WOMEN’S WELLNESS:
MASTERING THE MARKET

A LIFECYCLE VIEW OF FEMALE SUPPLEMENT BEHAVIOR

Presented by: Len Monheit

LEARN WHAT YOUR CUSTOMERS ARE REALLY LOOKING FOR...

INDUSTRY TRANSPARENCY CENTER

Our insight reports offer trusted data analysis and insights to enable more informed decision-making in these categories and across the health ingredients universe. We have reports available for Consumer and Pet Supplement Users, Functional Food and Beverage Consumers and Dietitians.

ITC delivers insights and assists our clients in developing a global strategy that leads to effective market action.

We survey thousands of consumers, health care professionals, and other group mindsets globally to help companies validate market assumptions, learn about consumer mindsets, compare year over year attitudes and behaviors, and uncover insights into emerging and high potential ingredients and formats.

We work with industry leaders, experts and influencers across the entire food, beverage, pet and supplement industry:

SUPPLIERS

BRANDS

INFLUENCERS

RETAILERS

OUR CORE COMPETENCIES:

INDUSTRY TRANSPARENCY CENTER

ITC INSIGHTS:

- Annual insight reports help identify where the best opportunities are in more than seven key ingredient categories.
- Custom reports help companies at any stage in the value chain attain or retain global leadership.
- Trusted data analysis and global market reports enable more informed decision-making.
- Expansion into consumer and pet supplement users, functional food and beverage consumers and dietitians.
- Defines a global strategy for driving category growth and the implementation of effective action in the market.

EDUCATION AND INSIGHTS:

- Provide free virtual events throughout the year with our Future of the Microbiome series and Naturally Informed series.
- Making the most up to date happenings, and deepest content within the natural products industry accessible for all.

CATEGORY STEWARDSHIP :

- Manage stewardship programs and association management for emerging and vibrant categories within the Natural Products Industry.
- Provide leadership, clarity and solutions to category-based issues so that categories can reach their full potential without exploitation.
- Deliver content, data and insights as well as strategic guidance in the industry.

AT ITC, WE DEEP DIVE INTO INGREDIENT CATEGORIES SUCH AS:

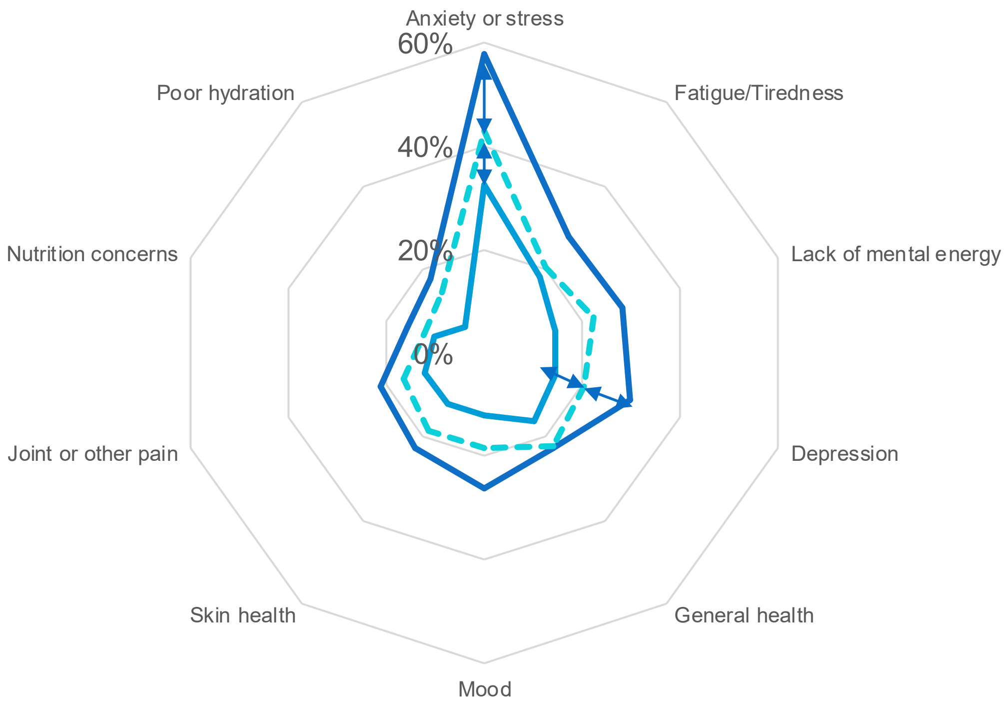
PREBIOTICS PROBIOTICS OMEGA-3S COLLAGEN ASTAXANTHIN MAGNESIUM MUSHROOMS ASHWAGANDHA

HEALTH CONCERNS AND WHAT THEY TAKE SUPPLEMENTS FOR (1st 10): AGE & GENDER(F), US

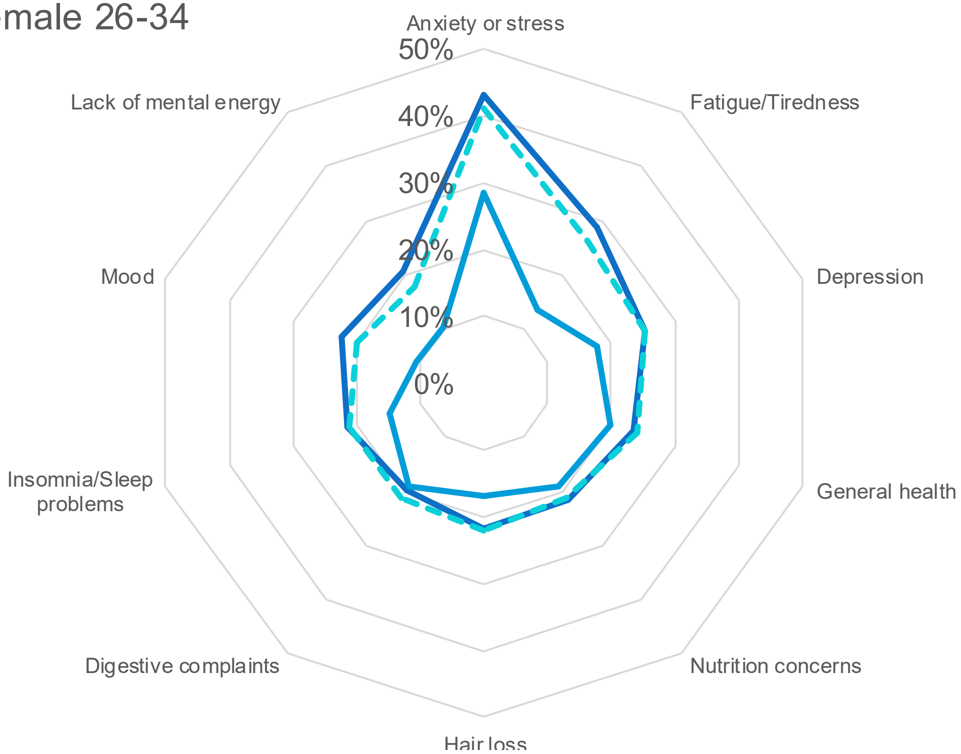
Key Insights:

- In the US, there is a large white space among younger females between those who are currently consuming products for a concern and those willing to do so. For females aged 18-25, this gap is seen in areas like anxiety or stress, lack of mental energy, skin health, mood, depression and general health. For females aged 26-34, the gap is primarily in anxiety or stress, fatigue/tiredness, depression, and mood.
- Looking at the gap between those with a concern and those willing to consume to address it, the main areas are anxiety or stress, fatigue/tiredness, depression, and mood for females aged 18-25. For those aged 26-34, the main gap is in fatigue/tiredness.

US Female 18-25



US Female 26-34



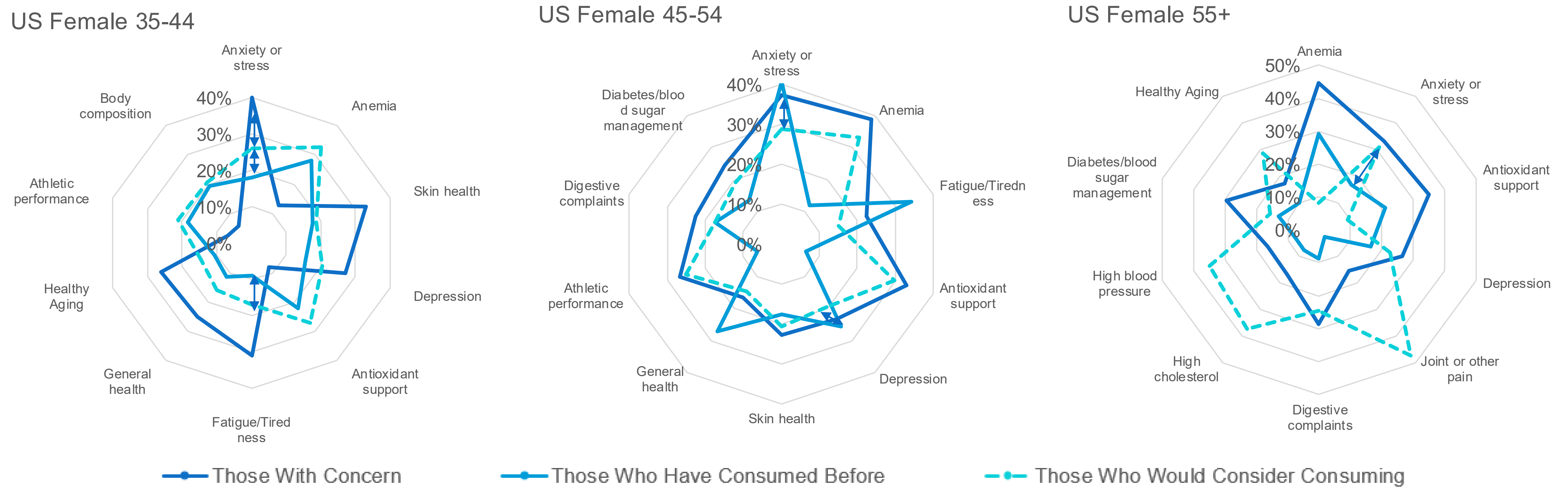
Those With Concern — Those Who Have Consumed Before — Those Who Would Consider Consuming

Note: US Female 18-25 n=57, US Female 26-34 n=111, US Female 35-44 n=108, US Female 45-54 n=125, US Female 55+ n=97. Results shown for top 10 health concerns. Question: “Which of the following health conditions or concerns currently impact or impacted you within the past year?”

HEALTH CONCERNS AND WHAT THEY TAKE SUPPLEMENTS FOR (1st 10): AGE & GENDER(F), US

Key Insights:

- For older females in the US and their top concerns, the white space between those currently consuming for a concern and those willing to consume is strong for depression, fatigue/tiredness, general health, and anxiety or stress for females aged 34-44; for females aged 45-54, the concerns are anemia, antioxidant support, and athletic performance; and for females aged 55 and above, the concerns are healthy aging, high blood pressure, high cholesterol, and joint or other pain.
- For the gap between those with a concern and those currently consuming to address it, we see anxiety or stress, skin health, depression, fatigue/tiredness, and healthy aging for females aged 35-44; anxiety or stress and fatigue/tiredness emerge for females aged 35-54; and for females aged 55 and above, we see anemia, antioxidant support, and diabetes/blood sugar.



Note: US Female 18-25 n=57, US Female 26-34 n=111, US Female 35-44 n=108, US Female 45-54 n=125, US Female 55+ n=97. Results shown for top 10 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?"

WOMEN'S WELLNESS USER PERSONAS (U.S.)

2025 ITC INSIGHTS CONSUMER SUPPLEMENT SURVEY

10 In-Depth Profiles | Global + US Focus | General Users n=4,029

Based on survey data from: US Users

Prepared by: Industry Transparency Center (ITC)

Female General User · Ages 18–25

THE CURIOUS STARTER

Curious, beauty-forward, and budget-conscious — she's just beginning her supplement journey, driven by anxiety, aesthetics, and whatever's trending on her feed.

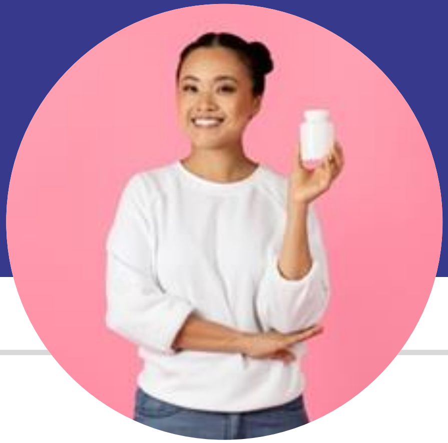
33%
Daily Supplement Use

$20–$29/mo
Avg. Monthly Spend

18% GLP-1
GLP-1 Usage

Female General User · Ages 18–25

THE CURIOUS STARTER (CONT.)



DEMOGRAPHICS

Survey N: n=57 (US users)
Income: Split between entry-level earners (<$30K, 19%) and mid-household earners ($70K–$99K, 26%), reflecting mixed student/early-career profiles
GLP-1 Usage: ~18% report GLP-1 drug use — notable for her age group; supplement nutrient support is an emerging adjacency

HEALTH CONCERNS & MOTIVATIONS

Primary Concerns: Anxiety/stress (58%) — the single highest anxiety rate of any segment in the study; Depression (30%), Skin health (23%), Hair loss (14%)

Notable Patterns: Strong mental wellness + beauty crossover; anxiety and appearance are the dual entry points for supplement interest

Largest Fulfillment Gap: High anxiety/stress concern with moderate supplement use for it — a major whitespace for mood supplement positioning

SUPPLEMENT USAGE BEHAVIOR

Usage Frequency: 33% take supplements daily; 23% use 1–3x/week — habits are forming but not yet fully entrenched

Top Motivations: General health & well-being (79%), Condition-specific benefits (33%), HCP recommendation (32%)

Preferred Formats: Gummy (54%) — the highest gummy preference of any segment; Pill (42%), Chew (21%)

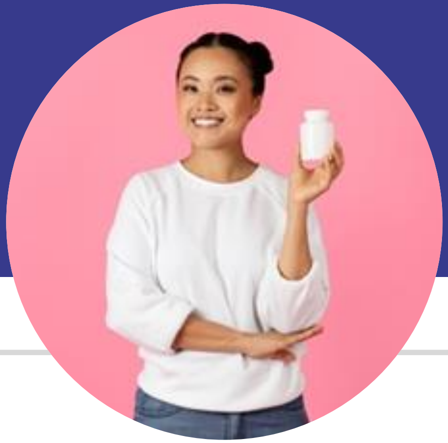
Format Appeal: Pleasant taste (54%), Easy to swallow (68%), Single daily dosage (37%)

Monthly Spend Detail: Mostly $20–$29/month (33%); very few spend over $60/month — the most budget-constrained female segment

Key Note: Core vitamins are essential to 35% (would not cut); 53% would trade to generics — significant price sensitivity

Female General User · Ages 18–25

THE CURIOUS STARTER (CONT.)



SUPPLEMENT FAMILIARITY

Purchase Attributes: Proof of safety (21%), Recommended by friend/family (14%), Natural source (14%)

Research Sources: Brand website (58%), Ingredient website (39%), Friends/family (32%), Online influencer (14%)

Influencer Reliance: 14% cite online influencers — discovery is highly social; peer and creator content dominates

Sustainability: Always or frequently influences 45% of purchase decisions — the most eco-motivated female age cohort

SHOPPING BEHAVIORS & TRUST DRIVERS

Estimated Monthly Budget: $15–$25/month — the most budget-sensitive female cohort

Preferred Formats: Gummies over-index strongly vs. older females; accessible, fun formats lower the trial barrier

Top Trust Factors: Quality seal on label (42%), Detailed ingredient QR/website (40%), HCP recommendation (39%)

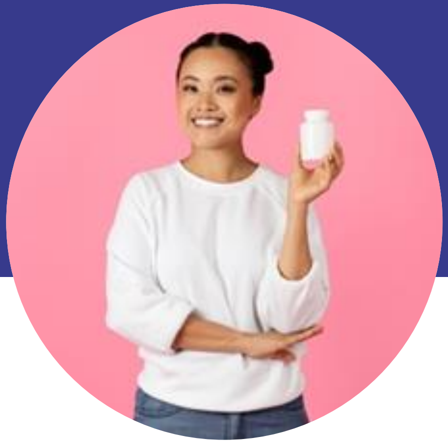
Transparency Impact: 88% say transparency greatly or somewhat increases purchase likelihood

HCP Discussion: Discusses supplements with HCP always (35%) — early HCP engagement is higher than expected for this age

Brand Values: Brand values alignment and eco-certification resonate meaningfully; she wants brands that share her values

Female General User · Ages 18–25

THE CURIOUS STARTER (CONT.)



"I take supplements for my anxiety mostly — if it's something I found on TikTok and my doctor is okay with it, I'm trying it."

MARKETING OPPORTUNITIES

- Anxiety and mental wellness are the primary entry point: Lead with mood, stress, and calm messaging; this is the #1 health concern driving supplement interest for this cohort
- Gummy format is table stakes: 54% prefer gummies, higher than any other segment; any product launch targeting this group needs a gummy SKU
- Social and influencer-first acquisition: TikTok, Instagram Reels, and trusted micro-influencers in wellness/mental health are the dominant discovery channels
- Price-entry packaging matters:$20–$29/month is the sweet spot; trial sizes, starter kits, and subscribe-and-save discounts reduce first-purchase friction
- GLP-1 adjacent opportunity: 18% are on GLP-1 drugs; muscle retention, micronutrient replenishment, and protein supplements are a growing complementary need
- Eco and clean-label claims resonate: Sustainability sourcing, organic, and non-GMO certifications reinforce brand values alignment for this cohort

WATCH OUTS & CONSIDERATIONS

- Habit is not yet established — supplement use is episodic, not routine; churn is high without subscription anchoring or a compelling daily ritual
- Income constraints are real — 19% earn under $30K; premium-only positioning will exclude a significant portion of this cohort
- Influencer trust is volatile — this group moves with trending content; negative social coverage can erase brand equity quickly
- Mental health sensitivity — anxiety and depression are real drivers; supplement claims must be measured and responsible, never exploitative

Female General User · Ages 26-34

INTENTIONAL HEALTH OPTIMIZER

Intentional, research-savvy, and increasingly condition-aware — she's locking in her wellness routine and wants clean ingredients, real evidence, and brands that share her values.

44%
Daily Supplement Use

$20–$59/mo
Avg. Monthly Spend

21% GLP-1
GLP-1 Usage

Female General User · Ages 26-34

INTENTIONAL HEALTH OPTIMIZER (CONT.)

DEMOGRAPHICS

Survey N: n=111 (US users)

Income: Skews $45K–$69K (27%) and $70K–$99K (24%); 14% earn $150K+ — growing earning power in mid-career phase

GLP-1 Usage: ~21% report GLP-1 drug use; GLP-1 supplement tie-ins and nutrient support products represent a meaningful opportunity for this cohort

HEALTH CONCERNS & MOTIVATIONS

Primary Concerns: Anxiety/stress (43%), Hair loss (22%), Fatigue/tiredness (29%), Depression (25%), Skin health (16%)

Notable Patterns: Mental wellness + beauty wellness crossover is the defining health profile; anxiety and appearance concerns are closely linked motivators

Largest Fulfillment Gap: Anxiety/stress: large gap between concern level (43%) and supplement use (28%) — a major whitespace for mood and stress supplement positioning

SUPPLEMENT USAGE BEHAVIOR

Usage Frequency: 44% take supplements daily; 9% multiple times daily — supplement use is becoming a structured wellness routine

Top Motivations: General health & well-being (72%), Condition-specific benefits (38%), HCP recommendation (37%)

Preferred Formats: Gummy (48%), Pill (40%), Chew (21%) — strong preference for convenient, palatable formats

Format Appeal: Easy to swallow (66%), Pleasant taste (52%), Single daily dosage (45%)

Monthly Spend Detail: Distributed across $20–$59 range; 15% reach $40–$59, suggesting moderate investment in targeted specialty products

Key Note: Core vitamins essential to 51% (would not cut spending); 37% would trade to generics — brand loyalty with cost sensitivity

Female General User · Ages 26-34

INTENTIONAL HEALTH OPTIMIZER (CONT.)

SUPPLEMENT FAMILIARITY

Purchase Attributes: Natural source (22%), Online ratings/reviews (16%), HCP recommendation (19%)

Research Sources: Brand website (50%), Ingredient website (37%), General web/AI (35%), Online influencer (18%)

Influencer Reliance: 18% cite influencers — digital discovery is a core channel, but brand credibility anchors the final purchase decision

Sustainability: Always or frequently influences 56% — among the highest eco-motivation rates of any segment in the study

SHOPPING BEHAVIORS & TRUST DRIVERS

Estimated Monthly Budget: \$20–\$60/month; willing to pay for proven quality and ingredient transparency

Preferred Formats: Gummy and pill dominant; values clean-label and certifications alongside format choice

Top Trust Factors: Quality seal on label (47%), Detailed ingredient QR/website (35%), CoA access (36%)

Transparency Impact: 93% say transparency greatly or somewhat increases purchase likelihood — the highest transparency-responsiveness of any segment

HCP Discussion: Discusses supplements with HCP always (25%) or situationally (34%); open HCP dialogue is part of this cohort's wellness identity

Brand Values: Brand values alignment, supply chain transparency, and eco certifications are strong conversion factors

Female General User · Ages 26-34

INTENTIONAL HEALTH OPTIMIZER (CONT.)

"I'm really intentional about what I put in my body — I research the ingredients, check reviews, and make sure my doctor knows what I'm taking."

MARKETING OPPORTUNITIES

- Anxiety and mental wellness are the primary hook: Position supplements around stress, mood, and emotional resilience; the fulfillment gap here is the single largest opportunity for this cohort
- Hair and skin beauty-from-within: The crossover between mental wellness and beauty wellness is the most potent dual positioning available; collagen, biotin, and adaptogens serve both simultaneously
- Digital channel mastery required: Brand website SEO, ingredient education content, and influencer partnerships all contribute meaningfully; invest across all three
- Transparency converts at 93%: Highlight sourcing, CoA access, and clean labels prominently at every stage of the purchase funnel
- Subscription + education model: This group is building habits and wants to learn; email nurture flows with ingredient education and personalized supplement protocols drive long-term retention

WATCH OUTS & CONSIDERATIONS

- High anxiety prevalence requires responsible marketing — 43% struggle with anxiety; supplement messaging must be empowering and evidence-based, never alarmist or exploitative
- Trust is conditional on quality — 93% say transparency increases purchase likelihood, but quality failures destroy that relationship permanently; consistent formulation is non-negotiable
- Cost sensitivity is real — most earn \$45K–\$69K; premium-only lines without a clear value rationale will lose traction in this income range
- Influencer authenticity is required — 18% cite influencers, but this cohort is sophisticated; paid partnerships that feel inauthentic actively backfire

Female General User · Ages 35-44

CONDITION-FOCUSED ACHIEVER

Focused, high-earning, and condition-targeted — she's moved beyond general wellness into specific solutions, with skin health, healthy aging, and anxiety at the top of her list.

50%
Daily Supplement Use

$30–$59/mo
Avg. Monthly Spend

21% GLP-1
GLP-1 Usage

Female General User · Ages 35-44

CONDITION-FOCUSED ACHIEVER (CONT.)

DEMOGRAPHICS

Survey N: n=108 (US users)

Income: Peak earning segment: 28% earn $100K–$149K and 19% earn $150K+; this is the highest-income female cohort in the study

GLP-1 Usage: ~21% report GLP-1 drug use; 7% actively supplementing for GLP-1 related concerns — skin support, protein, and micronutrient repletion are top adjacent needs

HEALTH CONCERNS & MOTIVATIONS

Primary Concerns: Anxiety/stress (40%), Skin health (33%) — the highest skin health rate of any segment; Fatigue/ tiredness (31%), Healthy aging (26%), Depression (27%)

Notable Patterns: The midlife wellness transition is fully underway; this is the first cohort where healthy aging enters as a defining concern alongside mental wellness and beauty

Largest Fulfillment Gap: Skin health and healthy aging: large gap between concern level and supplement coverage — two of the clearest product category opportunities for this segment

SUPPLEMENT USAGE BEHAVIOR

Usage Frequency: 50% take supplements daily; 7% multiple times daily — supplement use is structured and multi-product

Top Motivations: General health & well-being (76%), HCP recommendation (40%), Condition-specific benefits (33%)

Preferred Formats: Gummy (38%), Pill (37%), Softgel (29%) — a balanced format portfolio reflecting established, multi-supplement routines

Format Appeal: Easy to swallow (55%), Single daily dosage (50%), Pleasant taste (42%)

Monthly Spend Detail: Clusters $30–$39/month (16%); meaningful share reaches $80–$99 (9%) — willingness to invest in targeted specialty products

Key Note: Core vitamins essential to 44% (would not cut); 49% would trade to generics — brand loyalty present with cost consciousness

Female General User · Ages 35-44

CONDITION-FOCUSED ACHIEVER (CONT.)

SUPPLEMENT FAMILIARITY

Purchase Attributes: Detailed ingredient information (20%), Addresses specific conditions (19%), Natural source (18%) — formulation credibility is paramount

Research Sources: Brand website (53%), General web/AI (48%), HCP (44%), Ingredient website (38%)

Research Depth: 2.8 average sources consulted — high research depth reflecting a deliberate, condition-focused buying process

Sustainability: Always or frequently influences 54% — eco-motivated and values-driven purchasing at this income level

SHOPPING BEHAVIORS & TRUST DRIVERS

Estimated Monthly Budget: $30–$60/month; premium investment justified by high income and specific condition focus

Preferred Formats: Gummy, pill, and softgel balance — established routine with multiple daily products

Primary Channel: Online (43%), Mass market (27%), Natural/health food stores (21%)

Top Trust Factors: Detailed ingredient QR/website (52%) — the highest score on this metric of any segment; CoA access (33%), Quality seal (35%)

Transparency Impact: 87% say transparency greatly or somewhat increases purchase likelihood

HCP Discussion: Discusses supplements with HCP always (28%) or situationally (31%) — proactive HCP dialogue is a core wellness behavior

Brand Values: Consistent product quality (29%), HCP recommendation (25%), Long-term brand use (19%) — quality and clinical credibility drive trust

Female General User · Ages 35-44

CONDITION-FOCUSED ACHIEVER (CONT.)

"At this point in my life, I'm not just taking supplements for general health — I'm targeting specific concerns and I want to see the evidence behind what I'm taking."

MARKETING OPPORTUNITIES

- Skin health is the breakthrough category opportunity: 33% have skin health concerns, the highest of any segment; collagen, antioxidants, and skin-specific supplement lines have strong and immediate traction
- Healthy aging messaging begins here: 26% are aging-focused; this is the entry point for longevity, cellular health, and anti-aging supplement positioning across the entire consumer lifecycle
- Ingredient transparency is mandatory: 52% cite detailed ingredient QR/website as their top trust signal; make sourcing, CoA, and formulation rationale frictionlessly accessible on every channel
- Premium positioning works at this income level: $100K+ household income supports investment in specialty supplements; bundle, stack, and protocol-based offers convert exceptionally well
- General web/AI search optimization is critical: 48% research via web/AI search; ensure ingredient pages, clinical summaries, and FAQ content rank prominently for condition-specific queries
- GLP-1 adjacent products: 21% on GLP-1 drugs; skin support, protein supplementation, and micronutrient repletion are directly addressable GLP-1 needs for this high-value cohort

WATCH OUTS & CONSIDERATIONS

- Formulation credibility is non-negotiable — this cohort researches deeply (2.8 sources) and responds strongly to ingredient evidence; weak formulations will be identified and rejected
- Skin health claims require clinical support — 33% have skin concerns; unsubstantiated beauty-wellness claims will be scrutinized and dismissed by this educated, research-literate consumer
- Don't underprice — the temptation to compete on price misreads this segment; they are looking for quality credentials, not the lowest cost option
- HCP alignment is expected — 40% were recommended supplements by HCPs; brands not actively engaging practitioners are missing the primary trust-building channel for this cohort

Female General User · Ages 45-54

PROACTIVE HEALTH MANAGER

Proactive and pragmatic — she's managing real health concerns now and wants supplements that address specific conditions, with a daily routine that's as essential as her morning coffee.

60%
Daily Supplement Use

$20–$39/mo
Avg. Monthly Spend

16% GLP-1
GLP-1 Usage

Female General User · Ages 45-54

PROACTIVE HEALTH MANAGER (CONT.)

DEMOGRAPHICS

Survey N: n=125 (US users)

Income: Skews $45K–$69K (22%) and $70K–$99K (18%); lower than Female 35–44 — more cost-conscious purchasing decisions overall

GLP-1 Usage: ~16% report GLP-1 drug use — declining from younger cohorts; 4% supplementing for GLP-1 related concerns — metabolic and midlife health adjacency growing

HEALTH CONCERNS & MOTIVATIONS

Primary Concerns: Anxiety/stress (41%), Fatigue/tiredness (34%), Depression (26%), Healthy aging (24%), High blood pressure (20%)

Notable Patterns: The most fatigue-driven female segment; the midlife wellness transition is fully underway with healthy aging, hair loss (22%), and cardiovascular concerns all emerging

Largest Fulfillment Gap: Healthy aging and energy: concern is high but supplement coverage is moderate — a significant opportunity for fatigue, hormonal, and healthy aging product positioning

SUPPLEMENT USAGE BEHAVIOR

Usage Frequency: 60% daily; 11% multiple times daily — 71% take supplements at least daily; the most intense supplement routine of any working-age female segment

Top Motivations: General health & well-being (77%), Condition-specific benefits (37%), HCP recommendation (34%)

Preferred Formats: Pill (42%), Gummy (39%), Softgel (31%) — clinical-leaning but still maintains palatable format preference

Format Appeal: Easy to swallow (68%), Single daily dosage (60%) — the highest single-daily-dosage preference of any female segment

Monthly Spend Detail: $20–$39/month (42% combined); growing share at $40–$59 (14%) reflecting investment in targeted specialty products

Key Note: Core vitamins essential to 40% (would not cut); 55% would trade to generics — strong supplement commitment with meaningful cost sensitivity

Female General User · Ages 45-54

PROACTIVE HEALTH MANAGER (CONT.)

SUPPLEMENT FAMILIARITY

Purchase Attributes: Addresses specific conditions (30%) — the highest in any female segment; HCP recommendation (14%), Clinical ingredient research (12%)

Research Sources: Brand website (51%), General web/AI (47%), HCP (34%), Health app/wearable (20%)

Research Depth: 2.36 average sources — focused, efficient research; this consumer knows what she's looking for and finds it

Sustainability: Sometimes or frequently influences 51% — moderate and consistent eco-awareness

SHOPPING BEHAVIORS & TRUST DRIVERS

Estimated Monthly Budget: $20–$40/month; consistent investment in a reliable, condition-targeted regimen

Preferred Formats: Pill, gummy, and softgel balance — established multi-product routine

Primary Channel: Online (36%) and mass market (34%) nearly tied — bridge consumer comfortable in both physical and digital retail

Top Trust Factors: Detailed ingredient QR/website (40%), Quality seal on label (38%), CoA access (22%)

Transparency Impact: 84% say transparency greatly or somewhat increases purchase likelihood

HCP Discussion: Discusses supplements with HCP always (24%) or situationally (34%); HCP guidance is meaningful but not the sole decision driver

Brand Values: HCP recommendation (36%), Long-term brand use (23%), Consistent product quality (22%)

Female General User · Ages 45-54

PROACTIVE HEALTH MANAGER (CONT.)

"I'm at an age where I'm managing real things — my energy, my hormones, my blood pressure. I need supplements that actually address what's going on with my body."

MARKETING OPPORTUNITIES

- Condition management is the lead message — 30% cite 'addresses specific conditions' as their #1 purchase driver; name the concern, name the solution; this consumer is looking for targeted, evidence-based efficacy
- Fatigue and energy are the primary entry-point concerns — 34% deal with fatigue; energy metabolism, iron, and adaptogen products have direct and immediate relevance for this cohort
- Healthy aging positioning begins — 24% are aging-focused; collagen, bone density, cognitive support, and menopause-adjacent products are strong content anchors for this segment
- Menopause-adjacent supplement positioning — this cohort is entering perimenopause/menopause territory; products addressing hormonal balance, sleep quality, and bone health are highly relevant and largely underserved
- Dual-channel presence is critical — mass market and online are nearly equal at 36% vs 34%; brand must deliver strong in both; shelf placement and DTC site experience are equally important
- HCP partnership drives trust — 36% build brand trust through HCP recommendation; invest in clinician outreach, sample programs, and professional education materials

WATCH OUTS & CONSIDERATIONS

- Income constraints limit premium reach — $45K–$69K dominant income band; pricing must be competitive or clearly worth the premium through strong clinical rationale
- Menopause/perimenopause context requires sensitivity — products and messaging must be empowering, not stigmatizing or ageist; this consumer is self-aware and will reject patronizing tone
- Condition-specific claims require clinical backing — this cohort purchases by condition; unsubstantiated claims are actively filtered out by a health-literate, research-aware buyer
- Retention requires results — 60%+ daily supplement use means she's experienced enough to know if something isn't working; weak formulations lose her quickly and permanently

Female General User · Ages 55+

LIFELONG WELLNESS ADVOCATE

Deeply habitual, HCP-guided, and brand-loyal — she's had her supplement routine dialed in for years and won't change it without a doctor's recommendation or a very good reason.

76%
Daily Supplement Use

$10–$29/mo
Avg. Monthly Spend

8% GLP-1
GLP-1 Usage

Female General User · Ages 55+

LIFELONG WELLNESS ADVOCATE (CONT.)

DEMOGRAPHICS

Survey N: n=97 (US users)

Income: Skews lower: 20% earn under $30K and 21% earn $45K–$69K; 16% earn $150K+; cost sensitivity is a meaningful purchasing consideration

GLP-1 Usage: ~8% report GLP-1 drug use — among the lowest rates in the study; condition management rather than metabolic intervention defines her supplement profile

HEALTH CONCERNS & MOTIVATIONS

Primary Concerns: High blood pressure (35%), High cholesterol (37%), Healthy aging (29%), Digestive complaints (25%), Anxiety/stress (31%)

Notable Patterns: Cardiovascular and aging concerns dominate; mental wellness (anxiety 31%, depression 23%) remains relevant — this cohort is managing multiple concurrent conditions

Largest Fulfillment Gap: Healthy aging and digestive complaints: large gap between concern level and comprehensive supplement coverage

SUPPLEMENT USAGE BEHAVIOR

Usage Frequency: 76% daily; 8% multiple times daily — 84% take supplements at least daily; the most habitual supplement consumer in the study

Top Motivations: General health & well-being (86%), HCP recommendation (42%), Condition-specific benefits (41%) — all three at the highest levels of any female segment

Preferred Formats: Pill (49%), Tablet (48%), Softgel (32%) — classic clinical formats dominate; minimal gummy, chew, or powder interest

Format Appeal: Easy to swallow (84%), Single daily pill (48%) — simplicity and compliance are the paramount format considerations

Monthly Spend Detail: $10–$29/month (45%); consistent but cost-conscious; core vitamins are fully essential to 53% regardless of budget

Key Note: Core vitamins essential to 53% — the highest 'would not cut' rate of any segment; supplement spend is treated as a household necessity

Female General User · Ages 55+

LIFELONG WELLNESS ADVOCATE (CONT.)

SUPPLEMENT FAMILIARITY

Purchase Attributes: Addresses specific conditions (32%), HCP recommendation (30%), Past brand experience (25%)

Research Sources: HCP (52%), Brand website (47%), General web/AI (40%) — anchored in professional credibility; digital but practitioner-guided

Brand Loyalty: 25% cite long-term brand use as the top trust driver — the most brand-loyal female segment; switching costs are very high

Sustainability: Rarely or never influences 49% — the most sustainability-indifferent female segment

SHOPPING BEHAVIORS & TRUST DRIVERS

Estimated Monthly Budget: $10–$30/month; conservative but completely consistent; reliability and affordability are paramount

Preferred Formats: Tablets and pills overwhelmingly dominant; she sticks with familiar, proven clinical formats

Primary Channel: Mass market (56%) — Walmart, Target, CVS, Walgreens are the primary retail environments; online at 22%

Top Trust Factors: Quality seal on label (41%), Detailed ingredient QR/website (39%), Believable claims with references (23%)

Transparency Impact: 78% say transparency greatly or somewhat increases purchase likelihood

HCP Discussion: Discusses supplements with HCP always (28%) or situationally (32%) — highest HCP engagement of any female segment

Brand Values: HCP recommendation (47%), Long-term brand use (33%), Consistent product quality (28%)

Female General User · Ages 55+

LIFELONG WELLNESS ADVOCATE (CONT.)

"I've been taking my vitamins every morning for years. My doctor helped me figure out what works — I don't mess with that routine."

MARKETING OPPORTUNITIES

- HCP endorsement is the master key: 42% say their HCP recommended supplements; 47% build brand trust via HCP recommendation; clinical waiting room materials, pharmacist consultation programs, and practitioner leave-behinds are the highest-ROI acquisition channels for this segment
- Mass market shelf presence is non-negotiable: 56% buy in mass market environments; endcap placement, pharmacist recommendation signage, and clear label messaging at point of sale actively drive purchase decisions
- Condition-specific messaging converts: 32% cite 'addresses specific conditions' as their #1 purchase driver; speak directly to healthy aging, bone density, heart health, digestive support, and blood sugar management
- Pill and softgel formats are mandatory: Never push gummies, powders, or chews on this cohort; clinical formats reinforce trust and align with a deeply established daily routine
- Loyalty programs generate compounding returns — this consumer already has ingrained brand habits; subscription auto-ship, loyalty points, and value-size packaging deepens retention without creating switching costs
- Cost-sensitive value positioning: Multi-pack pricing, per-day cost transparency, and 'essentials' messaging aligns with budget realities without diminishing perceived quality

WATCH OUTS & CONSIDERATIONS

- Never patronize or infantilize — this is an opinionated, health-literate consumer with decades of supplement experience; condescending marketing or oversimplified messaging will repel her immediately
- Income constraints limit premium reach — 20% earn under $30K; any premium-only product line structurally excludes a meaningful share of this important cohort
- Brand switching costs are extremely high — she won't abandon proven brands easily; to acquire this consumer, brands need strong HCP endorsement or a trusted peer recommendation, not advertising alone
- Quality failures are permanent deal-breakers — concerns about non-declared ingredients and adulterated products are significant; one publicized quality incident ends the brand relationship for life

WHERE TO WIN

HIGHEST-PRIORITY WHITESPACE AND CHANNEL PRIORITIES FOR FEMALE SUPPLEMENT BRANDS

All ages 18–54
Mental Wellness

Anxiety, stress & mood supplements are massively under-indexed vs. concern levels. 41% female concern, massive use gap across all younger cohorts.

Peaks Females 35-44
Skin + Beauty From Within

33% skin health concern at F 35–44 — the highest in the study. Collagen, antioxidants, and skin-specific lines have strong and immediate purchase relevance.

Females 45-54
Menopause/Perimenopause

Largest unmet supplement need in the female market. Hormonal balance, sleep, bone health, and mood — almost no current supplement marketing addresses this directly.

Females 18-44
GLP-1 Adjacent

16–21% on GLP-1 across younger female cohorts. Muscle retention, micronutrient repletion, protein, and metabolic support are growing adjacent demands.

Females 18-25
Habit Conversion

Forming habits now — gummy formats, $20–29 entry pricing, social acquisition, and subscription anchoring can build decades of loyalty from this cohort.

Females 45-55+
HCP Channel

HCP recommendation is the primary trust driver for women 45+. Brands without active practitioner programs face structural acquisition barriers in these cohorts.

WHAT NOT TO GET WRONG

SIX CROSS-COHORT RISKS FOR BRANDS TARGETING THE FEMALE SUPPLEMENT CONSUMER

Females 18-25 & 55+
Income gaps require tiered pricing

F 18–25 and 55+ skew lower income. Premium-only lines structurally exclude meaningful populations at both ends of the age spectrum.

Females 18-44
Mental Health

41% of all females have anxiety. Claims must be empowering and evidence-based, as exploitative or alarmist messaging creates reputational damage.

All Ages
Quality failures are disproportionately harmful

84% say transparency increases purchase likelihood, the same sensitivity means quality scandals, hidden ingredients, or misleading claims cause outsized brand damage.

Females 18-34
Influencer trust is powerful but fragile

18–34 cohorts discover via social, but a single negative creator post can erase brand equity. Long-term authentic partnerships only.

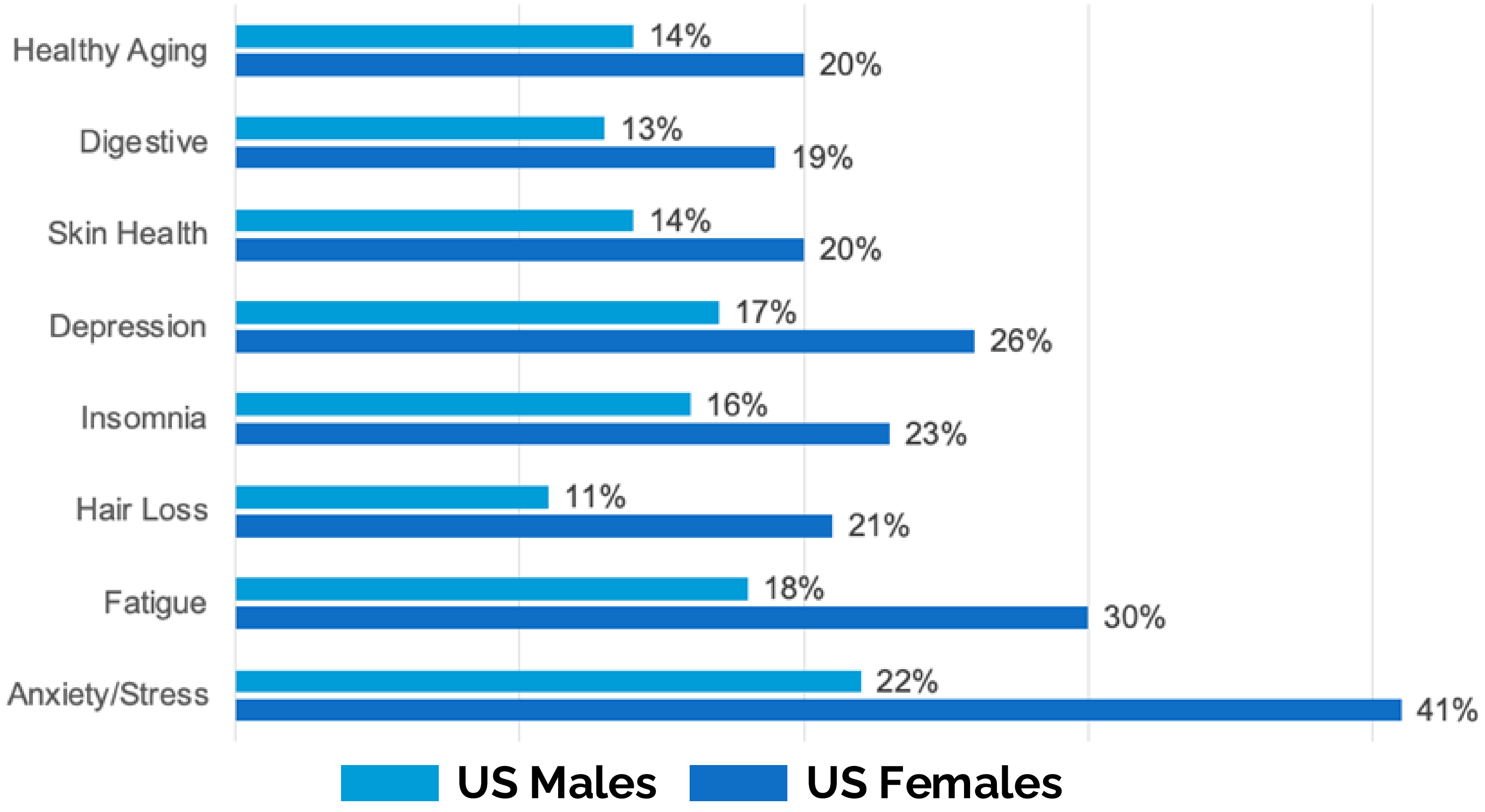
Females 55+
Never Patronize the 55+ consumer

With 76% daily use, this is the most experienced female supplement consumer. Condescending or oversimplified messaging will drive her away permanently.

Females 35-55+
HCP is non-substitutable from 35+

The shift to clinician-guided trust at 45–54 and 55+ means no marketing channel replaces HCP. Brands without practitioner programs face structural acquisition barriers.

The Gender Gap: Female vs. Male — Key Health Concern Differences



FEMALES SEEKING:

+19% Anxiety/Stress

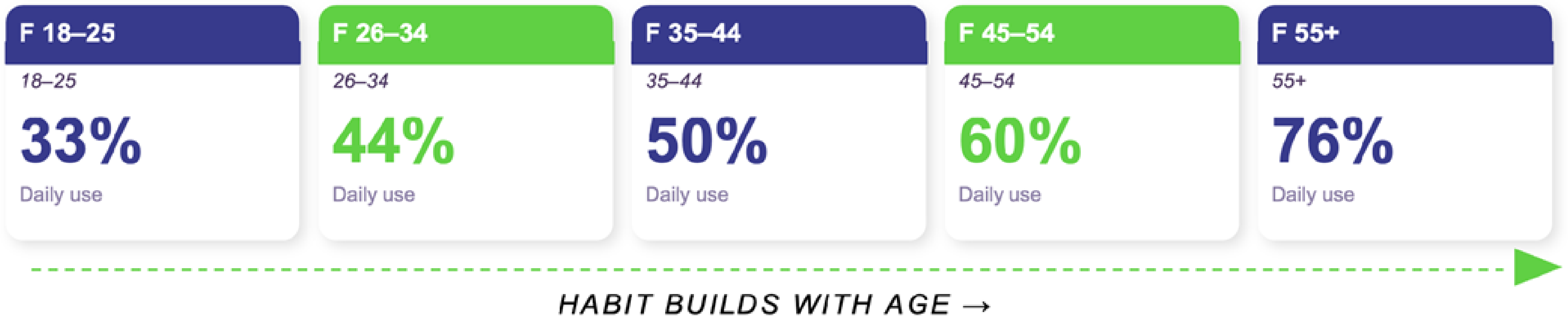
+11% Fatigue

+11% Hair Loss

+9% Depression

The Gender Gap: Female vs. Male — Key Health Concern Differences

Daily use, spend, and key concerns evolve significantly across age cohorts



Age	Habit Stage	Top Format	Top Channel	Spend	Trust Source
18–25	Forming	Gummy (54%)	Mass/Online	$20–$29	Influencer + Peer
26–34	Solidifying	Gummy (48%)	Online #1 (44%)	$40–$59	Digital Research
35–44	Established	Gummy/Pill mix	Online (43%)	$30–$99	Evidence-based
45–54	Intensive	Pill #1 (42%)	Online ≈ Mass	$20–$39	HCP + Digital
55+	Locked in	Pill/Tablet	Mass #1 (56%)	$10–$29	HCP Only

FOUR DEFINING THEMES ACROSS THE FEMALE CONSUMER LIFECYCLE

Mental Wellness Is the Gateway

Anxiety/stress affects 41% of all US females — vs. 22% males. The 15–25 pt supplement use gap at 18–34 is the single largest whitespace in the female market.

Habit Builds Across Decades

Daily use jumps 33% → 44% → 50% → 60% → 76% across cohorts. The 18–34 window is the highest-value habit formation opportunity for long-term retention.

Beauty-Wellness Crossover

Skin health (peaks at F 35–44, 33%), hair loss, and mood converge into a dual-positioning opportunity. 'Beauty from within' resonates most with F 26–44.

Trust Evolves — Social to Clinical

18–25: Influencers + peer recs. 26–34: Digital research + evidence. 35–44: Evidence + HCP. 45+: HCP is the dominant and often only reliable trust channel.

KEY TAKEAWAYS

THE US FEMALE SUPPLEMENT CONSUMER

1. **Mental wellness is the #1 market opportunity**

   Anxiety affects 41% of females, far exceeding male rates, with a massive supplement use gap across 18–44 that no brand has fully addressed.

2. **Format and channel strategy must be age-specific**

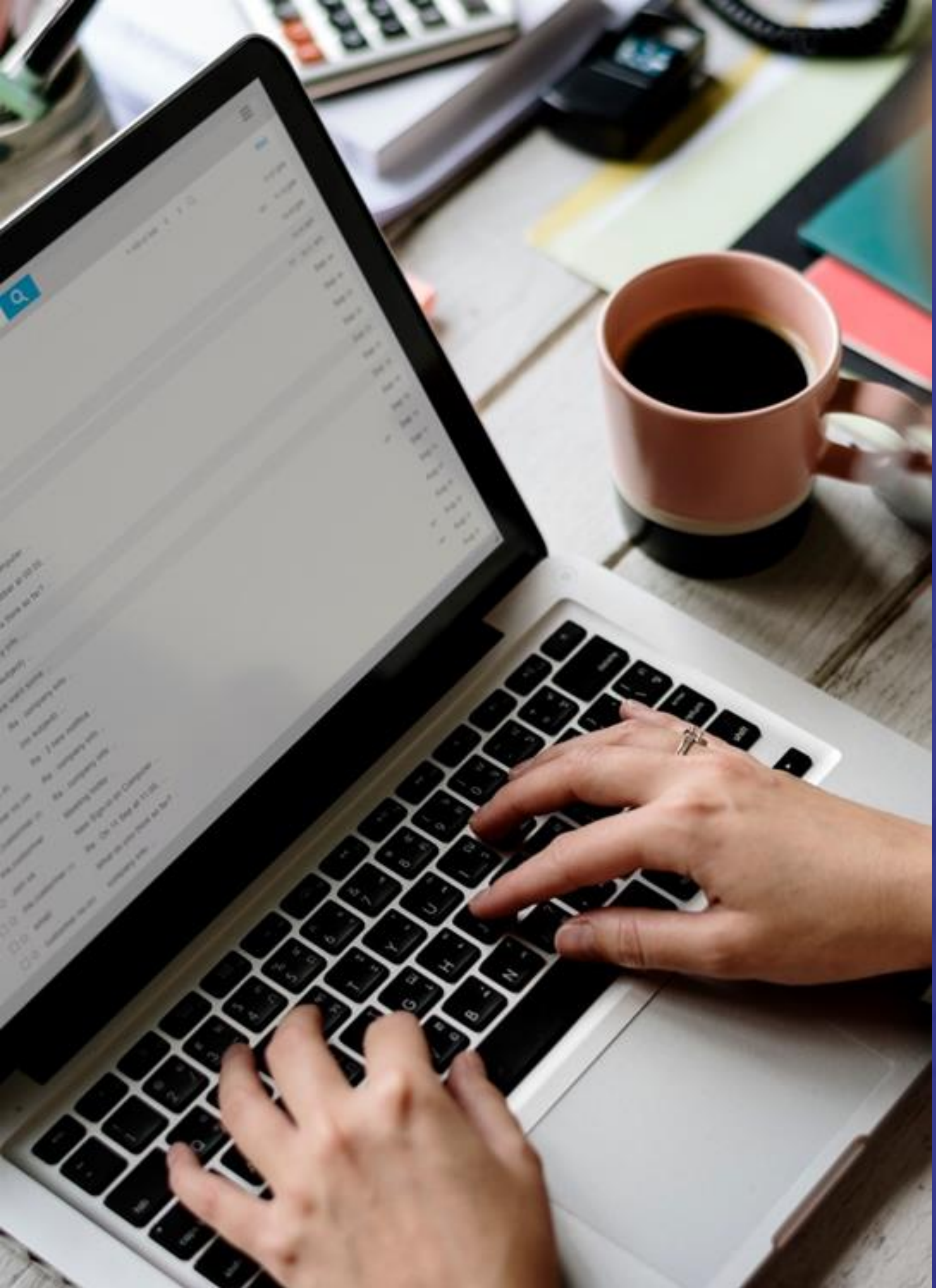
   Gummies dominate at 18–44; pills take over at 55+. Online leads until 55+, when mass market becomes essential at 56% of purchases.

3. **Habit formed at 26-34 predicts lifetime value**

   The most significant loyalty window is 26–34 when daily use jumps from 33% to 44%. Win her here and retain her for decades.

4. **HCP is non-negotiable from 45+ onward**

   Clinical trust replaces social proof at midlife. No amount of digital advertising substitutes for HCP endorsement for women 45 and older.



QUESTIONS?

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