NielsenIQ

Global State of Health & Wellness 2025 Regional Insights Companion: North America (NA)

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

Featured countries

Canada

US

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

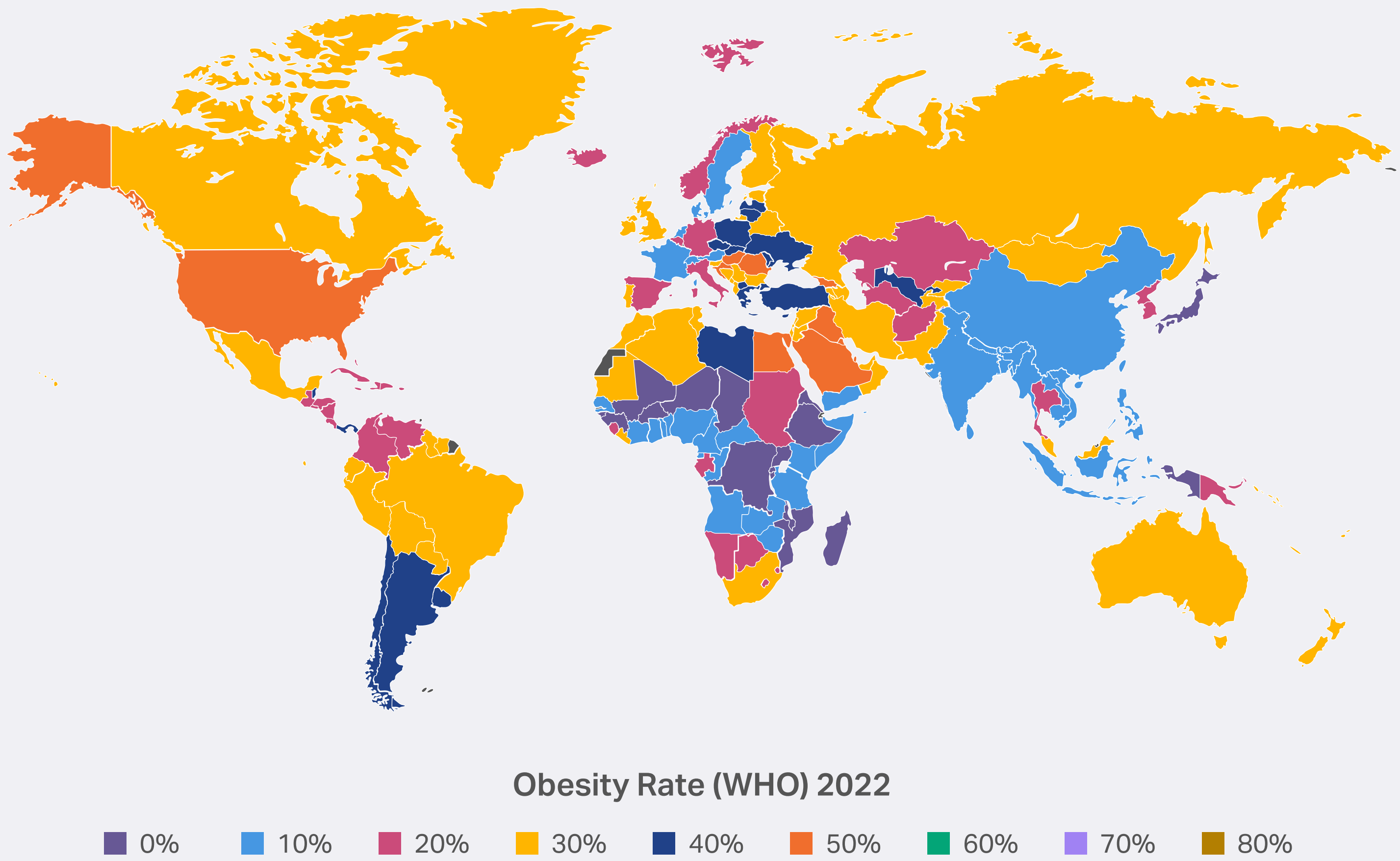
Aging population

- Canada's population is aging rapidly, with Boomers mostly retired or retiring soon, Canadians living longer, and fewer births. Approximately 7.6 million Canadians were aged 65 and older on July 1, 2023—accounting for almost one-fifth (19%) of the total population. By 2030, seniors could represent 21% to 23% of the total population.
- According to the US 2020 Census, one in six people in the US were 65 and older, and this segment is growing at a fast rate. By 2035, it's estimated that there will be more older adults than kids in the US.

Health equity

- Health equity is a key challenge in the US, where there is no universal healthcare system. It's better in Canada, given the universal healthcare system, but inequalities remain between rural and urban and high- and low-income populations.
    - Canada has a universal healthcare system, meaning the principal expectation is that all Canadians have the same access to healthcare and receive the same treatment. However, factors such as income, race, social status, and education have the strongest effects on health equity in Canada. Recent studies have also shown that, on average, the lowest-income Canadians get around 11 fewer healthy years throughout their lifetime than the highest-income Canadians.
    - Inequitable access to healthcare is one of the most fundamentally pressing issues facing US society: 46% of low-income and 27% of high-income adults have skipped a medical visit, test, treatment, follow-up, or prescription fill within the last year solely because of cost.

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 $\geq 30 kg/m^2$).

- The rise in levels of overweight, obesity, and cardiovascular disease (CVD), particularly in the US, has led to increased pressure on policymakers to implement changes to promote healthy diets. According to the US National Library of Medicine, projections estimate that over 85% of US adults may be overweight or obese by 2030, and 45% may have some form of CVD by 2035.
- According to USA Today, the top 10 health conditions that have the greatest impact on Americans' quality of life include hypertension (high blood pressure), coronary artery disease, Type 2 diabetes, and Crohn's disease—all of which are directly treatable or mitigated by healthier eating and/or wellness activities.

Canada and US health and wellness focus (vs. global benchmarks)

Audience engagement

- People in North America are slightly less likely than the global average to describe themselves as proactive when it comes to managing their health and wellness:
  - 23% agree *strongly* that they are proactive in doing things to improve their health and wellness on a regular basis (e.g., exercising, monitoring their health metrics, watching what they eat) vs. 28% global average
    - The gap gets smaller when including those who describe themselves as *"strongly"* and *"somewhat"* proactive: 68% across North America vs. 70% global average.
  - 56% plan to do more physical exercise in the next 12 months, and 37% plan to take more vitamins/supplements
  - 32% say seeking out the latest health and wellness products, diets, and routines is more important to them now than five years ago vs. 39% global average

Barriers

- Price is the most prevalent barrier, with 57% in North America (vs. 54% global) saying they find the cost of healthier alternatives over standard options to be a major barrier that's preventing them making healthier life choices.
  - In fact, North Americans are significantly *less* likely than consumers in other regions to be willing to pay extra (compared with the standard product) for ones with extra health or wellness attributes. That holds true across enriched-nutrition products, organic or all-natural ones, products produced or packaged in an environmentally friendly way, or even allergy-safe products.
  - This correlates to the 75% in North America who believe that companies have an obligation to ensure health-focused products are as affordable as unhealthy ones.
- Only one-quarter (24%) of North American consumers find availability an issue (vs. 31% globally).
- One of the biggest differences between North America and global findings is motivation: 30% of consumers in North America see their level of motivation as a

major barrier to making healthier life choices (vs. 25% globally). This resonates with their perception of their own proactivity around taking regular action to improve their health.

Trust and influence

- One in five (21%) respondents in North America say they do not trust that health products or services will be effective—and find this to be a major barrier to making healthier choices. However, trust improves when a brand has a strong health and wellness focus across its entire product portfolio: 65% of consumers say they are *more* likely to buy from companies like these.
- The top factors that are of *significant* influence when deciding which health and wellness products/services to buy are:
    - Recommendation by medical health specialist: 45%
    - Availability of detailed information on its usage, performance claims, and application: 35%
    - Ability to inspect, trial, or sample the product: 32%
    - Promotional offers, discounts, loyalty points, or special buys: 32%
    - Ease of returning the product for a refund or exchange: 32%

Mental health and well-being

- Looking after their emotional or mental health is one of the top three factors that are more important to North Americans now than five years ago, with 59% agreeing to this. That is slightly under the global average of 63%.
- However, 62% say that getting good sleep—a major contributor to mental and emotional well-being—is more important to them now, which is on a par with the global average (63%).
- Additionally, 48% are placing greater importance now on following a regular self-care routine; three in 10 plan to do more muscle relaxation; and three in 10 also plan to do more yoga or meditation this year.

Nutrition

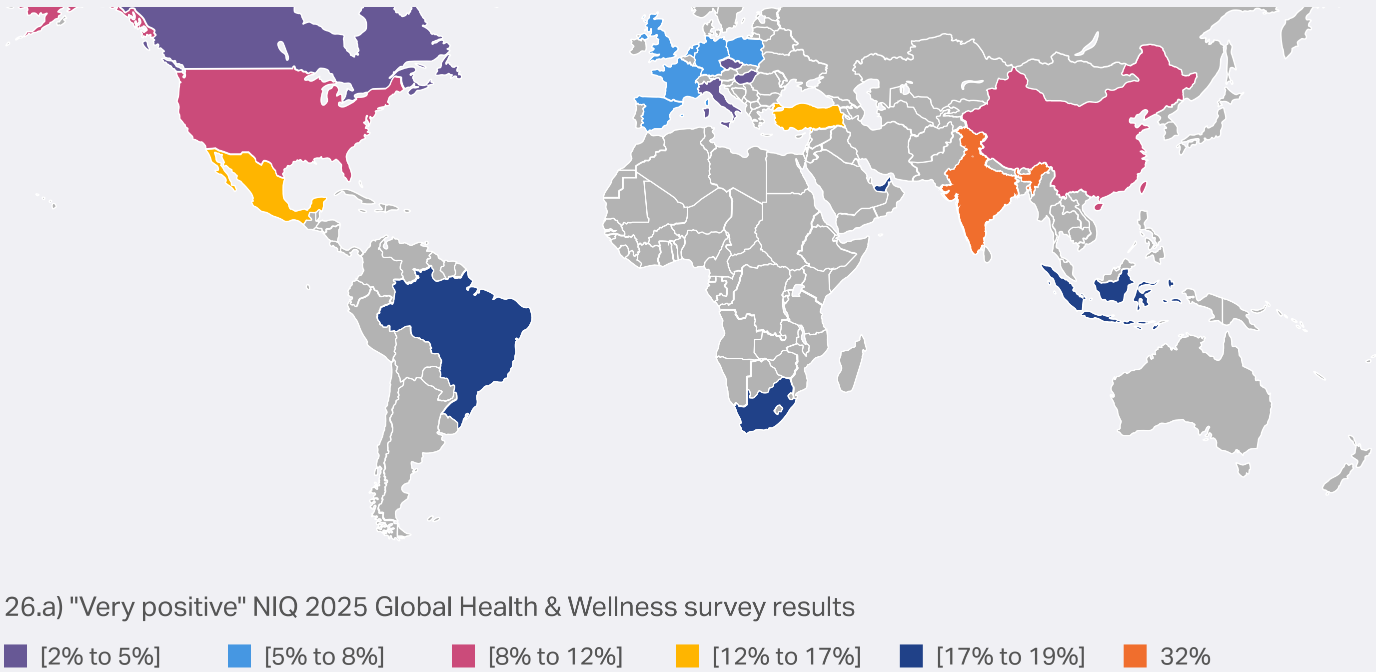
- The products that consumers in North America are most likely to be willing to pay more for are those that offer healthier cooking or eating options (such as those with low or no sugar, salt, carbs, caffeine, or alcohol), as well as those with enhanced nutritional benefits (such as added vitamins, high in fiber, etc.).

- In addition, 20% say they would pay over 10% more (compared with the standard product) for ones that are organic, non-GMO, or all-natural.
- When it comes to different food types, positive perception among North Americans is highest for high-fiber foods (82%), superfoods (72%), and probiotic foods (67%).
    - This correlates with consumers' buying intentions, with one-third or more saying they plan to buy more of these food types in the coming year.

Weight loss

- Healthy body weight is more important now than five years ago for 55% of North American consumers, with the most important motivations for maintaining or achieving a healthy body weight being health reasons, followed by appearance.
- Half (51%) of North American consumers also say that exercise and cardio/heart fitness are more important to them now, and 56% plan to increase their physical exercise in the coming 12 months.
- Familiarity with weight loss drugs is very slightly lower in North America (36%) vs. the global average (37%), with the US higher (43%) and Canada lower (28%).
- Positive perception of weight loss drugs, on the other hand, is notably lower in North America (25%) vs. the global average (31%)—especially in Canada (19%).
- Compared with the global average, fewer North American consumers say they are currently using weight loss drugs (6% vs. 8% global average)—although this is due to lower figures in Canada, rather than in the US.
- North Americans are also more likely to say that they would *not* use weight loss drugs in the future, even if recommended to do so by a healthcare professional (39% *"definitely"* or *"probably"* would not use them vs. 32% *"definitely"* or *"probably"* would).
    - This correlates with higher-than-average numbers in North America saying that the cost of the drug, or whether it's covered by insurance, is a major barrier (49% vs. 34% global average).

Percentage holding “very positive” views of weight loss drugs



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

- Awareness of, and support for, “conscious buying” when making health and wellness purchases is slightly lower in North America vs. other regions:
  - 47% are familiar with the concept (vs. 57% globally)
  - 61% say it’s important to them that the health and wellness products they buy are also ethical and/or environmentally friendly (vs. 70% globally)
- This lower-than-average trend is also seen in the numbers willing to pay more for health products that are also ethical or eco-friendly. Despite that, a significant portion of consumers in North America are willing to pay more for such items, in particular:
  - Organic, non-GMO, and/or all-natural ingredients: 49%
  - Cruelty-free or higher animal welfare products: 55%
  - Local source of origin: 55%
  - Socially responsible (e.g., supports communities, vulnerable populations, charities): 49%

Health tech

- Consumers in North America show a relatively high appetite for health-focused technology, although with a clear focus on price:
    - 22% would "definitely" prefer a technology product that offered extra health and wellness features over one that did not (vs. 31% globally)
        - Examples of such technology include health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, or products with more effective air/water filtration.
    - 42% would prefer such products, "depending on price"
    - 52% believe that health tech products are effective in helping to improve their health and wellness (lower than the global average of 63%)
- The leading drivers for North Americans buying health tech include:
    - Cooking more healthily: 41%
    - Improving sleep quality: 40%
    - Improving mental health and well-being: 38%
    - Monitoring physical activity: 36%

Opportunities for manufacturers and retailers selling in Canada and US

For a deeper dive into the US market, watch our on-demand webinar: What's Next In Wellness: A Guide to 2025.

The top factors that most North American consumers say are more important to them now than five years ago are:

- Getting good sleep: 62%
- Looking after emotional or mental health: 59%
- Aging well (i.e., proactive steps to ensure active and healthy senior years): 59%
- Protection from disease, ailments, or medical conditions: 58%
- Healthy nutrition: 55%
- Healthy body weight and shape: 55%

Products and services focused on these areas of growing importance to consumers will be well-positioned to capture their increasingly intentional spending. However, consumer focus on cost remains a key factor, particularly in North America. Consumers here are generally less willing to pay more (compared with the standard product) for ones with extra health or wellness attributes.

What we are seeing is that **products offering personalization and convenience—or that make it easier for consumers to live healthier lives—are likely to drive demand and the opportunity for premiumization** in North America:

- 48% are willing to pay more for health and wellness products that can be tailored to their preferences
- 46% say the same for health and wellness products that offer convenience, such as meal kits, pre-prepared meals, or on-the-go packaging
- 48% would allow a company to access some of their personal health data (e.g., weight, blood pressure, heart rate, average daily steps) to help them make healthier decisions
- 56% want all their personal health tracking statistics to be available to them in a single place and would favor a brand that enabled that

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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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