Hartman GROUP

Health & Wellness 2027

Wellness Under Pressure

A Hartman Group syndicated research study

Fielding January 2027
U.S. market coverage



When does wellness provide agency and when does it add pressure?

Financial pressure persists, and wellness options keep multiplying.

Consumers are making increasingly intentional choices about where to spend, what to cut back on and which goals to pursue. From food and beverages to supplements and preventive health, these tradeoffs are reshaping the wellness marketplace.

As the latest installment in Hartman Group's nearly 20-year Health & Wellness series, ***Health & Wellness 2027: Wellness Under Pressure*** examines how consumers pursue well-being amid economic strain, political tension and competing ideas about what "healthy" means.

Health & Wellness 2027 reveals how wellness engagement, beliefs and behaviors shape consumers' willingness to invest money and effort, their shopping choices and their expectations of brands.

Three themes guide the exploration to help companies translate meaningful consumer decisions into targeting, positioning, innovation and marketing:

- What makes wellness matter, and what feels worth pursuing?
- How do consumers reconcile wellness aspirations with real-life constraints?
- What helps consumers act on their intentions—and what gets in the way?

This study is for:

- CPG brands seeking to support consumers' evolving wellness needs through differentiation and accelerated growth
- Retailers looking to strengthen relevance, increase consumer consideration and expand share
- Foodservice operators seeking new opportunities to support consumers' shifting appetites and needs

Health & Wellness 2027 **is your strategic advantage:**

- A consumer-centric view of what wellness means today
- Actionable insights with tailored implications for competitive strategy

Uncover what motivates wellness and what helps consumers follow through

Cultural norms and social influences shape what consumers see as healthy, desirable and achievable. This study explores what drives them to keep, moderate or change habits—including those considered "vices"—and how pleasure and indulgence fit into living well amid stress and uncertainty. Study topics include:

Why wellness matters

- What motivates consumers to pursue wellness, and how can brands build trust by connecting with those priorities across segments?
- Which aspects of well-being do consumers protect when money is tight, and why?
- When do consumers see indulgence as part of living well, and when does it conflict with their health goals?
- How are GLP-1s reshaping wellness attitudes beyond users?

Aspirations vs. real-life constraints

- How do consumers balance their own wellness priorities with the needs of work, children, pets and other household members?
- Which aspects of wellness do consumers want to personalize, and how much effort will they invest?
- What support do consumers seek for emerging issues and conditions (e.g., hormonal health, inflammation, etc.) and how do those needs differ by life stage and gender?

Intention vs. action

- What helps consumers stick with desired changes, and what leads them to delay/give up?
- How is AI shaping personalized wellness and health decisions?
- How do trust in supplements and perceived efficacy shape wellness routines?

Different wellness priorities.
Different brand opportunities.



say they are willing to pay more for healthy foods and beverages*

Turn differences in wellness engagement into strategic opportunities

Hartman Group's proprietary World of Health and Wellness Model distinguishes consumers by their wellness engagement, motivations, priorities and behaviors—helping organizations identify who to target and how to connect.

Our depth of consumer engagement brings these differences to life, revealing why priorities matter, what shapes choice and where brands can play a meaningful role.

*Source: *Health & Wellness 2025: The Interplay of Vitality and Longevity*

Understand what various nutrient priorities mean for your business

INCLUDED IN THE STUDY

TRACKING OF 25 KEY NUTRIENTS AND INGREDIENTS

Health & Wellness 2027 will build on more than a decade of tracking which nutrients and ingredients consumers are actively adding or avoiding in food & beverage.

A closer look at four key nutrients

In addition to tracking avoidance and interest, this study takes a deep dive into four key nutrients, examining how they are reshaping consumers' nutritional aspirations and resetting expectations for CPG formulation, innovation, positioning and marketing:

- **Protein**—What "better-quality" protein means to consumers
- **Sugar**—Which sweeteners they prefer
- **Fiber**—How much they consider enough
- **Fat**—Which fats they seek and avoid

PROPRIETARY OPPORTUNITIES

ADD YOUR INGREDIENT TO THE TRACKING LIST

Organizations seeking more insight into a nutrient or ingredient not included in the standard study may commission a **custom proprietary analysis** tailored to their specific ingredient of interest.

- This option provides the flexibility to evaluate emerging, niche or brand-relevant ingredients alongside the 25 tracked in the study, measuring whether consumers are actively adding or avoiding a specified ingredient.
- Custom nutrient and ingredient additions are available **beginning at $2,000** (in addition to the report investment). **Contact us to review the study's standard ingredient list and discuss feasibility and pricing for specific ingredients of interest.**

IDENTIFY THE NUTRIENTS AND INGREDIENTS DRIVING CHOICE IN YOUR CATEGORY

For more actionable category insights, organizations may purchase a proprietary category analysis. This enhancement includes a category-specific question designed to identify the **five most influential nutrients and ingredients driving consumer purchase decisions** within a selected category, providing a focused view of the factors that matter most to category buyers.

- In addition to the full report, purchasers receive **proprietary data tables containing the full study results for their selected category**, segmented among consumers who have purchased that category within the past three months.
- The proprietary tables provide a deeper understanding of attitudes and behaviors for category purchasers, enabling more targeted marketing and innovation strategies. Proprietary category inclusion is available for **$5,000 per category** (in addition to the report investment).

Inform your wellness strategy with integrated consumer research and actionable guidance—at a fraction of the time and cost of custom research

ROBUST, INTEGRATED METHODOLOGY

Quantitative research: A nationally representative online survey of U.S. food shoppers aged 18-80, with a minimum total sample of n=2,000 and the ability to examine differences across key demographic groups, including generational cohort, race/ethnicity and income.

Qualitative research: Multi-day online engagement with demographically and regionally diverse consumers through journaling prompts, photos and videos, complemented by in-depth virtual interviews with a subset of participants.

Cultural analysis: Literature review of marketing, consumer publications, and broader health and wellness discourse, informed by cultural commentary, podcasts and social listening on key consumer platforms.

Final report available March 31, 2027

Report Price: $12,500 through March 31/2027; $15,000 beginning April 1, 2027.*

Report included in all Hartman Retainer Services packages

In-depth PowerPoint report: Includes a complete analysis of all relevant data, supported by robust charts and visuals, strategic implications and recommendations. Consumer quotes will add real-world context throughout.

Executive Brief: A standalone, streamlined strategic summary of key report findings.

Excel data tables: Detailed results with key demographic breakdowns for further analysis will accompany the report.

Proprietary research opportunities

Ingredient/nutrient and category inclusions are available by request on a first-come, first-served basis. Contact Melissa Abbott by December 14, 2026, for pricing and a feasibility assessment.

Turn insights into action: HEALTH & WELLNESS ACTIVATION SESSIONS

Explore what the findings mean for your business and identify opportunities to inform brand and portfolio strategy.

Contact Melissa Abbott at **melissa@hartman-group.com** to discuss a custom *Health & Wellness 2027* Activation Session.

Pre-order the ***Health & Wellness 2027*** report now

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ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients. Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

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