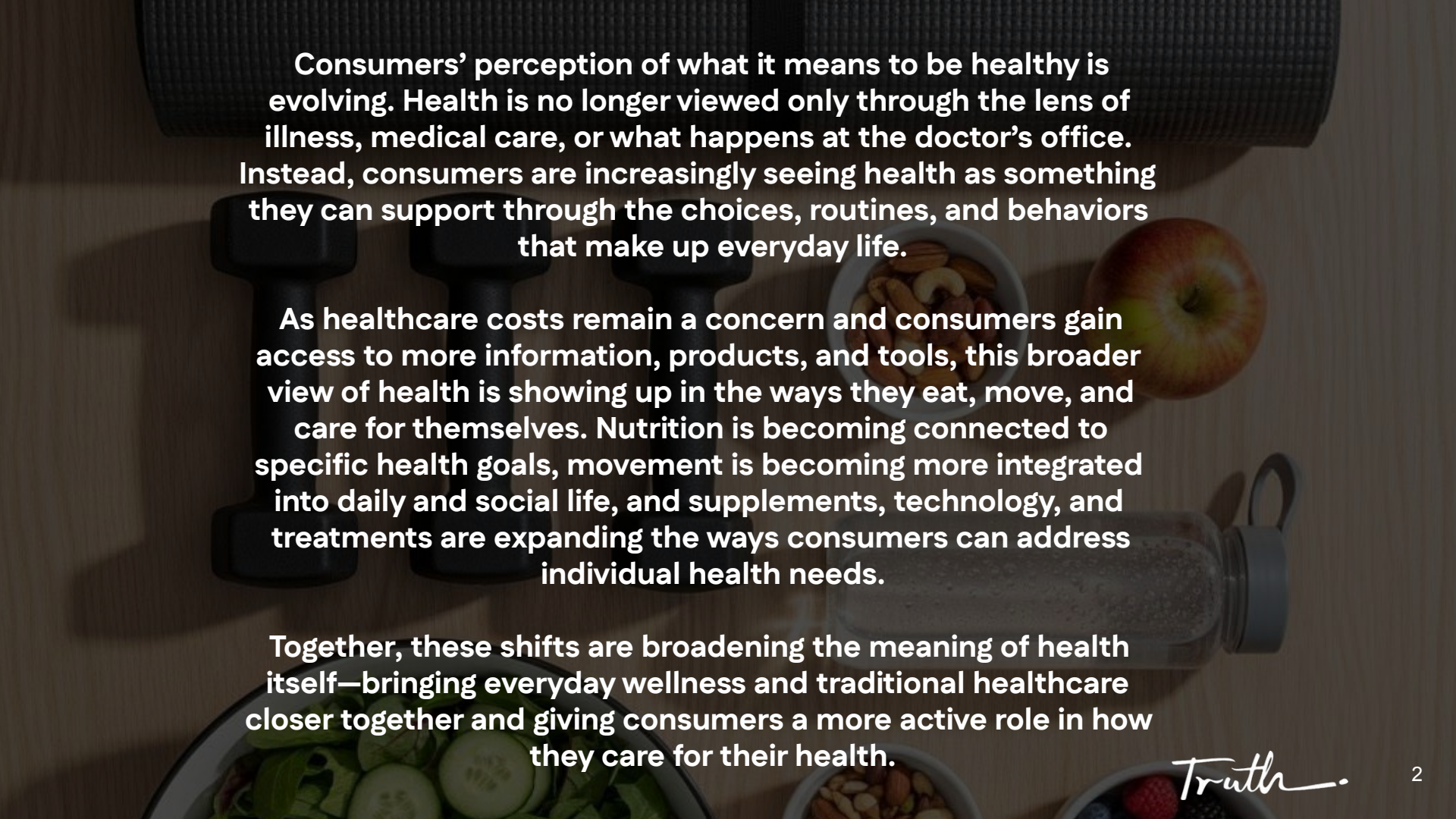


THE STATE OF CONSUMER WELLNESS

An overview analyzing how health is becoming embedded into everyday lifestyles and consumer behavior

Truth Research & Insights
September 2026



Consumers' perception of what it means to be healthy is evolving. Health is no longer viewed only through the lens of illness, medical care, or what happens at the doctor's office. Instead, consumers are increasingly seeing health as something they can support through the choices, routines, and behaviors that make up everyday life.

As healthcare costs remain a concern and consumers gain access to more information, products, and tools, this broader view of health is showing up in the ways they eat, move, and care for themselves. Nutrition is becoming connected to specific health goals, movement is becoming more integrated into daily and social life, and supplements, technology, and treatments are expanding the ways consumers can address individual health needs.

Together, these shifts are broadening the meaning of health itself—bringing everyday wellness and traditional healthcare closer together and giving consumers a more active role in how they care for their health.

HEALTHCARE BACKDROP

AS HEALTHCARE COSTS RISE, PREVENTION IS
TAKING ON NEW IMPORTANCE

HEALTHCARE HAS BECOME A LARGER PART OF THE AMERICAN ECONOMY

U.S. HEALTHCARE SPENDING in 2024

\$5.3T

Total U.S. healthcare spending

18%

Share of U.S. GDP spent on healthcare

\$1,632

Average out-of-pocket healthcare spending per person

Out-of-pocket healthcare spending increased by \$36 per person in 2024, signaling continued pressure on consumers' healthcare costs.

Half of U.S. consumers report being covered by Medicare and/or Medicaid.

88% of U.S. consumers who currently have insurance with healthcare companies would focus more on preventative care.

SO MUCH SO THAT COSTS ARE CREATING FINANCIAL PRESSURES

\$3,786

Average ACA Marketplace deductible in 2026

+37% from 2025

\$178

Average monthly premium in 2026

+58% from 2025

64% of U.S. adults are at least somewhat worried about being able to afford healthcare for themselves and their families.

42% of people with past or present medical debt said they delayed medical care because they didn't want to go further into debt.

ULTIMATELY PUSHING CONSUMERS TO RETHINK HOW THEY MANAGE THEIR HEALTH

As healthcare prices rise, consumers are balancing proactive health management with difficult financial trade-offs.

U.S. trade-down behaviors for healthcare price increasing, 2025

34%

Increase their focus on preventative care.

31%

Make significant lifestyle changes.

27%

Cut other expenses to accommodate healthcare costs.

25%

Turn to alternative solutions or home remedies over traditional doctor visits.

24%

Delay or skip non-urgent medical appointments.

THE PURSUIT OF BETTER HEALTH IS EXTENDING BEYOND THE DOCTOR'S OFFICE INTO LIFESTYLE WELLNESS

U.S. WELLNESS SPENDING
(2025)

U.S. consumers spend
> \$500 billion
annually on wellness.

The U.S. wellness market is
growing 4–5% annually.

58% of U.S. consumers want
to lead a healthy lifestyle to
prevent future health issues.

56% of U.S. consumers are
prioritizing their health more
than a year ago.

THIS IS BECOMING A TOP PRIORITY FOR CONSUMERS

well-being

[wel-bee-ing] noun.

The state of feeling healthy, balanced, and content through habits, choices, and moments that support your mind, body, and peace.

84% of U.S. consumers say wellness is a “top” or “important” priority in their everyday lives.

THE LINES BETWEEN HEALTHCARE AND WELLNESS ARE BLURRING

TRADITIONAL HEALTHCARE

(Treating Illness)

- Doctors
- Hospitals
- Prescriptions
- Insurance

THE OVERLAP

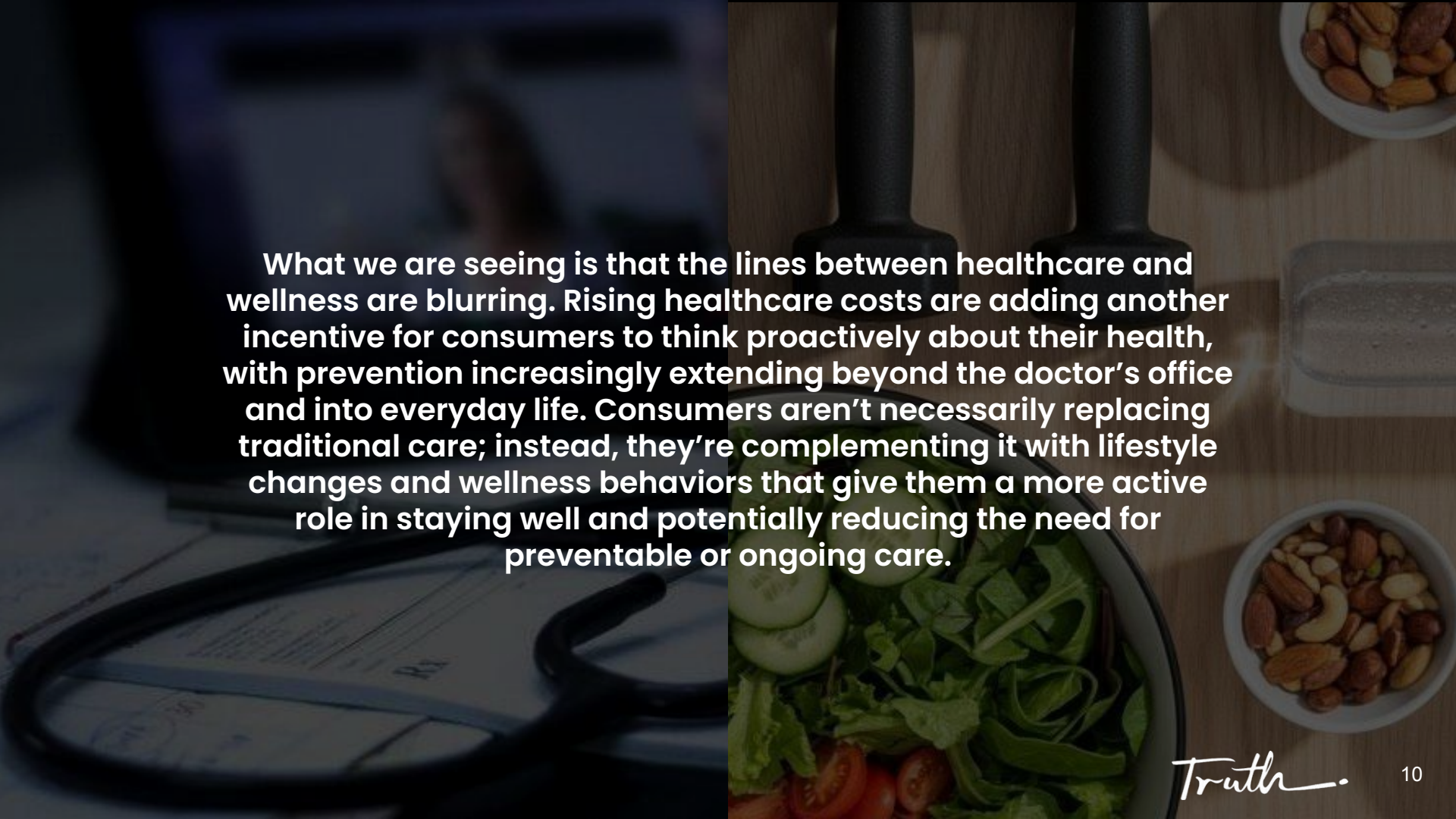
- Prevention care & early detection
- Health monitoring
- Personalization nutrition
- Digital health tools & telehealth
- Weight & metabolic health
- Chronic condition management

EVERYDAY WELLNESS

(Preventing + optimizing health)

- Nutrition
- Fitness
- Sleep
- Supplements
- Wearables
- Mental health
- Beauty

65% of consumers want a healthcare system focused on prevention rather than treatment.



What we are seeing is that the lines between healthcare and wellness are blurring. Rising healthcare costs are adding another incentive for consumers to think proactively about their health, with prevention increasingly extending beyond the doctor's office and into everyday life. Consumers aren't necessarily replacing traditional care; instead, they're complementing it with lifestyle changes and wellness behaviors that give them a more active role in staying well and potentially reducing the need for preventable or ongoing care.



HOW CONSUMERS

EAT → MOVE → CARE

AS HEALTH BECOMES MORE PROACTIVE, WELLNESS IS INFLUENCING HOW CONSUMERS EAT

This data includes functional foods, organic food, better-for-you foods, healthy beverages, and other products.

U.S. HEALTH AND WELLNESS FOODS MARKET SIZE AND OUTLOOK

\$296.5B

U.S. health & wellness foods market in 2025

\$592.9B

Projected market size by 2033

9.1%

Projected CAGR, 2026–2033



Organic foods represented **45% of the U.S. health and wellness foods market.** Making it the largest and fastest-growing segment.

THEY'RE TURNING WHAT'S ON THE PLATE INTO PART OF THE HEALTH PLAN

US: current and planned health goals, 2025

49%

Of U.S. consumers "currently" eat a balanced and nutritious diet.

59%

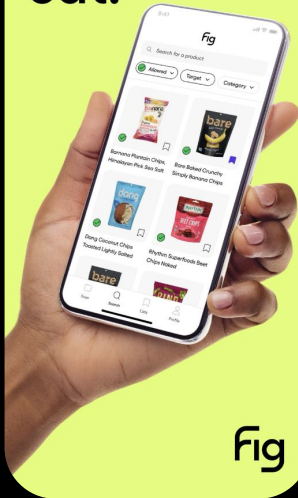
Of U.S. consumers, "planned" eat a balanced and nutritious diet.



Health habits are moving from personal routines to shared inspiration, giving consumers more ways to discover how others are caring for themselves.

AND SEEKING TOOLS MORE THAN EVER TO TAKE HEALTH INTO THEIR OWN HANDS

Find foods
you can
eat.



Scan as you shop.

Scan any barcode to instantly
know if a product works for you.



55% of U.S. consumers often choose food or drink products based on nutrition claims.

37% of U.S. consumers say nutrition facts or ingredient lists are very important to their food and drink purchase decisions.

Fig puts personalized nutrition into consumers' hands, helping them proactively manage their health by identifying foods that align with their dietary needs, allergens, and ingredient restrictions.

FUNCTIONAL NUTRITION IS SHIFTING THE ROLE OF FOOD INTO PRODUCTS THAT SUPPORT HEALTH GOALS

Consumers are increasingly connecting specific nutrients and ingredients with the health outcomes they want to support.



BRĒZ Elevate

An adaptogenic drink infused with herbs such as cordyceps, maca and ginseng to leave users feeling energized and support mental focus.



The Functional Chocolate Company (Funcho)

This unique blend of chocolate, chamomile, and lemon balm is designed to support children's bedtime routines with calming, botanical properties.

TOP BENEFITS SOUGHT OUT BY FUNCTIONAL-NUTRITION PURCHASERS

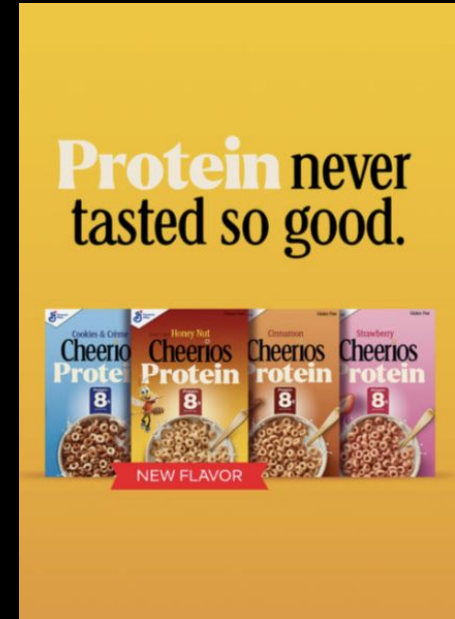
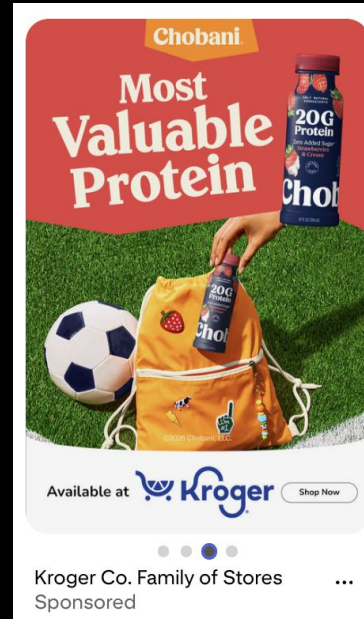
Energy (43%)
Gut health (40%)
Immunity (30%)
Muscle/bone/joint support (27%)
Weight loss (22%)
Sleep (22%)

PROTEIN HAS BECOME ONE OF THE CLEAREST SIGNALS OF “HEALTHY”

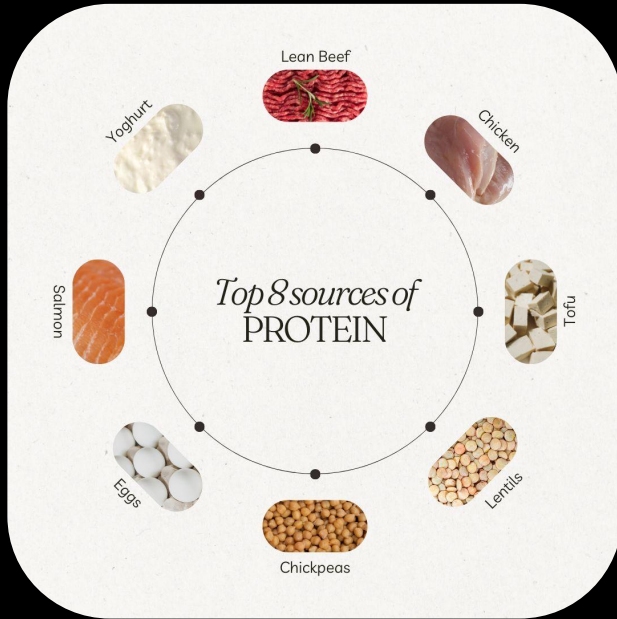
Protein is moving beyond performance foods into everyday products, as brands and content creators increasingly highlight protein to meet its growing role in consumers' health and nutrition priorities.

38% of Americans say a “good source of protein” is something that defines a healthy food.

“I’d rather see protein-maxing content than calorie-restriction content, that’s for sure. I find the high-protein meal prep content super helpful as someone who does strength training.” – Reddit



HOWEVER, PROTEIN IS NOT ALL EQUAL AND COMES IN DIFFERENT FORMS OF NUTRITIONAL VALUE



Why Is America Fixated on Protein?

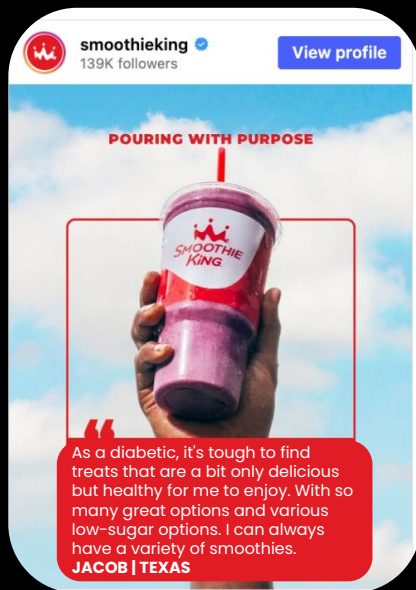
Not all proteins are created equal.

"The real issue, experts say, isn't that Americans need dramatically more protein. It's that the conversation has crowded out a more important message: Diversify your protein sources and eat more fiber-rich foods—which many Americans don't get enough of."

1 in 3 of Americans have eaten more protein than the previous year.

SMOOTHIE KING CONNECTS THE DOTS BETWEEN NUTRITION AND TANGIBLE HEALTH BENEFITS

Smoothie King prioritizes health by offering smoothies tailored to specific nutritional benefits and individual needs. Customers can choose options based on their daily health goals, including choices designed for diabetes management or GLP-1 users with nutrition-certified options.



POWER EATS™

Delicious and flavorful options to fuel your day. Power Eats™ are perfect to pair with your favorite blend!



FALL FAVORITES

Warm up with our Fall Favorites, a collection of seasonal blends that capture essence of autumn in every sip.



GLP-1 SUPPORT

Support your GLP-Routine with protein, fiber, and 0 g added sugar. Crafted by an expert team of registered dietitians with Ochsner Health.



FEEL ENERGIZED SMOOTHIES

Purposefully blended to help boost your energy and fuel your day



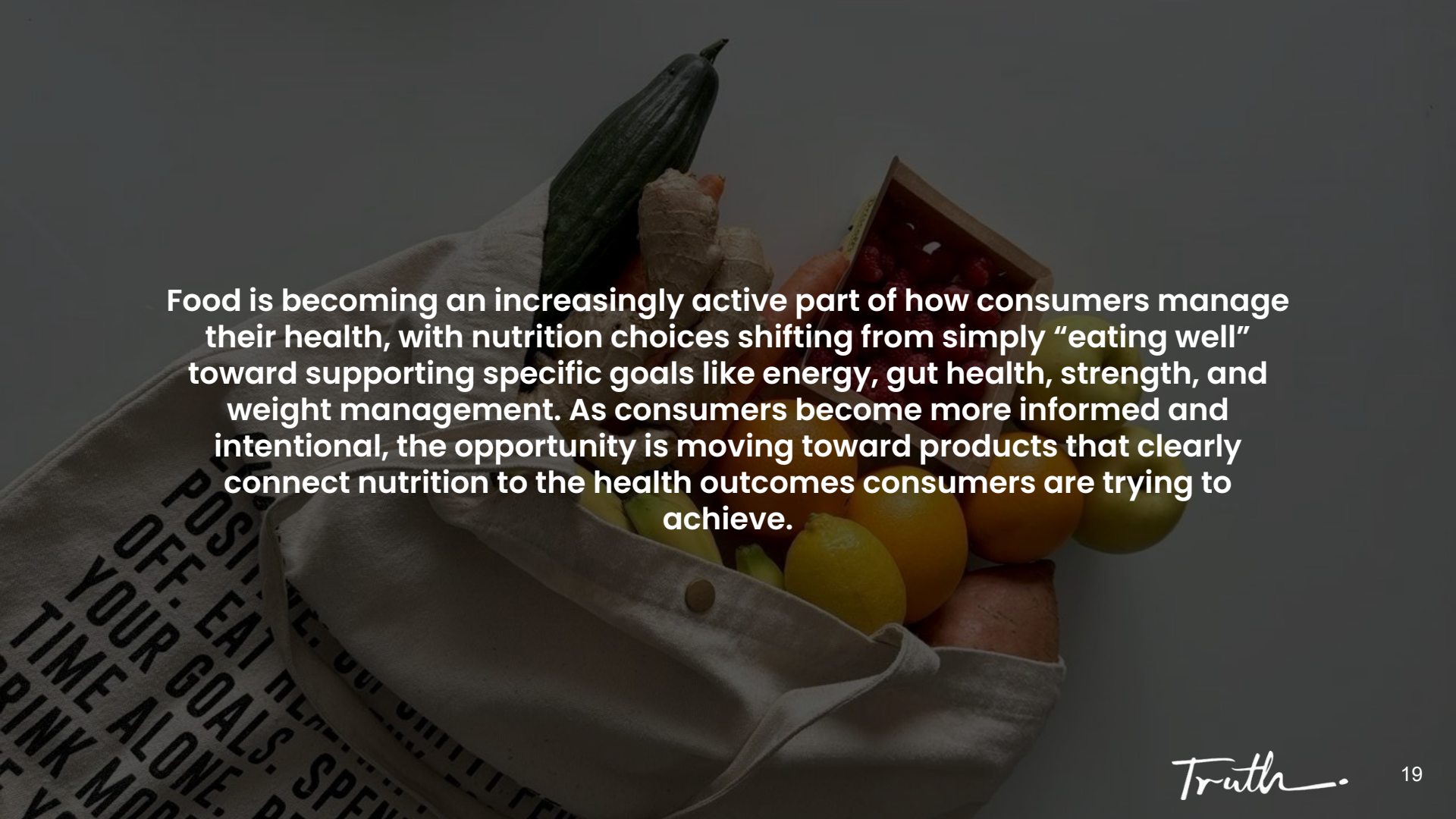
GET FIT SMOOTHIES

Blended to help you get toned, build muscle, last longer or recover faster when added to your fitness regimen



MANAGE WEIGHT SMOOTHIES

Blended to help you slim down, lighten up or reduce calories as part of a sensible diet and exercise.

A reusable grocery bag filled with fresh produce including cucumbers, ginger, lemons, and oranges, with a box of raspberries on top.

Food is becoming an increasingly active part of how consumers manage their health, with nutrition choices shifting from simply “eating well” toward supporting specific goals like energy, gut health, strength, and weight management. As consumers become more informed and intentional, the opportunity is moving toward products that clearly connect nutrition to the health outcomes consumers are trying to achieve.

HOW CAN MARKETERS LEVERAGE

INNOVATE AROUND THE NEXT HEALTH PRIORITY:

Protein demonstrates how quickly one benefit can reshape categories. Use search trends, social listening and consumer research to identify emerging needs such as fiber, gut health, hydration or metabolic health—and determine where the brand has permission to play.

BUILD PRODUCTS INTO EXISTING ROUTINES:

Rather than asking consumers to create entirely new behaviors, show how products can fit into what they already do—breakfast, meal prep, workdays, workouts or nighttime routines. Convenience can be as important as the benefit itself.

TURN HEALTH CLAIMS INTO CLEAR CONSUMER VALUE:

Nutrition labels and functional claims can quickly become complex. Translate ingredients and benefits into simple, digestible messaging that answers: “What does this do for me?”



HOW CONSUMERS

EAT → MOVE → CARE

MOVEMENT IS BECOMING A BIGGER PART OF HOW CONSUMERS MANAGE THEIR HEALTH

81M Members

Used a fitness facility in 2025, +5% YoY

100M+ Users

Used a gym, studio, or fitness facility in 2025

7B Visits

At a fitness facility in 2025



SO MUCH SO, CONSUMERS ARE FINDING MORE WAYS TO STAY ACTIVE IN THEIR LIVES

Consumers have more ways than ever to incorporate movement into their lives, creating fitness routines that span structured workouts, recreational activities, and everyday movement.

250M Americans participated in at least one sport, fitness, or leisure activity in 2025.

45% of U.S. Gen Z consumers say they are actively prioritizing physical fitness.



IN FACT, YOUNGER CONSUMERS ARE TURNING FITNESS INTO A SOCIAL OUTLET

Run clubs and group fitness are bringing health and social life closer together, giving consumers new ways to connect that don't have to revolve around drinking.

55%

Of Gen Z said social connection was their top reason for joining a fitness group.

66%

Said they have made new friends through a fitness group.

65%

Of Gen Z planned to drink less alcohol in 2025.

Gen Z's New Social Network May Be The Fitness Studio

By [Jeff Fromm](#), Contributor. © Jeff has written about travel, sports & loyalty w/...

Forbes

Published Aug 19, 2026, 09:00am EDT, Updated Aug 19, 2026, 12:43pm EDT

BUSINESS

Gen Z consumers swap bar tabs for gym memberships

"I think run clubs are great. There's so much negativity and isolation these days. If this helps you get out, meet new people and have fun I'm all for it." – Reddit

AND PILATES IS BECOMING A BIGGER PART OF THE MOVEMENT MIX

13.8M

Americans participated in Pilates in 2025

+39%

growth in participation since 2020

3.38M

“core” participants completing 50+ sessions annually

AMONG PILATES PARTICIPANTS ALSO

47%

Walk as a form of fitness

43%

Practice yoga

39%

Use dumbbells or hand weights

32%

Hike

24%

Run/jog

39%

Participate in high intensity training

TECHNOLOGY IS BRINGING FITNESS AND HEALTH CLOSER TOGETHER

Wearables are moving beyond basic fitness tracking, giving consumers continuous visibility into sleep, recovery, stress, heart health, and other signals that help them understand their bodies over time.

"I have had debilitating chronic illnesses since COVID. I wear my smartwatch for pacing to avoid health decline from overexertion." - Reddit



Oura Ring
SLEEP + RECOVERY



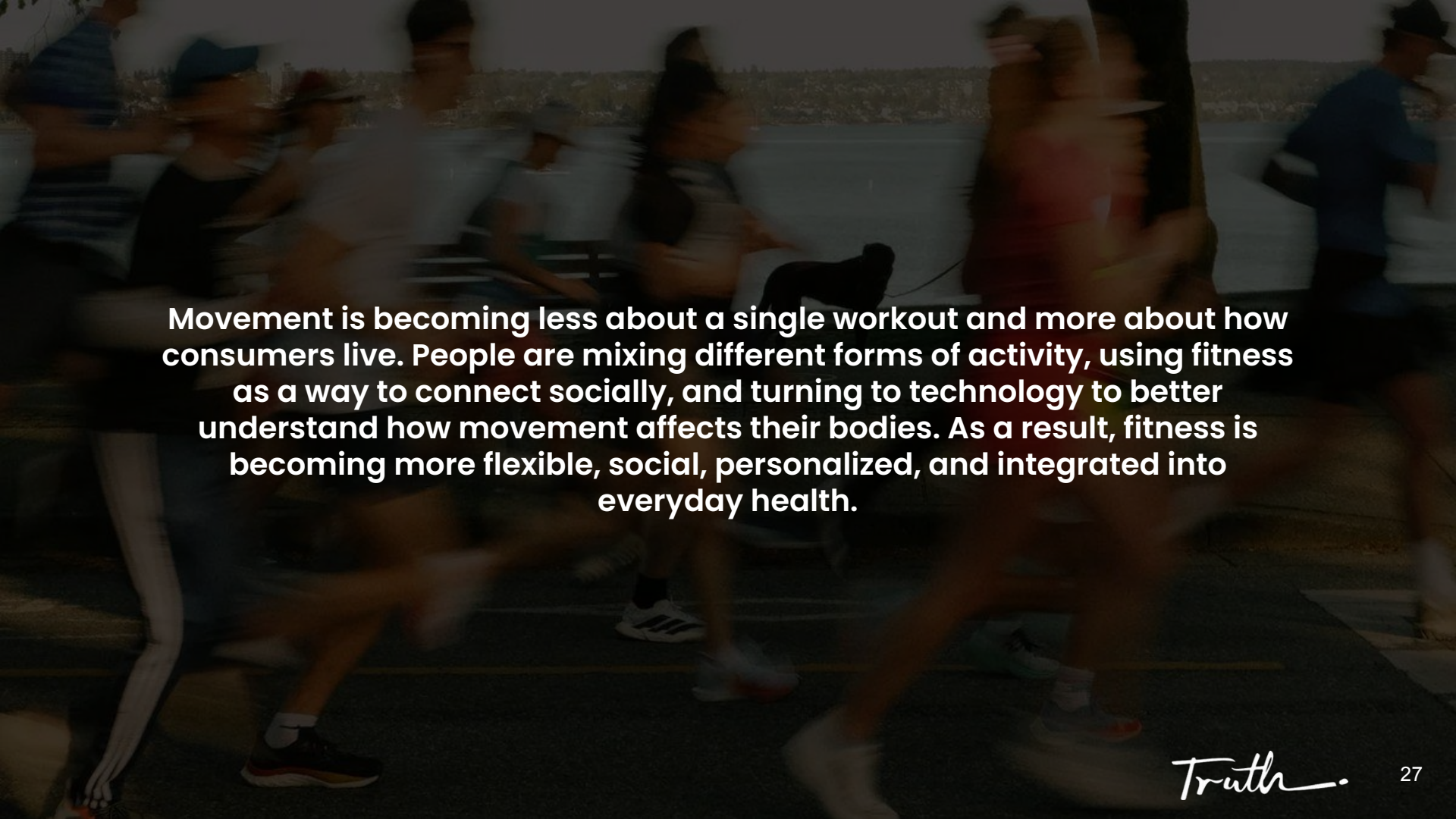
Apple Watch
Health + Safety



Fitbit
EVERYDAY FITNESS



Hume
LONGEVITY + HEALTH



Movement is becoming less about a single workout and more about how consumers live. People are mixing different forms of activity, using fitness as a way to connect socially, and turning to technology to better understand how movement affects their bodies. As a result, fitness is becoming more flexible, social, personalized, and integrated into everyday health.

HOW CAN MARKETERS LEVERAGE

CREATE REASONS TO PARTICIPATE BEYOND PERFORMANCE:

Not every consumer is chasing a personal record or transformation. Messaging can tap into connection, energy, stress relief, enjoyment, recovery and everyday well-being, widening the relevance of fitness.

DESIGN FOR THE “MOVEMENT MIX”:

Consumers aren't necessarily loyal to one fitness modality. Products, memberships, partnerships and messaging can acknowledge that someone can be a Pilates person + runner + walker + strength trainer at the same time.

CONNECT PHYSICAL AND DIGITAL EXPERIENCES:

The growth of wearables means fitness increasingly continues after consumers leave the studio or gym. Explore integrations, challenges, progress tracking and digital touchpoints that keep the brand relevant between physical experiences.



HOW CONSUMERS

EAT → MOVE → CARE

CONSUMERS ARE TAKING A MORE ACTIVE ROLE IN CARING FOR THEIR HEALTH

VITAMIN, MINERAL, AND SUPPLEMENT U.S. MARKET SIZE AND FORECAST 2025

\$41.7B

In (est) total retail sales of vitamins, minerals and supplements by the end of 2024

5.1%

Projected sales growth in 2025

26%

Forecasted growth in total retail sales at \$52.9bn by the end of 2030



VITAMINS, SUPPLEMENTS, AND MINERALS ARE BECOMING PART OF THE EVERYDAY WELLNESS ROUTINE

57% of consumers have incorporated 2–3 different vitamins, minerals, or supplements into their routine in the past 12 months.

"I take supplements as dictated by my doctor because my meds make me sick and suppress my appetite. Even before that I was always low in vitamin D, B12, and iron so had to supplement for those." - Reddit

REASON FOR TAKING VITAMINS, MINERALS, OR SUPPLEMENTS

- General health maintenance (55%)
- Boosting immune health (41%)
- Better digestion / gut health (29%)
- Beauty health (28%)
- Enhancing energy levels (27%)
- Improving sleep quality (25%)
- Managing chronic conditions (17%)
- Weight management (16%)

AS THESE ROUTINES GROW, CONSUMERS ARE SEEKING MORE GUIDANCE AND TRANSPARENCY

As supplements become part of everyday wellness, consumers are seeking greater guidance, information and transparency around the products they use.

US: attitudes and behaviors around VMS, % of consumers, 2025

39%

I consult my physician before incorporating new vitamins, minerals, and/or supplements into my routine.

34%

I see supplements as a part of a holistic lifestyle change, not a quick fix.

34%

I look up different ingredients in a product before using it.

31%

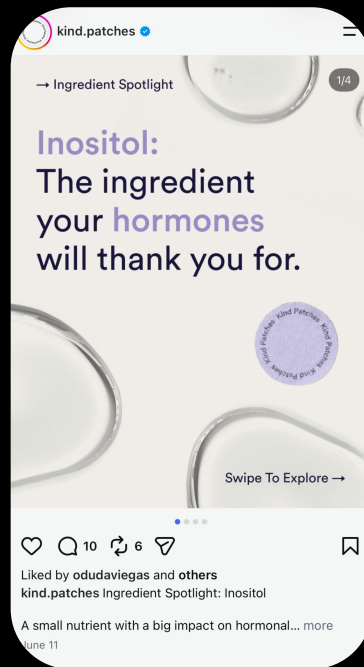
I wish there was transparency about what is included in the products I am using.

22%

The amount of information available makes me feel overwhelmed.

AS WELLNESS BECOMES MORE ROUTINE, THE WAY CONSUMERS TAKE SUPPLEMENTS IS EVOLVING TOO

Kind Patches shows how brands can modernize familiar wellness needs through format and convenience, turning supplements into an easy, wearable part of consumers' everyday routines. By organizing products around specific needs like sleep, energy, and stress, the brand makes wellness feel more personalized, approachable, and simple to navigate.



MEANWHILE, GLP-1s ARE EXPANDING THE CONVERSATION AROUND PRESCRIPTION MEDICATION

GLP-1s demonstrate how prescription medications can intersect with broader health and wellness goals, with consumers using them to address a range of individual health needs.

12%

Of U.S. adults currently use a GLP-1

+6%

From 2024

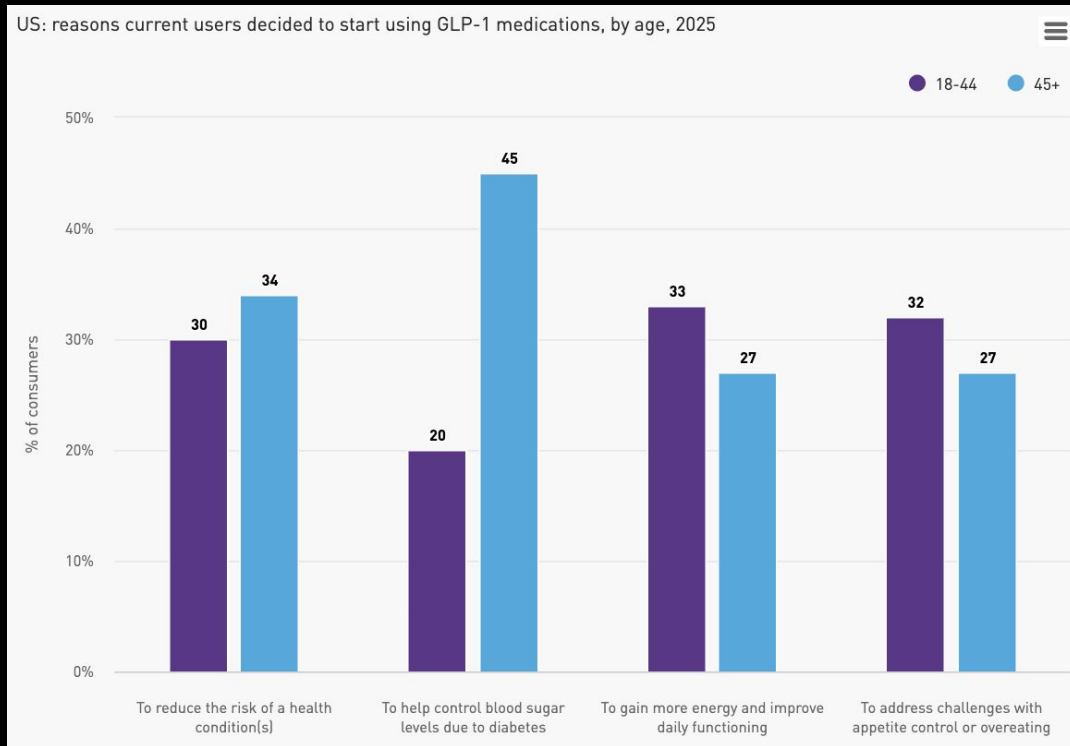
18%

Of U.S. adults have used a GLP-1 at some point

TYPE OF GLP-1 MEDICATION USED BY CURRENT GLP-1 USER

- Standard GLP-1 medication (21%)
- Semaglutide (23%)
- Herbal or natural supplements that promote GLP-1 (23%)
- Compounded GLP-1 medication (21%)

AGE IS SHAPING HOW CONSUMERS APPROACH GLP-1s



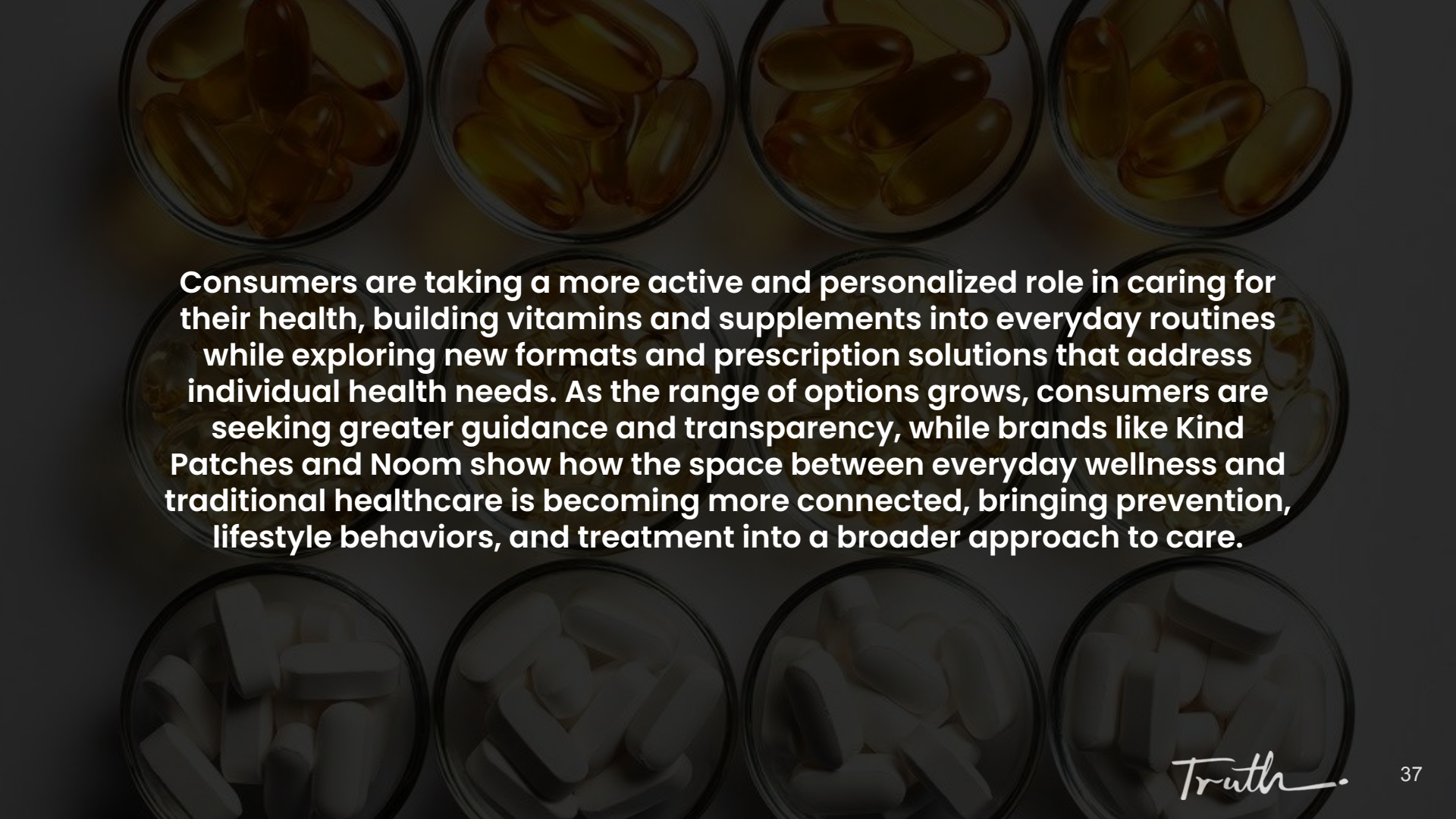
Consumers over 45 are more likely to use GLP-1s for health-related support, such as reducing the risk of chronic conditions and managing blood sugar levels. This group often takes a preventative approach to health, aiming to maintain their current quality of life and avoid future health issues, especially as conditions like type 2 diabetes and cardiovascular problems become more prevalent with age.

In contrast, those under 45 tend to turn to GLP-1s for lifestyle benefits, such as boosting energy levels and managing appetite. By addressing challenges like food noise, they can focus more on being present in their daily lives rather than constantly thinking about their next meal or portion sizing.

BRANDS LIKE NOOM ARE TURNING GLP-1 TREATMENT INTO A MORE HOLISTIC HEALTH EXPERIENCE



Noom extends GLP-1 care beyond medication by combining prescription treatment with nutrition, movement, behavior change, and ongoing support. Rather than positioning GLP-1s as a standalone solution, Noom integrates them into a broader wellness experience designed to help consumers build healthier habits alongside treatment—showing how brands can connect medical care with the everyday behaviors that support consumers' health journeys.



Consumers are taking a more active and personalized role in caring for their health, building vitamins and supplements into everyday routines while exploring new formats and prescription solutions that address individual health needs. As the range of options grows, consumers are seeking greater guidance and transparency, while brands like Kind Patches and Noom show how the space between everyday wellness and traditional healthcare is becoming more connected, bringing prevention, lifestyle behaviors, and treatment into a broader approach to care.

WHAT THIS MEANS FOR MARKETERS

BUILD AN ECOSYSTEM AROUND THE SOLUTION:

Consider what consumers need before, during, and after using a product: education, nutrition, movement, coaching, tracking, community, or professional support, and determine where the brand can credibly add value.

BE PRESENT DURING THE RESEARCH JOURNEY:

Consumers increasingly research ingredients and solutions before deciding what fits their needs. Search, educational content, retailer product pages, social content and creator/expert partnerships can help brands answer questions while consumers are actively evaluating their options, rather than only advertising after preferences have formed.

BUILD AUDIENCES AROUND BOTH LIFE STAGE AND HEALTH NEED:

Use demographic factors such as age and life stage alongside behavioral signals, health interests and specific needs to create more precise audience segments.

Truth.