Wellness: From Niche to Normalized

Kirsten Grothe, Associate Client Director, NIQ

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THE CONTEXT

Four forces reshaping how consumers approach supplements

01 Tech becomes the health monitor

Tech has flooded consumers with more information than they can process. Paired with growing skepticism toward doctors and a preference for self research, they may turn to other resources to make health choices.

02 Social media adds to the sway

Social Media is trusted media, especially among younger consumers. VMS is one of the key benefactors of social selling, especially on TIkTok.

03 Niche ingredients become normalized

Food and health are overlapping now more than ever. As consumers exercise more autonomy about their health, once-niche ingredients, like creatine, are gaining in popularity.

04 GLP-1s raise the stakes

As weight-loss peptides scale, supplementation becomes far more consequential.

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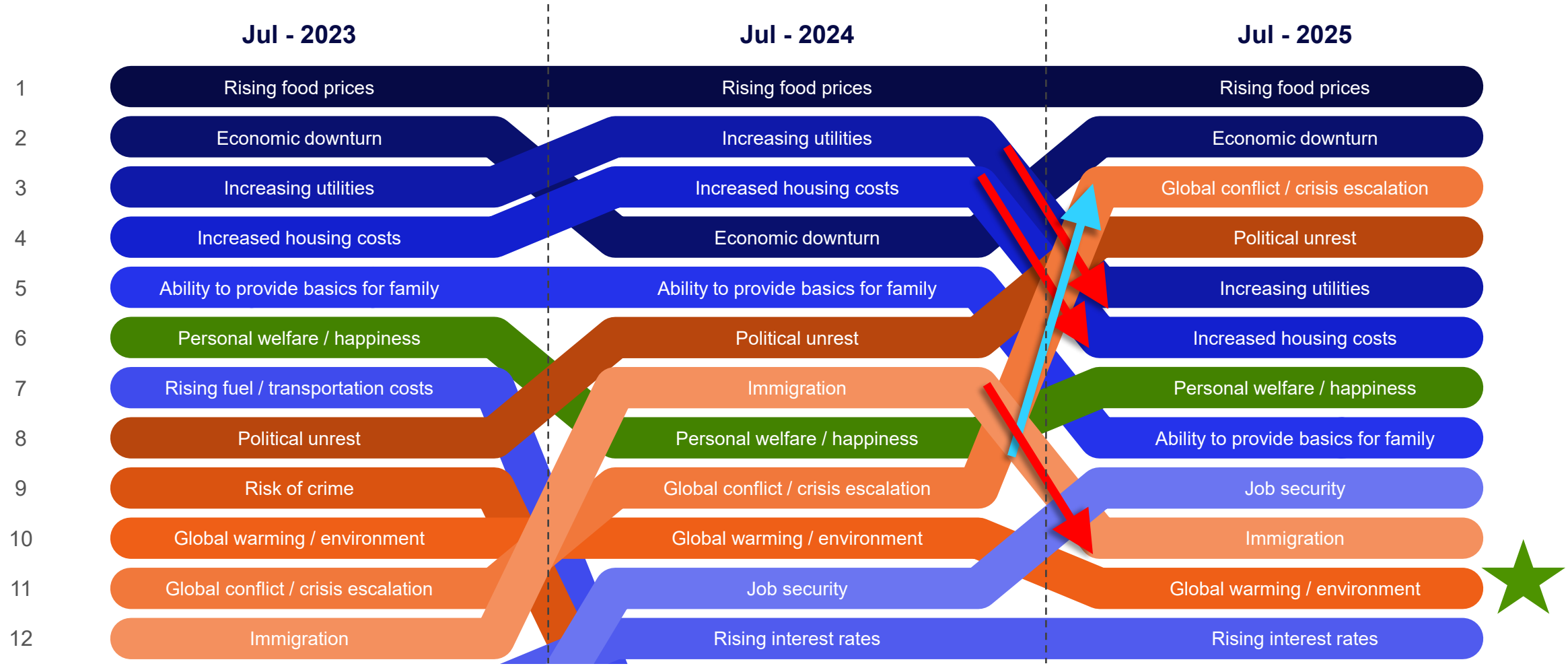
Environmental concerns are top of mind, but fall behind the economy, conflicts, and living costs

Global conflict and political unrest concerns have risen in US and have potential to get worse

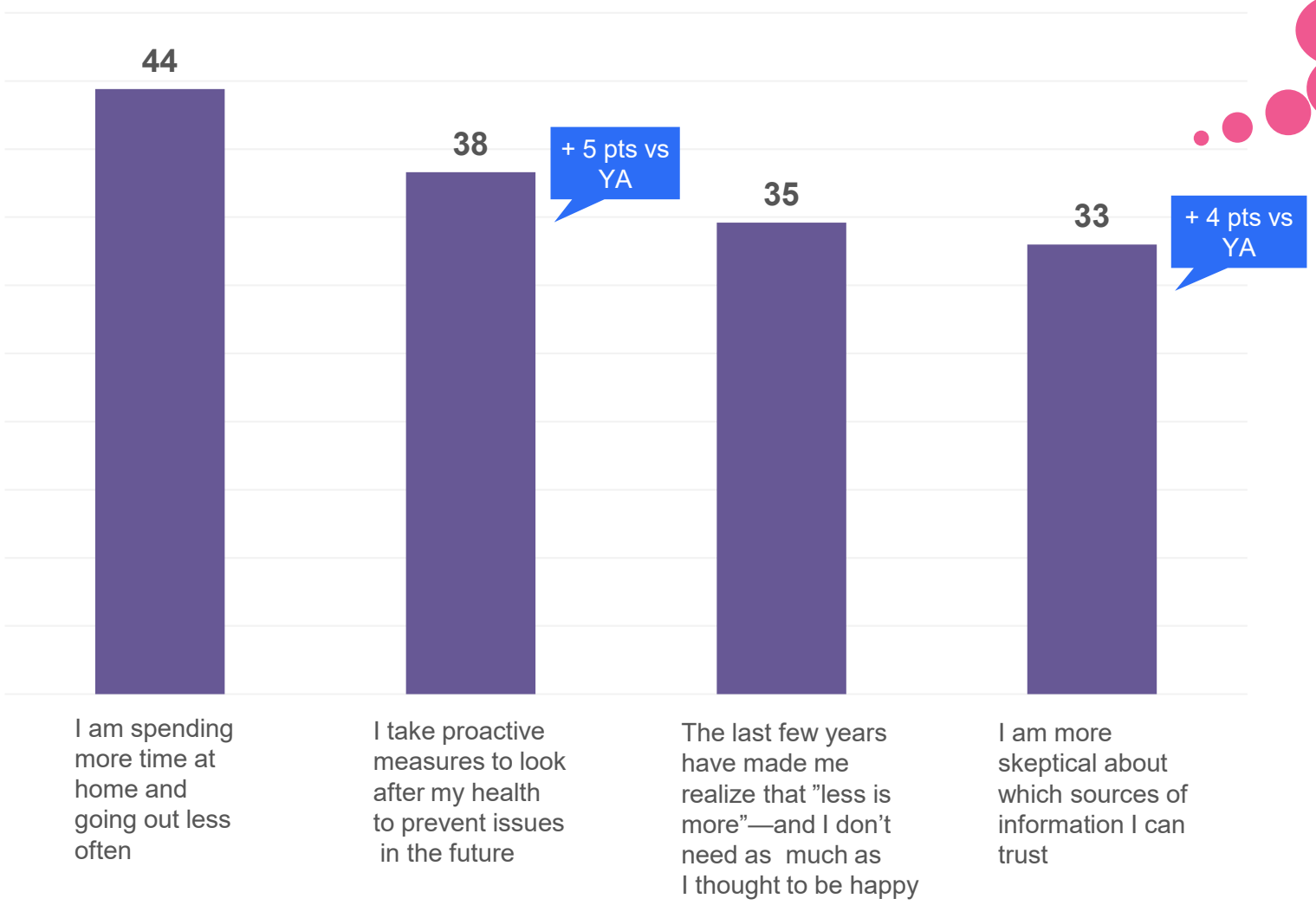
Top concerns among U.S. consumers



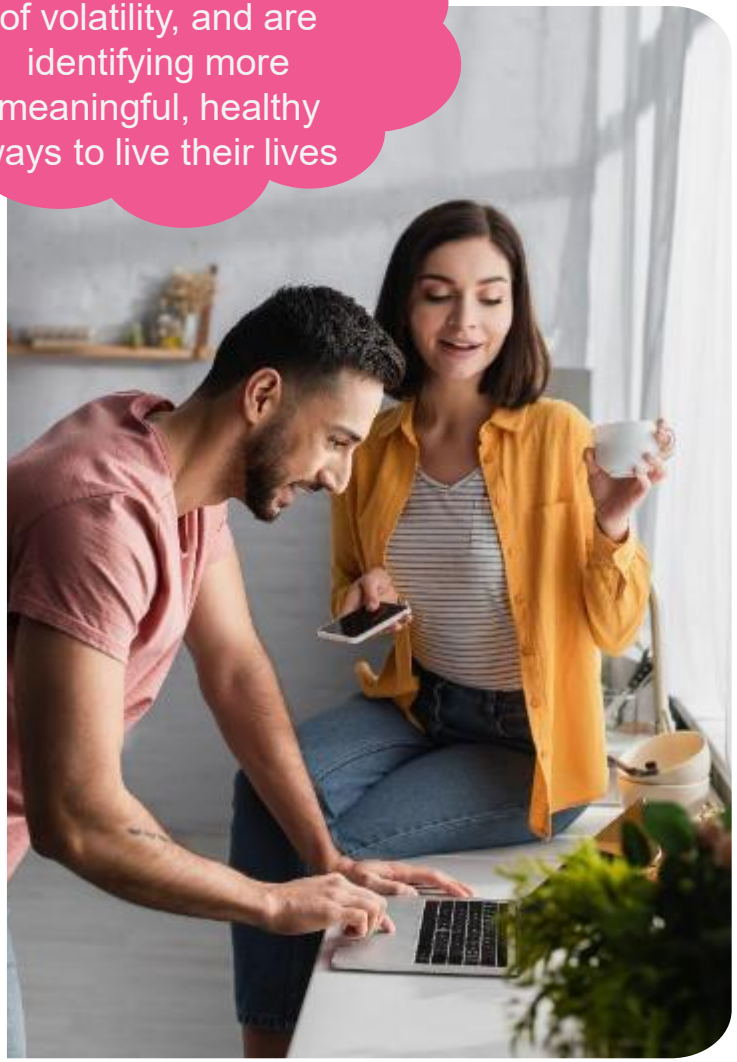
Source: NIQ 2024 Consumer Outlook vs Mid-Year 2023, 2024, 2025 Survey, US Market

Consumers' spending intentions are *being shaped by shifting lifestyle traits*

Thinking about your values and habits in the last year.
Which of the following statements do you agree with? (Living)



Consumers are tired of volatility, and are identifying more meaningful, healthy ways to live their lives



Source: NIQ 2025 Consumer Outlook survey

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Why Wellness Matters...

Canada & United States

40%	**Are ready to spend over $100 a month on their total wellness** (% agreeing strongly/ somewhat)
69%	**Agree that governments should regulate businesses to help them make healthier decisions** (% agreeing strongly/ somewhat)
65%	**"I am more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio."** (% agreeing strongly/ somewhat)
59%	**Agree "aging well" is more important now than five years ago**
48%	**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**
25%	**Have a generally positive perception of anti-obesity medications (AOMs) or GLP-1s** (% saying very/ somewhat positive)
43%	**"Environmental health is more important to me now than five years ago."**
45%	**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, Canada and the US

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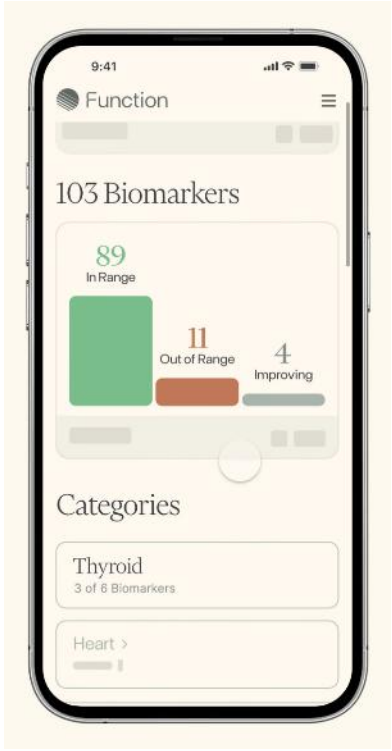
Technology empowering the consumer

The emerging wave of P4 Healthcare: *predictive, preventative, personalized, participatory*



Function measures all major biological functions: heart, hormones, metabolic, inflammation, kidneys, liver, heavy metals, and more.

Over-the-counter hearing aids: Elehear Beyond Pro Smart hearing aids can translate languages or help with tinnitus

SmartSKN has partnered with LillyCover to introduce AI-driven skincare robots to the US market. MULLI AI Dermascope tracks skin over time for personalized skin care.

The Eli Hormometer is the first instant saliva-based hormone monitoring system. Eli will soon launch a beta period with cortisol and progesterone tests.

Dexcom and Oura announce a strategic partnership to improve metabolic health through the integration of Dexcom glucose data with vital sign, sleep, stress, heart health and activity from Oura.

The Amazfit V1tal is a new health gadget that automatically logs food and provides nutritional info by recording you while you eat. It analyzes the recording and sends the data to the Zepp app, eliminating the need to manually enter meal details.

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Proactive and Empowered consumer, it's in our hands

74% of consumers would prefer a tech product with extra health and wellness features over one without.

63% say "health-focused technology products are effective in helping my health and wellness"

57% would share select personal health information in return for smarter, more personalized recommendations to help achieve health goals.

New wearable buyers cut alcohol, result of personalized feedback on sleep and recovery?

Buyers who purchase Oura Ring, Whoop, Lumen, Tile, FitBit, or Garmin BevAI

$ Sales in Subsequent Quarters

Top Selling Tech Wearables Brands on Amazon Prime Day 2025

By Sales

Apple ŌURA GARMIN. Galaxy fitbit AMAZFIT

for buying health tech **healthier cooking**, **overall well-being**, tracking **physical activity**, and improving **sleep quality**.

Source: NielsenIQ Global Wellness Study; Apple App Store, NielsenIQ Digital Purchases, October 2025 top Health and Fitness and Medical apps

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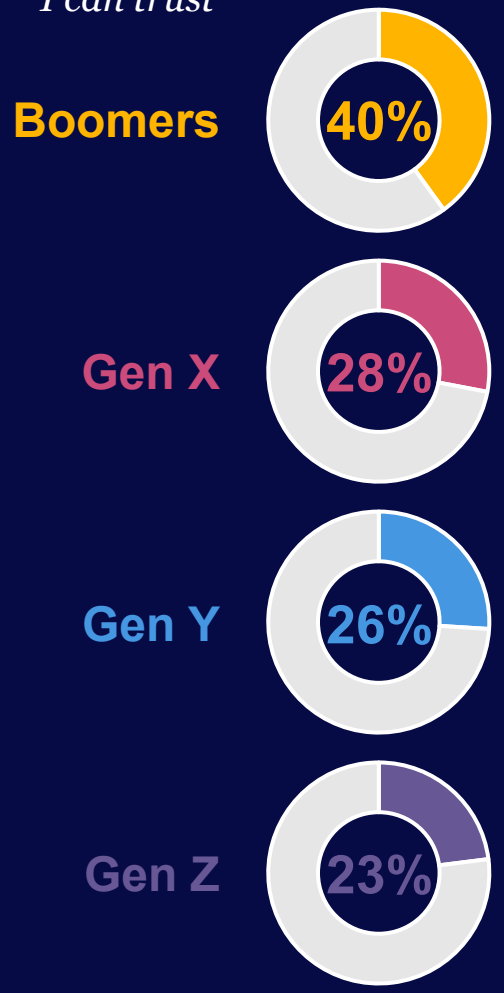
Trust: What matters most to consumers overall?

Self-Research	64%	*research treatment options independently before consulting their doctor*
Challenging Doctors	61%	*are willing to challenge their doctor's recommendations regarding their health*
Doctor Recommendations	57%	*worry that doctors recommend treatments based on financial incentives, and this concern is also growing*
Alternative medical care	56%	*are incorporating more alternative medical care into their lives over traditional care*
Homeopathic medicine	45%	*trust homeopathic medicine*
Alternative medicine	44%	*prefer alternative medicines over traditional ones, and 60% believe herbal supplements are effective*

MRI Simmons study

***I am more skeptical** about which sources of information I can trust*



***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.*

Gen Z

207
Social Media is Media Trusted the Most

126
Use Social Media to Obtain Healthcare Info

Source: MRI Simmons, Spectra,, NIQ Consumer Outlook 2024. Source: NIQ's 2025 Global Health & Wellness Report

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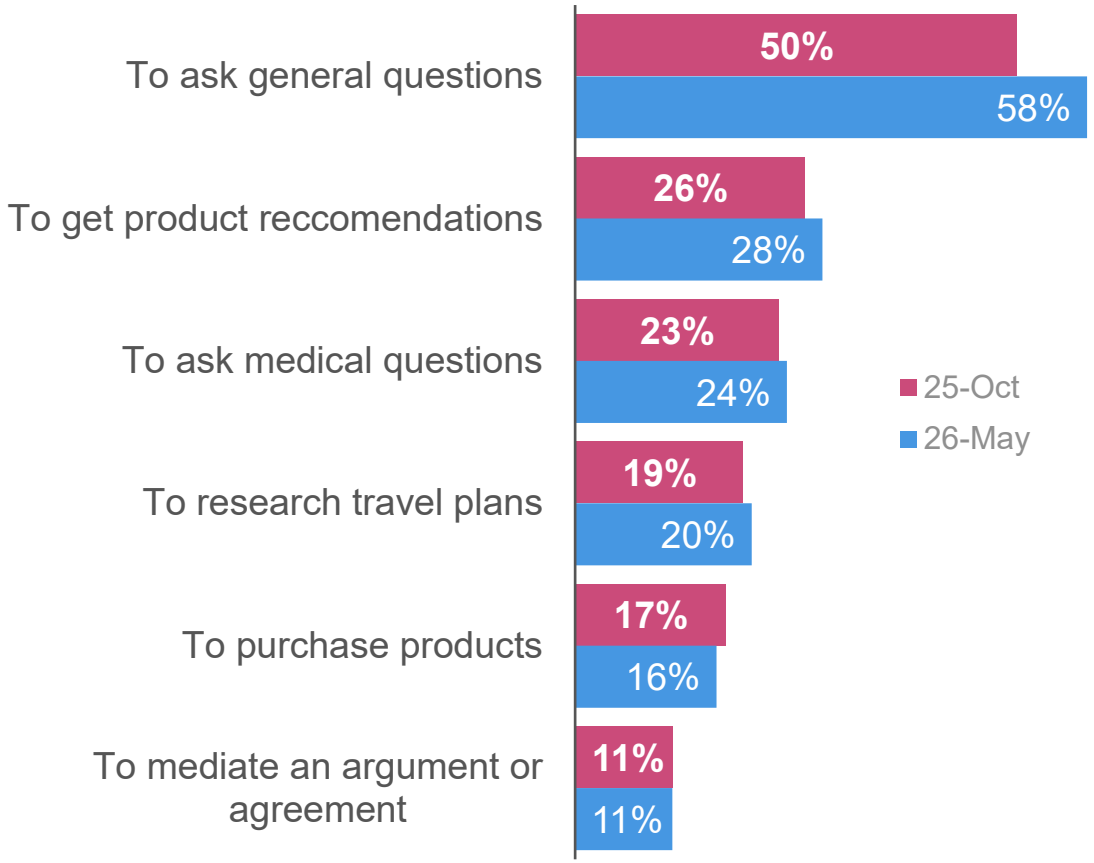
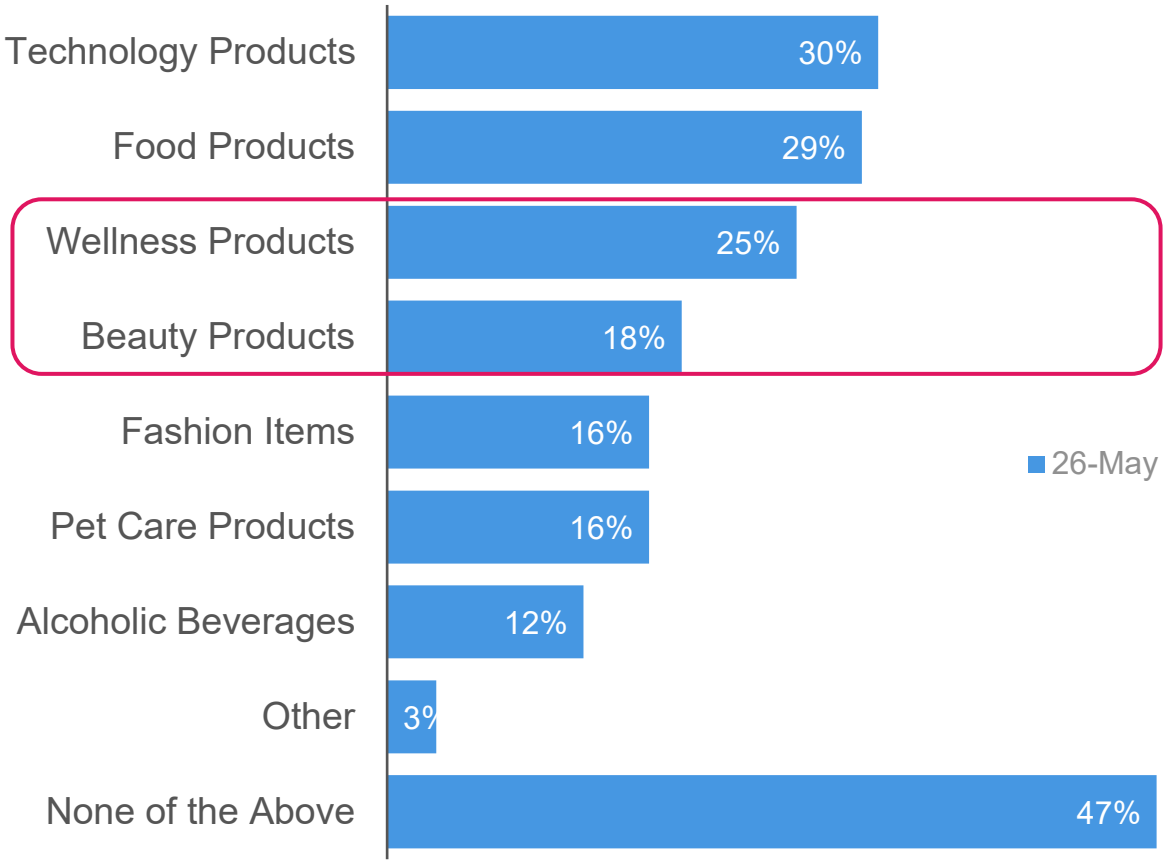
How Consumers are Using GenAI

Consumers are turning to chatbots for advice on their products and routines – taking the control away from brands and retailers

Q. Have you used Generative AI (e.g. Chat GPT, Gemini, Copilot) for any of the following?



Q. Which Types of products have you gotten recommendations for from Generative AI (e.g. Chat GPT, Gemini, Copilot) ?



Source: NielsenIQ LLM Survey US, Oct 2025 and May 2026

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Social selling growing

55% purchase directly via social media or live stream platforms

TikTok Shop[2]

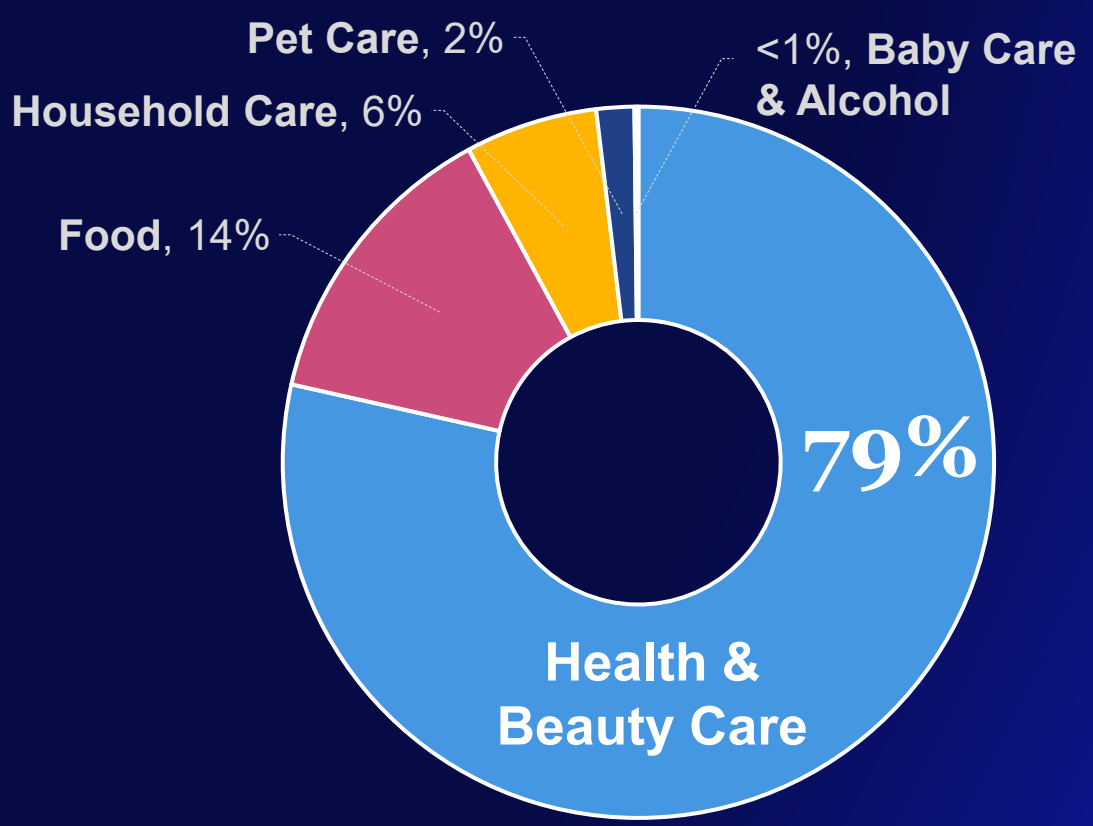
$120 *TikTok Shop H&B shoppers are spending an average of $120 per year, up +68% vs YA*

#6 *TikTok Shop is the Health and Beauty ecommerce retailer*

Top TikTok categories[3]

- Vitamins and supplements
- Cosmetics & Nail
- Facial Skin Care
- Fragrance
- Hair Care
- Oral Hygiene
- Candy, Gum, and Mints

TikTok Shop Category $ Share



NIQ Midyear Consumer Outlook; TikTok Shop, data ending 12 months ending November 2025

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Gen Z

207

Social Media is Media Trusted the Most

150

More Likely to Purchase Products Advertised on Social Media

126

Use Social Media to Obtain Healthcare Info

Millennials

138

More Likely to Purchase Products Advertised on Social Media

137

Social Media is Media Trusted the Most

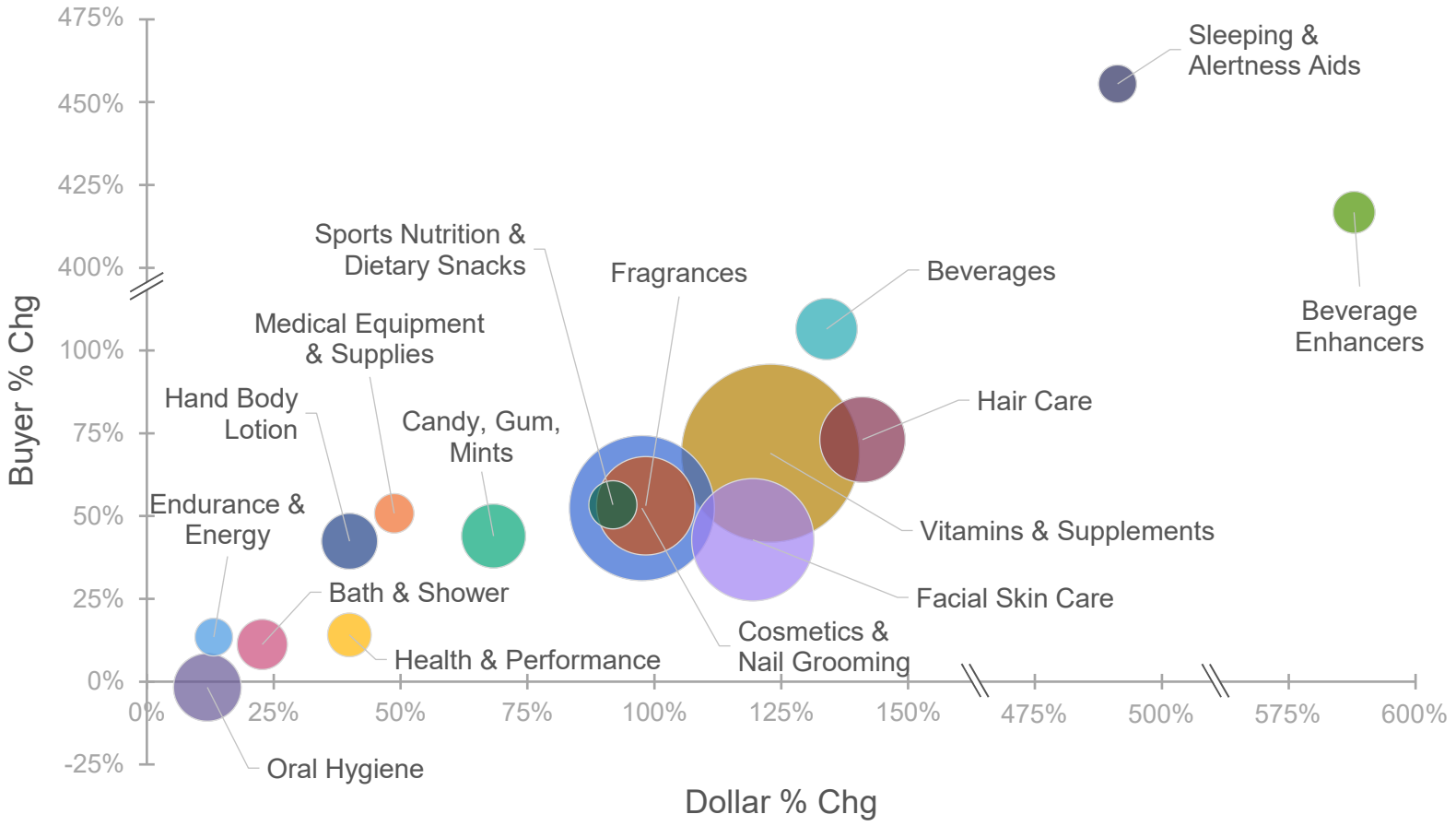
119

Use Social Media to Obtain Healthcare Info

NIQ

Source: NIQ Spectra Data Version March 2024

TikTok Shop's biggest selling category is Vitamins & Supplements



Bubble Size = Dollar Volume

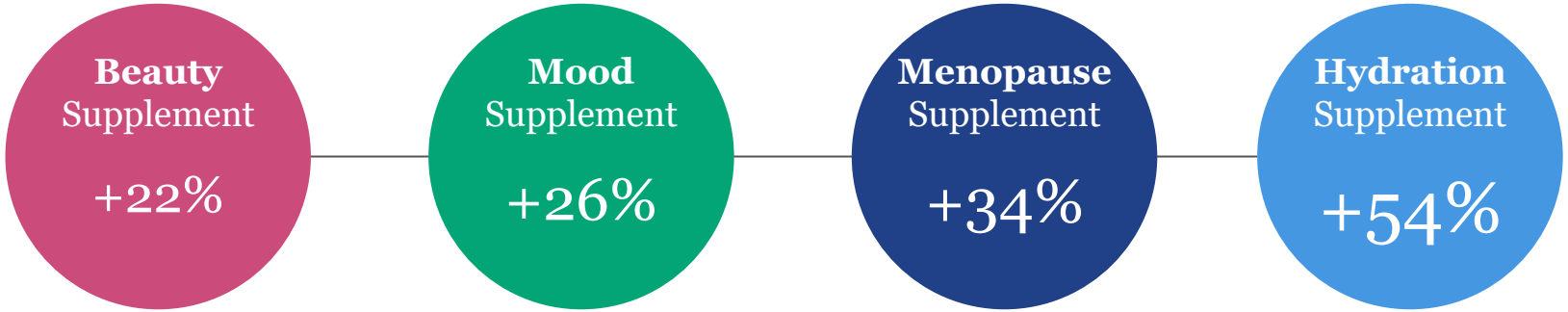
Source: NielsenIQ e-commerce Retailer View, TikTok Health & Beauty Categories, 12 months ending 9/30/25

Vitamins, Minerals & Supplements

From skin to sleep to digestive health, supplements are reframed as lifestyle tools - taken not just for functional benefits but as an aspirational wellness ritual

44% of consumers plan to *take more vitamins or supplements* in the next 12 months

Value % Chg vs YA - US



Source: NielsenIQ Health and Wellness Survey 2025 | Q. Thinking of your regular wellness or self-care routine, do you plan to do more or less of the following activities in the coming 12 months?

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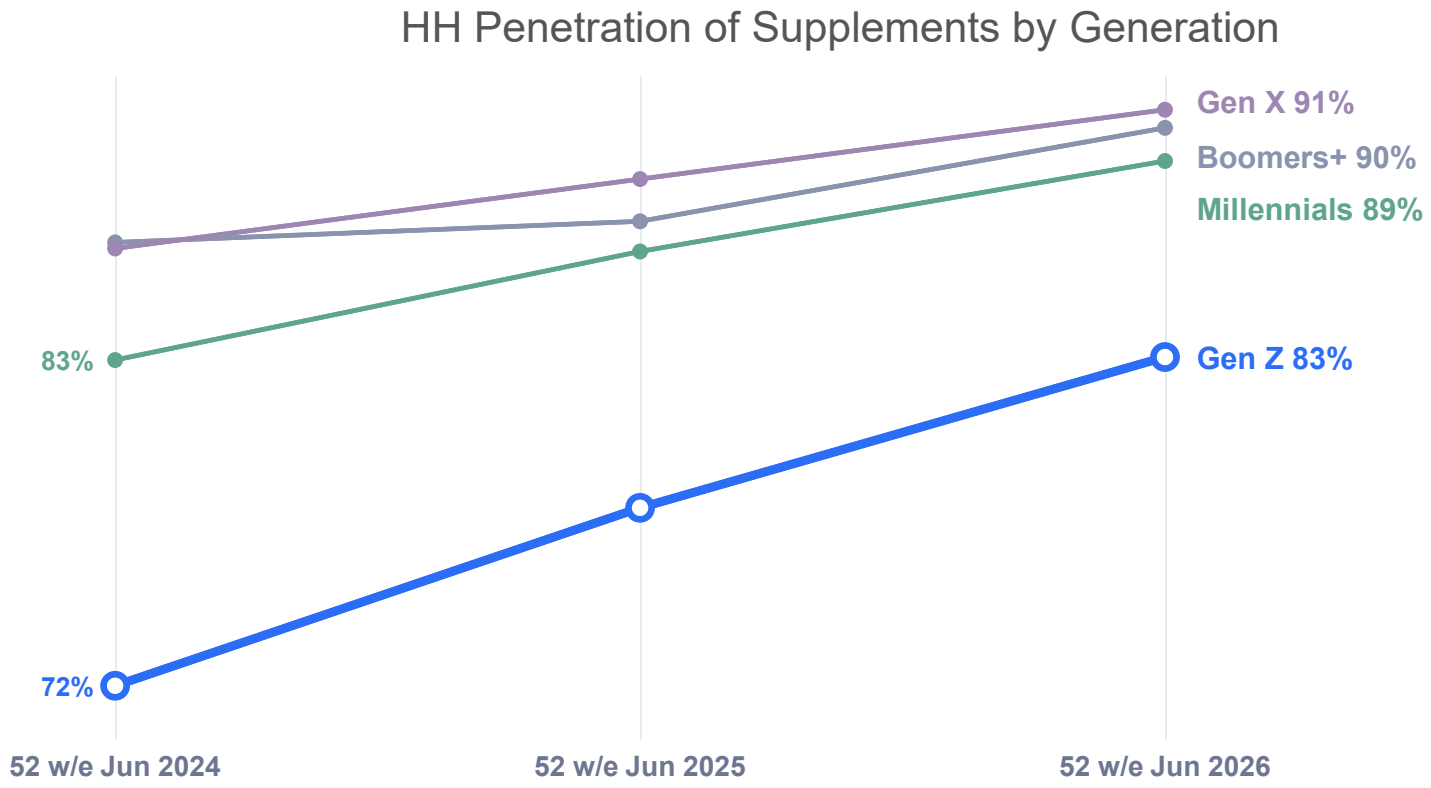
Every generation is buying more supplements, and Gen Z is growing the fastest

Supplement penetration is rising across generations, with Gen Z growing fastest, reinforcing the shift toward prevention and long-term wellness behaviors.



GEN Z

+11.0 pts

fastest-growing generation

71.8% → 82.7% in last two years

Every generation gained: Boomers+ +3.8 pts, Gen X +4.6 pts, Millennials +6.6 pts, Gen Z +11.0 pts.

Source: NielsenIQ Panel On Demand Omnishopper | US Exp Osh - NDH Synd Full View - 444 3yr | Entire Dataset

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Omni-wellness: Convergence of food and supplementation

	Supplements	Food and Wellness	
Beauty			***Beauty + Wellness*** *worth $160.8B*
Gut Health			***Digestive Health*** +9% Dollars +6.5% Units
Protein			***40g+ Protein per serving**** +30% Dollars +31% Units
Hydration			***Hydration Health (VMS)*** +21% Dollars +22% Units

Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025 | Beauty+ Wellness Omnishopper, 52 weeks ending April 19, 2025
*Food & Beverage trends

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Omni-wellness: Convergence of food and supplementation

	Supplements	Food and Wellness
Sleep/ Mood		
Energy		
Women's Health		

Mood & Stress support*
+50% Dollars
+75% Units

Energy
+6% Dollars
+6% Units

Peri-menopause support
+30% Dollars
+91% Units

Source: NIQ Retail Measurement Services; Total US xAOC; Total Store; NielsenIQ Product Insights; Dollars & Units % Change vs year ago; 52 weeks ending September 6, 2025
*Food & Beverage trends

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TREND SPOTLIGHT

CREATINE

VERY HIGH POPULARITY
48.8M AVERAGE MONTHLY POPULARITY SCORE

+66.4%
(YEAR-OVER-YEAR)

54.6%
(YEAR-OVER-YEAR)

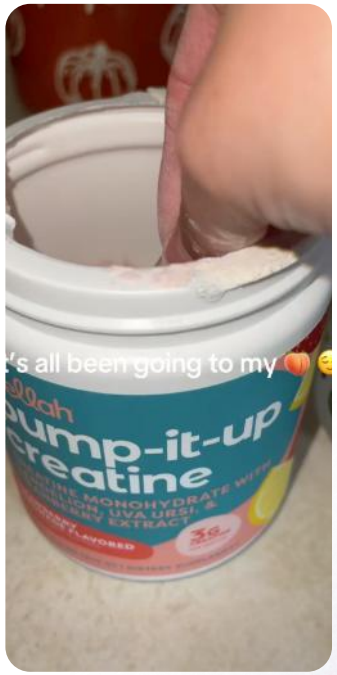
TOP SEARCH QUERIES

what is creatine
creatine kinase
creatine benefits
what does creatine do
best creatine
what are the benefits of creatine
does creatine make you gain weight
is creatine bad for you
does creatine cause hair loss
creatine loading phase

TOP VIEWED VIDEOS

@deals_detector

@getrawnutrition



@alee_vIdz13

Source: Popularity Index: US Google Search + TikTok Views from Oct 2024 to Sep 2025 vs. Oct 2023 to Sep 2024; US TikTok data, ending Oct 26, 2025.

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SPATE

WELLNESS MACRO TRENDS

ENERGY & FOCUS

Consumers aren't just looking for general wellness—they're increasingly searching for functional benefits that help them perform better, stay sharp, and manage their daily lives.

TOP TRENDS BY INCREASE IN POPULARITY

Trend	Popularity	Increase YoY↓	YoY
creatine	48.8M	**+21.5M**	78.6%
l-theanine	11.3M	**+7.4M**	190.4%
nad supplement	7.2M	**+5.8M**	400.9%
vitamin B12	1.9M	**+1.9M**	10.0%
coenzyme Q10	1.7M	**+1.7M**	32.7%

NIQ

Source: Popularity index- Google, TikTok, Instagram US - from Oct 2024 to Sep 2025 vs. Oct 2023 to Sep 2024

SPATE

Creatine’s benefits extend well beyond athletic performance

Creatine is evolving from a sports nutrition supplement into a potential women's health ingredient, with growing evidence for benefits spanning strength, cognition, mood, pregnancy, and healthy aging, though key research gaps remain in pregnancy and perimenopause.

STRONGEST EVIDENCE Physical performance

- **Muscle strength and power**
- **Exercise recovery**
- **Lean body mass**

EMERGING EVIDENCE Whole-body health

- Cognitive function
- Mood and depression symptoms
- Sleep quality and duration
- Bone health
- Healthy aging

Strongest evidence remains in physical performance and muscle-related outcomes, particularly when combined with resistance training.

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GLP-1s are changing lives and creating the next frontier

~130M clinically indicated across the United States^

~100M

Obese

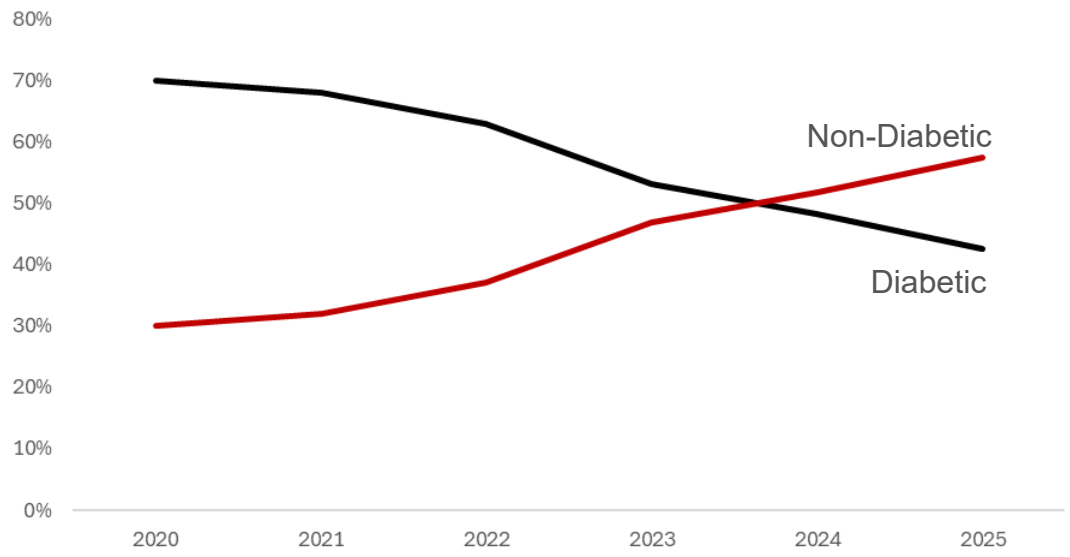
~45M

Over-Weight*

~35M

Type 2 Diabetic

Medical records show weight loss is now the #1 reason for taking GLP-1s



New weight loss GLP-1 users are driving adoption

Left Source: Centers for Disease Control; Middle & Right Source: Management Science Associates, Inc.

Notes: *Over-weight with one or more comorbidities; ^Defined as over-weight/obese/diabetic

Right Chart: Sums may not equal totals in middle chart due to rounding

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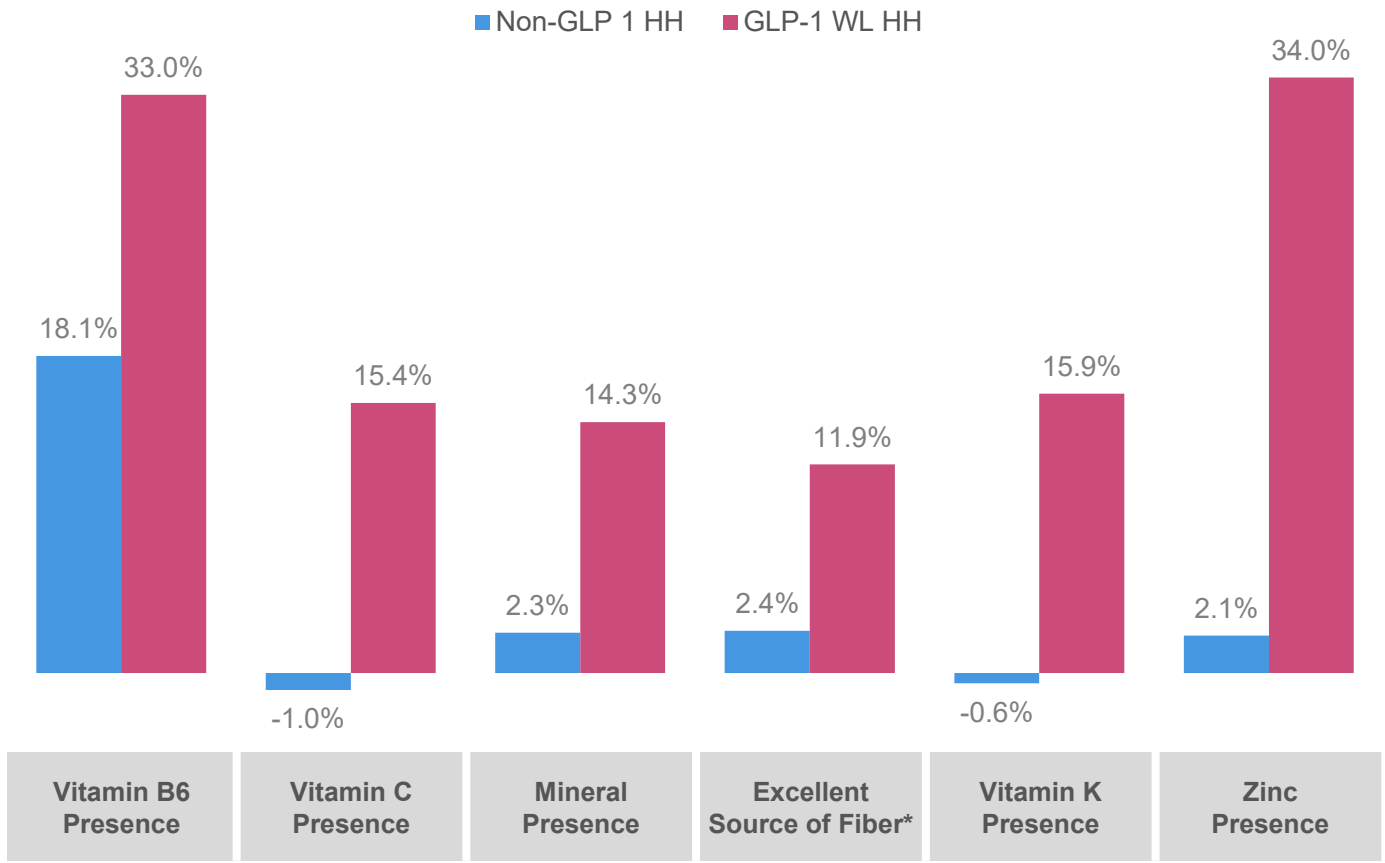
Understanding the GLP-1 consumer need to prioritize nutrients

Nutrient Purchasing (Total Store) | GLP-1 HH versus Non-Users



- ***GLP-1s work by reducing appetite, which helps people eat less— but when calorie intake drops below certain levels, it can make it hard to get enough of the nutrients the body needs.***
  - Nutrients of concern for people taking GLP-1s include the minerals calcium, iron, magnesium, and zinc, and vitamins A, D, E, K, B1, B12, and C.

** Indicates a Qualified attribute that is derived from the ingredient label. All other attributes are Stated claims on packaged.*

NielsenIQ, Homescan GLP-1 Panel Survey (Jan/Feb 2026 Nutritional considerations with antiobesity medications (Nutritional considerations with antiobesity medications - Almandoz - 2024 - Obesity - Wiley Online Library), Mechanisms of GLP-1 Receptor Agonist-Induced Weight Loss: A Review of Central and Peripheral Pathways in Appetite and Energy Regulation – (Mechanisms of GLP-1 Receptor Agonist-Induced Weight Loss: A Review of Central and Peripheral Pathways in Appetite and Energy Regulation – ScienceDirect)

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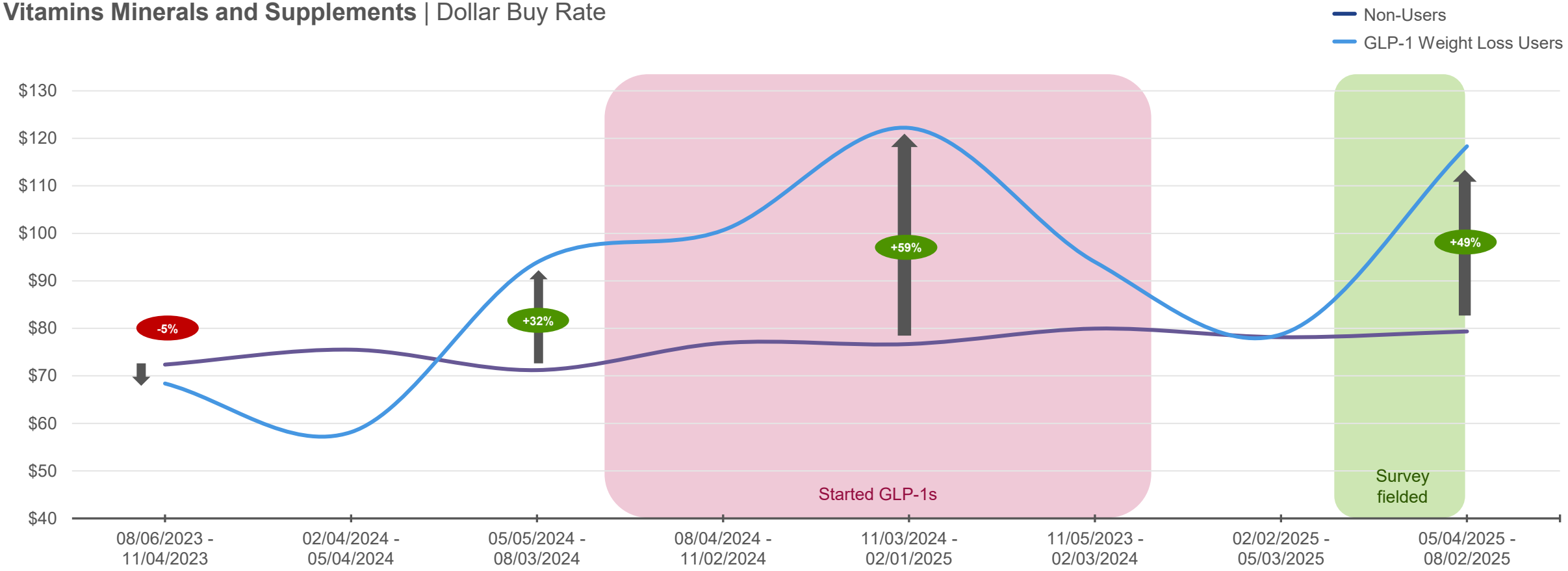
A view into the GLP-1 user journey unlocks key consumption moment opportunities

GLP-1 Buyers (Started 7-11 Months Ago) Compared To Non-Users

Vitamins Minerals and Supplements | Dollar Buy Rate



Source: NIQ, Homescan GLP-1 Panel Survey (Jun/Jul 2025); Total US; Total Outlets; Health & Beauty Care; $ per buyer; Quarterly periods through 13 weeks ending August 2, 2025

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