

Who Owns the Next Health Decision?

How technology reshapes the consumer health journey

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Industries				Consumers
Food & Nutrition - Cooking Ingredients and Meals - Dairy Products and Alternatives - Fresh Food - Health and Wellness - Nutrition - Snacks - Staple Foods	Drinks - Alcoholic Drinks - Hot Drinks - Soft Drinks Nicotine and Cannabis - Tobacco - Cannabis - Nicotine Survey B2B - Industrial - Ingredients - Packaging	Health & Beauty - Beauty & Personal Care Consumer Health - Eyewear - Tissue and Hygiene - Beauty Survey - Health & Nutrition Survey Luxury & Fashion - Apparel and Footwear - Luxury Goods - Personal Accessories	Home Products - Home and Garden - Home Care - Pet Care Appliances & Electronics - Consumer Appliances - Consumer Electronics - Toys and Games Services - Consumer Foodservice - Automotive and Mobility - Payments & Lending - Sports - Travel	- Households - Income and Expenditure - Lifestyles - Population Economies - Business Dynamics - Cities - Commodities - Economy, Finance and Trade
Channels	Companies	Products	Analytics	
- E-Commerce - Digital Shopper and VOC - Loyalty and VOC - Retail	Competitor Analytics	- Innovation - Sustainability - VIA SKU Analysis	Forecast Models	
				

Purchase triggers, consideration and selection are all in flux

As Thomas said - longevity, obesity, e-commerce and ecosystems are reshaping OTC and health.

The connective tissue is how the **shopper decision** itself is changing.

01

MOTIVE

**Looking
healthy**

02

PROOF (AKA FAITH!)

**Scientific and
Social validity**

03

TIMING

**AI + personal
signals**

04

RELATIONSHIP

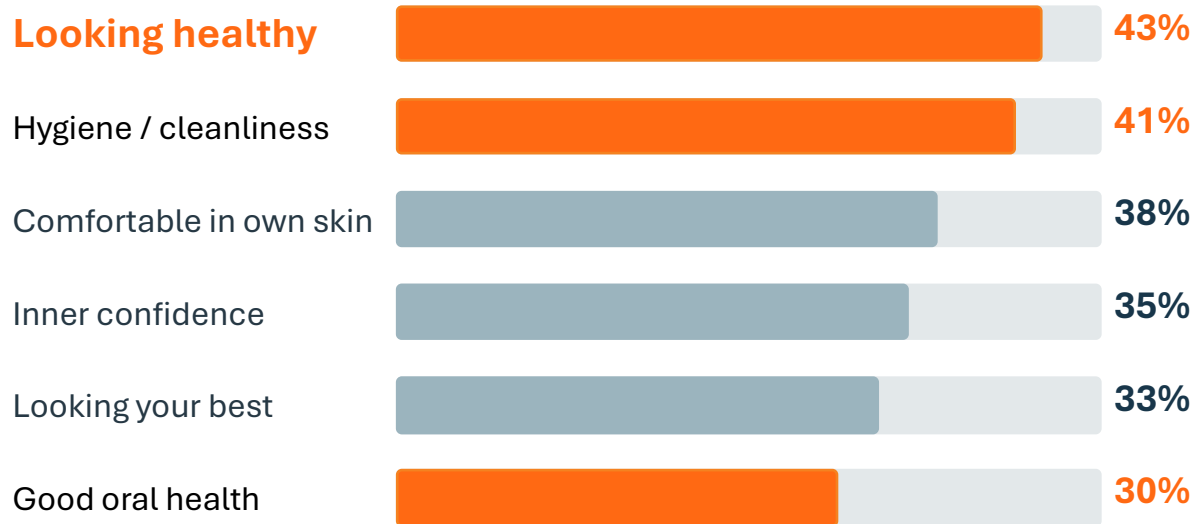
**Services +
ecosystems**

The implication: brands and channels can **win earlier and expand**, but they need to **prove more**, they need to **serve more** and be relevant for **more moments** in our life.

The **appearance** of health is the leading definition of beauty

How consumers define “beauty” (World, 2026)

% of respondents who mentioned this aspect



Is looking healthy the same as being healthy?

Covering-up and treatment grows faster than treatment alone

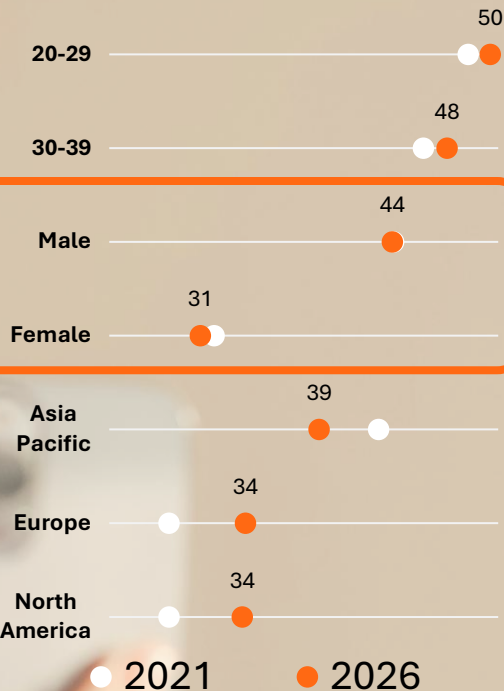
Attractiveness is a **trigger** for purchase that carries into **selection**

Source: Euromonitor International Voice of the Consumer: Beauty Survey, fielded February 2026, (n=20,086)



Q: "I use online dating sites/apps"

% of respondents who selected yes 2021~26



Euromonitor Voice of the Consumer:
Lifestyles Survey fielded Feb 2026 (n=40,225)

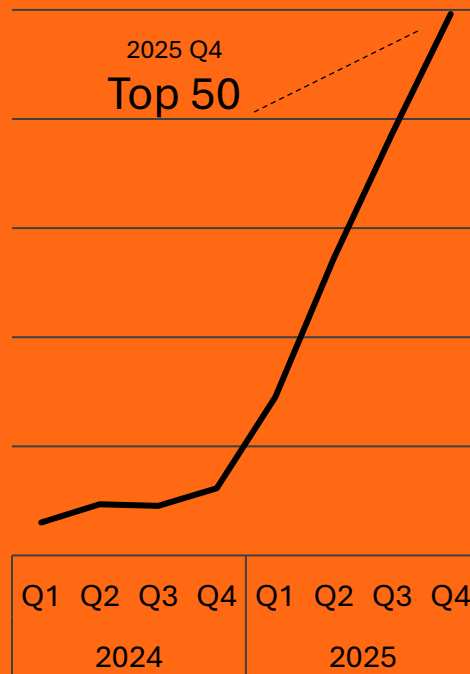
Bloom's Probiotic with Colostrum & Collagen Peptides

000s of **TikTok** CGC videos, up to >1.6M views

Lactobacillus casei as a **premium** probiotic combined with collagen.

Triple stack: gut, immunity and skin/hair/nails.

Bloom Supplement sales 2024~25
USD Millions, sold online (no sales tax inc).



Source: Euromonitor's E-Commerce tracking tool, using E-Receipt and Clickstream, scan data and other sources.

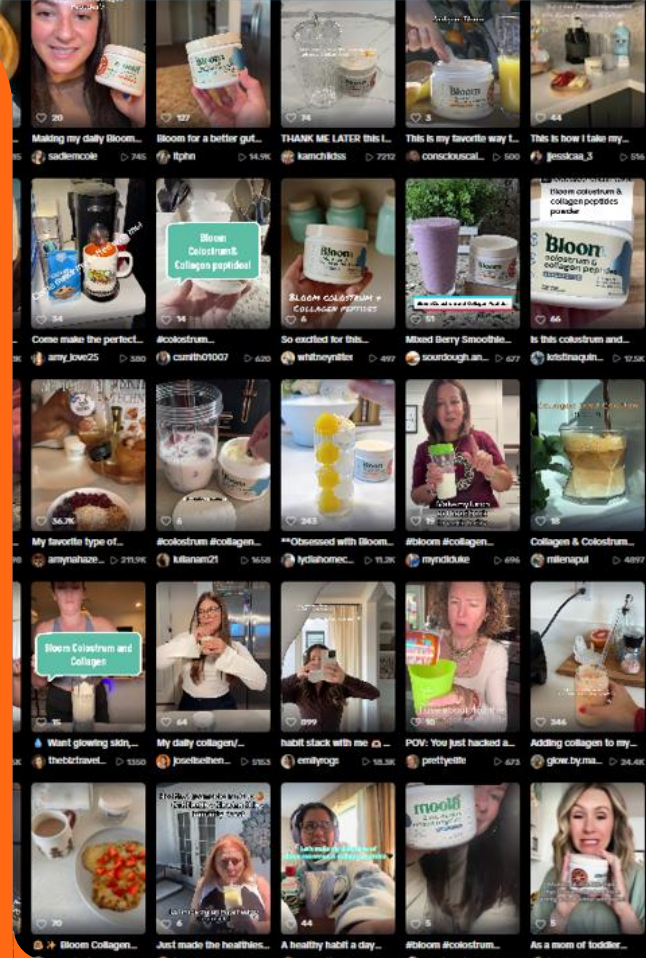


Image Source: TikTok Shop

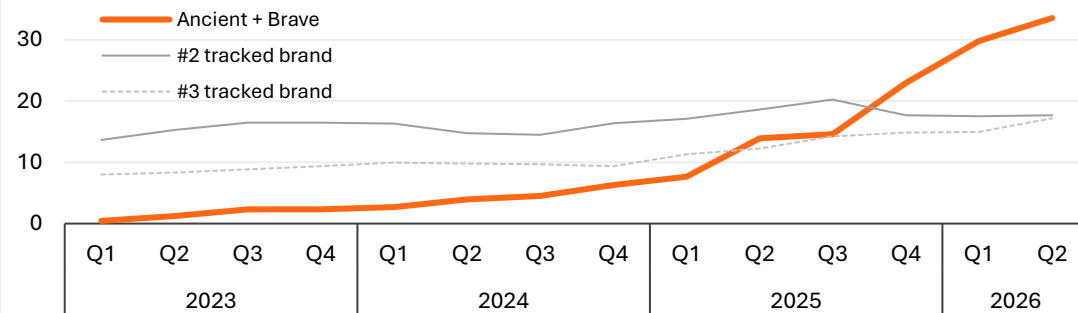
Ancient + Brave turned daily ritual into the leading growth story

A digital-native wellness brand rose from challenger to #1 tracked supplement brand in Europe

Scope: Germany, France, Italy, Netherlands, Spain, Poland and UK.

Europe's Top 3 E-commerce Dietary Supplement Brands (of c. 12,000 tracked)

Quarterly tracked sales online, US\$m (no sales tax inc).



>£100m

12MAT revenue
break-through

~90%

Revenue via D2C
Shopify & Amazon

£1m→17m

turnover,
2022 to 2024

Source: Euromonitor's E-Commerce tracking tool, using E-Receipt and Clickstream, scan data and other sources.

WHAT MADE IT COMPOUND?

- 1 Hero Collagen opened the door**
The curve began with social proof in a high-interest entry point in beauty, positive ageing and recovery
- 2 The product became a daily ritual**
Powders fold into existing habits - morning coffee, matcha, smoothies – not trying to create a new regime.
- 3 Subscription: trial > into a relationship**
A Shopify/Amazon focused subscription-led model lifts lifetime value and makes repeat purchase predictable.
- 4 Trust is from both science and social**
EU/MSD-certified sourcing, clinical evidence and B Corp status competes with a pharmacist's reassurance.

Social proof won attention - but it was how they built a role in morning **Rituals** that got them to No.1



There is something wrong
with you our product can fix:

- Joints
- Wrinkles
- Aging
- Collagen deficiency

Aspire to a life free of
imperfection:

- Vitality
- Performance
- Radiance/Resilience
- Wellbeing

**You stop taking something once it should have solved the problem...
but you never stop taking something that is part of who you want to be**

Trust takes us to agentic commerce and a coming earthquake

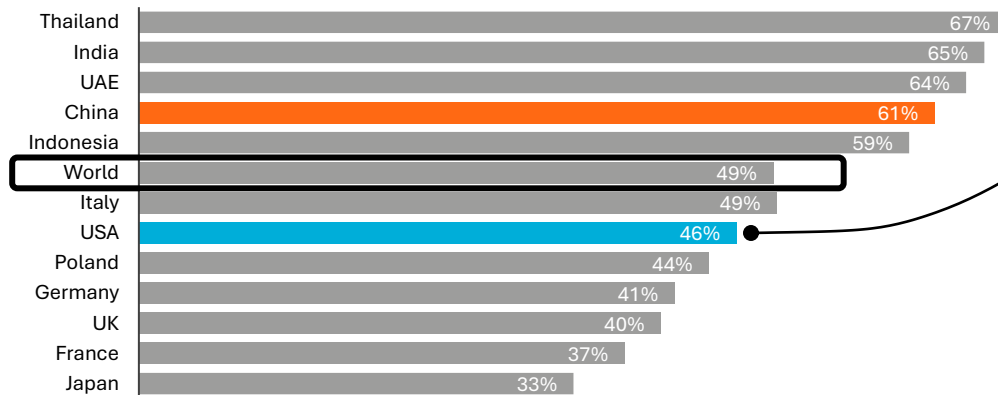


Share of GenAI referral traffic by US sector (extract Dec 2025)



Consumers rating generative AI “trustworthy” as a health data source

Extremely or moderately, 2026, % of respondents



Source:Euromonitor Voice of the Consumer Health and Nutrition Survey, fielded Jan 2026 (n=19,736).

The US is not the most advanced for AI appreciation in health, but GenAI originated >6% of purchase traffic by December 2025

The ideal case study is emerging for how to win with agentic commerce



Human trust is in relationships, not registries or institutions

The anatomy of trust — through the shopper's eyes

What a human shopper actually trusts when choosing a supplement



WEAKER → STRONGER PROOF (rising independence + verifiability)

	Internal / self-declared <i>brand's own tests & claims</i>	Social proof <i>reviews, ratings, influencers</i>	Professional endorsement <i>pharmacist / HCP / expert</i>	Third-party certified <i>independent labs & seals</i>	Regulatory / registered <i>authorised claims & approvals</i>
QUALITY	Overlooks pack says so	Considers word of mouth	Trusts trusted advice	Ignores USP / NSF seal	Ignores GMP approval
EFFICACY	Considers 'clinically proven'	Trusts before / after	Trusts clinical judgement	Overlooks human trial data	Ignores authorised claim
SAFETY	Overlooks 'safe & gentle'	Considers user reports	Trusts expert guidance	Overlooks contaminant tests	Overlooks registries & limits

Shopper's attention: ■ Trusts ■ Considers ■ Overlooks ■ Ignores

Source: Euromonitor Voice of the Consumer Health and Nutrition Survey, fielded Jan 2026 (n=19,736).

Trust “noise” fools a human shopper, but agents cut through it

The anatomy of trust — through the AI agent’s lens

What an AI shopping agent weights — and what it dismisses as noise



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QUALITY	Ignores <i>pack says so</i>	Ignores <i>word of mouth</i>	Discounts <i>trusted advice</i>	Prioritises <i>USP / NSF seal</i>	Prioritises <i>GMP approval</i>
EFFICACY	Discounts <i>'clinically proven'</i>	Ignores <i>before / after</i>	Checks <i>clinical judgement</i>	Prioritises <i>human trial data</i>	Prioritises <i>authorised claim</i>
SAFETY	Ignores <i>'safe & gentle'</i>	Ignores <i>user reports</i>	Checks <i>expert guidance</i>	Prioritises <i>contaminant tests</i>	Prioritises <i>registries & limits</i>

Agent’s weighting:

■ Prioritises

■ Checks

■ Discounts

■ Ignores

Source: Euromonitor International analysis of agentic traffic

Active wearables carry biometric sensing that feed temp, heart rate, O₂ and other metrics to GenAI analysis platforms.

- Device penetration rose to 7% in 2026 Globally
- Strongest in Australia and US, rising in China now
- Europe sitting slightly ahead of the Global average

Oura's Symptom Radar and Evidation's FluSmart programme have already proven the use case – where a human gets early warning of cold and flu hours ahead of main symptoms starting, these systems can give **>2 days of notice**.

That brings home delivery into the equation before symptoms start and it opens considered instead of impulse purchase.



Accurate prediction turns impulse into a considered purchase

The standard cold/flu wellness pattern creates one sales dynamic:

A proactive “just in case” sale The reactive “top of mind” impulse war that absorbs so much of the cost per sale



That experience gets disrupted by AI, wearables, biometrics, and in-real-life commercial reactions:

Considered purchase with home delivery Symptoms are never fully suffered Can we impact the outcome? Can we help recover faster?



Next battle becomes: **Who earns the right to be recommended** when AI identifies elevated risk.

The GLP-1 Opportunity Is Only the Tip of the Iceberg

The visible opportunity is the medicine.
The larger opportunity is **everything**
the medicine changes.

**GLP-1
MEDICATIONS**
The obvious opportunity



GLP-1 USER

A journey that
creates new needs
across health and
wellbeing



NUTRITION SUPPORT



Protein



Fibre



Vitamins &
Minerals



PHYSICAL RESILIENCE



Muscle
Preservation



Healthy
Ageing



Hydration



DIGESTIVE MANAGEMENT



Nausea
Relief



Constipation
Solutions



Diarrhoea
Relief



IBS
Support



APPEARANCE & CONFIDENCE



Hair
Health



Skin
Health



Beauty
Supplements



BEHAVIOUR & ENGAGEMENT



Personalised
Nutrition



Coaching &
Guidance



Communities
Support



Tracking &
Insights



HEALTHCARE ECOSYSTEM



Retail &
Pharmacy



Telehealth &
HCPs



Diagnostics &
Testing



Wearables &
Monitoring



AI Health
Agents



Data &
Platforms

CHANGING NEEDS



Many adjacencies



Many touchpoints



Much greater value



Stronger relationships



Long-term advantage



The winners won't take one big bite of GLP-1.

They'll take hundreds of small bites from the ecosystem around it.

Winning the next health decision

- 01 BE PRESENT EARLIER** One of the two growth stories requires expanding your role in the wellness journey. **“Preventative treatment”** is a milestone to an earned right-to-play in prevention.

- 02 DESIGN PROOF TWICE** Human and AI shoppers read entirely different **trust signals** — from one set of assets. If you lose share in agentic commerce, would your current data warn you?

- 03 THINK IN JOURNEYS** **Hiding imperfection** is a growing motive at every stage of the journey. When a brand wins loyalty, ask if it answered that angst; increasingly, the answer is “yes”.

- 04 ECOSYSTEMS NOT SKUS** GLP-1 has a user-base growth trajectory out to 2035; the kind of stable driver ROI gateways sign off. If you provide the treatment, why would any part of that ecosystem lack right-to-play?

Thank You – if you want to speak more...



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