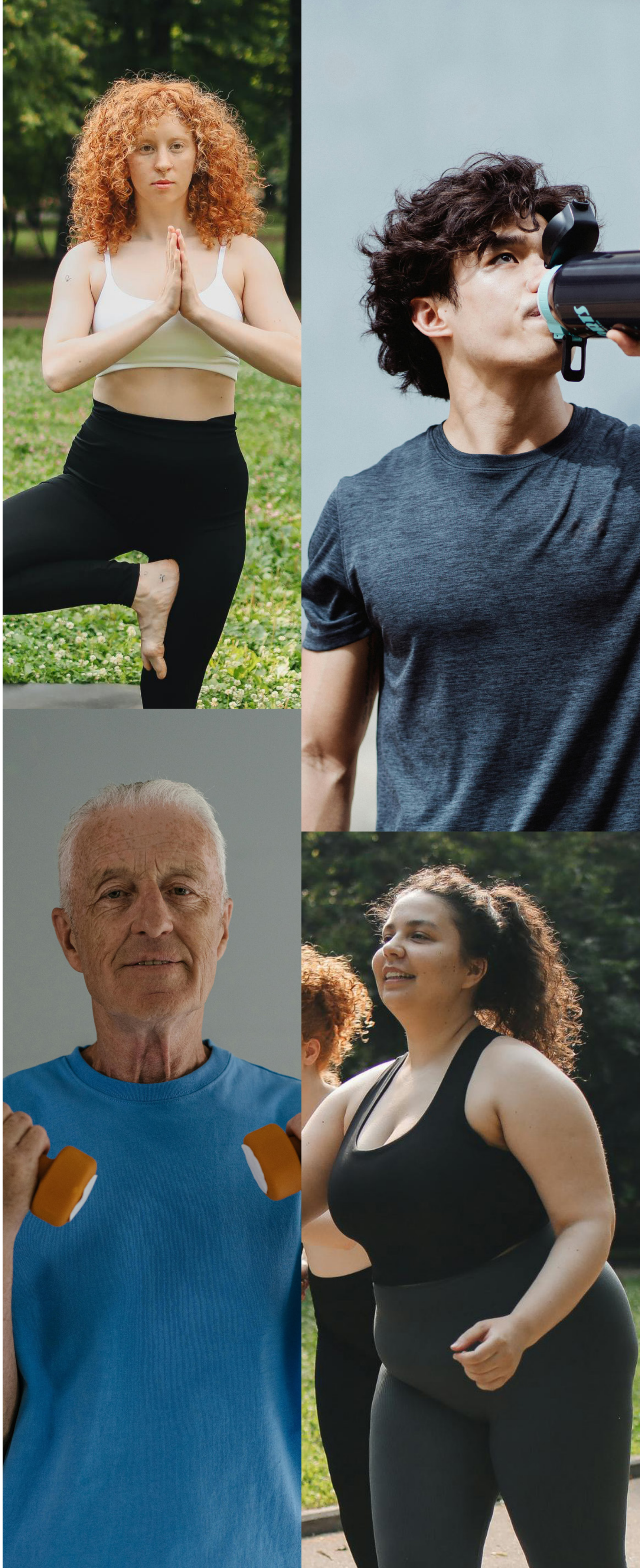
NielsenIQ

Global State of Health & Wellness 2025 Regional Insights Companion: Western Europe (WE)



Overall health and wellness landscape in WE: Trends to watch that are shaping today's industry

Featured countries

France

Germany

Italy

Netherlands

Spain

UK

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

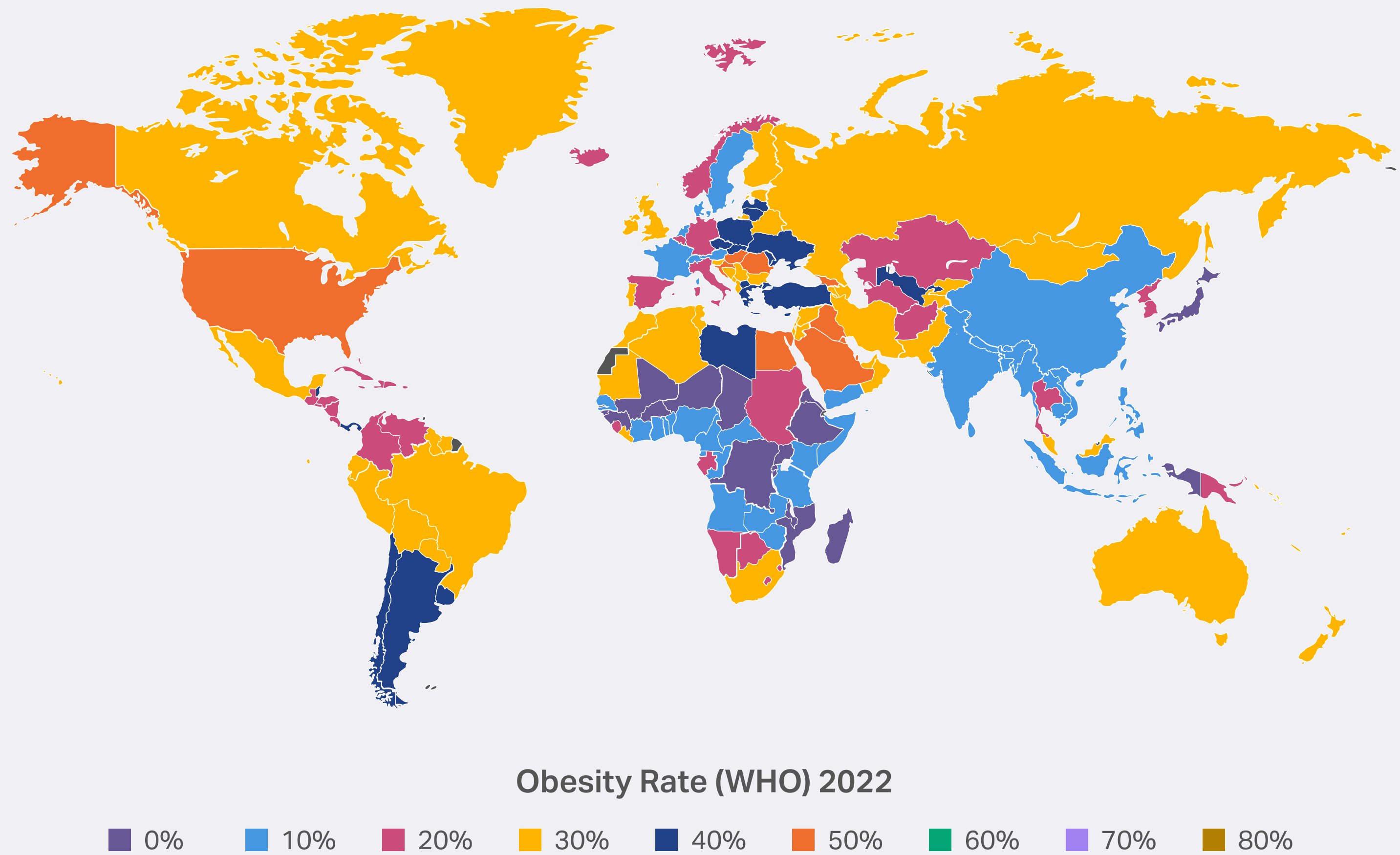
Aging population

- Population aging has been apparent for several decades in Europe, driven by historically low fertility rates, increasing life expectancy, and, in some cases, migratory patterns (EU member states characterized by net inflows of retired people).
  - Population projections suggest that the aging of the EU's population will quicken in the coming decades, with a rapid expansion in the number and share of older people.
  - By 2050, the population of older people (those aged 65 and up) in the EU-27 will increase significantly—rising from 91 million at the start of 2019 to 130 million by 2050. In particular, the number of people aged 75-84 will increase 56% by 2050, while those under 55 will decrease by 14%.

Health equity

- According to the World Health Organization (WHO) 2019 report covering health equity in Europe:
  - Children and adults from the least-affluent households across the WHO European region continue to report higher levels of poor well-being (measured by life satisfaction) than those from more-affluent households.
  - Inequities in life satisfaction are lowest in Nordic countries and highest in southern Europe, while the western Europe region falls in the middle.

Obesity



Source: The World Health Organization (WHO), Obesity Rates by Country. WHO defines obesity as a body mass index (BMI) greater than or equal to 30 kilograms per square meter of body area (BMI ≥30kg/m²).

Obesity poses an increasing challenge in Europe, particularly in Portugal, Germany, and the UK. According to WHO, around one in six people across Europe are obese, but this rises to one in two when "overweight" is added in. Countries less affected include France, the Netherlands, and Switzerland.

France, Germany, Italy, Netherlands, Spain, and UK health and wellness focus (vs. global benchmarks)

Audience engagement

- Consumers across Western Europe are slightly less likely to be actively engaged in their health and wellness on a regular basis, compared with some other regions.
- Two-thirds (64%) perceive themselves as proactive in doing things to improve their health and wellness on a regular basis (e.g., exercising, monitoring health metrics, watching what they eat). This is below the global average (70%).
- Half plan to do more physical exercise in the coming 12 months, and 30% plan to take more vitamins/supplements.
- 30% say seeking out the latest health and wellness products, diets, and routines to meet evolving health goals is more important to them now than it was five years ago—fewer than the global average of 39%.

Barriers

- As with most regions, cost is the most prevalent barrier. Over half (53%) say the cost of healthier alternatives (compared with standard options) is holding them back from making healthier life choices.
- Lack of time and lack of motivation are the next most prevalent issues, with one-quarter (26% and 25%, respectively) of respondents citing these barriers.
- Availability of healthy alternatives is relatively good in Western Europe—only 23% consider this a barrier (vs. 31% globally).

Trust and influence

- Trust in the effectiveness of health and wellness products is comparatively high in Western Europe. Only 18% cite lack of trust in such products being a barrier (vs. 25% globally).
- Despite this, 59% are still more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio.
- The top factors that are of *significant* influence when deciding which health and

wellness products/services to buy are:

- Recommendation by medical health specialists: 44%
- Availability of detailed information on its usage, performance claims, and application: 37%
- Ability to inspect, trial, or sample the product: 37%
- Promotional offers, discounts, loyalty points, or special buys: 34%
- Ability to ask questions and get expert advice from sales or medical representative: 31%
- Ease of returning the product for a refund or exchange: 31%

Mental health and well-being

- 54% find looking after their emotional/mental health is more important to them now than it was five years ago (vs. 63% global average)
- Additionally, significant numbers are placing more importance now on several other factors that are directly related to mental and emotional wellness:
  - Getting good sleep: 57%
  - Healthy nutrition: 51%
  - Exercise and cardio fitness: 43%
  - Following a regular self-care routine: 41%
  - Looking their best: 34%
- Within their regular wellness or self-care routines, people in Western Europe plan to do more of the following in the coming year:
  - Spending more time in nature: 51%
  - Physical exercise: 50%
  - Spending time with family/friends: 47%
  - Taking vitamins/supplements: 30%
  - Massage/muscle relaxation: 28%
  - Skin creams or applications: 28%

Nutrition

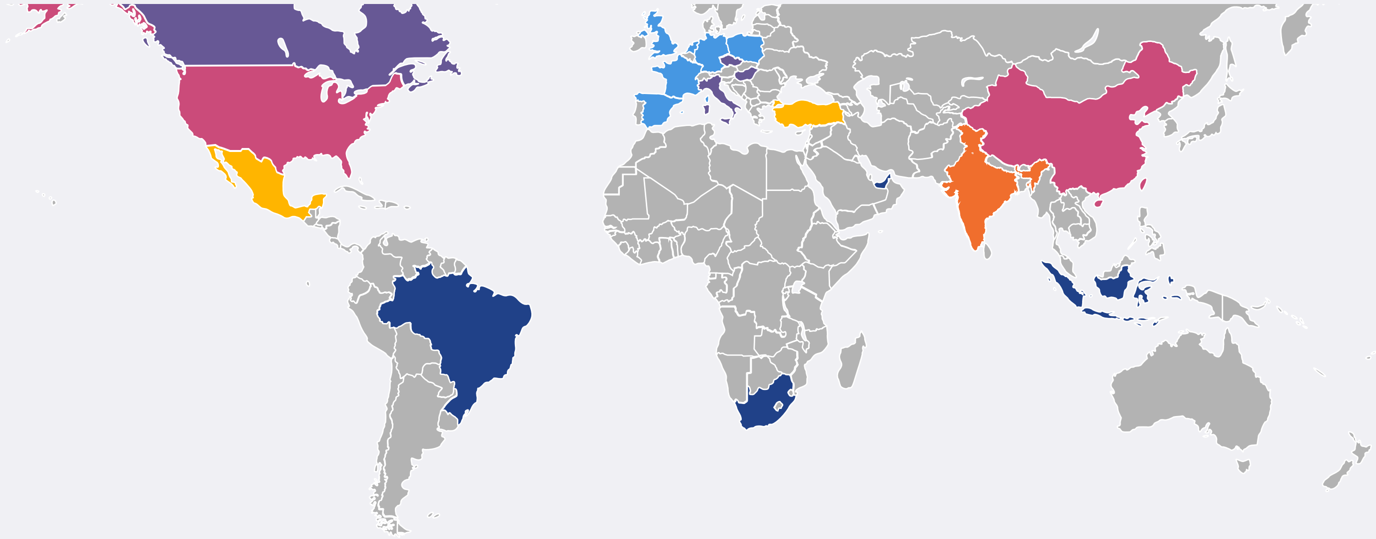
- 51% say healthy nutrition is more important to them now than it was five years ago (vs. 58% global average)
- Compared with some other regions, familiarity with certain food types is lower in Western Europe:
    - 43% are "*very* familiar" with high-fiber foods (vs. 54% globally)
    - 26% are "*very* familiar" with ultra-processed foods (vs. 36% globally)
    - 25% are "*very* familiar" with high-protein plant-based foods (vs. 35% globally)
    - 20% are "*very* familiar" with probiotic foods (vs. 33% globally)
- Most food types are viewed positively by the majority of consumers in Western Europe, although at slightly lower levels than the global average.
    - 78% hold a positive view of high-fiber foods (vs. 83% globally)
    - 67% for superfoods (vs. 74% globally)
    - 61% for probiotic foods (vs. 71% globally)
    - 61% for high-protein plant-based foods (vs. 69% globally)
- However, ultra-processed foods are more likely to be viewed negatively in Western Europe, with 47% saying they have a negative view of these foods (vs. 39% globally).
- Looking at future buying intentions, high-fiber foods are the most popular, with 40% saying they plan to buy more of this food type in the coming year. This is followed by high-protein plant-based foods, superfoods, and probiotic foods.

Weight loss

- Nearly half (47%) of consumers in Western Europe are placing greater importance on having a healthy body weight, shape, and muscle tone than they did five years ago; 43% feel the same about exercise and cardio/heart fitness.
- The primary motivator for achieving and maintaining a healthy body weight is the overall health benefits this brings (64% say this is a "*very* important" motivation). This is followed by appearance (37%).
- Western Europeans' familiarity with weight loss drugs is lower than some other regions—29% say they have a level of familiarity (vs. 37% global average).
- Their perception of weight loss drugs is also slightly more likely to be negative than positive—28% having negative perception vs. 25% having positive perception, while 47% are neutral.

- The number saying they are currently using a weight loss drug is also around half that of the global average: 4% (vs. 8% global average). And 5% say they've used one in the past (vs. 8% global average).
- Despite lower levels of current use of weight loss drugs, consumer willingness to use these drugs in the future (if recommended by a health professional) is evenly balanced between 36% saying they would and 36% saying they wouldn't. However, those in the "wouldn't" category are weighted toward saying "*definitely* not" rather than "*probably* not."

Percentage holding "very positive" views of weight loss drugs



26.a) "Very positive" NIQ 2025 Global Health & Wellness survey results

[2% to 5%] [5% to 8%] [8% to 12%] [12% to 17%] [17% to 19%] 32%

Source: NIQ's 2025 Global Health & Wellness survey, fielded Jan.–Feb. 2025, 19 countries
Map visualization is powered by NIQ Partner Network member Mapidea

Conscious buying

- Familiarity with the concept of conscious buying is lower in Western Europe (47%), compared with the global average (57%).
- However, 64% say it's important to them that the health and wellness products they buy are also ethical and/or environmentally friendly—which is closer to the global average of 70%.
- Most people also claim they're willing to put their money where their mouth is, with 63% willing to pay more (mainly up to 10% more) for health and wellness products that are also ethical and/or environmentally friendly.
- One in five are willing to pay over 10% more (compared with a standard product) for specific features, among them:
    - Cruelty-free or higher animal welfare products: 23%
    - Local source of origin: 21%
    - Organic, non-GMO, and/or made from natural ingredients: 20%
- The primary motivation for "conscious" buying is personal wellness benefits (61%), followed by environmental sustainability (45%) and ethical considerations such as fair trade or cruelty-free (39%).

Health tech

- Appetite for health-focused technology products is strong in Western Europe, with 64% saying they would prefer a technology product that offered extra health and wellness features over one that did not. This is lower than the global average of 74%, however.
    - Examples of such products include health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, and products with more effective air/water filtration.
- Similarly, 51% believe that health tech products are effective in helping to improve their health and wellness—a solid number, but lower than the global average of 63%.
- The primary motivations for Western Europeans in buying health tech are:
    - Cooking more healthily: 40%
    - Improving mental health and well-being: 35%
    - Monitoring physical activity: 33%
    - Improving sleep quality: 33%
    - Monitoring diet and nutrition: 26%
- Price (70%) and features and functionality (52%) are the two most common factors that people in this region say influence their purchase decision—far more than say the same for brand reputation (30%).

Opportunities for manufacturers and retailers selling in France, Germany, Italy, Netherlands, Spain, and the UK

Healthy foods (including organic, natural ingredients), nutrition-enriched foods, and cruelty-free products are well-positioned for growth.

- Half or more of Western European consumers say they're willing to pay more (compared with a standard product) for products that:
  - support healthier cooking/eating options
  - provide enhanced nutritional benefits (vitamins, minerals, high fiber, etc.)
  - or have specific "conscious" buying claims (organic, GMO-free, sustainably produced/packaged)
- Opportunity for premiumization is most obvious in products that:
  - offer enhanced nutritional benefits
  - are organic, non-GMO, or made of all-natural ingredients
  - are produced via cruelty-free or higher animal welfare means
  - are sourced locally
    - For these types of products, one in five Western European consumers say they are willing to pay over 10% more than they would for a standard product.

Products that help consumers de-stress, relax mentally and physically, and sleep better are also positioned for growth:

- 57% say getting good sleep is more important to them now than it was five years ago
- 51% plan to spend more time in nature, as part of their self-care routine, in the coming year
- 28% plan to do more muscle relaxation or massage
- 25% plan to do more yoga or meditation

Health tech is a growing opportunity in Western Europe.

- Half of Western European consumers believe that health-focused technology products are effective in helping improve health and wellness.
- Consumers continue to place high importance on tracking their health, and there's strong potential for ongoing organic growth, as the market is not yet saturated. In the EU5, for example, 45% of those who bought wearables last year were first-time buyers (Source: NIQ gfknewron Consumer, Core wearables, EU5).
- Wearables also have a price point that makes them accessible to a large proportion of consumers, including those in emerging markets.
- The incorporation of AI into health tech offers premiumization potential—especially

around personalized recommendations:

  - 50% would use a digital device or app that automatically monitors their daily health and recommends actions based on health preferences
  - 47% say they would pay more for a health or wellness product that can be tailored to their preferences
  - 43% would use an app, screening device, or personalized shopping list to ensure the products they purchase align to their health priorities

- The two most common factors that people in this region say influence their purchase decision around health tech are price, followed by features and functionality. The product's brand reputation comes in fourth. With increasing competition from low-priced and feature-rich emerging brands gaining share in Western markets, this is an area that established brands must focus on in their strategic planning and product innovation.

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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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