if a consumer had a specific condition and a specific doctor's recommendation to monitor it, they would. What we've seen change—and again, this is another one that the pandemic has heavily influenced—is consumers using at-home care as a means to more proactively manage and control their health. We see this with the increasing use of telemedicine. This is again one where, you know, prior to the pandemic, telemedicine did exist, but the pandemic really normalized it and got consumers much more comfortable with accessing their health via telemedicine for services where it made sense to do so.

The other area that I've seen really come into prevalence is this concept of at-home testing. We've just seen a real increase in tests for things like STDs, as well as preventative health needs—things like microbiome testing or testing for different vitamin needs.

Gen AI and wellness

Roberta Fusaro: What's the impact of gen AI on the wellness trends that we've talked about here?

Anna Pione: Gen AI is so interesting, in terms of how quickly it's been evolving and how quickly the different types of applications and use cases have really sprung up in the past couple of years. As we mentioned earlier, the most immediate and clear translation of gen AI to the wellness space is in some of these connected devices and app-based coaching services, so it allows for that hyper-personalization. You could see some interesting applications going forward that are a little bit less front and center for the consumer. If you could use gen AI in the development of medication, supplements, or over-the-counter products that are more effective or more available for consumers, and if you use gen AI techniques to speed up the research or clinical-testing process, that could also be really interesting.

We may also see it in the beauty space, where gen AI could help consumers remove some friction points about what type of skin care to recommend or could make virtual try-on services more sophisticated—things like that.

Women's health trends

Roberta Fusaro: McKinsey has done a ton of work [on women's health](#). How does this research relate to the previous studies we've done?

Anna Pione: One thing that just really came through in our more recent research is how critical women's health is to the overall consumer health landscape—especially from an investor and brand perspective. We've seen that the women's health space has been historically underserved and underfunded. But more recently, we've been seeing much more focus and interest and awareness of the importance of different subcategories—from menopause and period care to pregnancy and fertility and general women's health.

Menopause, in particular, is one that gets me really excited. We've seen a lot of new supplements and offerings for both healthcare and more consumer-facing facets to help people in that stage of their lives. Historically, this is something that has affected women for a very long period of time in a very concentrated and intense way, for which there have not been a lot of things to help them through that process.

It's a really underserved market, and now we're seeing just much more willingness to discuss, invest behind, and normalize what women are going through during this stage. Therefore, it's opened up a lot of opportunities for brands to come in and meet those consumer needs.

Roberta Fusaro: This is critical, critical stuff. Anna, thank you for taking the time to speak with us today. I am still going to ping you offline to talk about my tracker and what I can do to improve the number of steps I'm getting every day.

Anna Pione: Happy to talk to you about that.

Roberta Fusaro: Really appreciate you joining the podcast today.

Anna Pione: Thank you. It was a pleasure.

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Recognizing signs of stress

Lucia Rahilly: Next up, McKinsey senior partner Gayatri Shenai shares the humility it took to recognize that a colleague was in crisis.

Gayatri Shenai: During the pandemic, we were working through a project, and I had a colleague from a European office on my team. Everything seemed to be humming along really well. It was a dream project.

I remember one of my one-on-ones with this team member, where we were catching up on how things were going, how he was feeling, and what we could do differently. And he confided in me that he was staying up at night thinking about the project. I brushed it aside at that time, thinking, you know, this guy's taking things way too seriously. My guidance to him was to chill a bit. I encouraged him

to not take things so seriously, to relax. In hindsight, unfortunately, what I realized was that I had failed to catch the thread of a mental health challenge.

It was not much later when he called me and said, "I have to leave. I have to stop working. I'm grappling with almost no sleep over the last couple of weeks, and I realize I need to seek professional help."

The reason this story stays with me is that as a leader who prides herself on being a people developer, on being people first, even I got it wrong. And I have to pause and reflect on how much I am still learning about health and wellness and the power of asking questions versus making assumptions.

The biggest advice I have for leaders is to ask questions, to probe, and to seek out resources, because collectively, we can have a better answer than any individual can.

Anna Pione is a partner in McKinsey's New York office, where **Gayatri Shenai** is a senior partner. **Lucia Rahilly** is the global editorial director of McKinsey Global Publishing and is based in the New York office, and **Roberta Fusaro** is an editorial director in the Boston office.

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