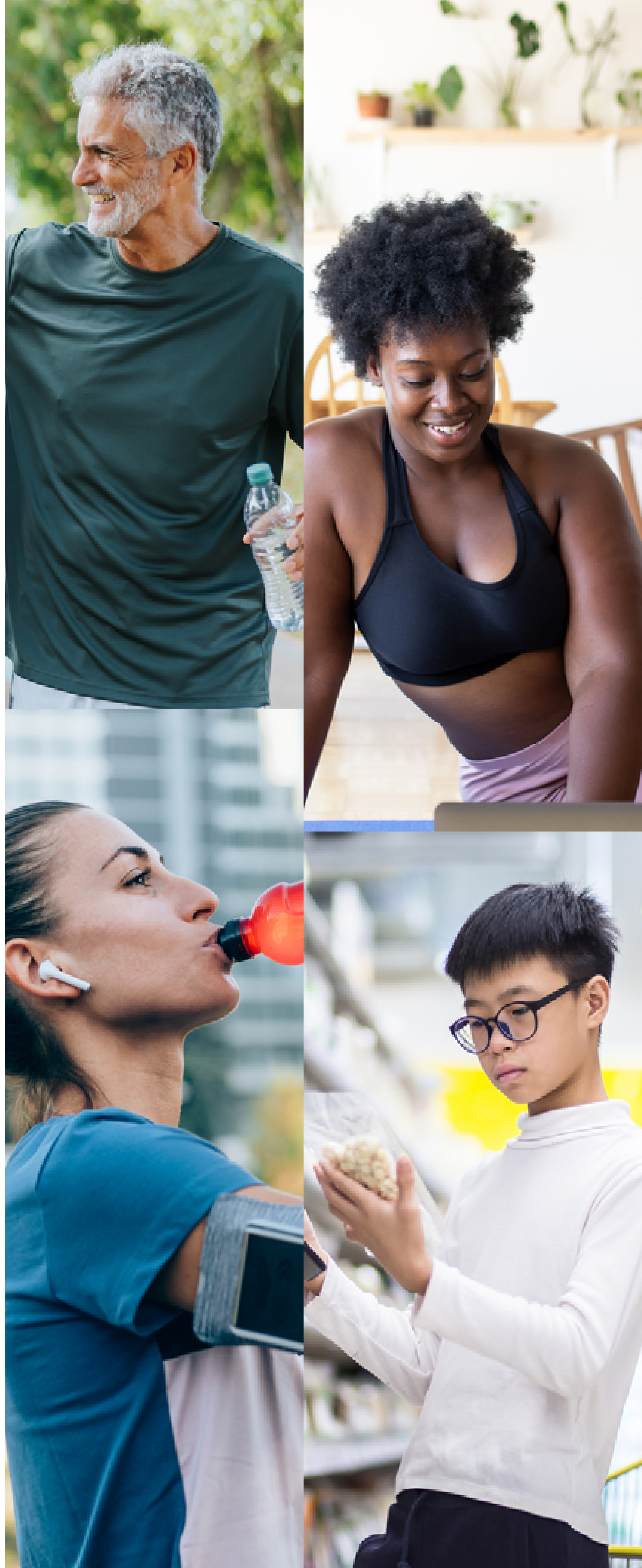
NielsenIQ

Global State of Health & Wellness 2025

Navigating the shift from health trends to lifestyle choices



A welcome letter *from Marsha McGraw*

Understanding consumers' developing behaviors around health and wellness—and identifying where emerging needs aren't being fully met—enables companies to innovate and differentiate their products and services to maximum effect.

This is critical in the increasingly competitive wellness market, where consumer preferences can shift rapidly. **Manufacturers and retailers that are agile and responsive to emerging behaviors will be best positioned to remain relevant with consumers and win share.**

This report is designed to support companies in doing just that. It highlights the global forces that are shaping consumers' developing needs around trust, clarity, and support in achieving a healthier present—and future. It also presents our very latest findings around consumers' health and wellness awareness, aspirations, motivations, barriers, future buying intentions, and more, focusing on the critical topics of trust and influence, nutrition, weight loss, mental wellness, health technology, and conscious buying within health and wellness.

Here, you'll find our very latest analysis of emerging trends—plus both global-level and region-by-region nuances. I'm certain you will find it all both insightful and of real value.

We welcome your engagement and look forward to working with you in navigating this complex and truly exciting new health and wellness landscape.

Marsha McGraw
Global Managing Director,
NIQ Partnerships and Verticals

NIQ

Table of Contents

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

1

The next frontier of wellness: Transparency, trust, and a $9 trillion global market opportunity

Health and wellness isn't a trend—it's a full-fledged lifestyle shift. Within this surging industry, consumers want more than just products. They're seeking clarity, innovation, and a healthier future.

Long gone are the days when health and wellness were confined to fleeting New Year's resolutions, doctor's advice, or narrow categories of exercise and diet. Today's consumers view well-being as a holistic, all-encompassing journey that extends far beyond the gym or the dinner table. It now includes everything from the sourcing of the foods they consume and the transparency of the ingredients used to the quality of sleep they get each night.

The Health & Wellness (H&W) industry has transformed into a vibrant, interconnected ecosystem that touches every corner of daily life. A recent report from the Global Wellness Institute projects that the global wellness economy will grow at 7.3% annually from 2023 to 2028—hitting an estimated $6.8 trillion in 2024 and reaching nearly $9 trillion by 2028. That's substantially higher than global GDP projected growth of 4.8% (current IMF forecasts). **This booming market is now 26% larger than it was pre-pandemic and, remarkably, four times the size of the pharmaceutical industry.**

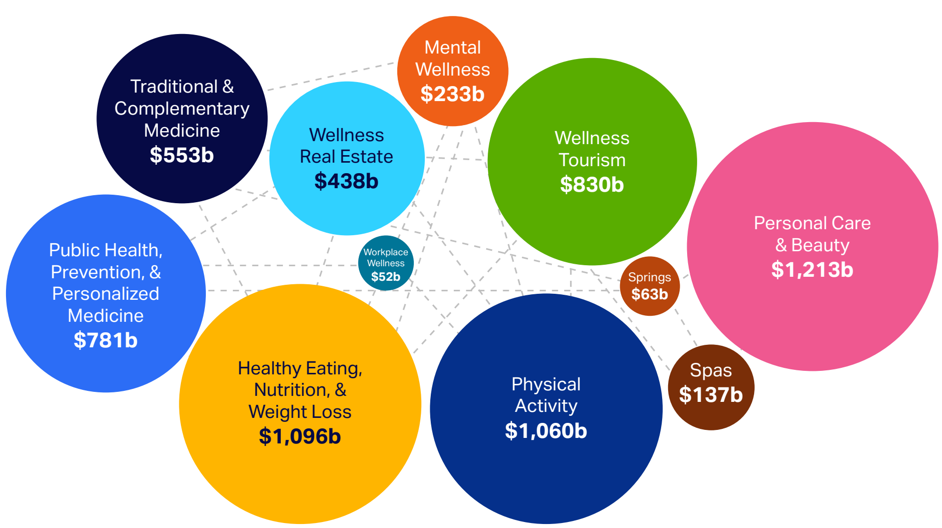
About the survey

NIQ's 2025 Global Health & Wellness survey was conducted in January and February 2025. Nearly 19,000 adult consumers were interviewed online in the following 19 countries: Brazil, Canada, China, Czechia, France, Germany, Hungary, India, Indonesia, Italy, Mexico, Netherlands, Poland, South Africa, Spain, Turkey, United Arab Emirates, United Kingdom, and United States. Data reflects the adult grocery shopping population in each respective country.

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

Global Wellness Economy

$6.3 trillion in 2023



Note: Numbers do not add due to overlap in sectors.
Source: Global Wellness Institute

Consumers generally being more invested than ever in what truly makes them feel prosperous and well—both financially and health-wise—is fueling this exponential growth. In fact, NIQ's 2025 Global Health & Wellness survey found that **70%** of consumers across 19 countries **are proactive in regularly engaging in health-boosting activities**, ranging from exercise to tracking nutrition to monitoring vital health metrics. And **55%** are ready to spend over $100 a month on their total wellness—including healthier nutrition, self-care, physical and mental health, etc. Only **19%** say they don't think about their health and wellness.

With health and wellness becoming a constant presence in a majority of consumers' thinking and daily routines, the demand for products and services that can cut through the noise and deliver on their promises has never been greater. **Earning trust and capturing purchasing power are paramount in today's wellness-driven marketplace.**

So, what's driving this unprecedented consumer focus on health globally? A confluence of factors is at work here:

- Factor 1: We're more aware and informed than ever.
- Factor 2: We're inundated with competing messaging and perceived "overclaims."
- Factor 3: We're living longer.

55%

are ready to spend over $100 a month on their total wellness

Source: NIQ's 2025 Global Health & Wellness survey, % agreeing strongly/somewhat, average across 19 countries

Factor #1: We're more aware and informed than ever.

Just nine years ago, less than half the global population owned or used a smartphone. Now, that's true for 69% of people, many of whom use smart devices to take charge of their health. In 2024 alone, health and wellness apps saw 3.6 billion downloads worldwide—a 6% increase from 2023—while core wearables such as smartwatches, wrist-worn sport computers, and health and fitness trackers saw global sales value grow **4%** year over year.[1]

Digital health tools, wearables, and at-home solutions have taken personal wellness to the next level. Today, many consumers need look no farther than their wrists to glean health data such as their heart rate, stress level, or the number of steps they've taken that day. These devices can not only monitor key biological functions but can also provide increasingly personalized recommendations—thanks to the inclusion of Artificial Intelligence (AI). And while many apps still rely on users to log their meals, cutting-edge wearables such as the Amazfit V1tal now automatically track food intake, offering real-time nutritional insights.

19%

"I don't think about my health and wellness."

Source: NIQ's 2025 Global Health & Wellness survey, % agreeing strongly/somewhat, average across 19 countries

Food labels are also becoming more informative, while regulations are becoming more directive. **In the US**, the Food and Drug Administration (FDA)'s proposed mandatory front-of-package food labels for the US market—displaying low, medium, and high levels of saturated fat, sodium, and added sugar—aim to help people understand the nutritional implications of what they are buying and make healthier food choices. Similarly, **in the EU**, the European Parliament has introduced detailed rules on the labeling and nutrition labeling of foods, to ensure that claims do not mislead the

[1] Source: NIQ GfK Market Intelligence, Sales tracking, Core wearables, Global (excl. North America), Jan.–Dec. 2024

75%

agree that governments should regulate businesses to help them make healthier decisions

Source: NIQ's 2025 Global Health & Wellness survey, % agreeing strongly/ somewhat, average across 19 countries

consumers. Meanwhile, taxes on sugary beverages—**now in 117 countries**—have led to marked reductions in their consumption and raised revenue for public health and education programs.

Consumers also have more awareness of (and information about) the latest health and wellness thinking, trends, and products, with the topic increasingly featuring in national news, documentaries, podcasts, social media and TV advertising, and more. Many also are discovering and purchasing these products through social commerce—with nearly **1 in 5** global consumers saying that recommendations by social influencers or ads on social media have a "significant influence" on which health and wellness products they buy.

The bottom line: In today's health and wellness market, it's no longer enough to manufacture and sell discrete products and services. Instead, the industry must support a healthier lifestyle ecosystem at a time when health and wellness are constant considerations and companions in consumers' daily lives.

Factor #2: We're inundated with competing messaging and perceived "overclaims."

While consumers eagerly embrace access to health and wellness data, the sheer amount of information can be confusing and overwhelming. Every day seemingly brings a new "breakthrough" health trend or a reversal of fortune for a product with a previously healthy halo. Is red wine a heart-smart choice or a heart health risk? Are seed oils truly toxic or simply misunderstood? It's tough for consumers to keep up with the seeming yo-yo of the latest health headlines.

69%

"I am more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio."

Source: NIQ's 2025 Global Health & Wellness survey, % agreeing strongly/ somewhat, average across 19 countries

Meanwhile, growing awareness of "healthwashing"—marketing tactics that make products seem more health-focused than they really are, or that promote only one aspect of the product rather than its holistic properties—have added an additional layer of uncertainty and mistrust. According to NIQ's Consumer Life 2024 survey, **62%** of consumers don't trust the health claims made by food companies, and **45%** believe product packaging needs to be more transparent and easier to understand. The spin-off from this is that consumers will favor brands that are perceived as being dedicated to supporting healthier lifestyles across their full assortment or portfolio.

Consumers are also increasingly wary of how their personal data is being used by health and wellness companies. While **57%** are willing to share data like weight or heart rate in return for personalized health recommendations, the risks associated with data privacy are top of mind—especially in North America and Europe.

The bottom line: Consumer trust is a critical area of focus that is only going to grow in importance as the market becomes increasingly congested. Manufacturers and retailers who get this right—prioritizing data security and authentic and clear messaging, for example—are well-positioned to win an increasing share of consumers' health and wellness spending in 2025 and beyond.

Factor #3: We're living longer.

People are living longer, and that's fueling the focus on healthier lifestyles—and better decision-making—for both individuals and governments.

The global life expectancy at birth reached 73 years in 2024—up 8.4 years since 1995, according to the World Health Organization (WHO). While aging populations are currently most pronounced in higher-income countries such as Japan, low- and middle-income countries are seeing the most significant increases in life expectancy. By 2050, two-thirds of people over age 60 will live in low- and middle-income countries.

Living longer has significant implications for public health—and for the health and wellness industry. People are placing greater importance on taking preventative actions to help them "age well" and enjoy better senior years. They're exercising for improved cardiovascular and joint health. They're avoiding or reducing higher-risk products such as fat, sugar, alcohol, and smoking. And acceptance of anti-obesity medications (AOMs) or GLP-1s is creeping up.

The bottom line: Consumers aren't just making healthy decisions for today; they're doing it to ensure their future health and wellness—and to "age well" in their senior years.

57%

agree "aging well" is more important now than five years ago

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

52%

say minimizing behaviors such as smoking, drinking, or sun exposure to protect their future health is more important to them now than five years ago

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

31%

have a generally positive perception of anti-obesity medications (AOMs) or GLP-1s

Source: NIQ 2025 Global Health & Wellness Survey, % saying very/somewhat positive, average across 19 countries

The paradox: Healthy aspirations versus actual behaviors

Here's an unfortunate fact: Consumers are becoming more attuned to their health, but at the same time, many health metrics continue to worsen at national levels. Public health indicators like infectious disease control and chronic disease management are improving globally, the Kearney Consumer Institute reports. But the rise in chronic illness linked to obesity, sedentary lifestyles, and mental health issues like anxiety and depression paint a more troubling picture.

So why isn't the world healthier, despite an unprecedented wealth of information, consumer awareness, and claimed consumer proactivity around health and wellness issues? Insights coming from NIQ's 2025 Global Health & Wellness survey found that the answer often lies in common barriers—including cost, availability, time, motivation and trust.

Top five barriers hindering healthier life choices

1. **Cost**
   54% of consumers say the expense of healthier options is a major barrier
2. **Availability**
   31% say difficulty finding healthy alternatives is an issue—particularly in countries like India (**51%**) and Turkey (**50%**)
3. **Time**
   26% of consumers say they simply don't have the time to make healthier choices
4. **Motivation**
   25% don't feel driven to make healthier choices
5. **Trust**
   25% don't trust that the product or service will be effective

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

50%

"Environmental health is more important to me now than five years ago."

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

Importantly, large numbers of consumers strongly believe that companies must step up to improve three of those areas—with **45%** agreeing "strongly" that product labels need to be more transparent and easier to understand, and **40%** agreeing "strongly" that companies have an obligation to ensure health-focused products are as affordable and readily available as unhealthy ones.

Climate change also is impacting people's health. Weather events such as heatwaves, floods, hurricanes, and wildfires aren't just more frequent and more intense; they're also leading to spikes in disease and disruption to water and food systems. Between 2030 and 2050, climate change-related factors such as heat stress and undernutrition are expected to cause about 250,000 additional deaths each year, WHO reports.

Such barriers to health can feel overwhelming—and beyond any individual person's control. Indeed, **seven in 10** admit to being worried that environmental issues such as pollution and climate change are having an adverse impact on their current and future health and wellness. Many consumers, therefore, will look for products and services that not only help them mitigate the effect of environmental pollution on their own health (such as air and water filters, organic foods, or all-natural products), but that are also environmentally friendly in how they are sourced, produced, packaged, and distributed.

48%

are willing to pay up to 10% more for health and wellness products that are also ethical (e.g., fair trade, cruelty-free, or higher animal welfare) and/or environmentally friendly

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

The way forward

As the wellness market continues to evolve, it's clear that the next challenge for health and wellness manufacturers and retailers is to deliver not just product innovation but also clarity, transparency, availability, and trust. Consumers are ready to make additional investments in their well-being, but they want to be pointed in the right direction—and significant numbers believe that companies have an obligation to drive this transition.

2

Emerging global trends: Opportunities for long-term impact

Gut health, wearable tech, and conscious buying are a few of the global trends that are driving consumers' health and wellness spending habits. Understanding these shifts is essential to providing the science-backed, holistic products and services that today's consumers want.

With consumers seeking more transparency and trust from the health and wellness products and services they use, **manufacturers and retailers face a clear choice: meet or exceed expectations—or risk losing consumer loyalty to competing brands**. That means ensuring health and wellness products are readily accessible, clearly and transparently labeled, and competitive in price.

In this chapter, we'll explore evolving consumer awareness, perception, and intentions around health and wellness at the global level. We'll focus on what's driving demand and how manufacturers and retailers can deliver health and wellness products that align with consumers' developing aspirations and preferences.

40% agree

"Companies have an obligation to ensure health-focused products are as affordable and readily available as unhealthy ones."

Source: NIQ 2025 Global Health & Wellness Survey, average across 19 countries

What matters to consumers: Trustworthy products

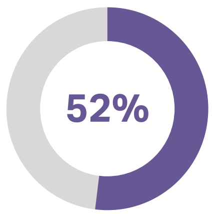
Trust is everything when it comes to health and wellness—and right now, it's in short supply. **One in four** consumers don't believe the health products and services they purchase will be effective and say this is a major barrier to them making healthier choices. That's partly due to a lack of clarity: Globally, **82%** say labels on health and wellness products need to be more transparent and easier to understand.

Consumers are also increasingly savvy and sensitive to "healthwashing," the practice of marketing products to appear more health-focused than they really are—for example, a snack food that promotes itself as being low-fat, yet is packed with added sugar.

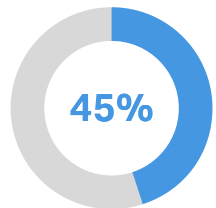
Consumers can quickly sniff out the difference between a company that waves the health and wellness banner for a particular product or ingredient and one that truly walks the talk across its product lines. Indeed, **69%** of consumers say they are more likely to buy from companies with a strong health and wellness focus across their entire product portfolio.

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

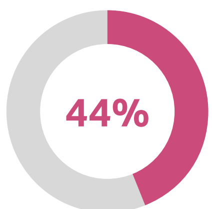
To win over today's savvy, health-conscious shoppers, manufacturers and retailers must go beyond basic promises and provide clear, evidence-backed claims. According to McKinsey, efficacy and scientific credibility are especially important to consumers when selecting wellness products—and this concept is supported by insights from NIQ's 2025 Global Health & Wellness survey. The biggest influences behind consumers' health and wellness purchasing decisions reflect a strong preference for factors that help consumers build trust in the product or service. When asked to identify what has "significant influence" on them when deciding which health and wellness products or services to buy, the leading responses are:



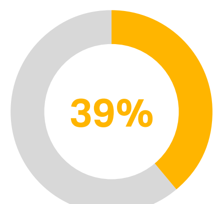
Recommendations from health specialists



Readily available and detailed information on a product's usage and performance claims



Ability to inspect, trial, or sample a product



Ability to ask questions and get expert advice from a sales or medical representative

By contrast, only **18%** felt that social influencers or sponsored ads on social media had a "significant influence" on their health and wellness purchases—although **38%** believe these have "some influence" on them.

These shifting consumer preferences are redefining what it means to live well today. Successful manufacturers and retailers are those who respond to these shifts and seize opportunities to innovate and connect with a more holistically minded and informed consumer. The key is to understand what is motivating consumers' behavior—from nutrition and wellness to ethics and technology. Below, we'll explore, in-depth, a few of the top forces that are actively shaping the global health and wellness ecosystem.

Go beyond label claims to understand which CPG/FMCG attributes resonate with shoppers so you can refine your marketing and innovation tactics accordingly. Learn more about the NIQ Product Insights solution today.

Products labeled as a good source of fiber saw sales value grow **8%** in the UK this year.

Source: NIQ Product Insights, UK, latest 52 weeks ending March 15, 2025, vs. same period previous year

Global trend #1: Nutrition and gut health—Driving food and beverage choices

Consumers are becoming more conscious of the nutritional value—and potential downsides—of what they eat and drink. More than half (**58%**) say healthy nutrition has become more important to them in the last five years, and **44%** plan to increase their intake of vitamins and supplements in the coming year.

They're also willing to pay more for what they want: **One-third** say they would pay over 10% more (compared with a "standard" product) for items that offer enhanced nutritional benefits like vitamins or higher fiber, while **one-quarter** say the same for products with relaxing or calming properties.

And in recent years, growing awareness about gut health has highlighted the vital role it plays in digestion, immunity, and overall well-being. In fact, **half** of surveyed consumers say they plan to buy more high-fiber foods in 2025, while **four in 10** plan to buy more superfoods, high-protein plant-based foods, or probiotic foods.

This trend of greater consumer awareness and focus on gut health isn't limited to aspirations—it's also illustrated in actual purchase trends. In the US and UK, for example, the share of households buying probiotic yogurts has soared in recent years—jumping from 31% in 2021 to **51%** in 2025 in the US, and from 13.8% in 2023 to **19%** in 2025 in the UK.[2]

Snapshot of consumers' awareness, perception, and future buying intentions around key food types

High-fiber foods

Definition	Primarily plant-based foods with proven health benefits such as improved digestion, weight management, and heart health
Examples	• Beans • Fruits • Nuts • Seeds • Vegetables • Whole grains
Awareness	**54%** very familiar **36%** somewhat familiar
Perception	**83%** very or somewhat positive
Purchase plans	**53%** plan to buy more high-fiber foods in the next year

Source: NIQ 2025 Global Health & Wellness survey

[2]NIQ FMCG Omnichannel (In-store & Online) Purchasing Panel, with NIQ Product Insights, selected countries (UK, US)

Superfoods

Definition	Nutrient-rich foods that deliver maximum health benefits
Examples	• Berries • Green tea • Kale • Nuts • Salmon
Awareness	**36%** very familiar **43%** somewhat familiar
Perception	**74%** very or somewhat positive
Purchase plans	**42%** plan to buy more in the next year

Source: NIQ 2025 Global Health & Wellness survey

Probiotic foods

Definition	Food and beverages that contain beneficial live microorganisms that support gut health
Examples	• Kefir • Kimchi • Miso • Sauerkraut • Yogurt
Awareness	**33%** very familiar **44%** somewhat familiar
Perception	**71%** very or somewhat positive
Purchase plans	**39%** plan to buy more in the next year

Source: NIQ 2025 Global Health & Wellness survey

Products promoting themselves as probiotic saw demand grow **6.6%** in the US this year.

Source: NIQ Product Insights, US, latest 52 weeks ending Feb. 22, 2025, vs. same period previous year

Ultra-processed foods

Definition	Foods containing industrially processed ingredients or additives
Examples	• Biscuits • Breakfast cereals • Carbonated beverages • Ice cream • Instant soups • Mass-produced breads
Awareness	**36%** very familiar **42%** somewhat familiar
Perception	**31%** very or somewhat positive **39%** very or somewhat negative
Purchase plans	**16%** plan to buy more in the next year

Source: NIQ 2025 Global Health & Wellness survey

High-protein foods

Definition	Animal- or plant-based foods that are rich in protein that promote satiety and muscle health
Examples	• Dairy • Meat • Seafood • Chickpeas • Lentils • Tofu • Quinoa
Awareness	Meat and dairy: **57%** very familiar High-protein plant-based foods: **35%** very familiar
Perception	Meat and dairy: **67%** very or somewhat positive Plant-based proteins: **69%** very or somewhat positive
Purchase plans	**28%** plan to buy more meat and dairy in the next year **40%** plan to buy more high-protein plant-based foods in the next year

Source: NIQ 2025 Global Health & Wellness survey

Products promoting themselves as protein rich saw sales grow **9.7**% in value and **4.8%** in volume in the US this year.

Source: NIQ Product Insights, US, latest 52 weeks ending Feb. 22, 2025, vs. same period previous year

How to deliver what consumers want

With a growing consumer awareness of—and demand for—the nutritional benefits of high-fiber, high-protein, and gut-healthy foods, brands should focus on these ingredients in their marketing. Gut health in particular is a smart way to attract consumers' attention with probiotic-rich products well-positioned to capitalize on this trend.

Consumers, however, are looking for more than just claims—they want tangible proof. Brands should emphasize, and provide information supporting, the actionable benefits of products, such as improved skin, increased energy, better mental clarity, and stronger immunity.

Global trend #2: Weight loss drugs or anti-obesity medications (AOMs)—A new era in weight management

Nearly half the world's adults—around 1 billion men and 1.11 billion women—are overweight or obese. Since 1990, obesity rates have skyrocketed, doubling in adults and quadrupling in children.

As the obesity crisis intensifies, people are increasingly aware of the importance of maintaining a healthy weight and staying active. NIQ's 2025 Global Health & Wellness survey shows that **54%** of individuals now place more importance on having a healthy body weight, shape, and muscle tone than they did five years ago.

The desire for weight loss isn't purely aesthetic. In fact, **72%** of people cite health reasons as a "very important" motivator for shedding pounds, while only **46%** list appearance and **31%** mention athletic performance. So why the disconnect between knowing the benefits of a healthy weight and achieving it? Stress, poor sleep, sedentary jobs, and a lack of time to cook or exercise—not to mention the prevalence of inexpensive, high-calorie, ultra-processed foods—are all contributing factors.

For years, obesity was seen as a personal flaw or a lack of willpower. But now, there's a growing perception of obesity as a medical condition—one that can be managed, just like any other disease. Enter anti-obesity medications (AOMs), which work in multiple ways, including by slowing digestion and suppressing the appetite.

Today, **8%** of global consumers say they are using weight loss drugs, with another **8%** having used them in the past. However, AOMs are still relatively unknown to many. Despite the recent media attention, **63%** of people are not at all, or not very, familiar with AOMs. Given this low level of awareness, it's not surprising that many people currently have no opinion about AOMs. Among those with a decided opinion, however, more see these medications in a positive (**31%**) rather than negative (**23%**) light.

One thing is clear: Expert guidance once again matters. A hearty **43%** of consumers would consider taking AOMs if recommended by their healthcare provider. But the remaining **57%** remain divided, with around half of this number being undecided and the rest saying they wouldn't consider it.

For everyone, the biggest concern about AOMs is side effects, with nearly **70%** of consumers citing possible side effects as a "major barrier." What's more, **one-third** are deterred by the cost—or concerns about whether it's covered by their health insurance. According to our survey, **one-third** of consumers globally say they aren't willing to pay anything (without insurance) to get anti-obesity medication—and nearly the same amount isn't willing to pay more than $100 per month.

How to deliver what consumers want

With obesity rates climbing worldwide and many consumers still holding a neutral perception of AOMs, there's a significant opportunity here for both manufacturers and retailers. If they can provide trustworthy, proven, and more affordable weight loss solutions, they'll be tapping into a growing need.

In this, it's important for companies to focus on what really matters to consumers: health. Products and services that help people achieve and maintain a healthy weight should be marketed not just as tools for a better appearance, but as aids to reaching a healthier lifestyle.

As more people look to professionals for advice on how to manage their weight, the demand for effective, safe, and reasonably priced AOMs will likely continue to grow. The future of weight loss is increasingly about shedding pounds now to ensure long-term health and aging well.

Global trend #3: Wellness—The new frontier of self-care

Wellness is no longer a buzzword; it's a lifestyle. The aspects of wellness that are of particular importance to consumers these days are quality sleep and mental health. A significant **63%** of consumers say these two areas have become even more important to them over the last five years.

This growing focus on mental health and sleep isn't just a trend—it's a reflection of global realities. Consider that one in two people will experience a mental health disorder in their lifetime, according to a Harvard survey of 150,000 adults in 29 countries. Meanwhile, sleep struggles are rampant: More than one-third of people in 13 markets report difficulty falling asleep, with almost as many struggling to stay asleep at least three nights a week.

As part of their regular self-care routines, consumers are planning to turn to activities like spending time in nature (**60%**), massage and muscle relaxation (**40%**), yoga and meditation (**35%**), or aromatherapy (**24%**) for relief in the year ahead. There's also a noticeable shift toward spending more on products with calming or relaxing properties, with **26%** willing to pay a premium (10% or more above the cost of a "standard" item) for these products.

Prioritizing exercise (**61%**) and spending more quality time with family and friends (**60%**) are other ways that people are aiming to boost their wellness routines.

And while consumers of all ages agree on the basics, **generational divides are shaping the wellness landscape in unique ways**. For example, in the US market, we find the following nuances in how different generations are focusing their attention:

Unique and sometimes overlapping priorities across generations

Gen Z

Animal welfare-related
- Cruelty-free, humane

Social responsibility
- Ethical, B-Corp, fair trade

Clean label
- Free from aluminum, parabens, phthalates and sulfur, and artificial fragrance
- Natural ingredients

Health needs
- Brain and eye health, hair, skin, nails, mood, and stress
- Immune system health, microbiome

Millennials

Highest-indexing group for:
- "Provides energy"
- Pregnancy and lactation support
- Reusable packaging

Highest-indexing group for:
- Consuming Better For™ foods and organic overall

Gen X

This generation prioritizes aging well and physical fitness.
- **82%** say anti-aging benefits are important to them
- **47%** regularly exercise or play sports (more than Gen Z)

Channel choice
- Preference for convenience and wide assortments
- **38%** use social media as their primary source to learn about new products

Boomers

Sustainable packaging
- Less packaging
- Sustainable packaging

Health and need states
- Cellular function
- Cardiovascular health
- Joint health
- Heart health

Greatest

Environmental sustainability
- Low emissions
- Reduced carbon impact

Health and need states
(even greater degree than Boomers)
- Cellular function
- Cardiovascular health
- Joint health
- Heart health
- Mood supplements

Sources: NIQ Homescan, Generational cohort demographics; NIQ Product Insights; and NIQ Consumer Life, Global, 2024

How to deliver what consumers want

People's perceptions of wellness—and approaches to it—are increasingly including self-care routines such as massage, yoga, meditation, aromatherapy, saunas or cold plunges, vitamins, and skin creams. This presents enormous growth opportunities for wellness manufacturers and retailers to serve a multitude of markets.

But it's not just about products—it's about experiences. There's vast potential for brands across sectors to collaborate, such as beauty brands partnering with outdoor activity companies, or wellness venues offering packages that combine yoga, therapy lamps, and relaxation therapies.

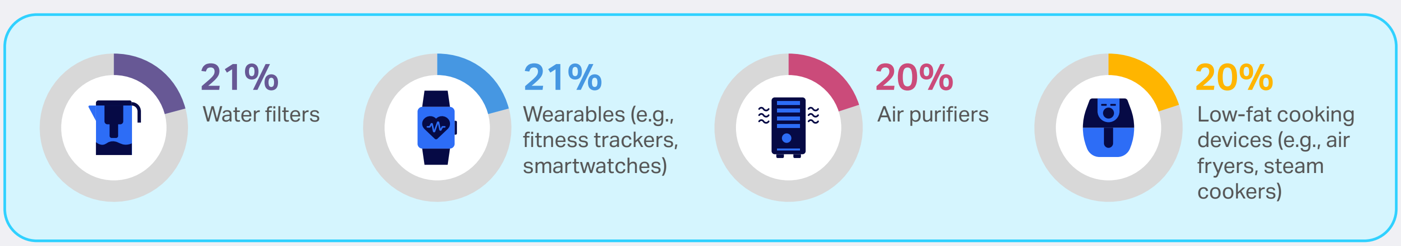
The future of wellness lies in synergy: providing consumers with complete, holistic experiences that address shifting consumer needs and generational preferences across the full spectrum of wellness.

Global trend #4: Health-related technology—Shaping the future

As wellness becomes a central part of people's daily lives, health-related technology is emerging as a major area of growth within the global Consumer Tech & Durables market. In 2024, sales of core wearables, such as smartwatches and wrist-worn sports and health and fitness trackers, jumped **4%** in year-over-year sales value, according to NIQ GfK Market Intelligence—well above the total Consumer Tech & Durables industry growth of **1.4%**.

Nearly **two-thirds** of consumers believe that health-focused technology products are effective in helping to improve their health and wellness, and **three in 10** say they "definitely" prefer technology products that offer extra health features over ones that do not—whether it's tracking their fitness progress on a smartwatch, using a steam-wash function to sanitize their laundry, or cooking healthier meals with an air fryer.

Over the next 12 months, consumers plan to prioritize these types of products in particular



These trends reflect people's core motivations for buying health tech, with **four in 10** saying they are looking to cook more healthily, improve their overall well-being, track physical activity, or improve sleep quality.

Importantly, although data privacy remains a key concern, a majority **(57%)** of consumers are willing to share select personal health information (e.g., weight, heart rate, daily steps) with a company in exchange for smarter, more personalized recommendations that help them achieve their health goals.

How to deliver what consumers want

It's clear that the health tech market is booming, with **63%** of consumers affirming that health-focused technology has a tangible impact on their well-being. But competition is fierce, and **to stay ahead, manufacturers and retailers must focus on three key pillars: price, functionality, and personalization**.

Price is especially paramount: **69%** of consumers cite it as a top influence on their purchase decisions for health tech products, followed by features and functionality (**60%**). Brand reputation, by contrast, lags far behind, with only **39%** of consumers citing it as a deciding factor. This opens the door for new and emerging brands to disrupt the market by offering health tech products with a compelling mix of features at competitive prices.

Consumers are also craving more convenience and tailored experiences. A sizable **27%** would pay **over 10% more** for a health product that can be customized to their preferences, while **22%** are willing to invest similarly in products that offer enhanced convenience.

Looking ahead, the future of health tech will likely be driven by AI innovation. The potential for AI-enhanced wearables, for instance, to offer real-time, personalized health recommendations is vast. In fact, **57%** of consumers say they would use an app or screening device that ensures the products they purchase align with their personal health priorities, and **60%** would use a device that automatically monitors their daily health and delivers personalized recommendations based on their health preferences. These statistics underscore the growing demand for customization and intelligent, user-specific insights within health and wellness products.

Know how to address the environmental concerns and expectations of your consumers: Explore NIQ's Green Gauge® Report.

Global trend #5: Conscious buying—The global demand for ethical health and eco-friendly wellness products

The line between personal well-being and societal responsibility has blurred, with consumers increasingly viewing health and wellness as both an individual and collective concern. Enter **conscious buying**—a global trend that's seeing more consumers consider the social, environmental, and ethical implications of the products they buy and the businesses they support.

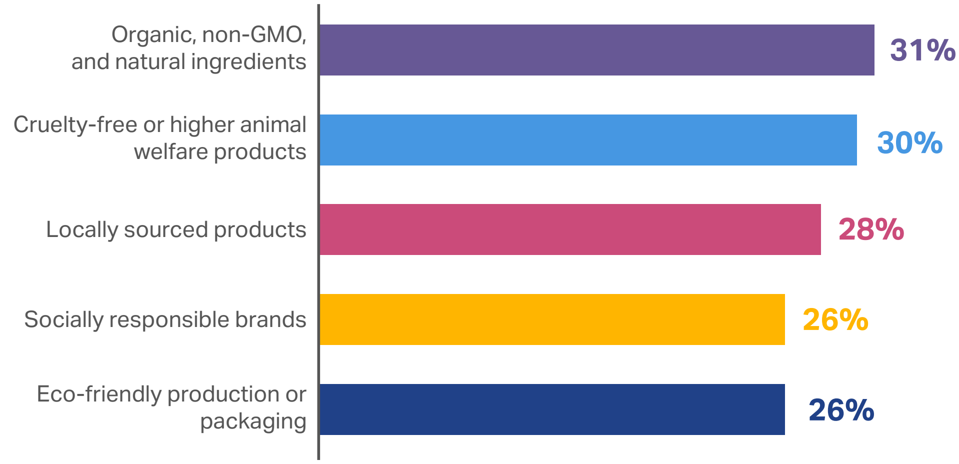
NIQ's 2025 Global Health & Wellness survey found that **70%** of consumers believe it's "important" or "very important" that the health and wellness products they buy are also eco-friendly and/or ethically produced. In fact, only **6%** of consumers deem these characteristics unimportant, signaling that **conscious buying is no passing fad**.

Behind this surge in conscious consumption is a blend of personal health motivations and a desire to create positive societal change. While **69%** of consumers say personal wellness benefits are their top motivator for conscious buying, **49%** are equally driven by the desire to support environmental sustainability and **41%** are motivated by ethical considerations such as fair trade and cruelty-free production.

These claims are more than just aspirations—they are backed by the trends we're seeing in actual purchases too. In the US, for example, Health & Beauty Care products labeled as cruelty-free saw sales grow **6.7% in value** and **4.6% in volume**. In the UK, products labeled as recyclable grew **2.4% in value**.[3]

In fact, **nearly half** of consumers claim they are willing to pay up to 10% more for health and wellness products that align with their ethical and environmental standards, and a further **22%** would pay above that amount.

So, which conscious-buying features are consumers most willing to splurge on? Here's the breakdown of the items that **significant portions of consumers are willing to pay over 10% more for**, compared with a standard product:



[3]Source: NIQ Product Insights, UK and US, latest 52 weeks ending March 15, 2025, vs. same period previous year

The connection between personal and social benefits of conscious shopping is only growing stronger—especially as **69%** of consumers worry that environmental crises like climate change and pollution are directly threatening their current and future health. As this awareness rises, so too does the expectation that brands will step up to the plate to address global threats.

How to deliver what consumers want

Consumers are demanding more from the brands they support—especially in the health and wellness space. They want products that not only promote their health but also align with their ethical values. However, this conscious consumer is also highly discerning, with a sharp eye for greenwashing.

This is where brands can make a real impact. Those that invest in true, end-to-end conscious credentials—ensuring their entire health and wellness product portfolio is ethically sourced, environmentally responsible, and socially aware—will build stronger consumer trust and loyalty. The brands that maintain consistent, transparent messaging across all touchpoints—from sourcing and production to marketing and product packaging and transport—will be the ones to thrive in this new era of conscious consumption.

The way forward

Consumers across the globe are becoming increasingly health-conscious, savvy about marketing claims, and holistically minded in how they view health and wellness. They increasingly expect brands to provide products and services that are backed by research and results; readily available and accessible; and fully aligned to consumers' evolving preferences and needs across their holistic mental, emotional, and physical health.

3

Region-by-region takeaways for 2025

From surging interest in health-related technology in Asia to a focus on mental health in Latin America, health and wellness trends in five global regions are shaping consumer behaviors, barriers, and brand opportunities in distinct ways.

The health and wellness trends highlighted in the previous chapter were observed worldwide, but consumer priorities and motivations can differ greatly from one region or country to another. In this chapter, we explore the regional variations that can help companies better tailor their products and marketing approaches to align with the distinct needs and preferences of each market. **Brands that truly understand and address the health and wellness concerns of their target consumers are more likely to build trust and foster deeper engagement.**

What follows are high-level takeaways for five regions:

- Asia Pacific (APAC)
- Eastern Europe, Middle East & Africa (EEMEA)
- Latin America (LATAM)
- North America (NA)
- Western Europe (WE)

For more regional data and analysis, download the corresponding "Insights Companion" found at the end of each regional section.

Asia Pacific (APAC) region

Our survey examined the health and wellness landscape across these APAC countries: China, India, and Indonesia.

Theme #1: Overall attitudes toward health and wellness

Proactiveness

Consumers in China, India, and Indonesia are more likely to describe themselves as being proactive in improving their health and wellness on a regular basis (**86%** vs. **70%** globally). These consumers also are far more likely to share some of their personal health data with companies in return for assistance in making relevant personal health decisions—**81%** vs. **57%** globally.

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

Barriers

The cost of healthier alternatives (**46%**) is the most common barrier cited by these consumers, closely followed by difficulty finding healthy alternatives (**44%**).

Trust and influence

Consumers in China, India, and Indonesia are more likely to say that lack of trust in the effectiveness of health and wellness products is a major barrier to making healthier life choices—**37%** vs. **25%** globally.

To mitigate that, health and wellness brands selling into these countries can focus on areas that drive health and wellness purchasing decisions, such as readily accessible information and knowledgeable sales staff at all points of sale. Social media ads and influencers also are more impactful in terms of influencing people's wellness purchase decisions **(85%)** in these countries, compared with the global average **(56%)**.

Theme #2: Nutrition/Gut health

Seven in 10 consumers in China, India, and Indonesia say healthy nutrition is more important to them now than five years ago. Awareness and positive perception of high-fiber foods, superfoods, high-protein plant-based foods, and probiotic foods—all key to gut health—are higher when compared with other regions. **Between 20% and 30%** of people across these countries say they intend to buy "a lot more" of these food types in the coming 12 months.

Conversely, positive perception around ultra-processed foods is relatively high, at **48%** (vs. **31%** globally) due to a noodle-based food culture and the popularity of convenience snacks.

Theme #3: Weight loss/Anti-obesity medications (AOMs)

Over half (**56%**) of consumers across these countries prioritize having a healthy body weight and shape more than ever before, with **nearly two-thirds** placing greater importance on cardio and heart fitness. The top motivation cited as being "very important" for maintaining a healthy body weight is health (**83%**), followed by appearance (**50%**). These figures reflect a global trend, though at higher levels. Social acceptance is also a more prevalent motivation here than globally—with **36%** saying it's a "very important" motivator (vs. **25%** globally).

When it comes to weight loss or anti-obesity medications (AOMs), familiarity, positive perceptions, and usage—past and current, as well as acceptance of future use—are all significantly higher in these countries. A striking **50%** view weight loss drugs positively (vs. **31%** globally), while just **13%** hold a negative view.

Looking for more data from (and contacts for) this region? Download our APAC Insights Companion or buy our in-depth State of Health in Asia Pacific 2025 report.

Theme #4: Wellness

A culture of long work hours and social pressure to succeed in APAC has heightened awareness of mental health. In China, India, and Indonesia, **seven in 10** say prioritizing mental and emotional well-being and getting quality sleep has become more important to them in the past five years. What's more, a significant **42%** are willing to pay over 10% more (compared with standard items) for products that have relaxing or calming properties—significantly higher than the global average of **26%**.

Theme #5: Health-related technology

Consumers in China, India, and Indonesia are highly receptive to health-focused technology, with **four in 10** believing these products are effective in improving their health and wellness. **Half** "definitely prefer" tech products with added health features—notably higher than in other regions. **One-third** of respondents surveyed say they also find these products enjoyable to use, far exceeding the global average of just **18%**.

"Features and functionality" are the key factors driving purchasing decisions—unlike other regions, where price is paramount. Brand reputation also plays a stronger role in this region, with **63%** citing it as a deciding factor, compared with **39%** globally.

Theme #6: Conscious buying in health and wellness

Awareness of conscious buying is especially high in China, India, and Indonesia, with **two-thirds** saying they're familiar with the concept. **Four in 10** say it's "very important" that the health and wellness products they purchase are also ethical and/or environmentally friendly. And **87%** are willing to pay a premium for products that meet these standards (vs. **71%** globally).

Eastern Europe, Middle East & Africa (EEMEA)

Eastern Europe (EE)

Our survey examined the health and wellness landscape across these EE countries: Czechia, Hungary, and Poland.

Theme #1: Overall attitudes toward health and wellness

Proactiveness

In Czechia, Hungary, and Poland, only **56%** of consumers report regularly taking steps to improve their health and wellness, compared with the global average of **70%**.

However, **half** plan to exercise more in the next 12 months, **one-third** aim to take more vitamins and supplements, and **one-quarter** say they now place more importance on seeking out the latest health and wellness products, diets, and routines than they did five years ago.

Barriers

The cost of healthier alternatives is the most cited barrier (**57%**) to making healthier choices in these countries. However, difficulty finding healthy alternatives appears to be less of an issue here, with only **24%** mentioning it as a barrier, compared with **31%** globally.

Trust and influence

Just under a quarter (**23%**) of consumers cite a lack of trust in a product's effectiveness as a barrier to healthier choices. Brands with a strong health and wellness focus across their entire portfolio are better positioned to address this, with **53%** of consumers across these countries saying they're more likely to buy from these brands. (This is much lower than in other regions, however.)

In contrast to other countries, consumers in Czechia, Hungary, and Poland are less influenced by health specialist recommendations (**37%** finding these have "significant influence"). Instead, **42%** prioritize the ability to inspect, trial, or sample a product.

Theme #2: Nutrition/Gut health

Consumers here are less focused on healthy nutrition compared with other regions, with **42%** saying it's more important to them now than five years ago, (below the global average of **58%**). They are also less likely to plan to take more vitamins or supplements in the next year (**34%** vs. **44%**).

Familiarity and perceptions around most food types are generally lower across these countries than many other regions, with high-protein plant-based foods standing out for lower-than-average positive perception and future buying intentions.

Theme #3: Weight loss/Anti-obesity medications (AOMs)

Consumers in Czechia, Hungary, and Poland are less likely than some other regions to view healthy body weight and cardio fitness as more important than five years ago. But their motivations for maintaining a healthy body weight mirror global trends, namely health reasons (**nearly two-thirds** cite it as "very important") and appearance (**42%**).

Only **18%** are familiar with AOMs (compared with **37%** globally), and just **3%** currently use them. While most people in these countries have a neutral view of these medications, twice as many view them negatively than positively, and **over one-third** say they would not use such medications, even if recommended to do so by a healthcare professional—higher than many other regions.

Theme #4: Wellness

Half of consumers across these countries feel that looking after their mental and emotional well-being is more important to them now than five years ago. Unlike other countries, however, the activities that most people plan to focus on for their self-care routines are being in nature and socializing—both of which top physical exercise across these countries. Only **one-third** plan to take more vitamins or supplements.

Theme #5: Health-related technology

Consumers in Czechia, Hungary, and Poland are keen on health tech, with **seven in 10** preferring products with added health features, such as smartwatches with health tracking or washing machines with a steam-wash function, over those who do not.

As with most other countries, EE consumers' main motivations for purchasing health tech are to cook more healthily and to enhance mental well-being and sleep quality. Similarly, price is the top factor influencing purchase decisions, followed by features and functionality. However, only **24%** say brand reputation matters—much lower than the global average of **39%**.

Theme #6: Conscious buying in health and wellness

Nearly half of consumers in Czechia, Hungary, and Poland are familiar with the concept of conscious buying, and **55%** say it's important to them that the health and wellness products they purchase are also ethically produced and/or environmentally friendly. That's a healthy percentage, but lower than the global average of **70%**.

As in other regions, personal wellness benefits are the top motivator for conscious buying (**62%**), followed by environmental sustainability (**38%**). Unlike many other regions, supporting local businesses is the third-most-prevalent motivator, cited by **34%** of respondents—and therefore topping ethical considerations.

Middle East & Africa (MEA)

Our survey examined the health and wellness landscape across these MEA countries: South Africa, Turkey, and United Arab Emirates (UAE).

Theme #1: Overall attitudes toward health and wellness

Proactiveness

Consumers in South Africa, Turkey, and the UAE are more committed to being proactive around their health and wellness compared with many other regions. **One-third** "strongly agree" that they regularly take steps to improve their health and wellness, and **56%** say seeking out the latest health products, diets, and routines is more important to them now than five years ago. Both figures surpass the global average.

Barriers

The top barriers to healthier living are the cost of healthier alternatives (**60%**) and difficulty finding these alternatives (**40%**)—with the latter being notably more pronounced in this region (compared with the global average of **31%**).

Trust and influence

Consumers in these countries are also more likely to distrust the efficacy of health and wellness products, with **one-third** of respondents citing this as a barrier to making healthier choices. As a result, **43%** agree "strongly" that they are more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio.

Theme #2: Nutrition/Gut health

The importance of healthy nutrition has risen significantly across South Africa, Turkey, and the UAE, with **70%** of consumers saying it matters more to them now than five years ago—well above the global average of **58%**. Additionally, **26%** plan to take "a lot more" vitamins and supplements in the next 12 months, compared with just **16%** globally.

Theme #3: Weight loss/Anti-obesity medications (AOMs)

Healthy body weight, exercise, and cardio fitness are increasingly important, with roughly **two-thirds** of consumers prioritizing these factors more now—well above the global average of just over **half**. Additionally, **39%** plan to engage in "a lot more" physical exercise as part of their self-care routine, compared with just **24%** globally.

Familiarity with—and positive perceptions of—weight loss drugs are also higher. Notably, **45%** are familiar with these medications, and **40%** view them positively (both above the global average), with only **15%** holding negative views.

Theme #4: Wellness

Mental and emotional health are top priorities in these countries, with **three-quarters** saying that looking after these aspects of their overall wellness is more important to them now than five years ago (surpassing the global average of **63%**). When it comes to their self-care routines, consumers in the region are particularly focused (compared with other countries) on relaxation and de-stressing. Activities such as massage and muscle relaxation, yoga, or meditation are notably above the global average for the percentages saying they plan to do "a lot more" of these in the coming 12 months. Additionally, **one in 10** plan to use light therapy devices, such as electrical face masks or therapy lamps, a lot more to boost their well-being.

Theme #5: Health-related technology

The appetite for health tech is particularly strong across South Africa, Turkey, and the UAE. **Three-quarters** of consumers believe that health tech products are effective in improving health and wellness, and an equal number would use digital devices or apps that monitor their health and offer personalized recommendations. Additionally, **45%** would "definitely" prefer a technology product that offered extra health and wellness over one that did not.

As in other regions, price, features, and functionality are key factors in purchase decisions, but brand reputation holds more weight here, with **half** of consumers in these countries saying it influences their purchases.

Looking for more data from (and contacts for) this region? [Download our EEMEA Insights Companion].

Theme #6: Conscious buying in health and wellness

In South Africa, Turkey, and the UAE, **seven in 10** survey respondents are familiar with the concept of conscious buying, and **four in 10** say it's "very important" to them that the health and wellness products they buy are also ethical and/or environmentally friendly. **Eight in 10** are willing to pay more for products that meet these criteria.

As in other regions, personal wellness is the top motivator for conscious buying, followed by environmental sustainability and ethical concerns.

Latin America (LATAM)

Our survey examined the health and wellness landscape across these LATAM countries: Brazil and Mexico.

Theme #1: Overall attitudes toward health and wellness

Proactiveness

Consumers in Brazil and Mexico are proactive about their health and wellness, with **79%** regularly engaging in activities like exercise tracking and diet monitoring, and **56%** placing more importance on seeking out the latest health and wellness products than they did five years ago. Both of these results are higher than the global average.

Barriers

Cost, availability, and time are the most common barriers people say are preventing them from making healthier choices. Motivation is less of a concern here than globally, with just **21%** reporting the lack of it as a major barrier (vs. **25%** globally).

Trust and influence

A hefty **42%** of consumers in these countries "agree strongly" that they're more likely to buy from companies that prioritize health and wellness across their entire portfolio—significantly higher than the **29%** global response. Additionally, **half** of consumers across Brazil and Mexico say that promotional offers or speed of delivery have "significant influence" when deciding which health and wellness products to buy—significantly higher than the global average.

Theme #2: Nutrition/Gut health

Healthy nutrition is more important for **74%** of these consumers than it was five years ago (compared with the global average of **58%**), and **four in 10** are willing to pay over 10% more for products with enhanced nutritional benefits, like vitamins or fiber. On the flip side, nearly half (**46%**) have negative perceptions of ultra-processed foods—seven percentage points above the global average.

Theme #3: Weight loss/Anti-obesity medications (AOMs)

Two-thirds of consumers in Brazil and Mexico place more importance on maintaining a healthy body weight now than they did five years ago, and **four in 10** plan to do "a lot more" exercise in the next 12 months. Health reasons are by far the most prevalent motivator for achieving and maintaining a healthy weight (**81%**), followed by appearance (**55%**) and athletic performance (**44%**).

Nearly **half** of consumers in Brazil and Mexico are aware of weight loss drugs, and positive perception of these drugs is also quite high, at **41%**. Not surprisingly then, **61%** say they would use a weight loss drug in the future if recommended by a healthcare professional—**the highest of any region**.

Theme #4: Wellness

Mental health is a huge focus for consumers in Brazil and Mexico, with **80%** saying it's more important to them now than five years ago, surpassing the global average of **63%**. In addition, **75%** say aging well is more important to them now (vs. **57%** globally), and **67%** say the same about following a regular self-care routine (**50%** globally).

Theme #5: Health-related technology

The appetite for health tech across Brazil and Mexico is hearty. Overall, **85%** of survey respondents say they would prefer tech products that offer additional health and wellness features over ones that do not, and **81%** believe such products are effective in improving their well-being. Consumers in these countries also are more likely to recommend health tech products to others—**nearly half** "agree strongly" that they would do so, compared with just **29%** globally.

Looking for more data from (and contacts for) this region? Download our LATAM Insights Companion.

Theme #6: Conscious buying in health and wellness

In Brazil and Mexico, **47%** of consumers say that it's "very important" to them that the health and wellness products they buy are also eco-friendly and/or ethically produced. Environmental sustainability is a particularly high concern, with **85%** of consumers saying they are worried that issues like pollution and climate change are impacting their current and future health—that's 16 percentage points above the global average.

North America (NA)

Our survey examined the health and wellness landscape across these NA countries: Canada and United States.

Theme #1: Overall attitudes toward health and wellness

Proactiveness

Just over two-thirds of consumers across Canada and the United States describe themselves as proactive in improving their health and wellness, while **56%** plan to engage in more physical exercise in the next 12 months. Meanwhile, **37%** say they plan to take more vitamins and supplements. At the same time, consumers in these countries are less likely to be willing to share personal health data with companies in exchange for assistance in making healthier choices—**48%** in North America versus **57%** globally.

Barriers

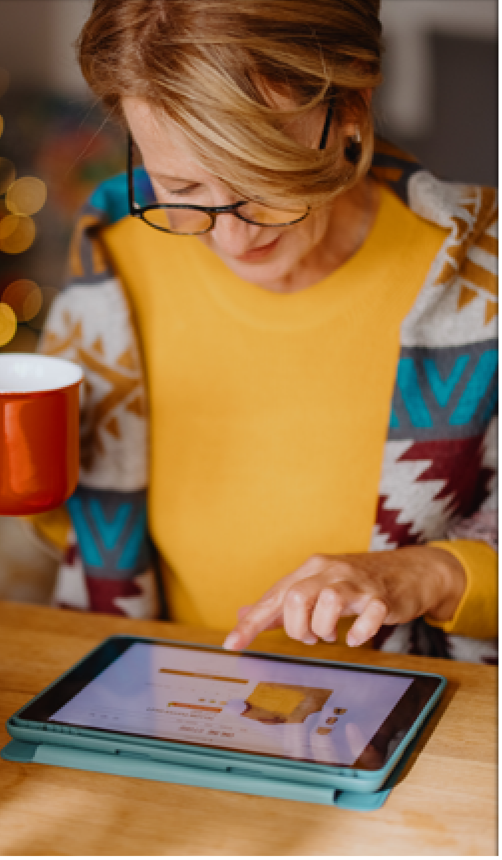
As in other regions, the cost of healthier alternatives is the biggest barrier to making healthier life choices, with **57%** citing it. However—unlike other countries—lack of motivation is the second-most-significant barrier for North American consumers, at **30%**. Only **24%** cite difficulty finding healthy alternatives as a challenge.

Trust and influence

Overall, **21%** cite a lack of trust in the effectiveness of health and wellness products as a barrier to making healthier choices. While that's less than the global average, manufacturers and retailers can improve trust with North American consumers by focusing on recommendations from medical professionals and providing detailed product use and performance information—cited as the top two "significant influences" on their purchase decisions for health products. **Nearly one-third** of North Americans are also "significantly influenced" by the ability to inspect, trial or sample products before purchase—and by the ease of returning a product if they are not satisfied, as well as by promotional offers.

Theme #2: Nutrition/Gut health

Healthy nutrition is more important for **55%** of North Americans today than five years ago. Perceptions are especially positive for high-fiber foods (**82%**), superfoods (**72%**), and probiotic foods (**67%**), with **more than one-third** planning to buy more of these types of foods this year. Conversely, **22%** hold a "very negative" view of ultra-processed foods—**among the highest of any region**.



Theme #3: Weight loss/Anti-obesity medications (AOMs)

More than half of North Americans say maintaining a healthy body weight and improving heart health are more important now than five years ago. Awareness of weight loss drugs (**36%**) is on par with the global average. But opinions are polarized: **25%** have a positive view, **27%** have a negative view, and **nearly half** are neutral. Only **32%** would consider using a weight loss drug if recommended by a healthcare professional, while **39%** say they wouldn't. Concerns about side effects are a barrier for **69%** (about equal with the global average), whereas **49%** cite worries over cost and whether it's covered by insurance—considerably higher than in most other regions.

Theme #4: Wellness

For **six in 10** consumers in North America, looking after their mental and emotional health is more important now than it was five years ago, as is getting good sleep. **Nearly half** feel the same about maintaining a regular self-care routine.

The top wellness activities consumers here plan to do "a lot more" include socializing with family and friends, doing physical exercise, and spending time in nature. Additionally, **three in 10** plan to incorporate more massage, muscle relaxation, and yoga or meditation into their self-care routines.

Looking for more data from (and contacts for) this region? Download our North America Insights Companion and watch our on-demand webinar for the US market: What's Next in Wellness: A Guide to 2025.

Theme #5: Health-related technology

The appetite for health tech is moderate in North America, with just over half (**52%**) believing these products are effective in helping them improve their health and wellness—that's below the **63%** seen globally. Additionally, **63%** say they would prefer a technology product that offered extra health and wellness features over one that didn't—but most of those add that it depends on the price. In fact, price is a higher factor here than in many regions, with **77%** saying this influences their decisions around buying health tech (vs. **69%** globally). The most prevalent reasons for buying health tech are to cook more healthily and to improve sleep quality.

Theme #6: Conscious buying in health and wellness

While North Americans are slightly less familiar with the concept of conscious buying than other regions, **61%** say it's important to them that the health and wellness products they buy are also eco-friendly and/or ethically produced. When it comes to cost, **58%** say they're willing to pay more for such products, while **one in five** would pay over 10% more (compared with a standard product) for ones that are organic, made from natural ingredients, and/or cruelty-free.

Western Europe (WE)

Our survey examined the health and wellness landscape across these WE countries: France, Germany, Italy, Netherlands, Spain, and UK.

Theme #1: Overall attitudes toward health and wellness

Proactiveness

More than two-thirds (**64%**) of consumers in Western Europe describe themselves as proactive in improving their health and wellness, slightly below the global average of **70%**. **Half** plan to increase their physical activity over the next 12 months, while **30%** say that seeking out the latest health and wellness products is more important to them now than it was five years ago.

Barriers

As with other countries, the cost of healthier alternatives remains the biggest barrier to healthier life choices in Western Europe, cited by **over half** of consumers. Lack of time (**26%**) and lack of motivation (**25%**) are the next most common challenges across these countries.

Trust and influence

Compared with other regions, fewer consumers in Western Europe are deterred by distrust in health product effectiveness. **Just under 20%** cite this as a barrier to making healthier choices (vs. the global average of **25%**). In terms of influence, **six in 10** say they're more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio, and just under half (**48%**) would allow a company to access some of their personal health data in return for help making healthier decisions.

Theme #2: Nutrition/Gut health

Healthy nutrition is more important to **51%** of Western Europeans now than five years ago, and **59%** are willing to pay more for products offering enhanced nutritional benefits, such as vitamins or high fiber. In addition, **over half** would pay extra for healthier options like low-fat, low-sugar, or low-carb products or those made from natural ingredients.

Familiarity with certain food types is lower here than in other regions. For example, just **20%** say they are "very familiar" with probiotic foods, compared with **33%** globally. Positive perception is strongest for high-fiber and superfoods, with **four in 10** and **three in 10**, respectively, planning to buy more of these. Meanwhile, **47%** of consumers in Western Europe view ultra-processed foods negatively, which is higher than the global average (**39%**).

Theme #3: Weight loss/Anti-obesity medications (AOMs)

Just under half (**47%**) of Western Europeans say maintaining a healthy body weight is more important now than it was five years ago, and **43%** say the same for exercise and cardio fitness.

Awareness of weight loss drugs is lower in Western Europe, with just **29%** of consumers familiar with them, compared with **37%** globally. Usage is also lower—only **4%** say they currently use weight loss drugs (half the global average)—while feelings around future use is polarized between those who say they would use them, if recommended by a health professional, and those who way they would not (both **36%**). However, there is opportunity for companies to influence this, since **47%** of survey respondents currently hold neutral views of these drugs that could be swayed either way.

Theme #4: Wellness

More than half (**57%**) of Western Europeans say that getting good sleep is more important to them now than it was five years ago, while **54%** feel the same about looking after their emotional health. Roughly **four in 10**, meanwhile, say they are prioritizing regular self-care routines.

The most popular wellness activities that Western European respondents plan to do more of in the coming 12 months include spending more time in nature (**51%**), exercising (**50%**), and socializing with family and friends (**47%**). Additionally, **more than one-quarter** plan to do more muscle relaxation, yoga, or meditation or use skin creams more often.

Theme #5: Health-related technology

The appetite for health tech is strong in Western Europe but lower than it is in some other regions. Nearly two-thirds (**64%**) of Western Europeans say they would prefer technology products that offer extra health and wellness features over ones that do not (vs. **74%** globally), and **51%** believe these types of products are effective in improving their health (vs. **63%** globally).

The primary motivations for purchasing health tech are healthier cooking (**40%**), improving mental well-being (**35%**), and monitoring physical activity and sleep (**both 33%**). Price, followed by product features, are the two main factors influencing those purchasing decisions.

Looking for more data from (and contacts for) this region? Download our Western Europe Insights Companion.

Theme #6: Conscious buying in health and wellness

Familiarity with conscious buying is lower in Western Europe compared with some other regions, with just **under half** aware of the concept. However, nearly two-thirds (**64%**) say it's important to them that the health and wellness products they buy are also ethically produced and/or environmentally friendly.

A majority (**63%**) are willing to pay more for ethical and eco-friendly products—slightly under the global average—with personal wellness benefits being the most common motivator (cited by **61%**). This is followed by environmental sustainability (**45%**) and ethical concerns such as fair trade and cruelty-free standards (**39%**).

4

Your next steps to win share in 2025

By understanding consumers' developing behaviors around health and wellness—and identifying where emerging needs aren't being fully met—companies can innovate and differentiate their products and services to maximum effect.

Consumers are increasingly prioritizing their health and wellness, seeking products that empower them to take control of their overall well-being—and that resonate with their personal aspirations and values. From supporting immunity and gut health to promoting mental clarity and aging well, **today's health-conscious shoppers are looking for brands that meet their evolving needs and that they can trust**.

To win consumer loyalty, manufacturers and retailers must address concerns such as the cost and availability of healthier options and a desire for clear and detailed product information. Ethical sourcing and sustainable practices are also critical to building lasting consumer trust. By staying attuned to regional trends, companies can offer customized health and wellness solutions that boost customer satisfaction and set themselves apart in a highly competitive market.

Key takeaways

To succeed in 2025 and beyond, health and wellness companies must develop strategies and solutions that address five core themes that global consumers have identified as important.

Health equity: Cost and accessibility

Consumers increasingly want healthier products to be just as accessible and affordable as their "standard" counterparts. (This is especially true for consumers in APAC, LATAM, and the Middle East & Africa.) They also tend to view this as a shift that *companies* should prioritize making.

Self-tracking and at-home diagnostics

There's a growing demand for wearable devices and at-home health diagnostics that allow consumers to conveniently track their health metrics. This trend is particularly pronounced in APAC, where consumers are more inclined to purchase health-focused technology products. Premiumization will be driven by the incorporation of AI that delivers increasingly personalized and holistic recommendations based on individuals' own metrics and goals.

Key takeaways (continued)

Aging well

With aging populations across the globe, there's an increasing need for products that support joint health, mobility, heart health, and mental alertness. Innovations in AI-powered health tech are poised to become invaluable tools in improving the quality of life for an increasingly tech-savvy generation of seniors.

Mental health, good sleep, and energy support

Fueled by consumers' prioritization of their mental and emotional health, demand for products that support sleep, relaxation, and energy will continue to soar. This category includes wearables and other health tech devices that track stress and sleep and promote relaxation, as well as supplements and high-nutrition foods, drinks, and snacks that boost calmness, mental alertness, or physical vitality.

Trust and information transparency

Consumers across regions are more likely to buy from companies that focus on health and wellness throughout their entire product portfolio. They also value access to expert advice and transparent, detailed product information that helps them make informed choices about their health purchases.

Want to go deeper?

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NIQ Product Insights

Understand growth drivers in your categories and stores through the lens of product attributes. Use performance of dietary, sustainability, and clean label characteristics to inform marketing strategies and win with discerning consumers. NielsenIQ tracks six times the attributes of other providers so you can see trends, optimize product assortment, and ensure product guidelines are met.

NIQ Homescan

Track, diagnose, and analyze consumers' actual CPG/FMCG purchase behavior with data from more than 250,000 households across 25 countries.

NIQ Market Measurement

Grow your business and market share with a complete view of performance across categories, channels, and global markets.

About NIQ's 2025 Global Health & Wellness survey

Fieldwork was conducted in January and February 2025, with nearly 19,000 adult consumers interviewed online in the following 19 countries: Brazil, Canada, China, Czechia, France, Germany, Hungary, India, Indonesia, Italy, Mexico, Netherlands, Poland, South Africa, Spain, Turkey, United Arab Emirates, United Kingdom, and United States. Data reflects the adult grocery shopping population in each respective country.

Contact our global Health & Wellness experts

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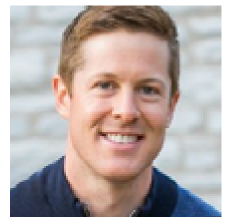

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See our region-specific Insights Companions for key regional contacts in Asia Pacific; Eastern Europe, Middle East & Africa; Latin America; North America; and Western Europe.

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Complete this brief survey to let us know what you think of the content in this report.

About NIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

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