pwc

Voice of the Consumer 2026 – Middle East findings

Goal-led, digitally enabled and health confident – charting the Middle East consumer's wellness journey



Foreword



The everyday choices of Middle East consumers reveal a more self-defined approach to health, shaped by personal wellness and nutritional goals. Consumers are making deliberate decisions about what they eat and drink – and are choosing to be more in control of their health.

At the supermarket, attention is turning to healthier ingredients and supplements. There is a focus on protein. A wearable device tracks sleep, activity and recovery, while an app helps monitor progress. A visit to the pharmacy may involve questions about weight management, preventive health or wellbeing. And when a health concern arises, AI may be the first place to seek information, even if a healthcare professional remains the most trusted source of advice.

These everyday decisions reflect a broader shift in how consumers across the region approach health and wellness. Increasingly embedded in daily life, health and wellness choices are being driven by a desire to live longer, improve physical and mental wellbeing, and take greater control of personal health. This reflects the wider consumerisation of healthcare, with individuals taking a more active role in decisions that were once largely guided by traditional healthcare providers. And they are prepared to pay for it.

PwC's Voice of the Consumer 2026 survey, drawing on responses from 2,614 respondents in Saudi Arabia, the UAE, Qatar and Egypt, reveals a Middle East consumer who is actively engaged in managing personal health.

Half of regional respondents frequently plan their nutrition and track their sleep, while nearly six in 10 regularly monitor their fluid intake. Three-quarters turn to AI when they first have a health or wellness question, compared with just over half of their peers globally. There is a greater interest in personalised health insights, preventive screening, and technologies that help them understand their health.

Yet greater engagement does not necessarily make healthier living easier. Despite reporting stronger overall health confidence than their global peers, Middle East consumers continue to struggle with sleep, stress, and even motivation. They are also navigating a growing range of products, services and sources of information, making trusted guidance and demonstrable value increasingly important.

For businesses, this marks a shift in where and how wellness demands are taking shape. Consumers are looking beyond individual products, favouring solutions that fit their lives, support their personal goals, and help them maintain healthier habits. The opportunity for healthcare providers, retailers, consumer goods companies, insurers and technology businesses lies in connecting products, services, data and professional expertise to support consumers throughout their wellness journey, not just at the point of purchase or care.

Norma Taki,

Consumer Markets Leader, PwC Middle East

What the survey reveals

Health confidence runs higher in the Middle East

42% of consumers surveyed in the region rate their health as “good”, compared with

31% globally, an 11 percentage-point gap in perceived health confidence.

Clinical credibility is becoming a premium in digital health

77% are willing to pay more for a wearable device if its data is trusted by and can be reviewed with healthcare professionals, compared to

65% globally.

GLP-1 use is extending the wellness conversation beyond weight management

15% of respondents report currently using GLP-1 medications, compared with

10% globally, while

34% of regional non-users are open to future use, versus

28% globally.

Nutrition and fitness are set to lead wellness spending intentions

Nearly six in 10 consumers surveyed in the region intend to increase their spending on nutrition and fitness over the next 12 months.



AI is becoming a first port of call for health information

75% of respondents in the Middle East are substantially more likely to use AI when they first have a health or wellness question, compared to

51% globally.

The biggest barrier to wellness isn't money – it's time

65% cite lack of time as a barrier to achieving their wellness goals, higher than the

54% globally.

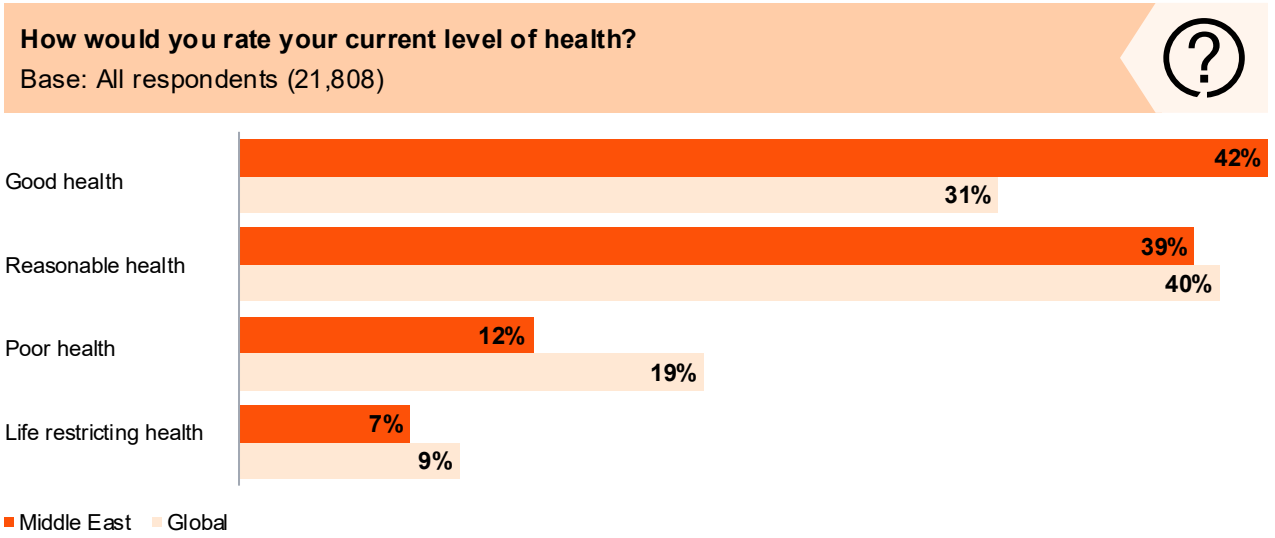
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Health confidence runs high among Middle East consumers

Consumers in the Middle East are more confident about their health than their global peers. But beneath this optimism, concerns around sleep, physical fitness and emotional wellbeing are revealing new opportunities for preventive and personalised wellness.

More than eight in 10 Middle East consumers (81%) report good or reasonable health, compared with 71% globally. At the other end of the spectrum, only 19% of Middle East respondents describe their health as poor and lifestyle-restricting, versus 28% globally, indicating a generally more positive health perception in the region (see Figure 1).

Figure 1: Current levels of health



This positive outlook on health comes as governments in key regional economies make longer, healthier lives a strategic priority, investing in preventive care, healthcare infrastructure and advanced technologies. Saudi Arabia and the UAE, for example, are advancing national agendas that focus on healthier lifestyles, along with investments in longevity and precision health. Under Vision 2030, Saudi Arabia's Quality of Life Programme promotes wellbeing and aims to raise life expectancy to 80 years by 2030. The UAE's National Strategy for Wellbeing 2031 encourages healthy eating, physical activity and better access to healthcare, while initiatives such as the Omics Centre of Excellence are advancing investment in genomics, multi-omics and regenerative medicine. In Egypt, Presidential public-health initiatives also support a wider shift towards prevention and early diagnosis. These efforts are laying stronger foundations in the region for more preventive and, personalised healthcare.[1]

According to survey results, cardiovascular and brain health emerge as the region's strongest areas, with 57% of respondents rating each of these as excellent, compared with global averages of 43% and 44%, respectively. Middle East consumers also report more positive perceptions of their immune, digestive and mental health than their global peers.

Yet this optimism is only part of the story.

Sleep, in particular, reveals a gap between feeling healthy and achieving optimal wellbeing. Despite the region's stronger overall health scores, sleep quality ranks lowest across all seven dimensions assessed. Only one in three consumers (33%) describe their sleep as excellent, while approximately a third rate it as average, poor or very poor. When viewed alongside consumers' everyday habits, this becomes more meaningful. Almost half of regional respondents say they frequently track and try to improve their sleep, compared with 30% globally.

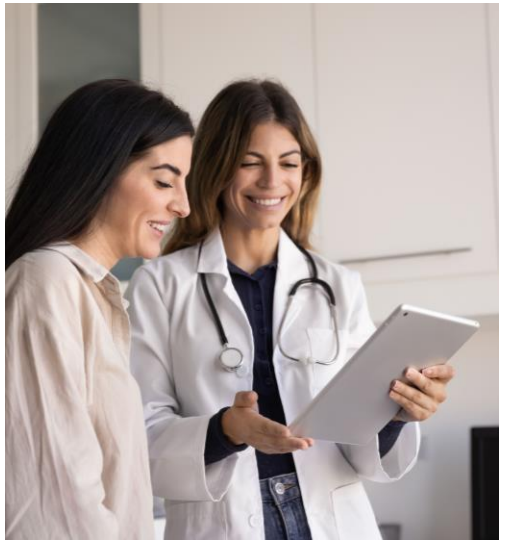
Mental health adds another important dimension, particularly for the younger generations in the Middle East. While 74% of Middle East consumers rate their mental and emotional wellbeing as good or excellent, compared with 66% globally, this overall confidence masks a generational divide. Among younger Middle East consumers, 73% rate their mental and emotional wellbeing positively, compared with 80% of older generations.



Trusted guidance matters

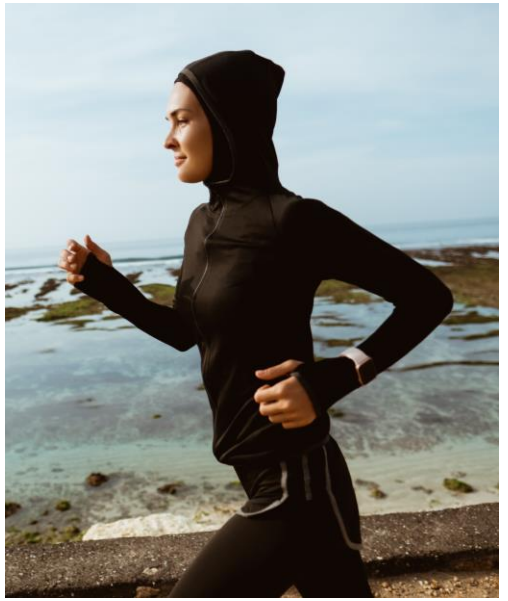
Trusted guidance remains central to how regional consumers make health and wellbeing decisions. Healthcare professionals are the most influential source of advice for both Middle East and global respondents. However, the sources of influence differ beyond this shared preference. In the Middle East, certified health and wellness experts rank second, while globally, respondents place greater emphasis on their personal curiosity and advice from friends, family and colleagues.

Yet alongside this reliance on professional expertise, a more digitally influenced consumer is emerging. 64% of Middle East respondents indicated that they would use an AI tool before seeking professional medical advice, slightly higher than 61% of their global peers.



Wellness is becoming part of everyday life

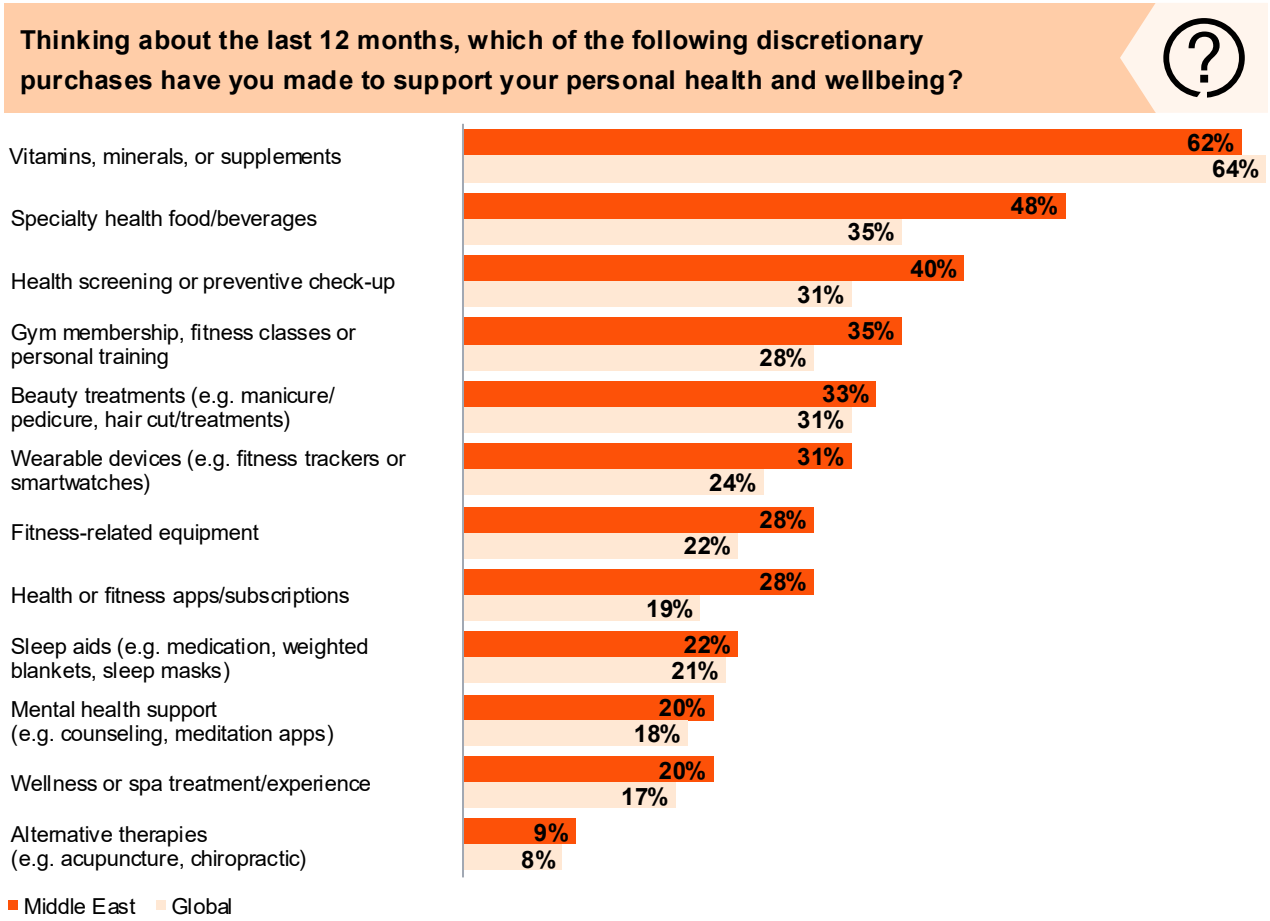
Consumers in the region have taken a more proactive, approach to wellbeing, driven by better access to health information and a growing focus on prevention. They are increasingly incorporating supplements, specialty health foods and other wellness products into their daily routines, and consistently outpace their global peers in physical, nutritional, mental and lifestyle-related wellness activities.





In the region, vitamins and supplements topped the list of discretionary wellness purchases over the past 12 months (see Figure 2). Four in 10 Middle East consumers have also paid for health screening or preventive check-ups in the past year, compared with 31% globally. This signals that consumers are also spending on services that help them understand and monitor their health.

Figure 2: Discretionary purchases for health and wellbeing



Physical fitness remains the most frequently practised wellness activity in the region, with 63% exercising regularly compared with 58% globally. Spending time outdoors follows at 56%, which is comparable to the global average of 53%

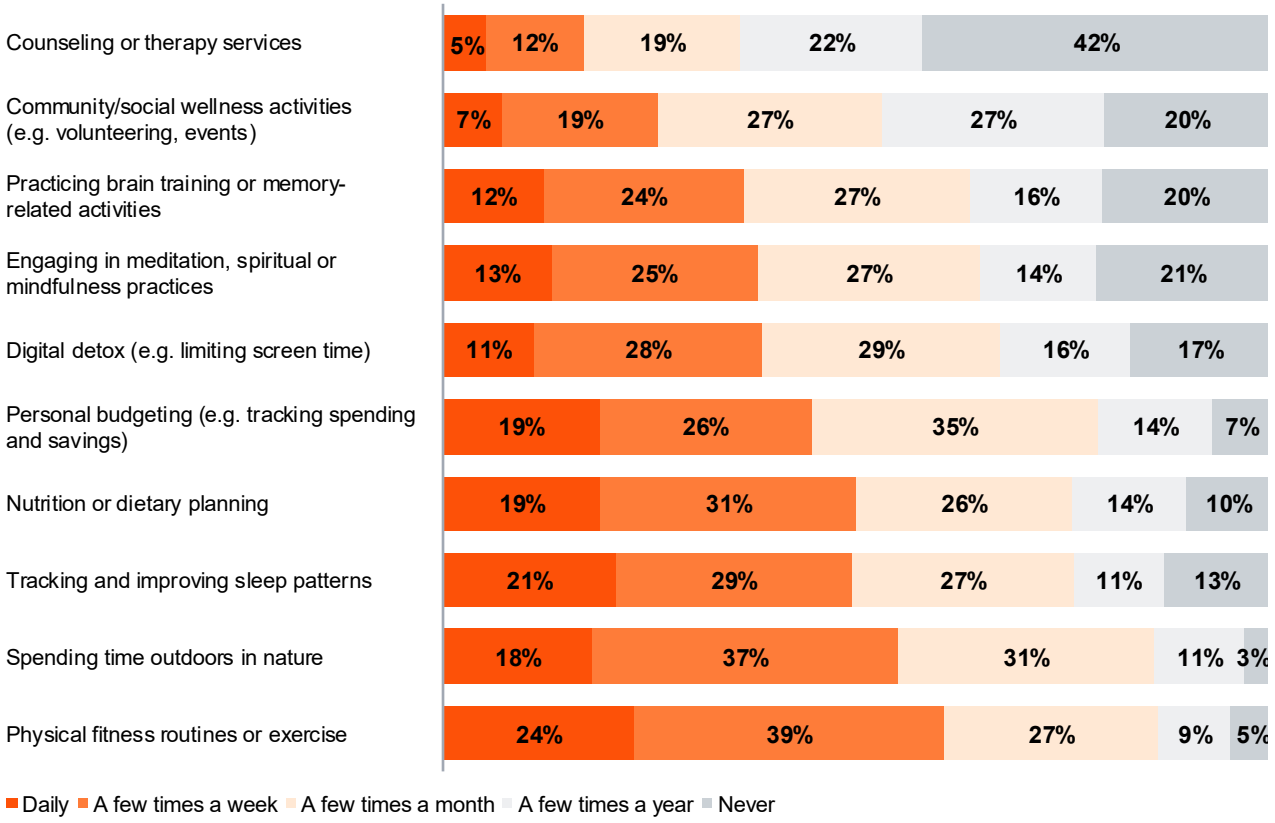


The Middle East leads the global comparison by 18 percentage points in sleep tracking, 14 points in nutrition planning, 15 points in digital detox and 14 points in mindfulness - pointing to a more deliberate management of everyday wellbeing (see Figure 3).

Figure 3: Health and wellness activities

How often, on average, do you practice the following health and wellness activities?

Middle East



Mindfulness, digital balance and community shape mental wellbeing

Mental and emotional wellbeing is also becoming part of everyday self-care, a shift reflected in the growing national focus on mental health. As part of broader healthcare transformation, Dubai in the UAE has created its Mental Wealth Framework,[2] while in Qatar, the Ministry of Public Health (MoPH) is intensifying its initiatives aimed at promoting mental health and wellbeing across different segments of society.[3] In Saudi Arabia, the National Center for Mental Health Promotion (NCMHP) promotes mental wellbeing through psychological assistance programmes and community activities,[4] and in Egypt, the General Secretariat of Mental Health (GSMHAT) has led several mental health campaigns over the past decade to raise awareness of key mental health conditions.[5] Awareness-building efforts such as these may have helped build a regional consumer base that is more likely than their global peers to practise mindfulness, limit screen time and participate in community wellness activities.



Consumers are making more deliberate nutrition choices

Half of Middle East consumers frequently track their protein intake, compared with 35% globally, while 47% monitor calories, more than the 33% globally. The biggest difference emerges in intermittent fasting, practised frequently by 45% of regional consumers — nearly double the global figure of 33%. Consumers are also paying closer attention to hydration (59% versus 47%) and fiber intake (45% versus 33%).

Meal preparation at home is the one area where Middle East consumers slightly trail their global peers, at 65% versus 68%. This suggests that greater nutritional awareness does not necessarily translate into more traditional home-cooking habits and the more interesting shift lies in how actively people are monitoring what they consume.

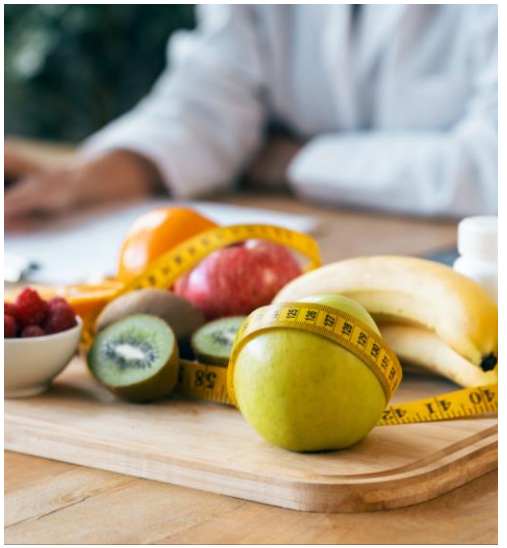
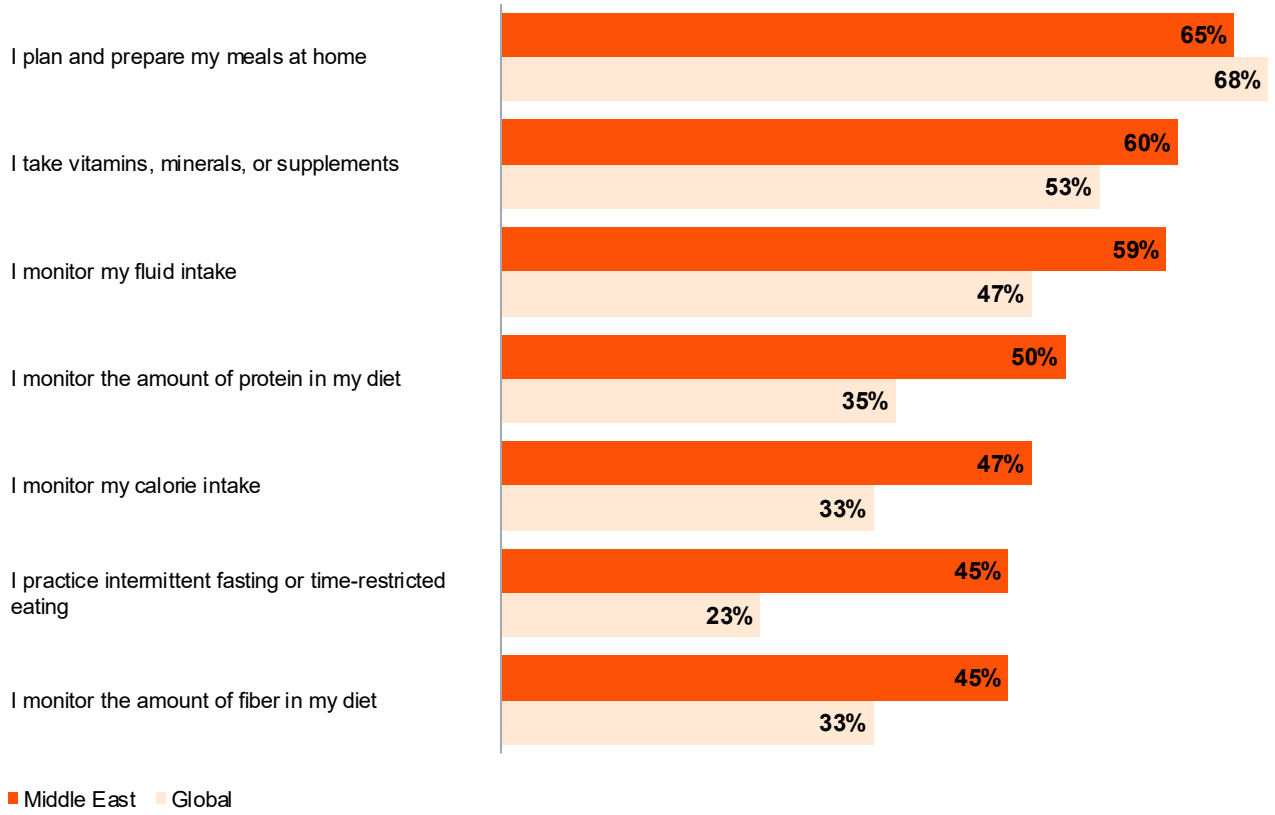




Figure 4: Health and nutrition habits

How often do you engage in the following health and nutrition related habits?
(NET: Frequently)



Beyond nutrition, survey findings also show greater regional participation in beauty and wellness experiences. A third of respondents (33%) in the Middle East purchased beauty treatments, while 20% spent on wellness or spa experiences, compared with 17% globally. The region has a long tradition of spa and wellbeing practices, and today, these are being combined with modern wellness services and personalised experiences, offering consumers a wider range of ways to relax, recover and care for their wellbeing.[6]

Egypt stands out for proactive wellness engagement

Consumers in Egypt report the strongest engagement in the Middle East across several aspects of health and wellness. More than half (59%) purchased specialty health foods or beverages in the past year, compared with 48% regionally, while 50% paid for preventive health screenings or check-ups, against 40% across the Middle East. Everyday wellness activities are also prominent, with 51% frequently practising digital detox and limiting screen time (39% regionally), 48% engaging in mindfulness, meditation or spiritual activities (38% regionally) and 27% purchasing mental health support services (20% regionally).



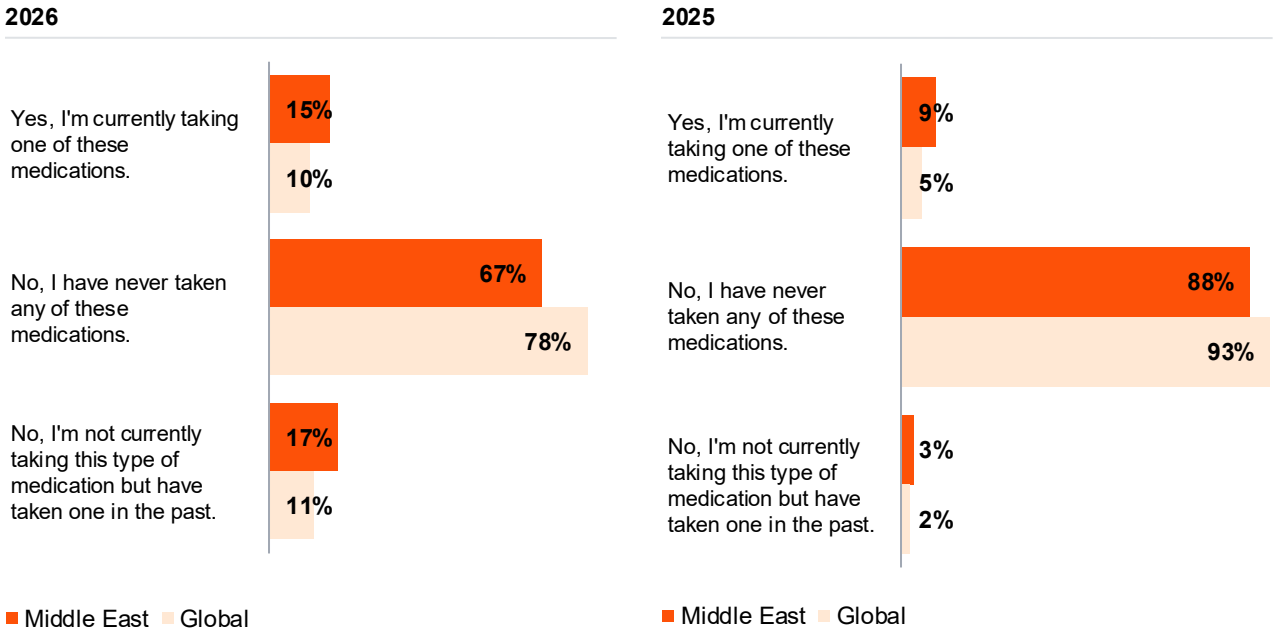
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As GLP-1 adoption grows in the region, the market opportunity is expanding beyond weight management. The next phase will focus on the broader wellness ecosystem these medicines enable – from nutrition and fitness to clinically supervised, sustainable care.

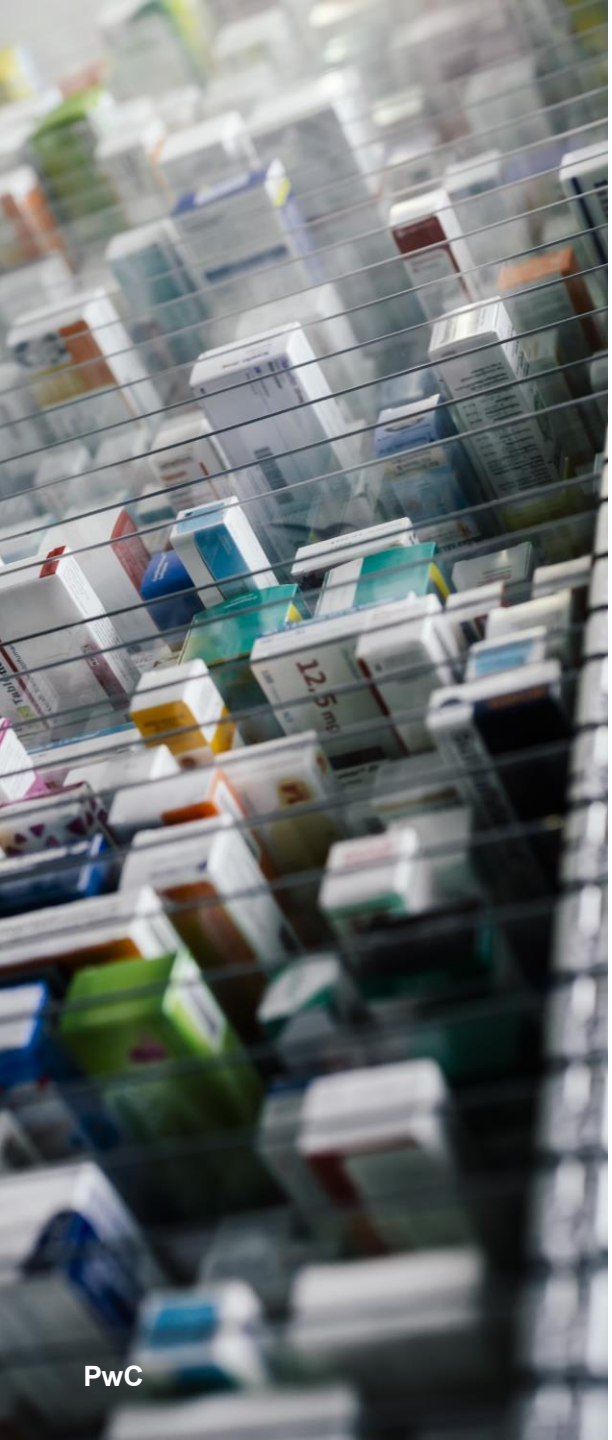
In the Middle East, reported current use is rising from 9% in 2025 to 15% in 2026, compared with an increase from 5% to 10% globally. This growing uptake comes as many countries across the region continue to grapple with high rates of diabetes and obesity. Established healthcare infrastructure, evolving regulatory frameworks and greater patient awareness of treatment options may also be contributing to the increased use of these medications.[7] The region also records higher levels of previous use, with 17% of Middle East consumers reporting they previously took GLP-1 medication but were no longer taking it, compared with 11% globally.

Figure 5: GLP-1 current use

Do you currently take a GLP-1 prescription medication for type 2 diabetes and/or weight loss (e.g. Ozempic, Mounjaro, Wegovy, Zepbound)?



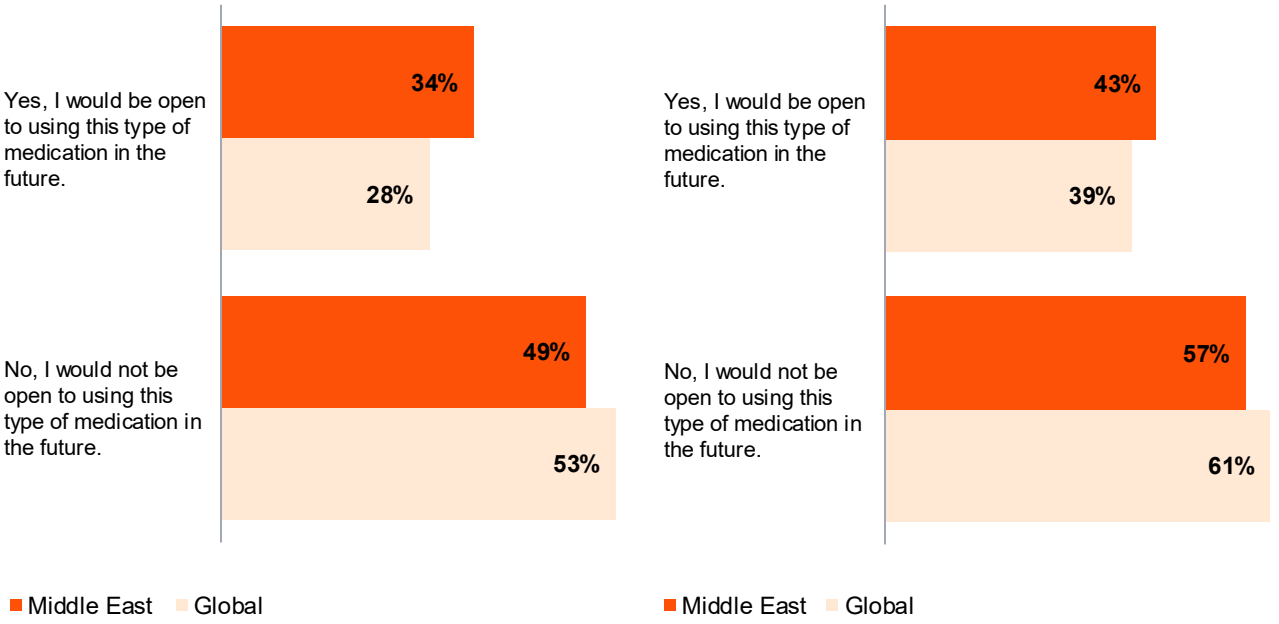
However, while reported GLP-1 use is growing in the Middle East, future willingness remains more selective. Among respondents not currently taking these medications, around a third (34%) say they would consider using them in the future, compared with 28% globally. This is lower than the 43% recorded regionally in 2025.[8]



This indicates that while interest in GLP-1 medications is growing, consumers are also paying more attention to nutrition, physical fitness, and personalised health management. With GLP-1s, the key question now is whether the market can deliver safe, supervised and sustainable outcomes – not just faster weight reduction. Health experts are now stressing the importance of adequate meals and hydration, while urging patients to pay attention to the loss of lean tissue and muscle, which could be a result of significant reduction of food intake.[9]

Figure 6: GLP-1 future use

Would you be open to taking a GLP-1 prescription medication for type 2 diabetes and/or weight loss in the future?



GLP-1 use is reshaping consumer habits

For respondents who have used GLP-1 medications, the findings reveal changes extending beyond weight management. Nearly two-thirds of Middle East users report paying greater attention to nutrition (65%), while 64% have increased their spending on health and wellness products and 60% report exercising more. Notably, 62% also say they socialise more frequently.

Here, an important distinction emerges between appetite and consumption behaviour. While GLP-1 medications can suppress appetite, half of Middle East respondents who have used them (50%) report eating out more frequently, while 63% say their spending on food has increased. This suggests that reduced appetite does not necessarily translate into lower food spending or dining out.



Saudi Arabia – GLP-1 use is shaping wider lifestyle and spending habits

Saudi Arabia stands out for its higher levels of GLP-1 adoption, with 16% of Saudi consumers currently using GLP-1 medications, compared with 10% globally, while 18% report previous use, compared with 11% globally. GLP-1 users in Saudi Arabia also show broader changes in lifestyle and consumption. Among current users, 65% report paying greater attention to nutrition (compared with 61% globally), 61% socialising more frequently (versus 49% globally) and 58% increased spending on food (versus 50% globally). This wider focus on health is also reflected in digital habits, with 39% of Saudi consumers frequently using apps or wearables for dieting, weight loss and nutrition, compared with 25% globally.

3

From tracking health to taking control – the rise of personalised digital wellness

Middle East consumers are moving from simply tracking their health to using technology and AI to manage it more actively. But as digital health becomes more sophisticated, trust, clinical credibility and the ability to deliver personalised outcomes will determine where value is created.

Consumers in the Middle East are more frequent users of health apps and wearables than their global peers across every category surveyed. While exercise monitoring remains the most common use, at 47% compared with 34% globally, consumers are increasingly using these tools to manage a wider range of everyday health needs.

Nearly half of regional respondents frequently use apps or wearable devices to track their sleep (45% versus 30% globally), while 44% use them to manage medication or supplement reminders, compared with 30% globally. Digital support for dieting, weight loss and nutrition is also significantly more common in the region, at 41% versus 25% globally.

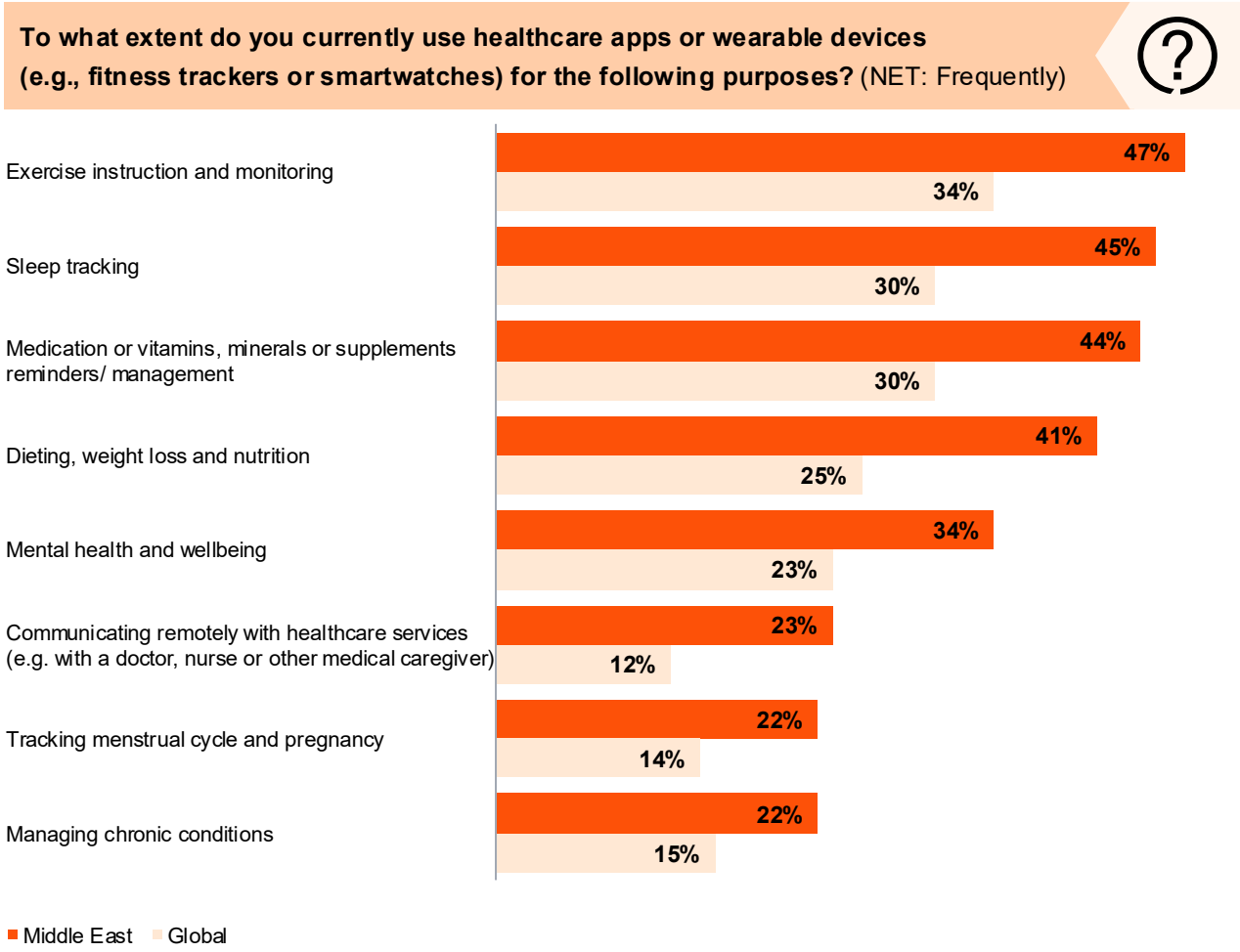
Wearable technology is becoming an increasingly important part of preventive and personalised healthcare, moving beyond tracking steps, sleep and fitness to providing continuous insights into consumers' health. In the region, the Gulf Cooperation Council (GCC) wearables market is projected to grow from US$1.8 billion in 2026 to US$3.3 billion by 2031,[10] reflecting growing interest in devices that help consumers better understand and manage their wellbeing.

In Abu Dhabi, the Department of Health's research collaborations with WHOOP[11] and ŌURA[12] illustrate how wearable technology is being explored as part of a more proactive approach to healthcare, including continuous health monitoring, personalised coaching and the assessment of cardiometabolic risk.



What makes this particularly interesting is that digital health engagement is extending into areas traditionally associated with healthcare delivery. Around one in three Middle East consumers (34%) frequently use technology to support mental health and wellbeing, compared with 23% globally, while 23% regularly use digital tools to communicate remotely with healthcare providers, nearly double the global average of 12%.

Figure 7: Healthcare apps and wearable device use

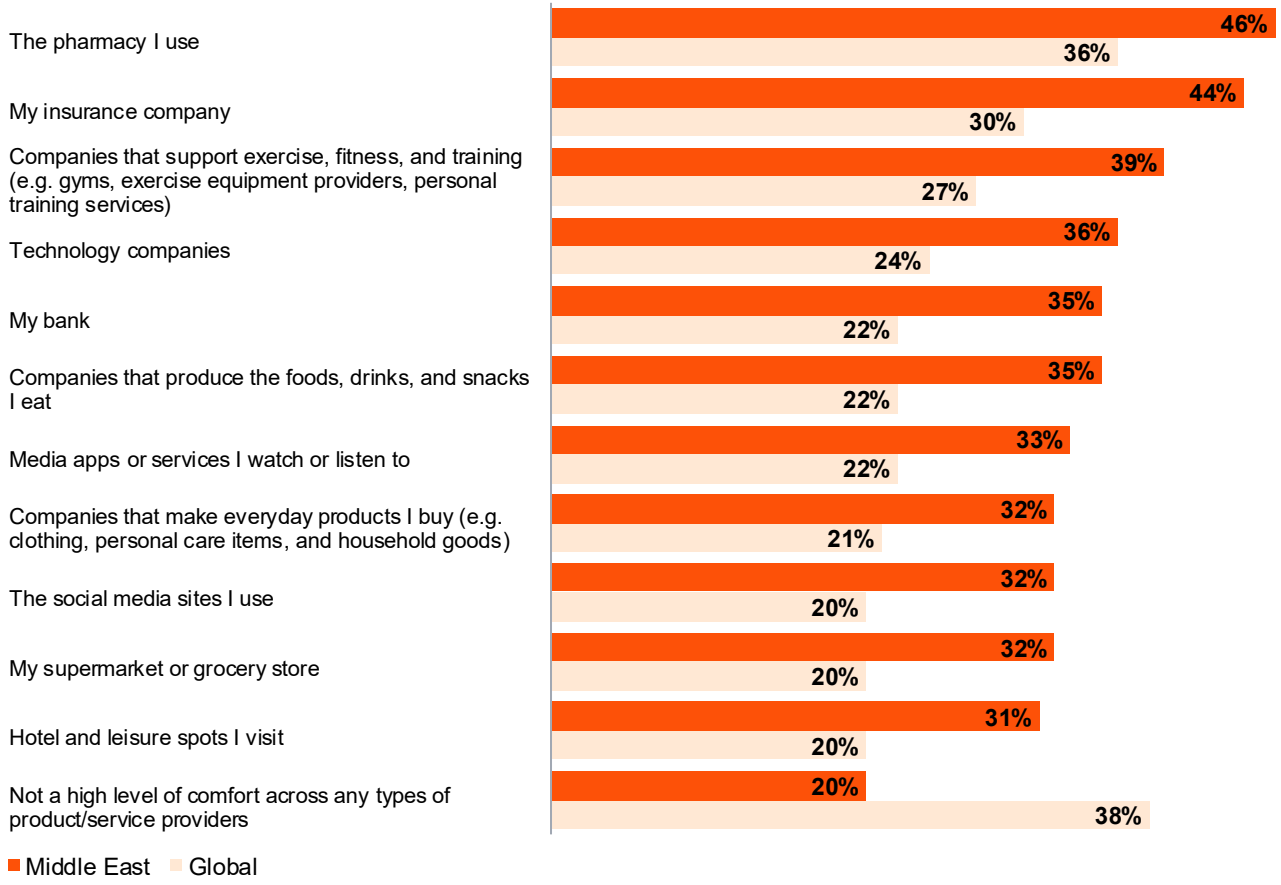


Consumers are willing to share their health data, but credibility remains key

The openness extends beyond traditional healthcare providers: 36% report high comfort with sharing health data with technology companies, compared with 24% globally, while 35% would do so with food and beverage companies, compared with 22% of their global peers.

Figure 8: Willingness to share health data with products/service providers

Please select the level of health data you would be comfortable sharing with the following types of product/service providers if they were able to use the data to give you more personalised products and services. (SUMMARY: NET High comfort)



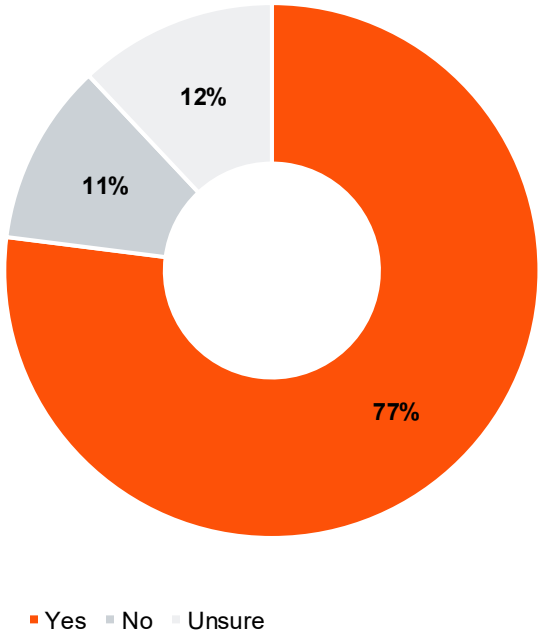


Clinical credibility could be a particularly important differentiator. More than three-quarters of Middle East consumers (77%) say they would pay more for a wearable device whose data is trusted by healthcare professionals and can be reviewed by them to support their care, compared with two-thirds (65%) globally. This is an important signal for the next phase of digital health. Consumers are not simply interested in collecting more information about themselves; they appear to value technology that can connect personal data with professional guidance.

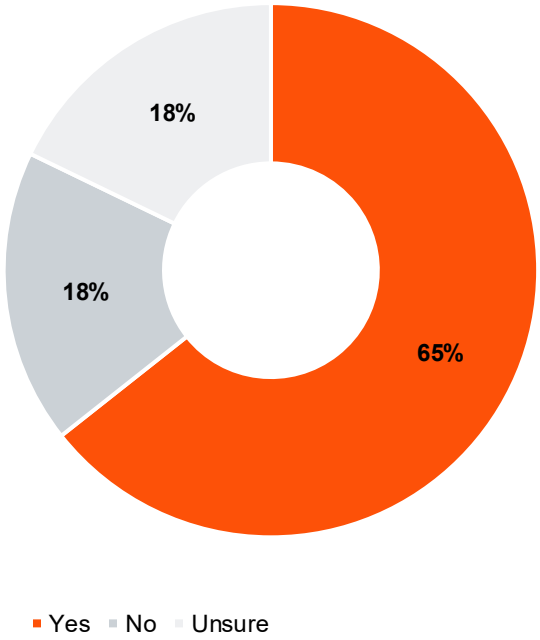
Figure 9: Willingness to pay more for healthcare-trusted wearables

Would you be willing to pay more for a wearable device whose data is trusted by healthcare professionals and can be reviewed by them to support your health and wellness care?

Middle East



Global



AI is becoming the first stop for health information, but not a replacement for medical expertise

According to survey findings, the most striking shift noticed among regional consumers is the growing role of AI in how Middle East consumers seek health information.

Three-quarters (75%) say they use AI tools when they first have a health or wellness question, compared with 51% globally. This 24-percentage-point gap is one of the clearest examples of the region's stronger engagement with emerging health technologies.

Among those using AI for health information, 64% typically turn to it before consulting a healthcare professional or another source, while only 6% say they rely on AI exclusively.

This indicates that AI may be becoming an accessible starting point for health-related questions, rather than necessarily replacing professional advice. Consumers can use it to explore symptoms, understand wellness options or prepare for conversations with healthcare providers, while continuing to value human expertise.



From answering questions to taking action: AI's next opportunity in wellness

Consumers are not only using AI to find information. They are also increasingly open to allowing it to support practical aspects of everyday health management.

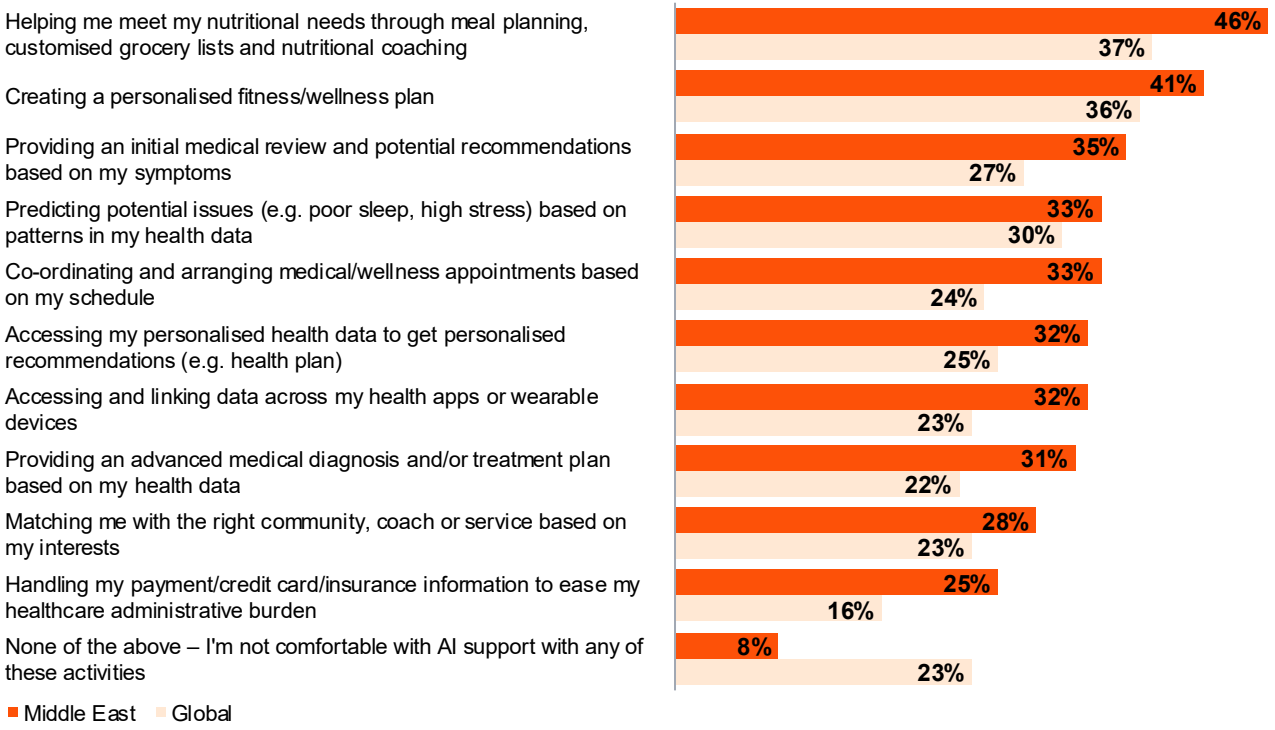
Nearly half of Middle East respondents (46%) would be comfortable using AI for personalised meal planning and nutritional coaching, compared with 37% globally. Another 41% would allow AI to create personalised fitness or wellness plans, while 35% are open to AI providing an initial medical review and potential recommendations based on symptoms.

This suggests that AI's immediate appeal lies in making everyday wellness management easier, more convenient and more personalised. There is also growing openness to more advanced applications, with around a third of the consumers comfortable with AI predicting potential health issues based on their data (33%) or providing an advanced medical diagnosis or treatment plan (31%). These more clinically consequential uses would require appropriate safeguards and professional oversight.

Younger generations are helping shape this emerging demand. Across the Middle East, younger consumers indicate greater comfort with AI-enabled health services, particularly nutritional guidance and personalised fitness planning.

Figure 10: Consumer comfort with AI-powered health and wellness tasks

Which of the following health and wellness tasks, if any, would you be comfortable allowing AI to perform?



Qatar – Cautious optimism for digital health

Among survey respondents in the Middle East, consumers in Qatar stand out for the highest level of caution around sharing personal health data. They are particularly cautious of social media sites (27% versus 24% regionally), banks (26% versus 22%) and technology companies (25% versus 17%). Yet Qatar's consumers are more open than their global peers, reporting particularly high levels of comfort of data sharing with pharmacies (48% versus 36% globally) and insurance companies (43% versus 30%).



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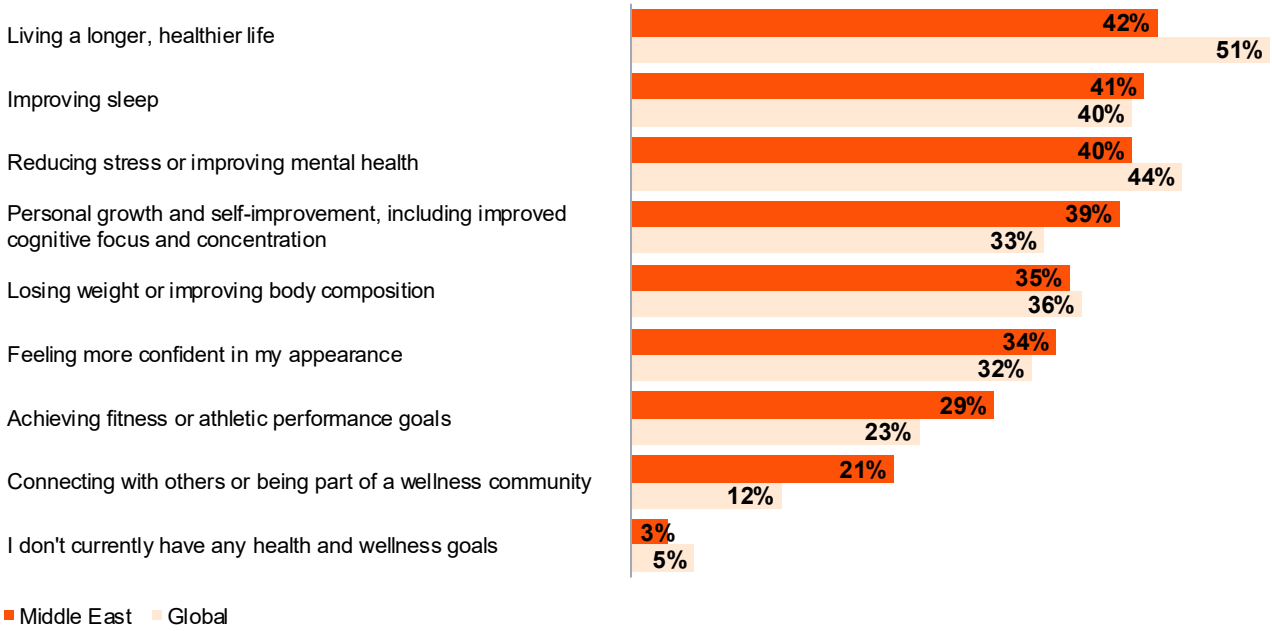
Wellness goals are rising, but barriers remain

For consumers in the Middle East, living a longer, healthier life remains the leading wellness ambition, indicated by 42% of respondents. This aligns with the region's policy direction: Dubai's Longevity Strategy aims to position the city as a global hub for healthy ageing, Saudi Arabia is linking healthcare innovation to economic diversification, and Egypt is placing greater emphasis on healthy ageing and longer workforce participation.[13] Longevity is, therefore, moving beyond a healthcare objective to become part of the region's wider economic and social agenda, with prevention, technology and healthier life expectancy increasingly seen as drivers of productivity, investment and new growth opportunities.

But while longevity remains important, consumers in the region are placing relatively greater emphasis on other areas of wellbeing. Sleep improvement (41%) and stress reduction or better mental health (40%) rank just behind longevity. These priorities reflect some of the challenges identified earlier in the survey.

Figure 11: Consumers' top health and wellness goals

Considering your current health and wellness, which of the following, if any, best represents your primary goals (i.e. specific aims or desired outcomes that you intend to achieve)?
(Respondents were allowed to rank up to three health and wellness goals)



In the Middle East, there is a stronger focus on personal growth, physical performance and social connection. Nearly four in 10 consumers (39%) cite personal growth and self-improvement, including cognitive focus and concentration, as a wellness goal, compared with 33% globally. Fitness and athletic performance also feature more prominently (29% versus 23%), while the desire to connect with others via wellness communities is especially interesting: 21% want to connect with others through wellness, compared with 12% globally.

Obstacles to better health

The survey reveals another interesting insight – the biggest obstacle to better health isn't necessarily a lack of ambition or spending power. The findings suggest that time, energy and motivation are particularly important constraints on the region's wellness ambitions.

Nearly two-thirds of respondents in the Middle East **(65%)** struggle to find time for their wellness goals, compared with **54%** globally, an 11-percentage-point difference.

Energy and consistency remain major challenges. Stress, fatigue or low energy affect **63%** of consumers surveyed, while **60%** struggle to stay motivated, broadly in line with global levels.

Maintaining motivation is a key challenge as well, with **60%** struggling to stay consistent with their wellness goals, broadly in line with their global peers.

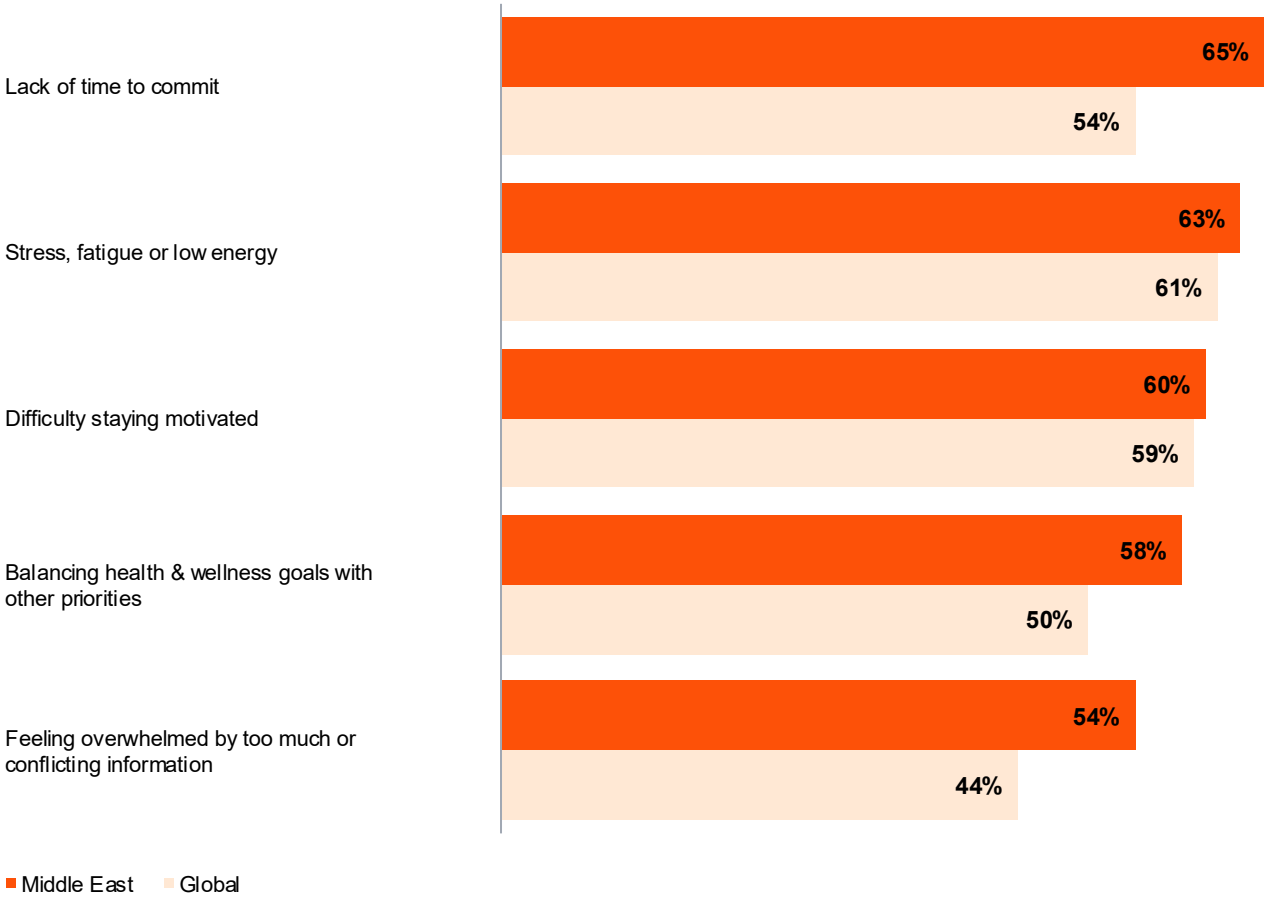




Figure 12: Key barriers to achieving health and wellness goals

Thinking about your health and wellness goal(s), which of the following challenges, if any, do you face in achieving them?

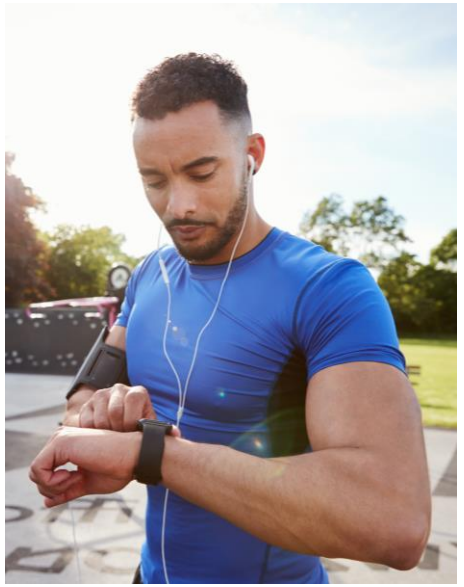
Top five challenges to achieving health and wellness goals



Where wellness spending is headed

The wellness goals of regional consumers are also influencing spending patterns. In the Middle East, priorities such as living healthier lives, improving sleep, reducing stress, and supporting personal growth and fitness are translating into demand across a broad range of wellness categories.

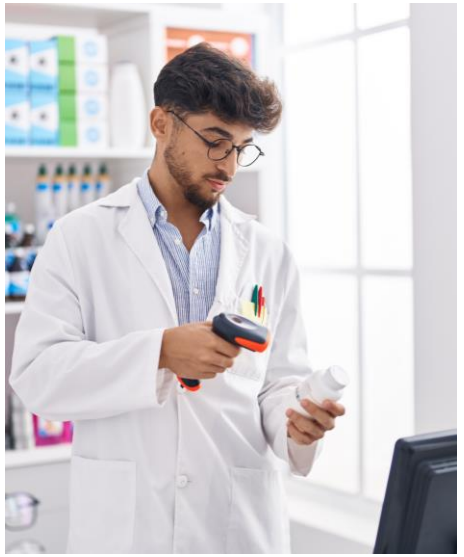
Nearly six in 10 respondents (58%) expect to increase spending on both nutritional and dietary products and services and fitness and physical activity over the next 12 months. These are the strongest areas of anticipated spending growth. However, demand shows up in other areas as well. More than four in 10 consumers (43%) expect to spend more on holistic wellness services, while 38% anticipate higher spending on beauty-led services and 33% on clinical or science-led treatments. Although these categories attract a smaller share of consumers planning to increase their expenditure, they point to a broader wellness market encompassing physical health, personal care, preventive services and lifestyle experiences.



Purchasing channels reveal consumer preferences

Pharmacies remain by far the most widely used channel, with 76% of Middle East respondents purchasing health and wellness products or services through them. Online marketplaces follow at 41%, ahead of supermarkets (36%) and doctor-led clinics (29%).

The prominence of pharmacies is particularly interesting given the importance consumers place on credible health advice. At the same time, the strong presence of online marketplaces points to the importance of digital access and convenience. This suggests that consumers are navigating wellness through both established healthcare channels and broader retail platforms, rather than relying on a single route to purchase. And at this intersection, traditional pharmacies across the Middle East are expanding digital and on-demand delivery services, forging new partnerships with regional delivery operators to meet growing consumer demand for convenience.[14] [15] [16]



Healthier eating ambitions face a test of affordability

Middle East consumers are signalling a stronger appetite for healthier diets, even as rising food prices and pressure on household budgets complicate purchasing decisions. 47% of Middle East consumers cite a lack of disposable income as a barrier to achieving their wellness goals. But at the same time, nearly three-quarters (74%) expect to increase their consumption of fresh fruit and vegetables over the next 12 months, compared with 61% globally, while 61% anticipate consuming more vitamins and supplements, against 43% worldwide. This could mean that healthier eating is becoming a stronger consumer priority, but affordability may decide whether those intentions translate into sustained dietary change.

The strongest regional differences emerge in protein-related categories. Some 58% of Middle East consumers expect to consume more meat, poultry and fish, compared with 37% globally, while 54% anticipate increasing their dairy consumption, against 33% worldwide. These intentions reinforce the survey's earlier findings on consumers' growing attention to nutritional intake, particularly protein.

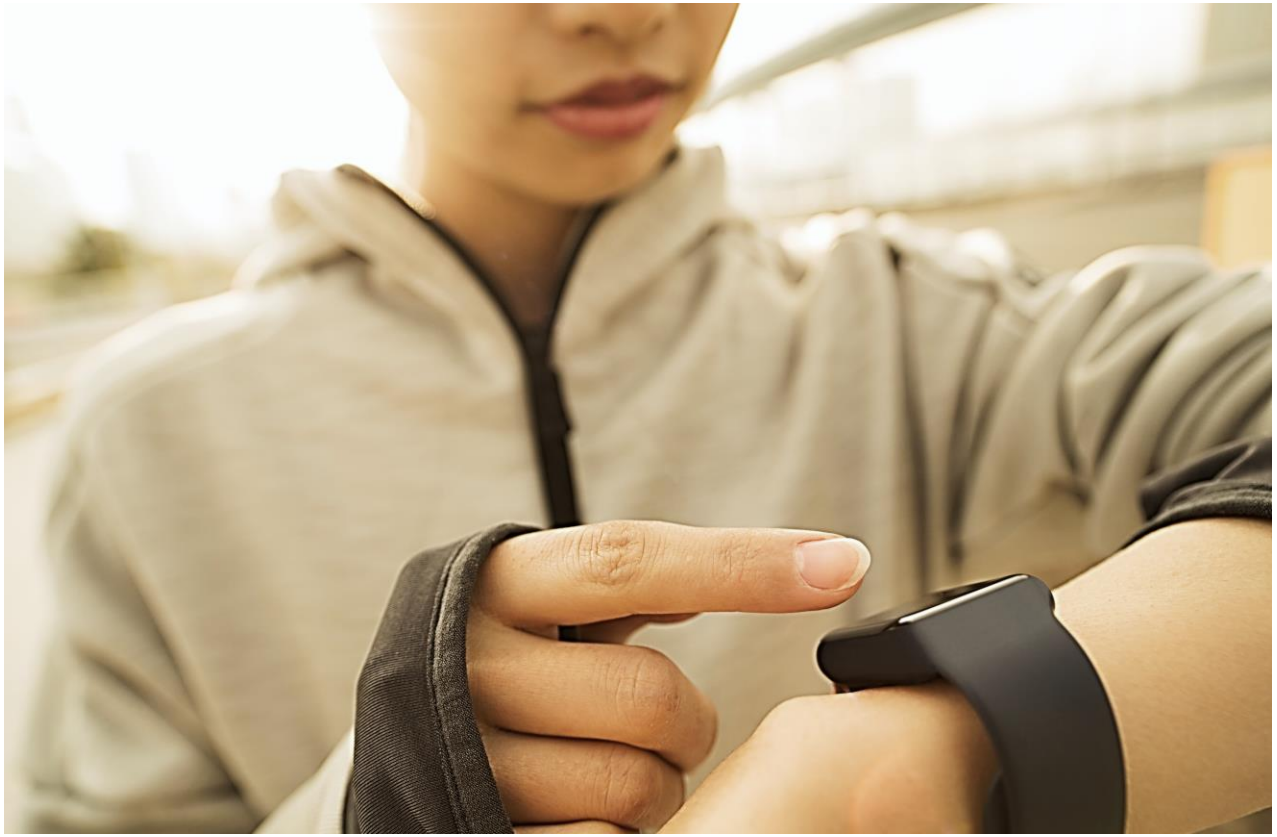
As Middle East consumers take greater responsibility for their health, their concerns are extending beyond personal habits to the wider factors that influence wellbeing. Food safety stands out, with 57% expressing high concern about pesticide use, followed by environmental pollution and ultra-processed foods (50% each).

UAE – Food safety and affordability shape wellness concerns

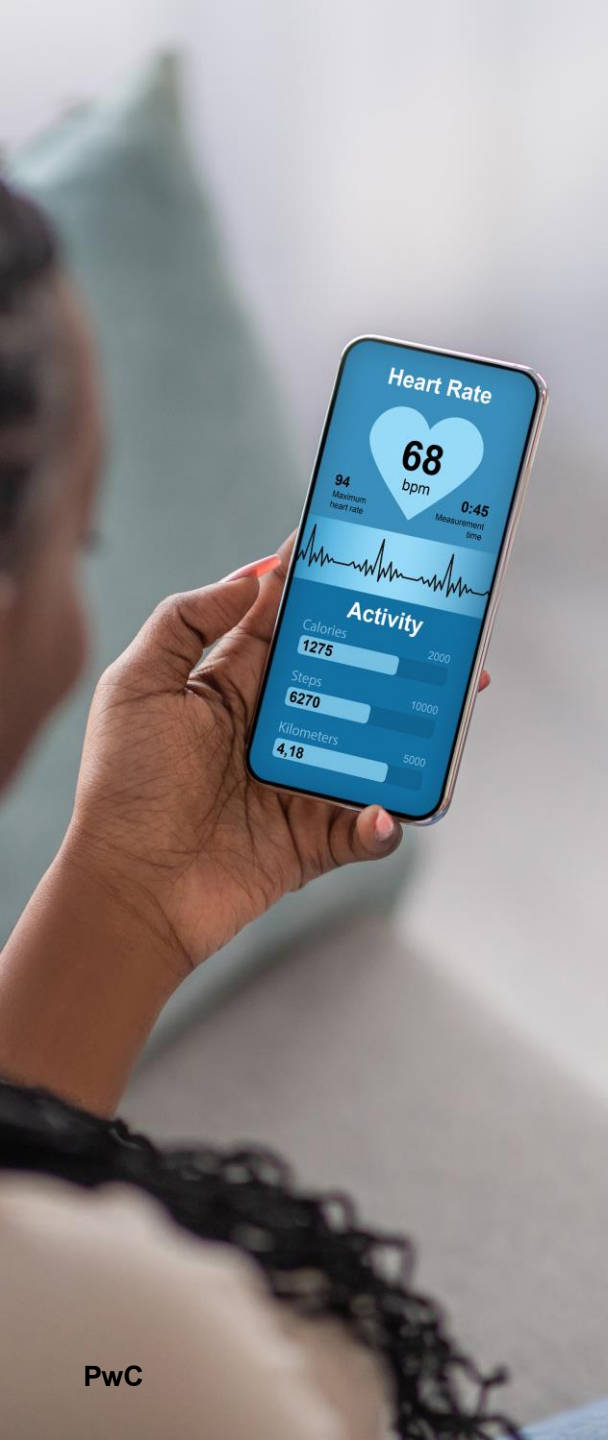


The UAE has a comprehensive food safety monitoring and inspection system to ensure that food sold in markets and served in restaurants meets required safety standards, from source to consumer.[17] In the survey, consumers in the country stand out for heightened concerns about food safety, healthcare costs and trusted health information. More than six in 10 (61%) express high concern about pesticide use in food (versus 58% in the Middle East), 58% are concerned about ultra-processed foods (versus 51%), 42% on traceability (versus 35%) and 49% about microplastics (versus 43%). Healthcare affordability is another concern, cited by 52% of UAE respondents compared with 46% across the region.

Five priorities for industry leaders



Our findings point to a wider commercial opportunity in the Middle East's wellness market. Consumers are taking greater responsibility for their health, but they are also seeking trusted advice, measurable benefits and solutions that fit into their everyday lives. For businesses, the opportunity is not simply to expand their wellness offerings, but to make health and wellness more accessible, credible and easier to sustain.



1 Trust will be the crucial competitive advantage in digital wellness.

As digital health tools become more widely adopted, clinical credibility could become a powerful differentiator. For the Middle East, healthcare professionals remain a leading influence on health decisions (57%), while 77% of regional respondents said they would pay more for a wearable device whose data and analytics are trusted by healthcare professionals. Brand trust also matters, with 69% identifying it as an important purchasing consideration, compared with 57% globally. The opportunity lies in combining the accessibility and convenience of technology with the credibility of professional healthcare advice. Businesses that deliver reliable insights, integrate expert guidance and use health data responsibly will be best positioned to earn consumer trust.

2 Make healthier living easier, not more complicated.

In the Middle East, the consumer ambition is strong, but everyday barriers remain. Half of Middle East consumers frequently plan their nutrition and track their sleep, yet 65% struggle to find time for their wellness goals, 60% face difficulties staying motivated and 54% feel overwhelmed by excessive or conflicting information.

This creates an opportunity to move beyond selling individual products towards solutions that simplify healthier choices and support lasting habits. Convenient services, curated recommendations, credible advice and personalised coaching could help consumers translate wellness intentions into consistent action.



3 Turn personalisation into measurable value.

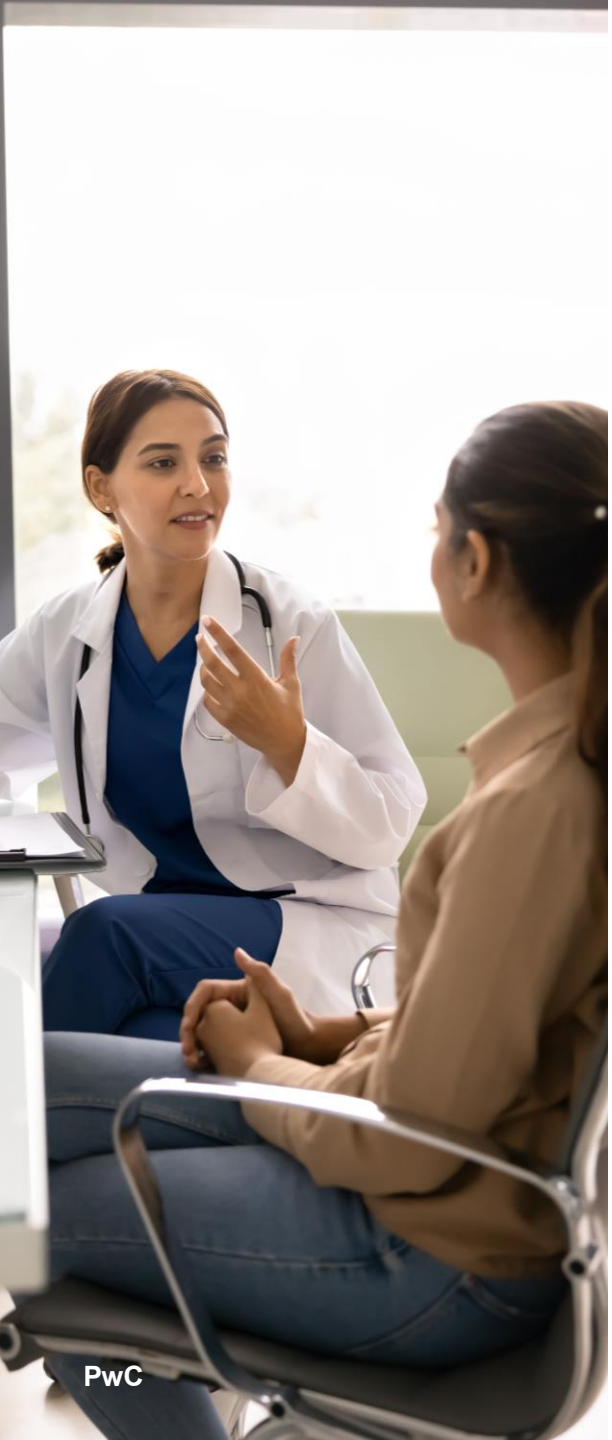
Middle East consumers are open to personalised health solutions, but they expect these solutions to deliver tangible benefits. While 77% of the respondents would pay more for wearables backed by medically trusted data, their broader purchasing priorities reinforce the importance of practical value: 71% prioritise convenience, 70% value for money and 67% clear information about how products work. So, the opportunity could lie in making solutions more useful, accessible and trustworthy. Businesses can achieve this by turning individual health data into tailored recommendations, timely guidance and actionable insights that help consumers achieve their health goals.



4 Look at the wider GLP-1 wellness opportunity.

GLP-1 medications could have implications far beyond the pharmaceutical market. Current use among Middle East respondents stands at 15%, compared with 10% globally. Among regional users, 65% report paying greater attention to nutrition, 64% have increased spending on health and wellness products and 60% say they exercise more. Notably, 62% also report socialising more frequently. While these self-reported changes do not establish causation, they challenge the assumption that GLP-1 use simply reduces consumption. For businesses, opportunities may lie in clinically guided nutrition, fitness, weight-management support and lifestyle experiences that address consumers' evolving needs. The priority should be sustainable health outcomes – not weight reduction alone.





5 Make prevention more accessible and actionable.

Preventive healthcare is becoming a more tangible part of consumer wellness spending. Four in 10 Middle East respondents paid for health screenings or preventive check-ups in the past year, compared with 31% globally. This points to growing interest in services that help people understand and monitor their health before issues become more serious.

Healthcare providers, diagnostics companies, insurers and pharmacies can make prevention more convenient and better integrated into everyday care. By combining accessible screening with personalised risk insights, professional follow-up and ongoing support, they can help shift prevention from occasional check-ups to more continuous health management.



Contact us



Norma Taki

Partner, Consumer Markets Leader, PwC Middle East

Email:
norma.taki@pwc.com



Jan Schmitz-Hubsch

Partner, Healthcare & Life Sciences Leader, Strategy&

Email:
jan.Schmitz-hubsch@pwc.com



Zeina Koubar

Partner, Health Industries Regional Sector Leader

Email:
zeina.koubar@pwc.com

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Survey scope and Middle East focus

About the survey and methodology

PwC's Voice of the Consumer 2026 is a large-scale global consumer survey designed to understand health and wellness behaviours, priorities, purchasing preferences and engagement with emerging health technologies.

Global respondents
21,808

Countries & territories
27

Middle East respondents
2,614

Middle East markets
4

The analysis primarily examines Middle East consumers, based on respondents from these four countries in the region, while using the broader global sample to benchmark selected findings and test where relationships differ between Middle East and the Global averages. The findings should therefore be interpreted as directional insights from the surveyed markets.

The respondents were at least 18 years old and were asked about a range of topics relating to consumer health and wellness, including their behaviours and habits, tech/AI engagement, GLP-1 usage, health goals, and wellness-related products. For the purposes of the survey, younger generations comprised Gen Z and Millennials, while older generations included Gen X, Baby Boomers and the Silent Generation. Responses were collected anonymously through an external consumer panel, with demographic quotas applied to support representation within participating markets.

In February and March 2026, PwC surveyed 21,808 consumers across 27 countries and territories. This report focuses on the 2,614 respondents in the Middle East market, specifically in Egypt, Qatar, Saudi Arabia and the United Arab Emirates. Saudi Arabia and the UAE account for the largest shares of the sample, with 1,006 and 1,002 respondents respectively, alongside 305 respondents in Egypt and 301 in Qatar.

Interviews with industry executives took place in April and May 2026.

The sentiments captured in the report reflect views at the time of the survey.

PwC Research, PwC's global centre of excellence for market research and insight, conducted this survey.