

Lumina Intelligence

Gen Z Wellness Rewritten: Mental Load, Microbiome Logic & the New Rules of Supplement Engagement

Probiota 2026

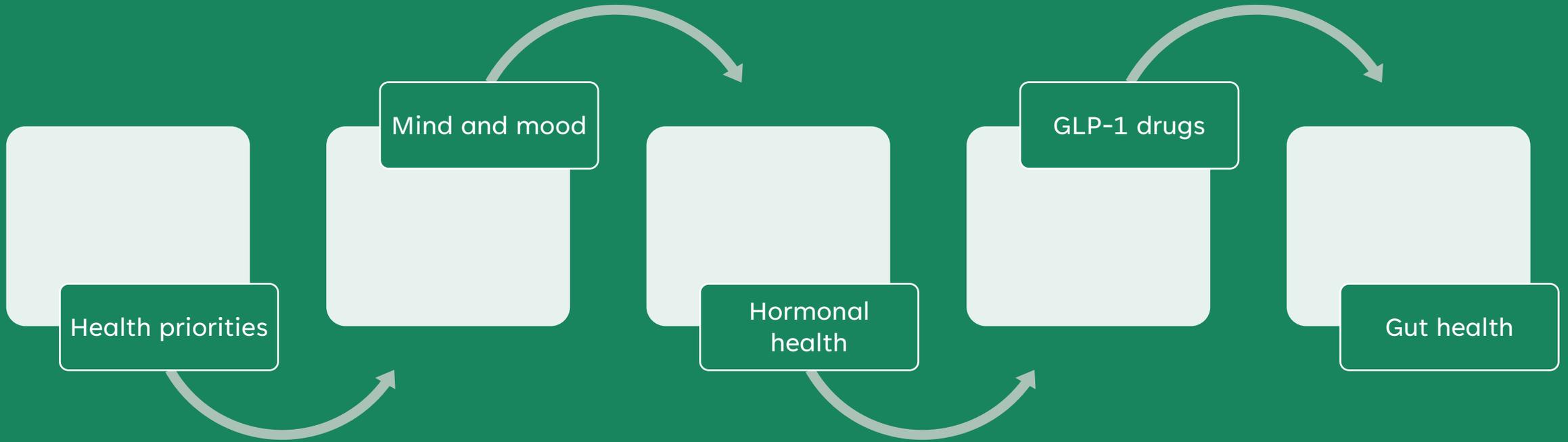
11 February 2026

Ewa Hudson

Director of Insights, Lumina Intelligence

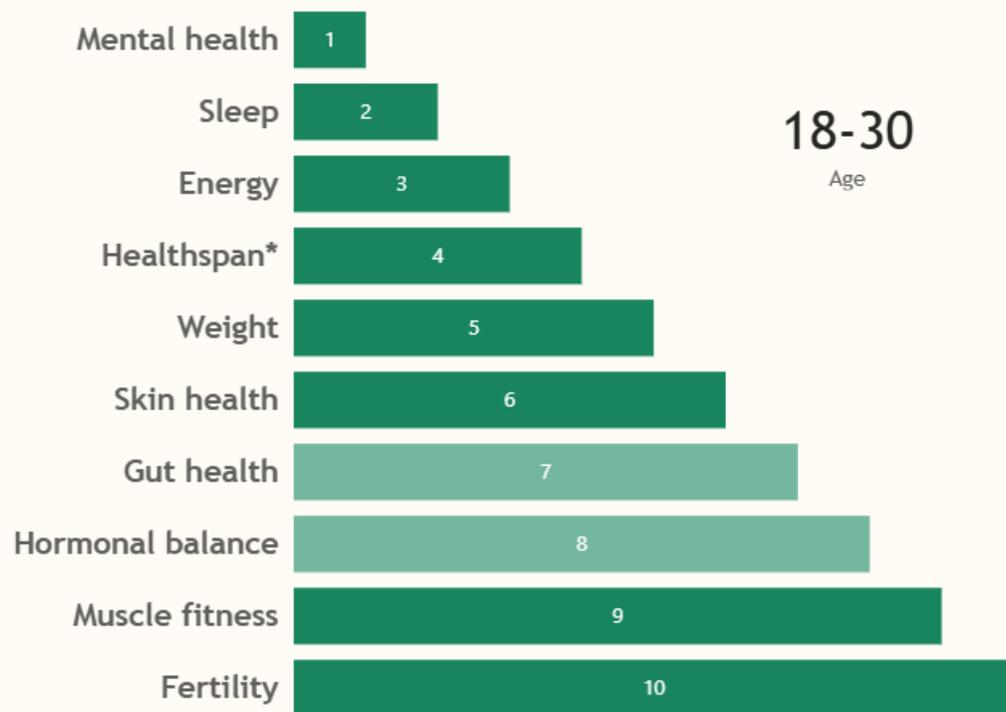


Gen Z Wellness Rewritten

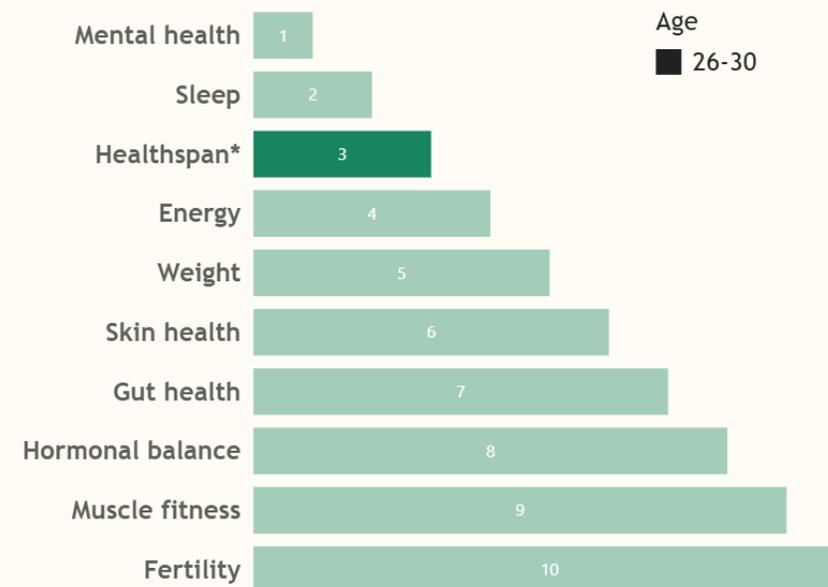


Mental health, sleep and energy are top health priorities

Which health concerns matter most to you? Rank them in order of importance (1-most important)



Sample: 18-30-year-olds in China, UK and USA (n=3,000)



Sample: 26-30-year-olds in China, UK and USA (n=1,061)

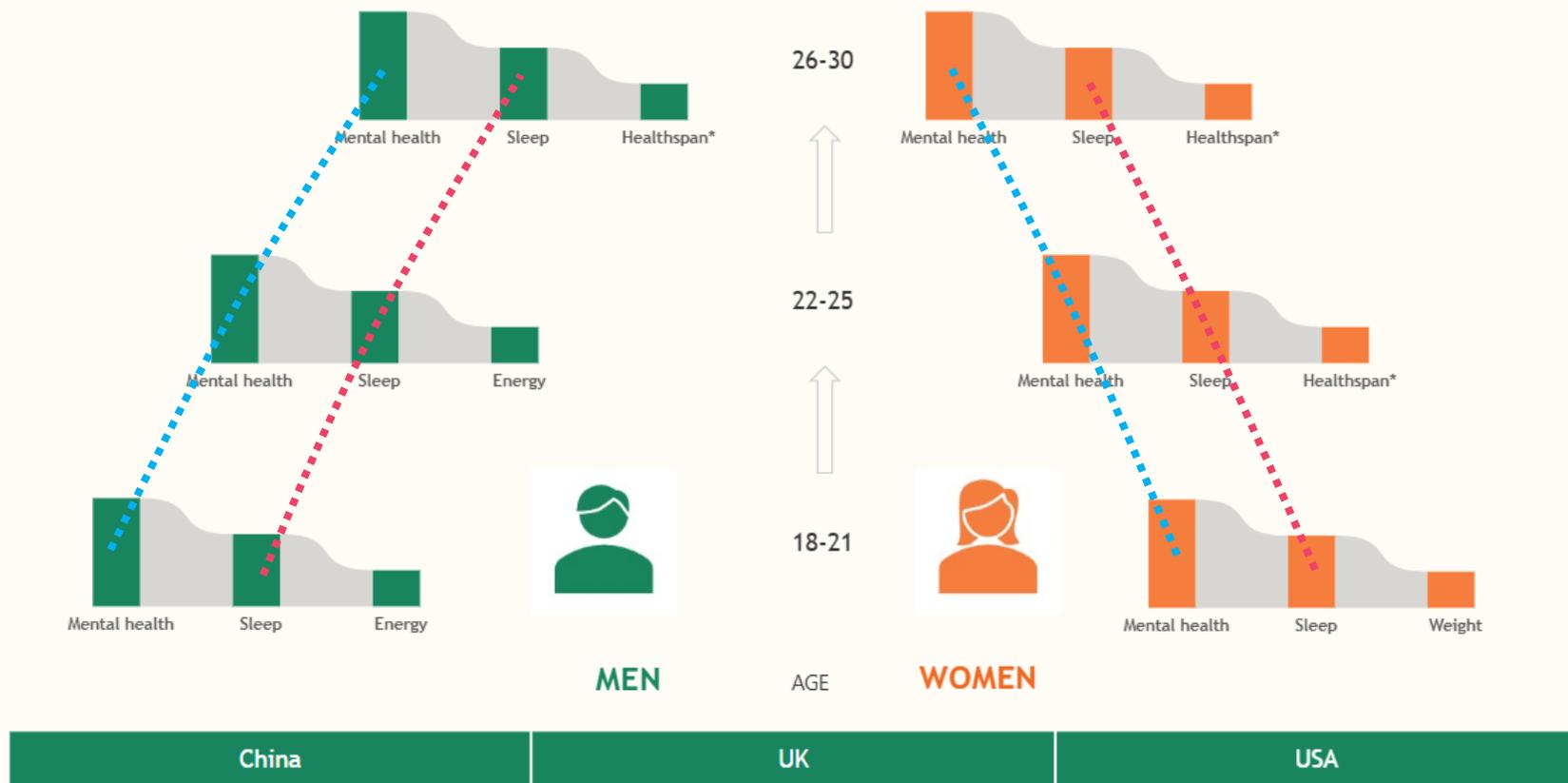
target sample:

* Full name: Longevity / healthspan

Mental health & sleep are top health priorities no matter the gender or age



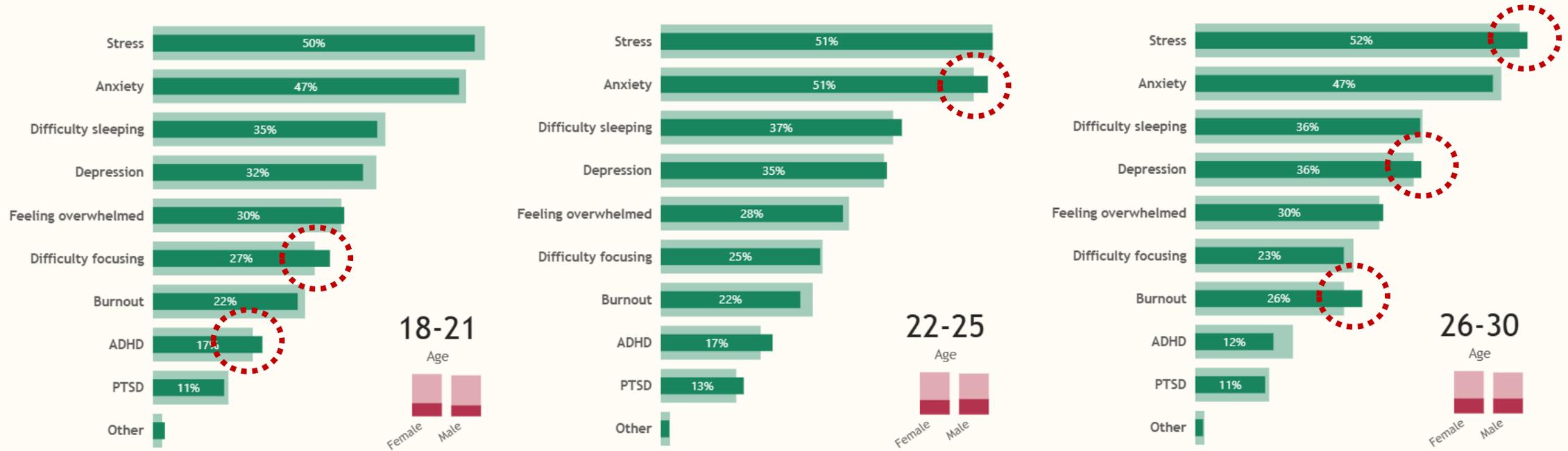
Which health concerns matter most to you? Top 3 by gender and age



Mental health challenges intensify with age — stress spikes, sleep struggles rise, and burnout surges



Which mental health challenges affect you most?

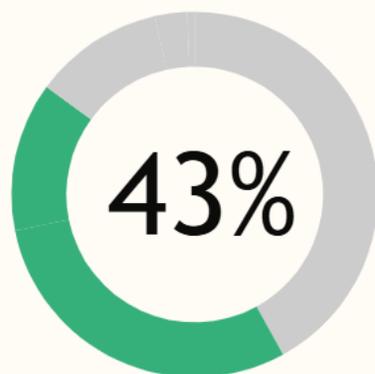


Target Sample:

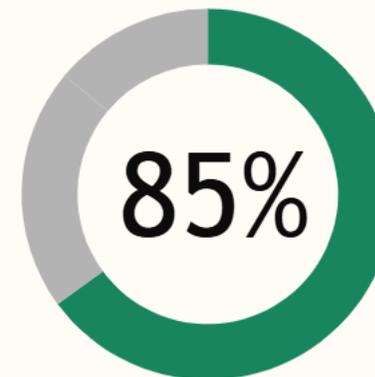
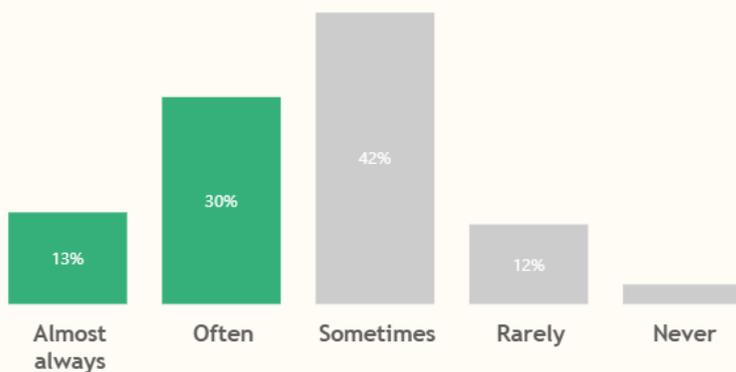


Almost half of young adults live in a near-constant state of stress or anxiety

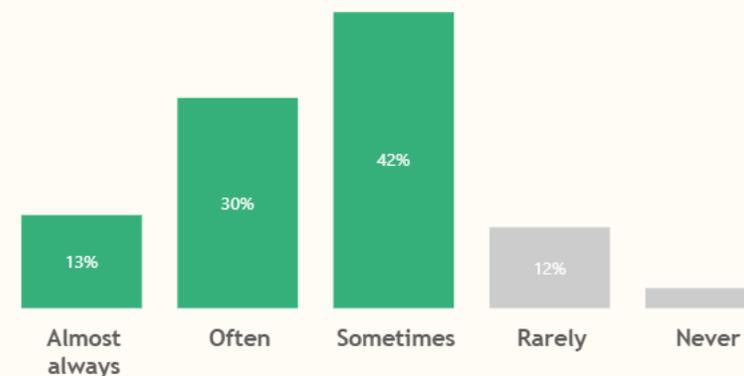
How often do you feel stressed or anxious?



of the population in China, UK and USA feel 'almost always' or 'often' stressed out or anxious

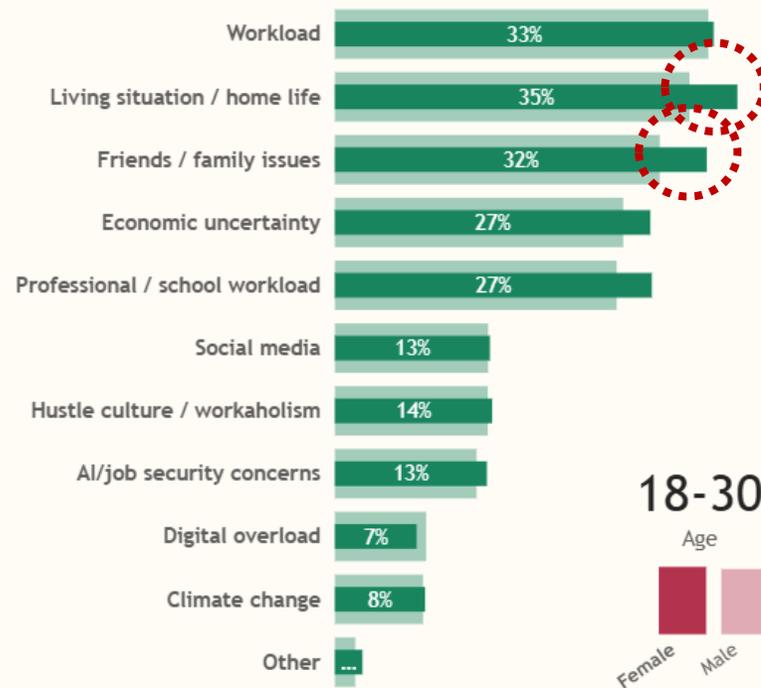


of the population in China, UK and USA feel 'almost always', 'often' or 'sometimes' stressed out or anxious

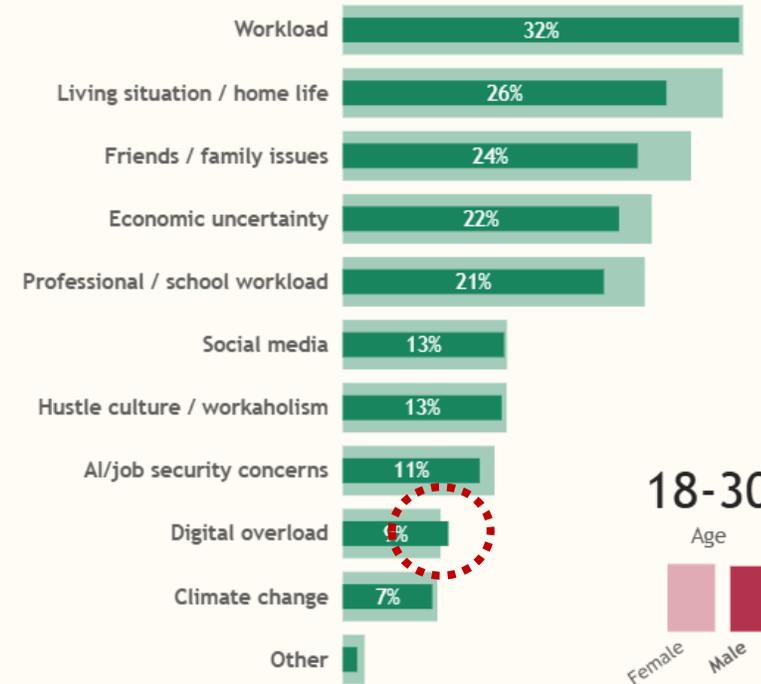


Stress hits differently: women feel it at home and in relationships, men feel it at work

What are your main sources of stress? By gender



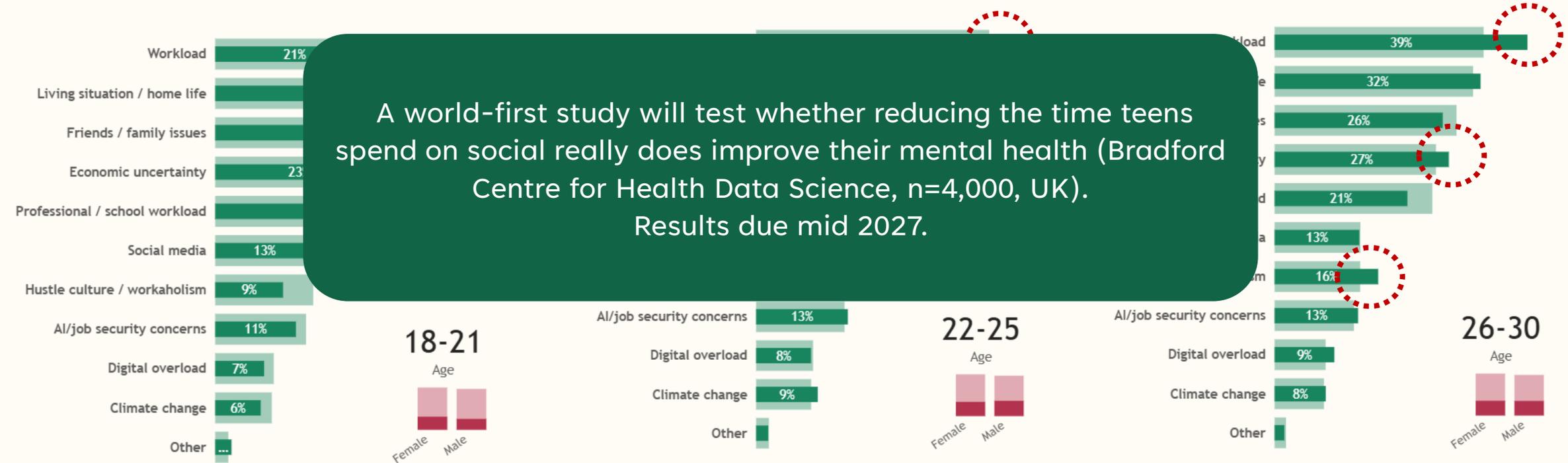
Sample: Female, 18-30-year-olds in China, UK and USA (n=1,512)



Sample: Male, 18-30-year-olds in China, UK and USA (n=1,465)

Stress is driven by everyday pressures - workload dominates stress at every age — it just changes shape

What are your main sources of stress? By age



Sample: 18-21-year-olds in China, UK and USA (n=863)

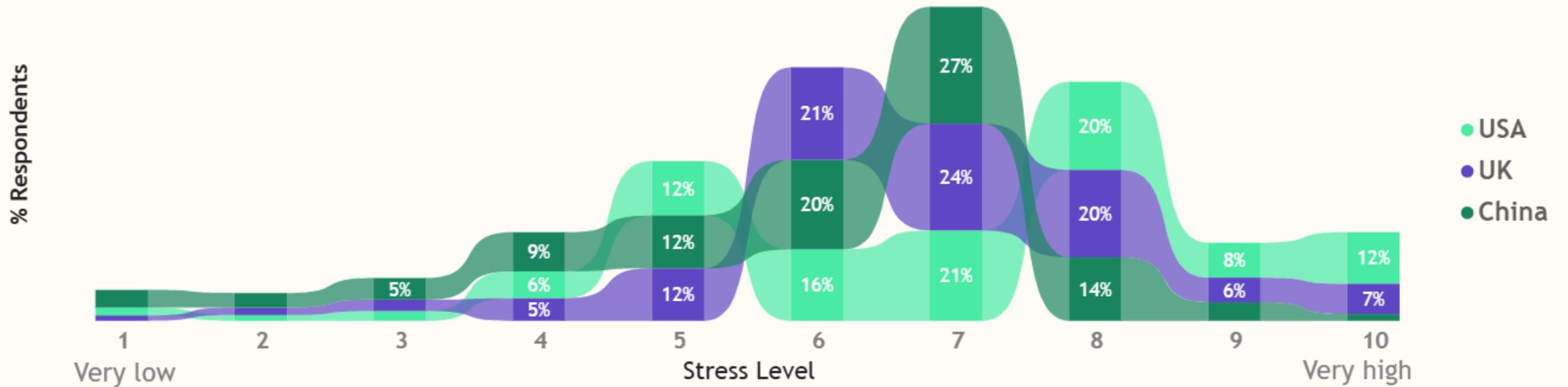
Sample: 22-25-year-olds in China, UK and USA (n=1,076)

Sample: 26-30-year-olds in China, UK and USA (n=1,061)

Stress levels skew high — for 60% of the society stress level sit between 6 and 8

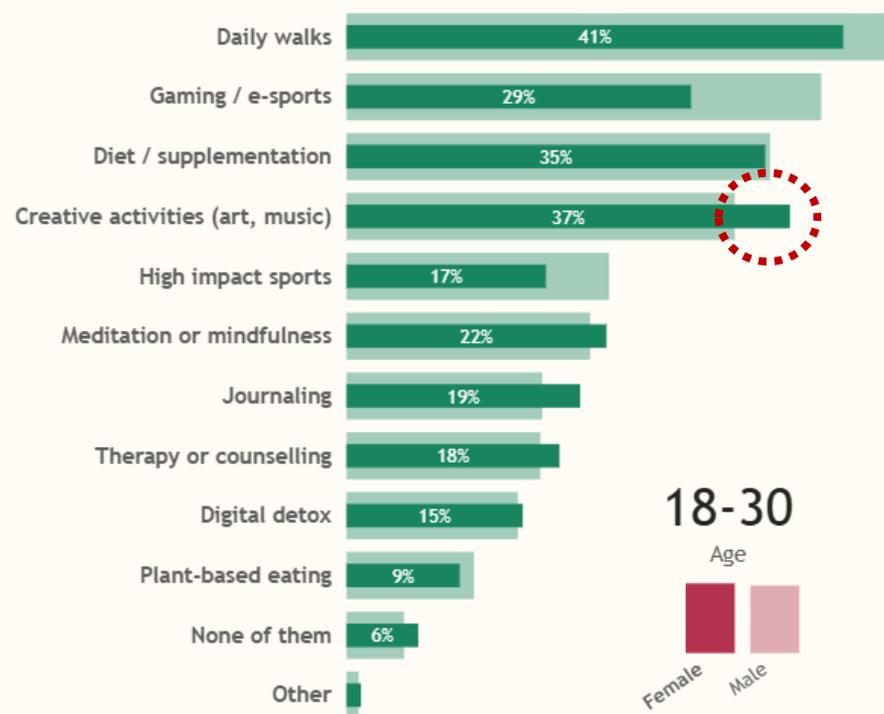


How would you rate your stress level (1-10)?

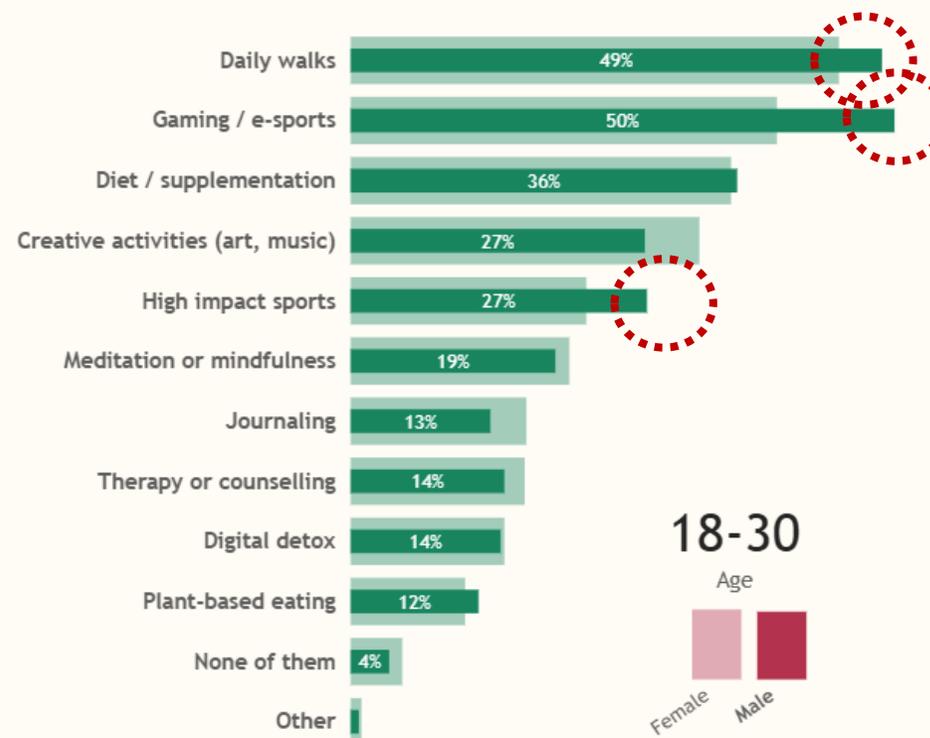


Wellness is a core part of everyday life — and gender shapes the pathways into it

Which wellness habits do you practice regularly? By gender



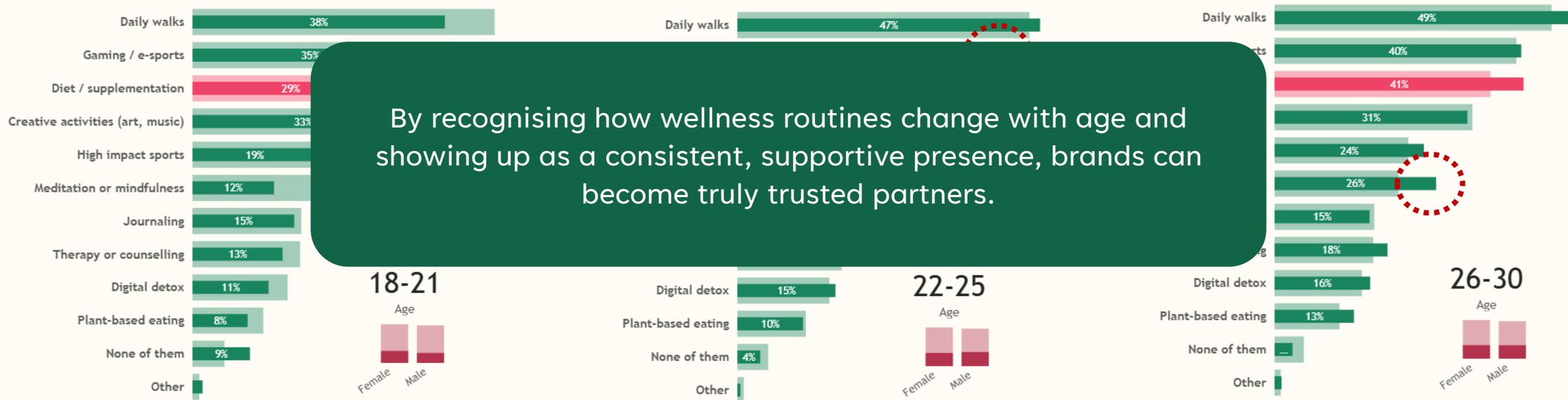
Sample: Female, 18-30-year-olds in China, UK and USA (n=1,512)



Sample: Male, 18-30-year-olds in China, UK and USA (n=1,465)

...but attention to diet and supplementation grows with age

Which wellness habits do you practice regularly? By age



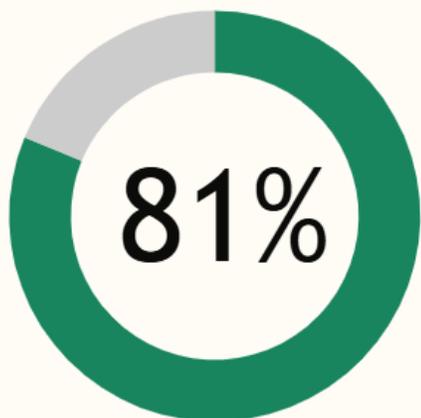
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Four in five young adults already turn to functional nutrition for stress, mood or cognitive support

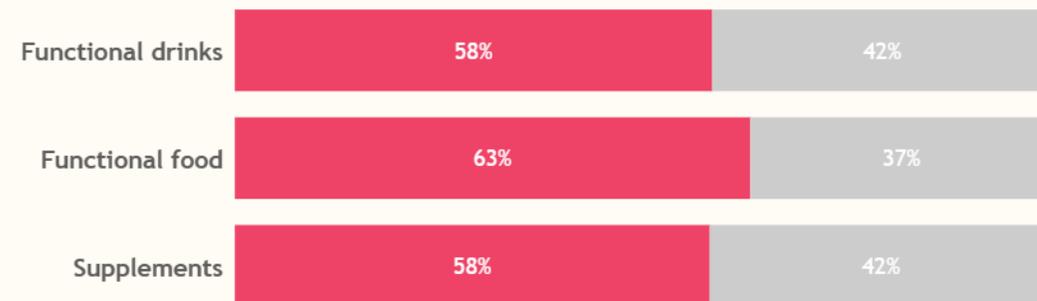
For **stress, mood or cognitive support**, do you currently take functional drinks, functional food or supplements?



of the 18-30-year-olds in China, UK and USA take at least one of functional drinks, functional foods, or supplements for stress, mood, or cognitive support (81%, n=3,000).

% of respondents who currently take functional food, functional drinks or supplements for stress, mood or cognitive support

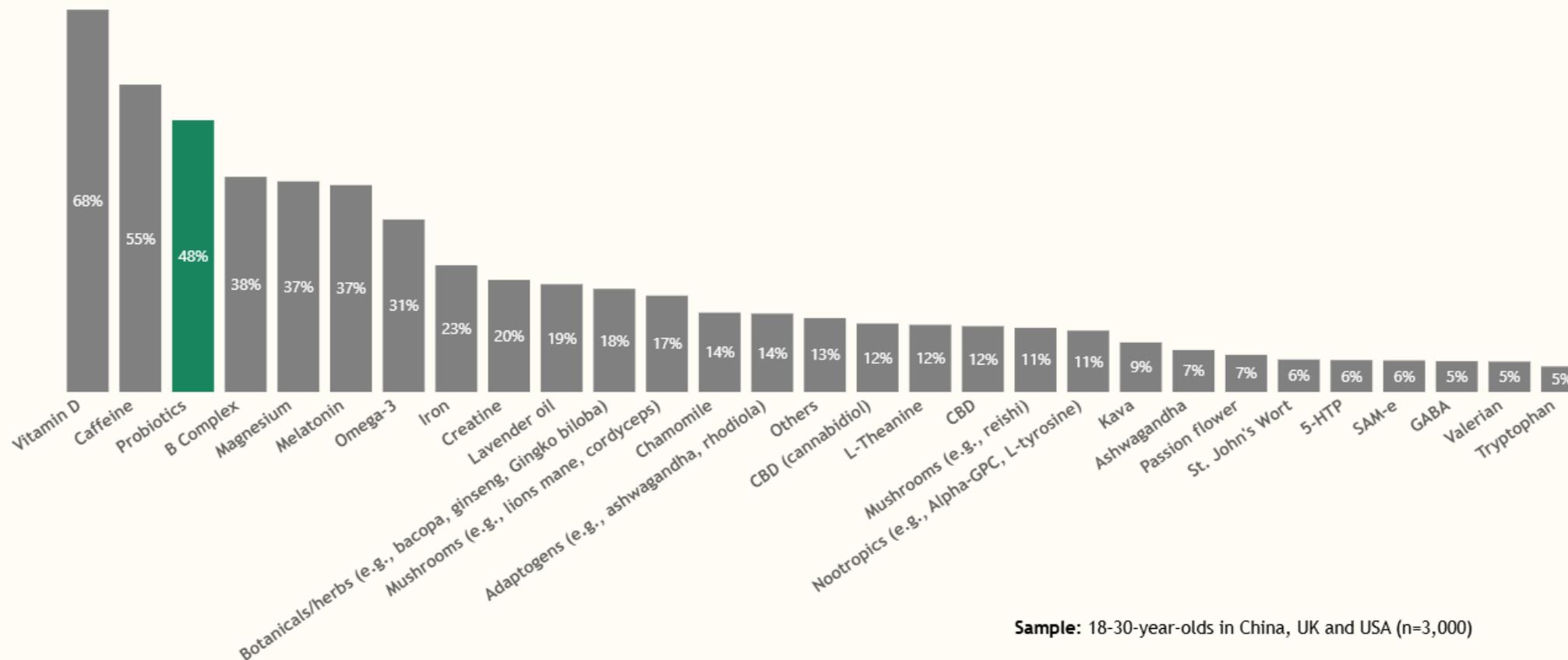
Use ● Yes ● No



Sample: 18-30-year-olds in China, UK and USA (n=3,000)

Vitamin D, caffeine and probiotics lead — but openness to emerging functional ingredients is high

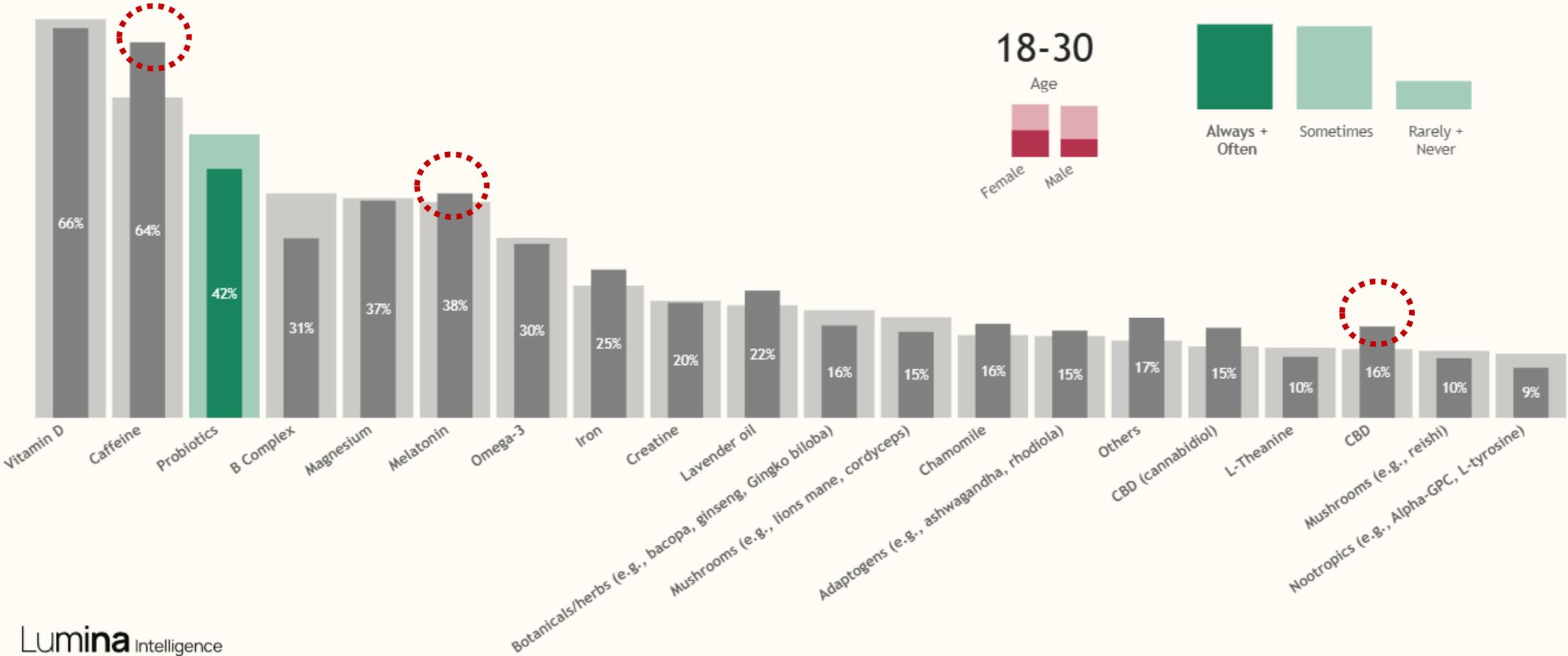
Which types do you use? (those who take functional drinks, food or supplements)



Sample: 18-30-year-olds in China, UK and USA (n=3,000)

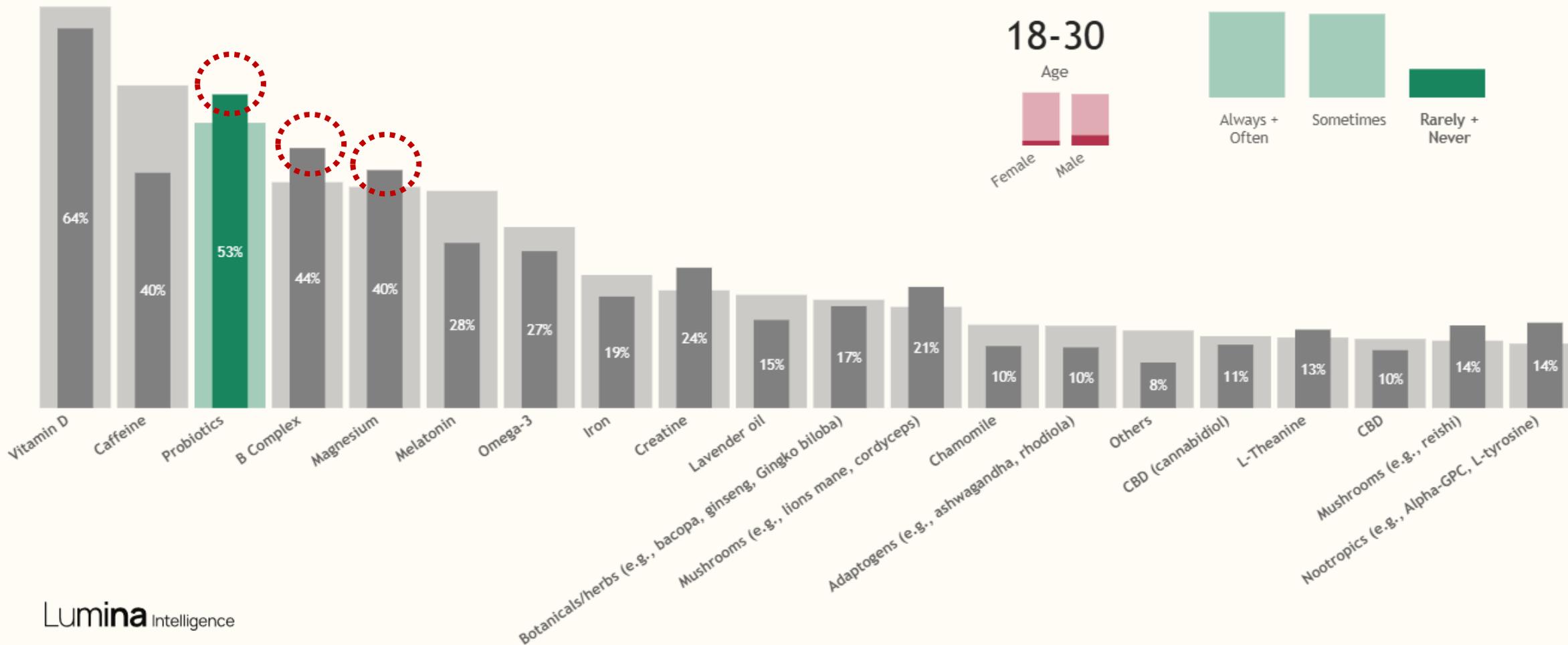
The most stressed reach for caffeine, not gut-health support

Which types do you use? Top 20, always+often stressed respondents



High stress = caffeine. Low stress = probiotics.

Which types do you use? Top 20, rarely+never stressed respondents

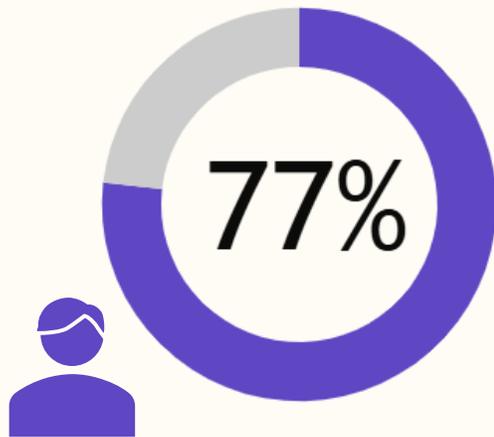


Hormonal health issues affect most young men — and shift significantly with age

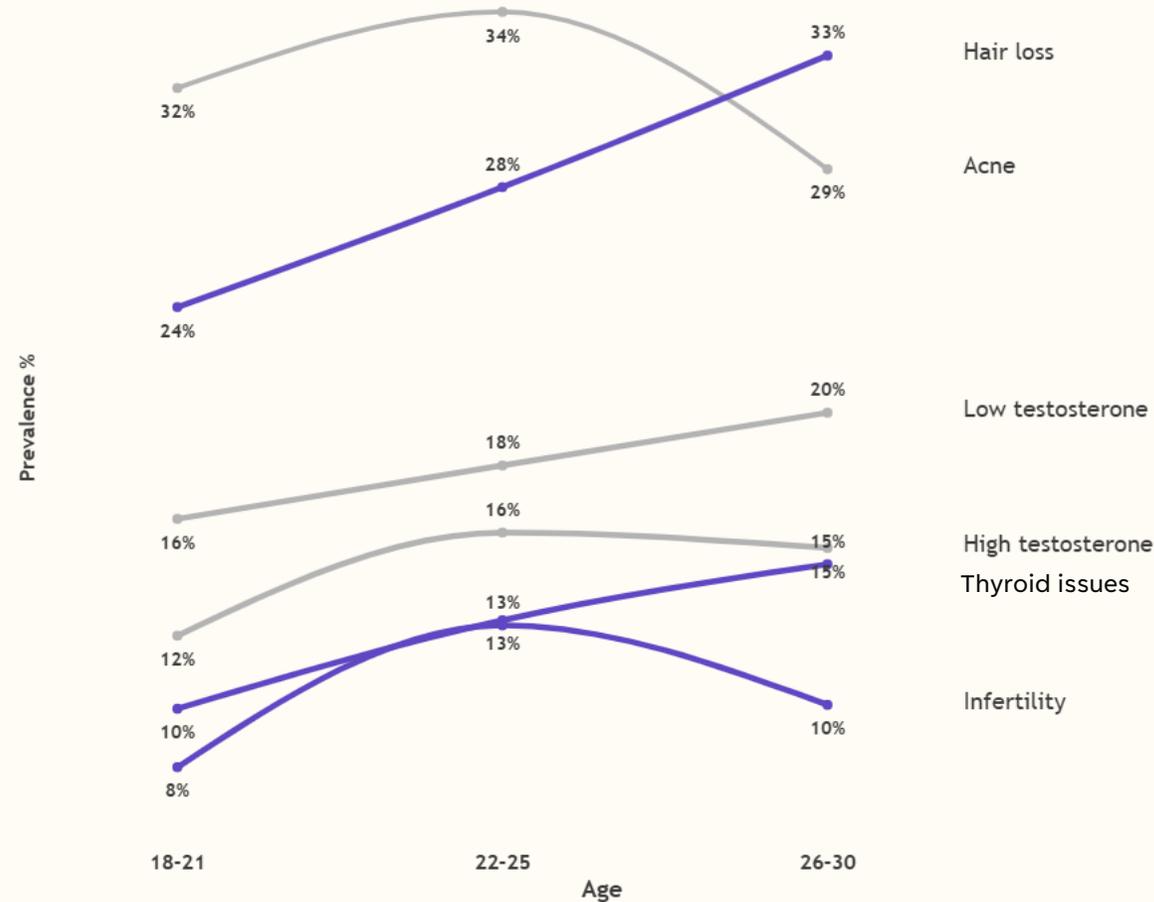


Prevalence of hormonal health challenges by age group

Which **hormonal** health challenges affect you most? Men



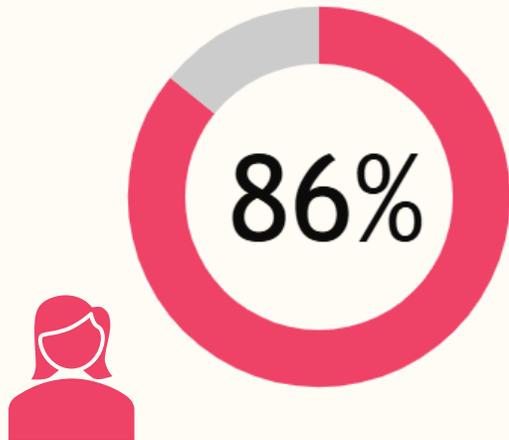
of the male, 18-30-year-olds in China, UK and USA are affected by at least one hormonal health challenge (n=1,465).



Hormonal health issues affect most young women — and their challenges evolve with age

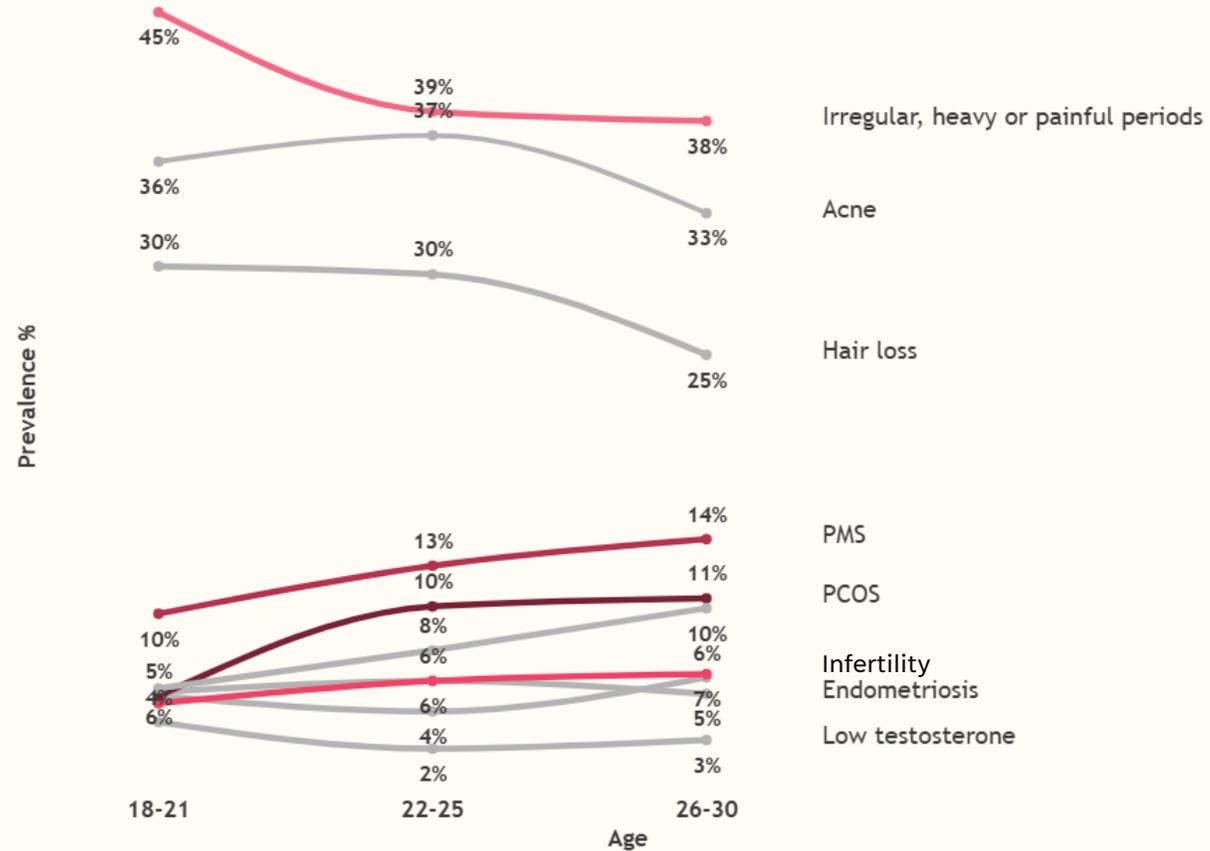


Which **hormonal** health challenges affect you most? Women



of the female, 18-30-year-olds in China, UK and USA are affected by at least one hormonal health challenge (n=1,512).

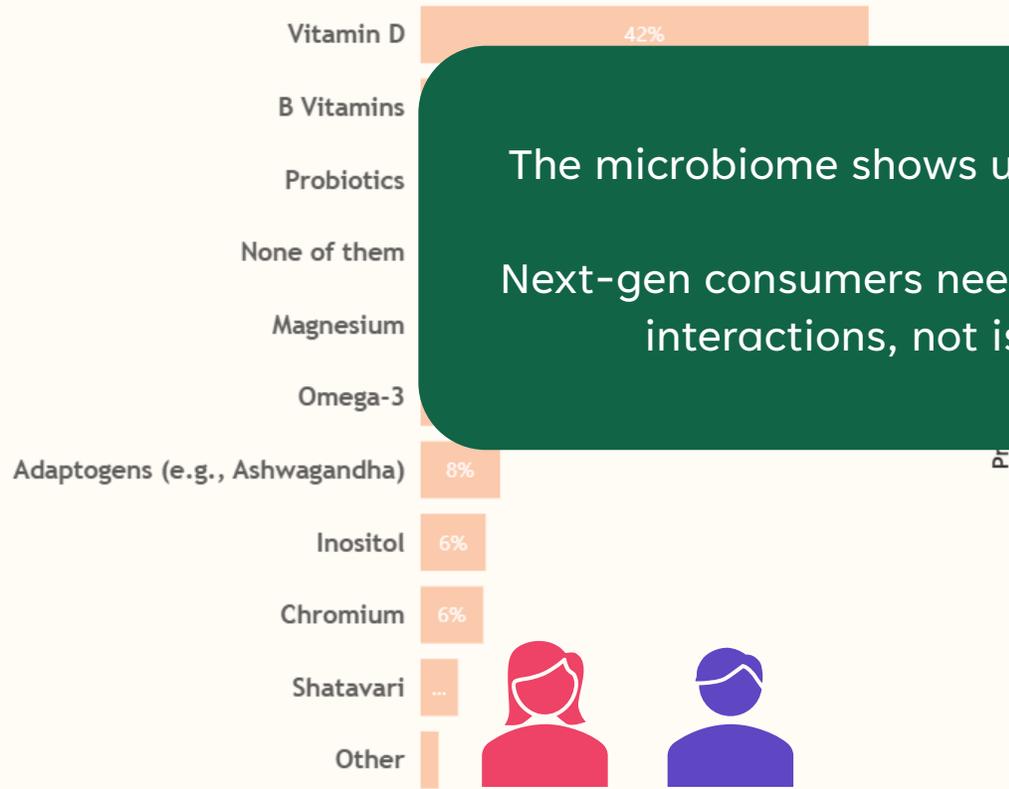
Prevalence of hormonal health challenges by age group



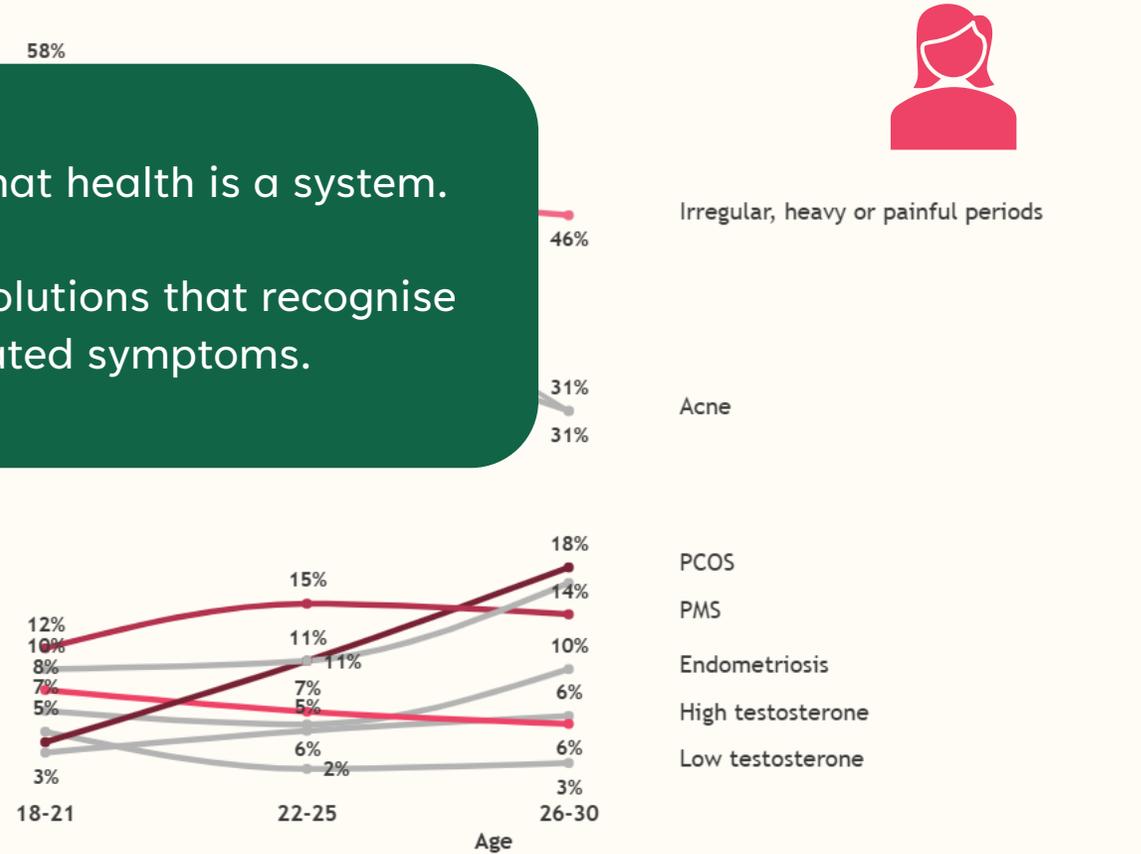
60% of affected consumers take action. Vitamins D and B anchor hormonal health supplement use, probiotics follow



What do you take?



Prevalence of hormonal health challenges by age group of those who have taken inositol



The microbiome shows us that health is a system.
Next-gen consumers need solutions that recognise interactions, not isolated symptoms.



Irregular, heavy or painful periods

Acne

PCOS

PMS

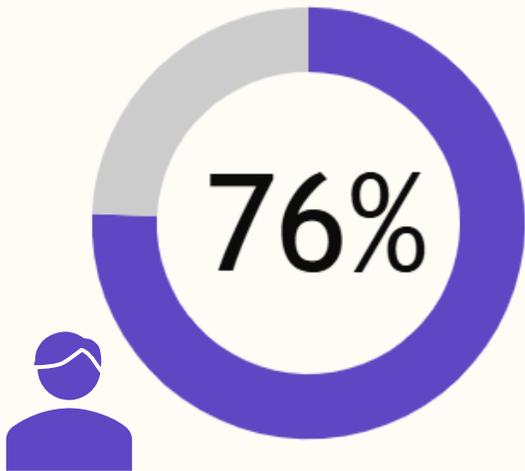
Endometriosis

High testosterone

Low testosterone

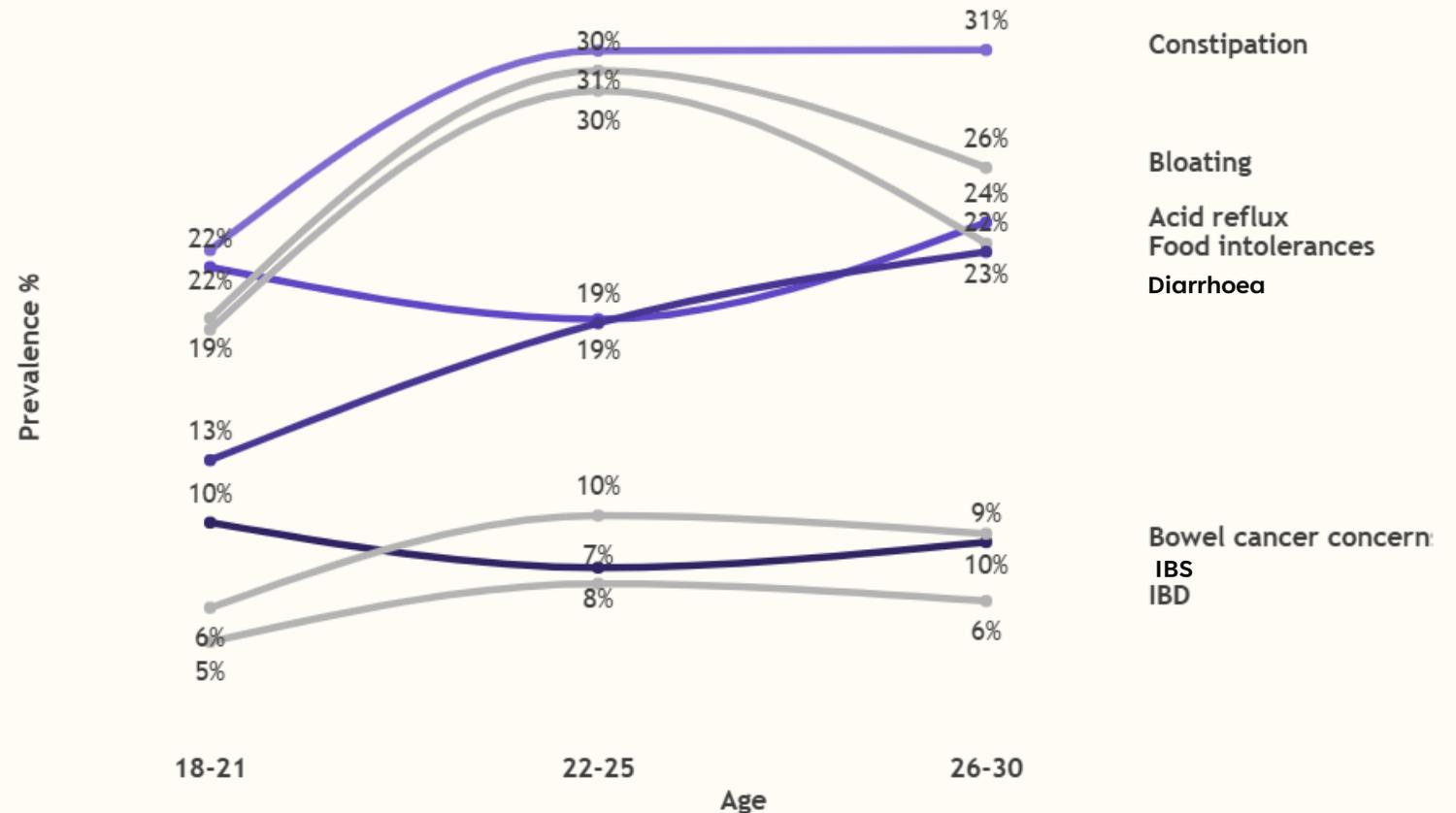
Gut health challenges shift and intensify across young men's early adulthood

Which **gut** health challenges affect you most? Men



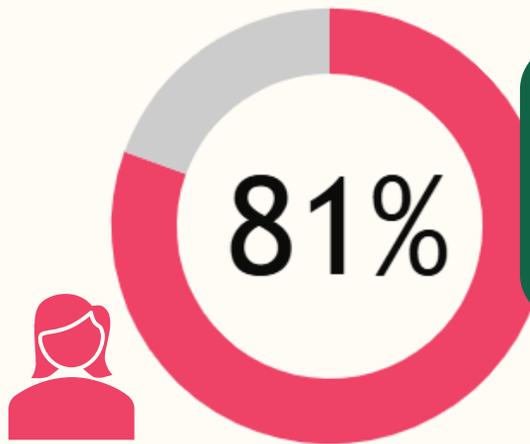
76% of the male, 18-30-year-olds in China, UK and USA are affected by at least one gut health challenge (n=1,465).

Prevalence of gut health challenges by age group



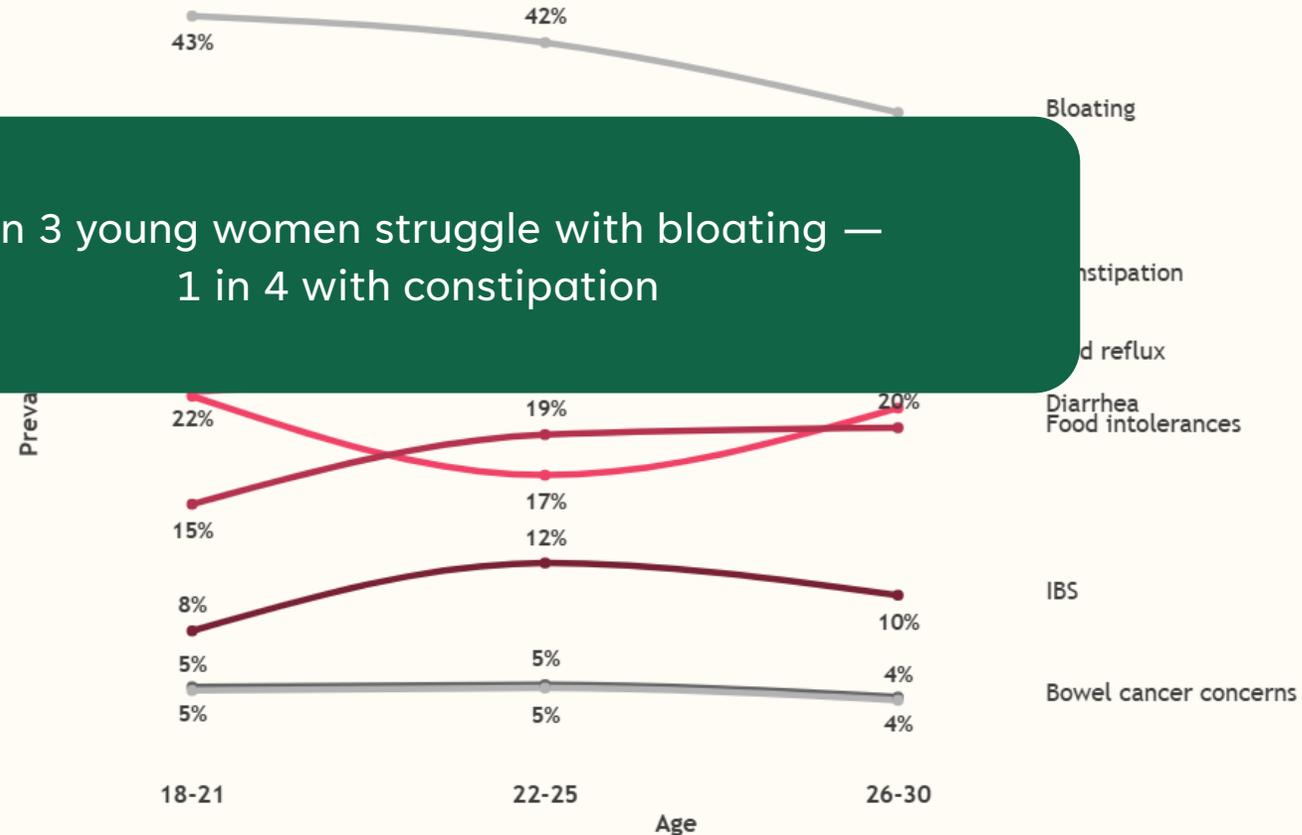
The hidden burden: gut symptoms affect 8 in 10 young women

Which **gut** health challenges affect you most? Women



of the female, 18-30-year-olds in China, UK and USA are affected by at least one gut health challenge (n=1,512).

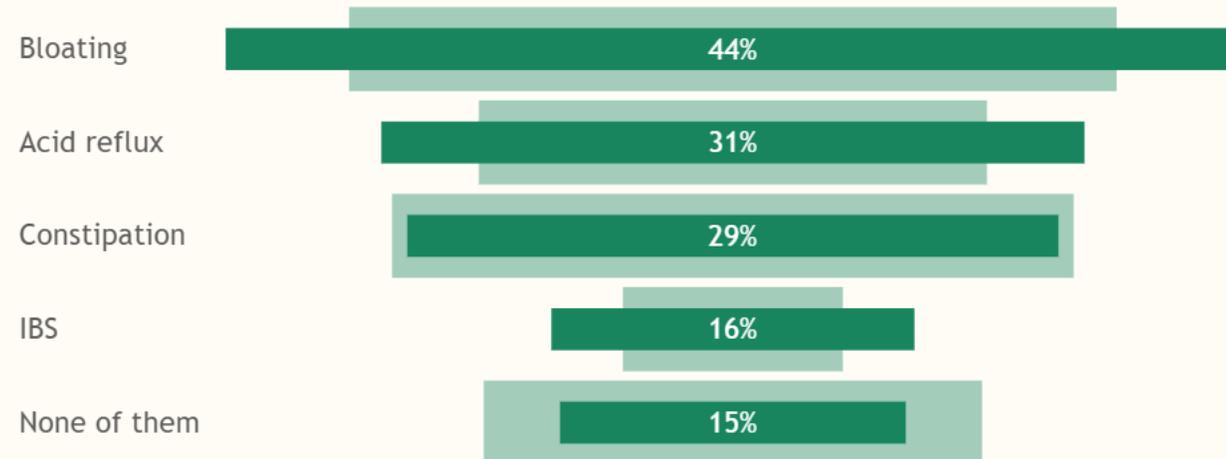
Prevalence of gut health challenges by age group



1 in 3 young women struggle with bloating —
1 in 4 with constipation

Stress strongly intensifies gut discomfort — especially bloating

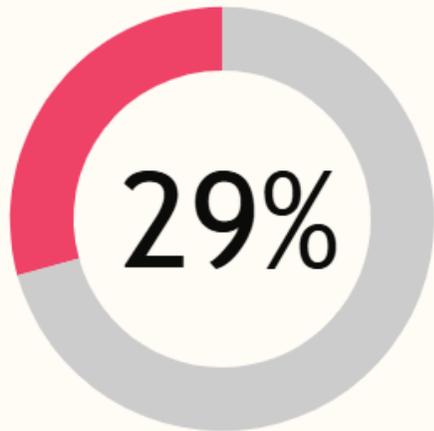
Most Common Stress-Linked Gut Symptoms



GLP-1 drugs have entered young adults' health routines — mostly through recent exploration



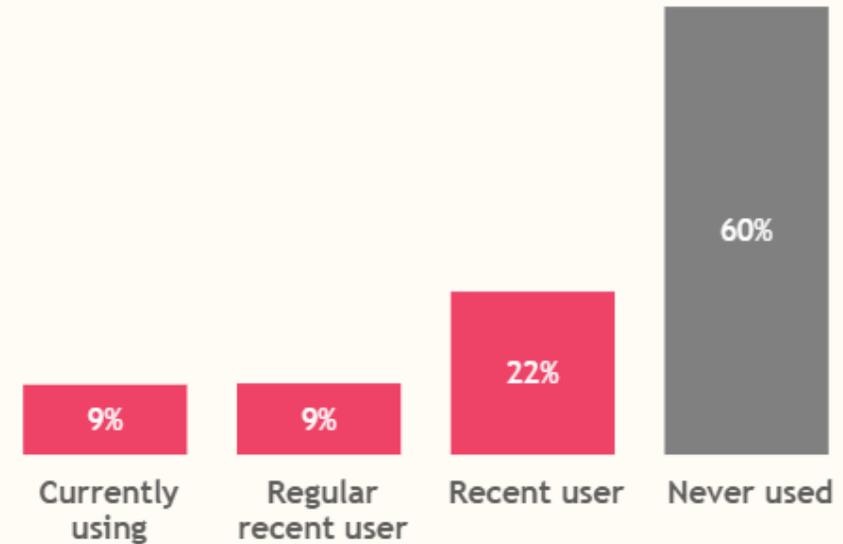
Have you taken GLP-1 agonist drugs in the past two years?



of the 18-30-year-olds in China, UK and USA are classified as Ever users of GLP-1 agonist drugs.

Ever users are defined as those who are currently taking the drugs or have taken them in the past. (n=2,262).

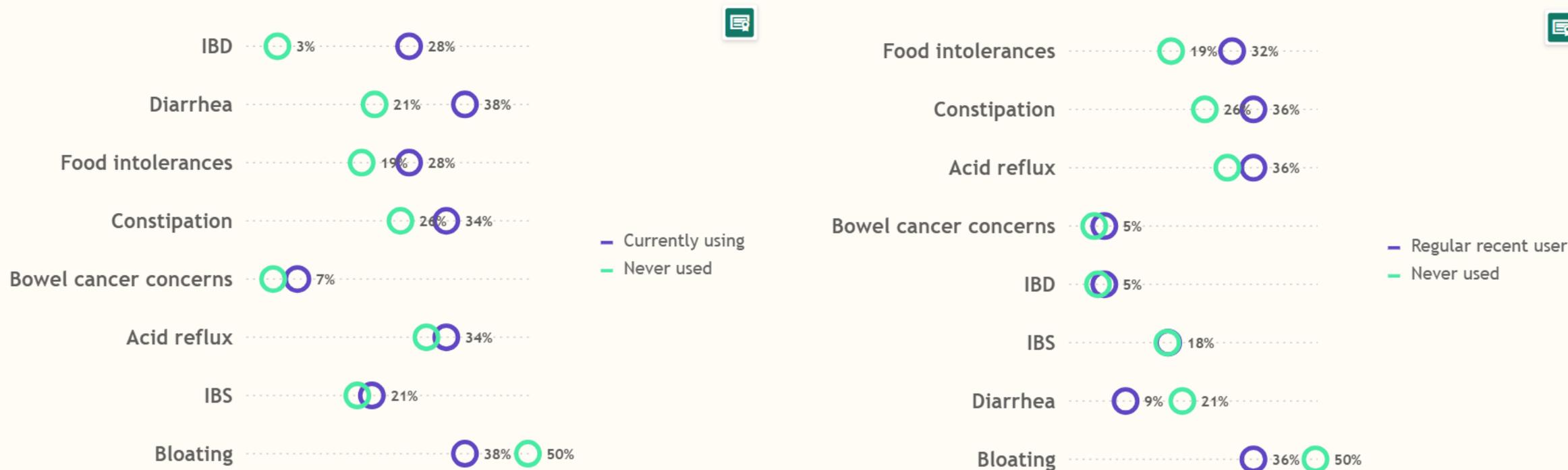
GLP-1 agonist drugs: Ever users by type



GLP-1 drug users report far higher gut-health concerns than non-users, led by IBD

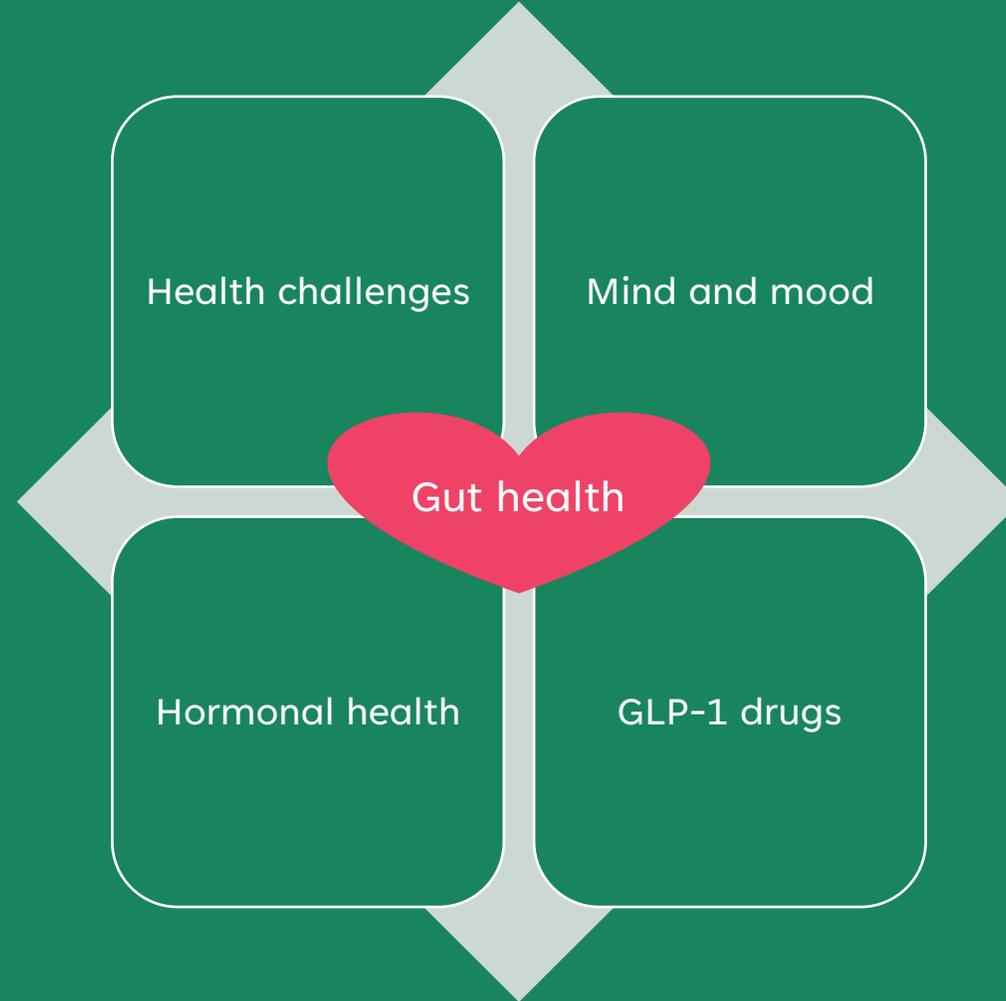


Gut health concerns: **current** GLP-1 drug users and **regular recent** users versus **never used**



• Regular recent GLP-1 drug users are defined as those who have taken regularly in the past two years, but not any more

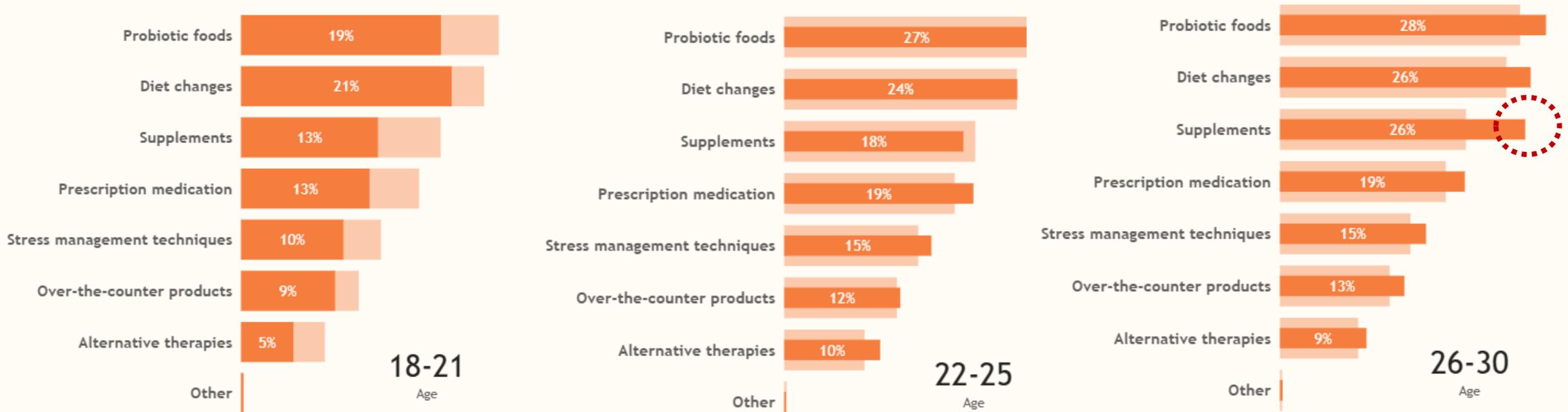
Gen Z Wellness Rewritten



Health-seeking behaviours intensify through the 20s — especially supplements, diet changes, probiotic foods



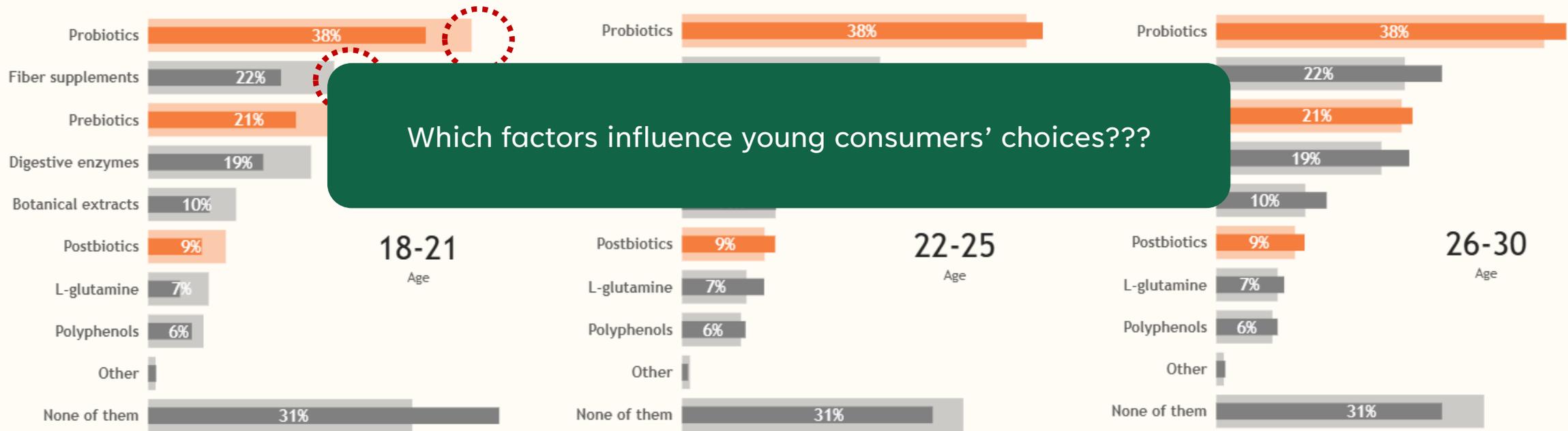
What have you tried?



As young adults move through their 20s, fibre and probiotic supplementation becomes a growing priority



Which supplements do you take for gut health?



Sample: 18-21-year-olds in China, UK and USA (n=863)

Sample: 22-25-year-olds in China, UK and USA (n=1,076)

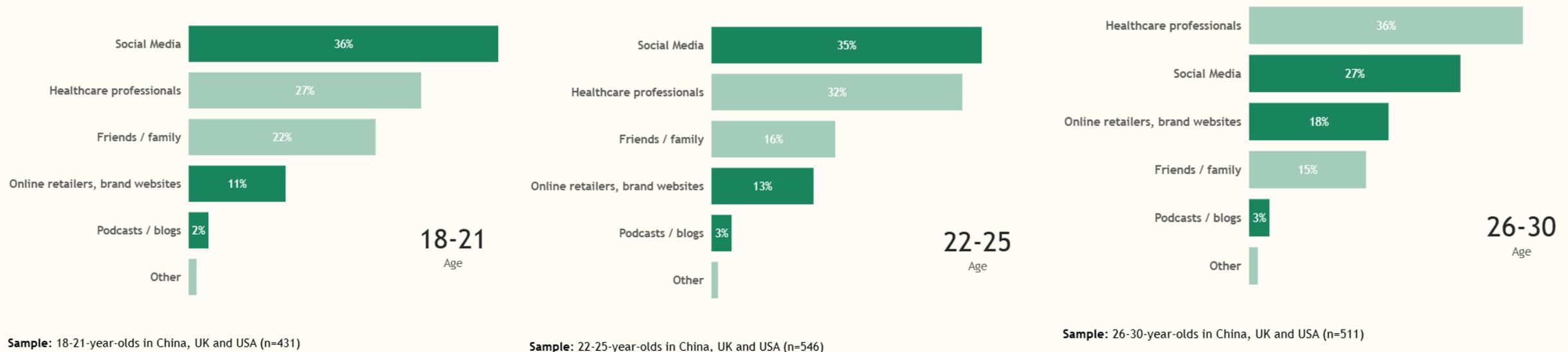
Sample: 26-30-year-olds in China, UK and USA (n=1,061)

Product discovery is split between social media and healthcare professional advice

Influence factors



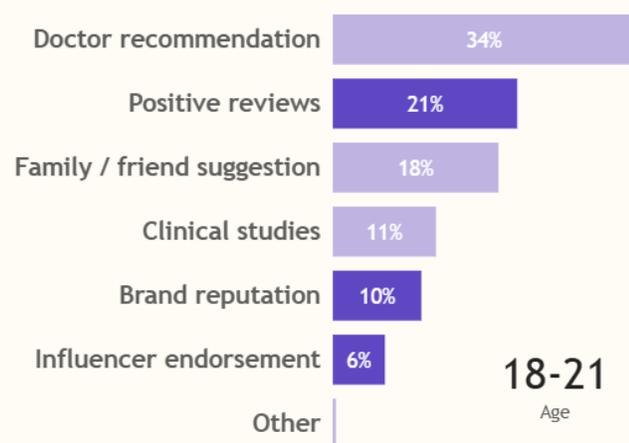
When it comes to nutritional products and dietary supplements, where do you usually get product information?



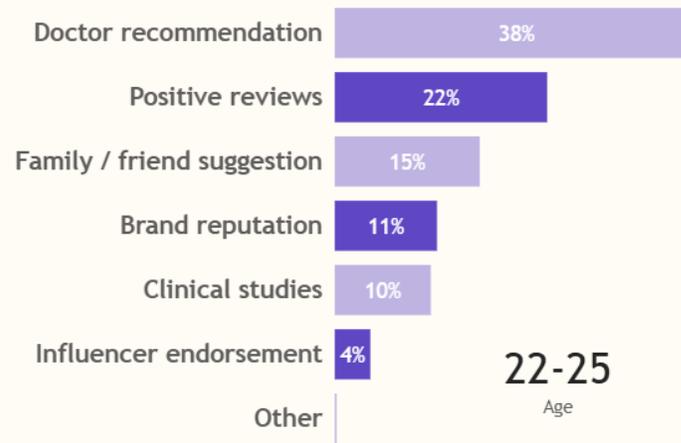
Authority and credibility matter most



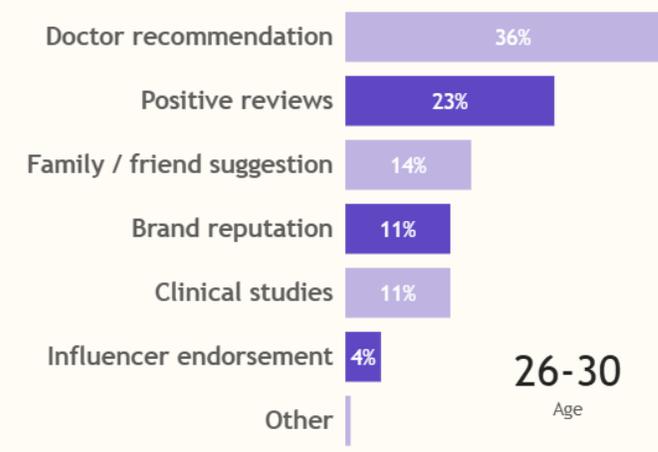
What would make you more likely to try a new supplement?



Sample: 18-21-year-olds in China, UK and USA (n=312)



Sample: 22-25-year-olds in China, UK and USA (n=394)

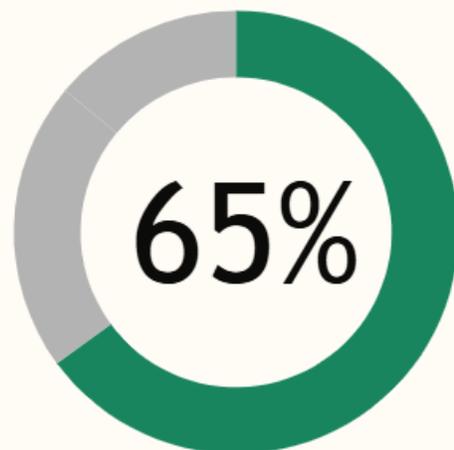


Sample: 26-30-year-olds in China, UK and USA (n=403)

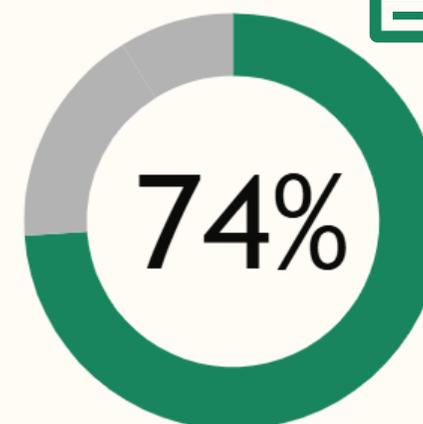
Next generation consumers prefer gender-specific supplement positioning



Would you prefer supplements marketed specifically for 'her' or 'him' versus 'general'?



of the population in China, UK and USA prefer supplements marketed for 'her' or 'him' versus 'general'



of the population in China, UK and USA prefer supplements marketed for 'her' or 'him' versus 'general'

Sample: 18-30-year-olds in China, UK and USA (n=3,000)

Sample: financially independent 18-30-year-olds in China, UK and USA (n=1,766)

Teen biotics: the next frontier in microbiome-driven health



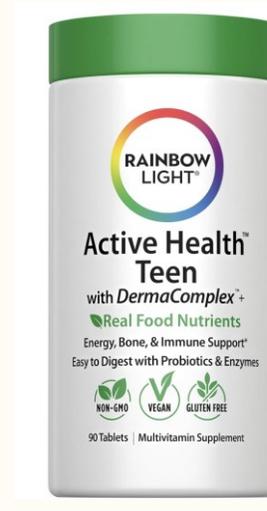
<https://www.amazon.com/dp/B0F6FV6M5S?th=1>



<https://www.amazon.co.uk/dp/B0DJH1KTSM>



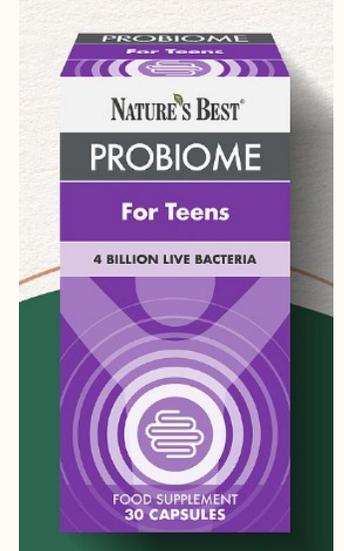
<https://www.amazon.com/dp/B0DZJXGNJK>



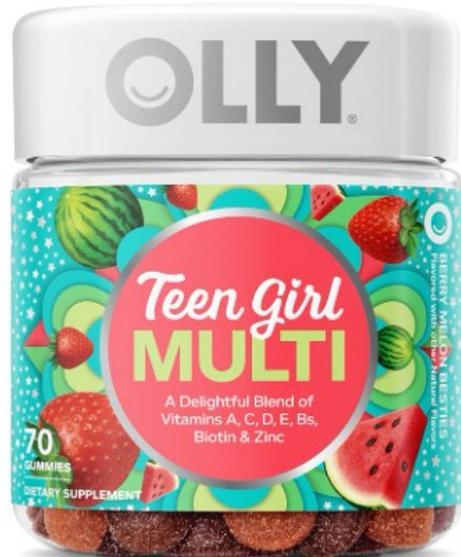
<https://www.amazon.com/en/dp/B000EEBWJA>



<https://www.amazon.com/dp/B0DJDQGRRB>



But not just teen biotics...Teen Guy, Teen Girl biotics!



<https://www.amazon.com/-/en/dp/B0038MDEZK?th=1>

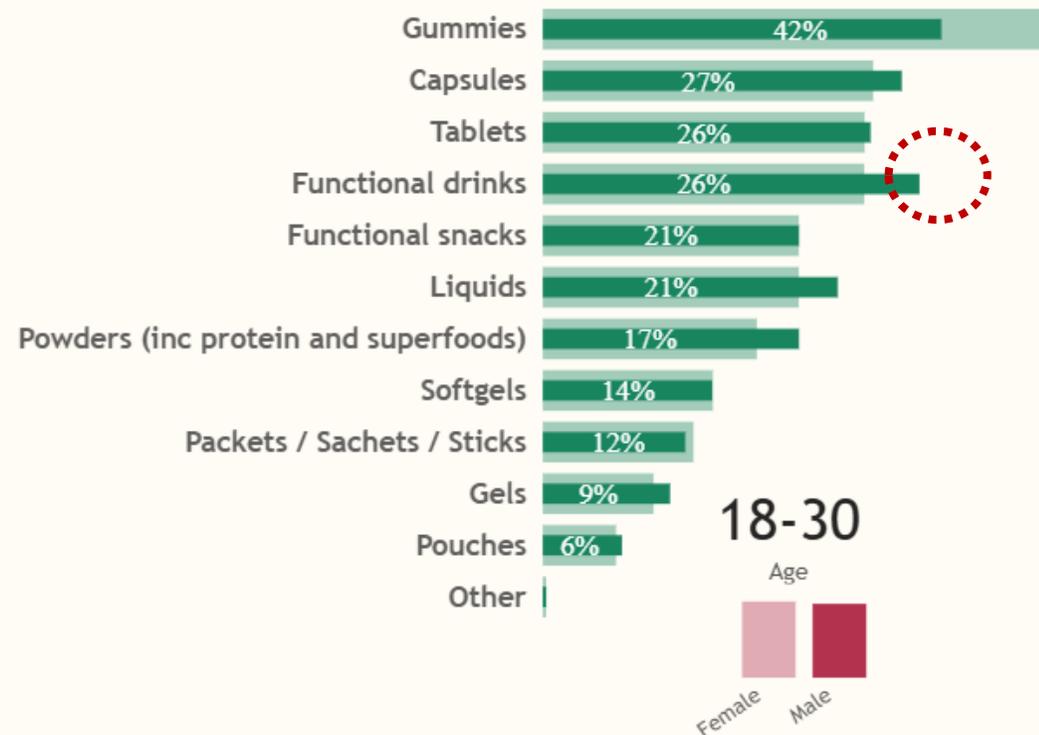
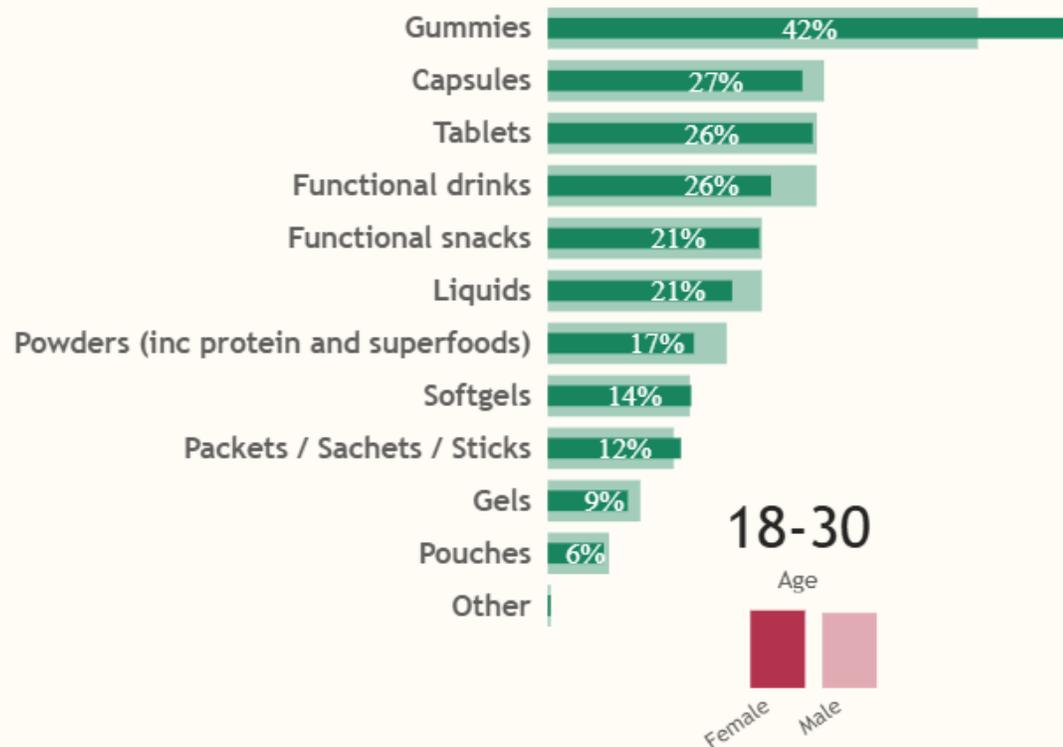


<https://www.amazon.com/dp/B0038M7LL8?th=1>

She loves gummies. He isn't as convinced.



Which supplement format do you prefer?

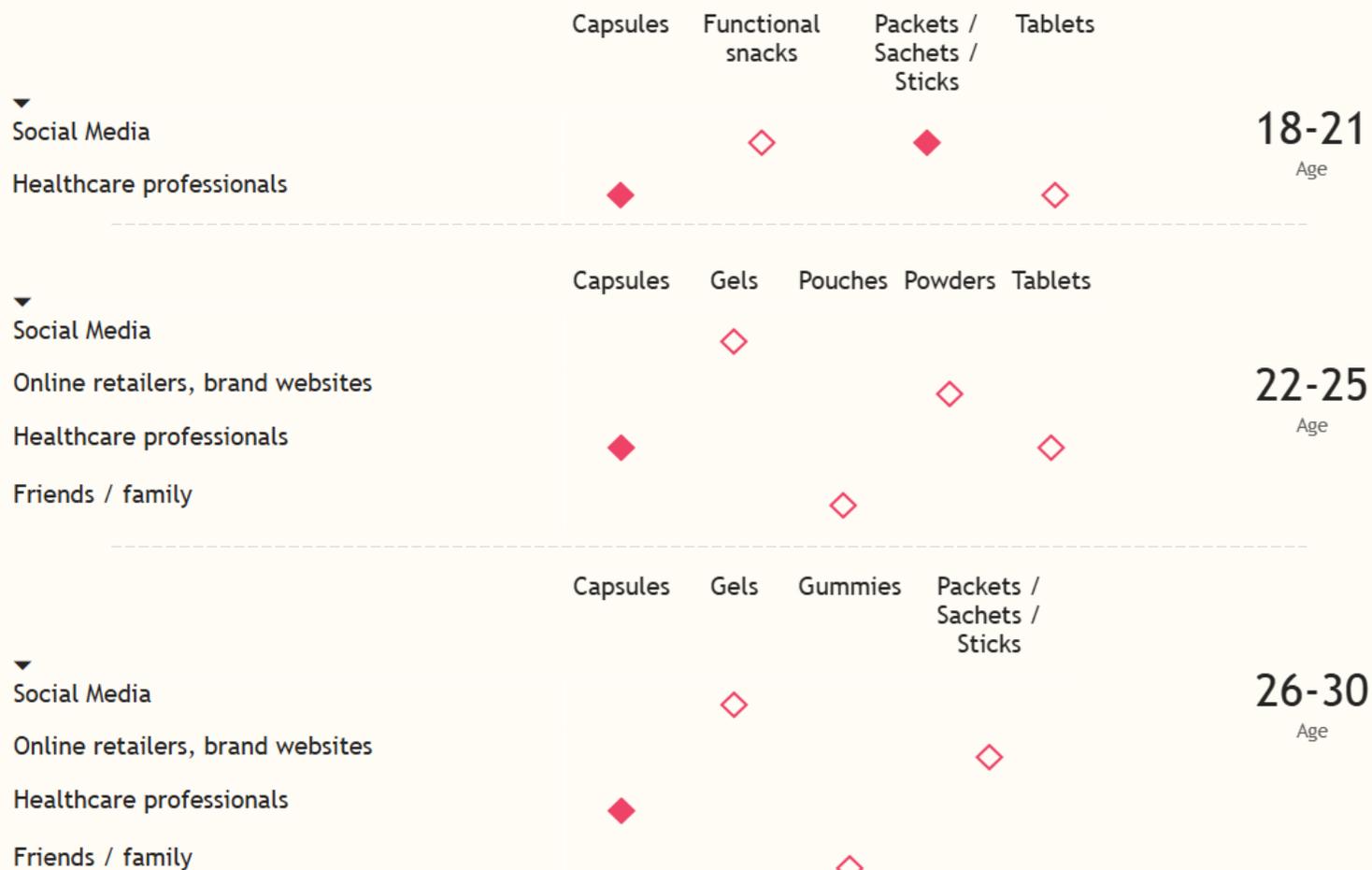




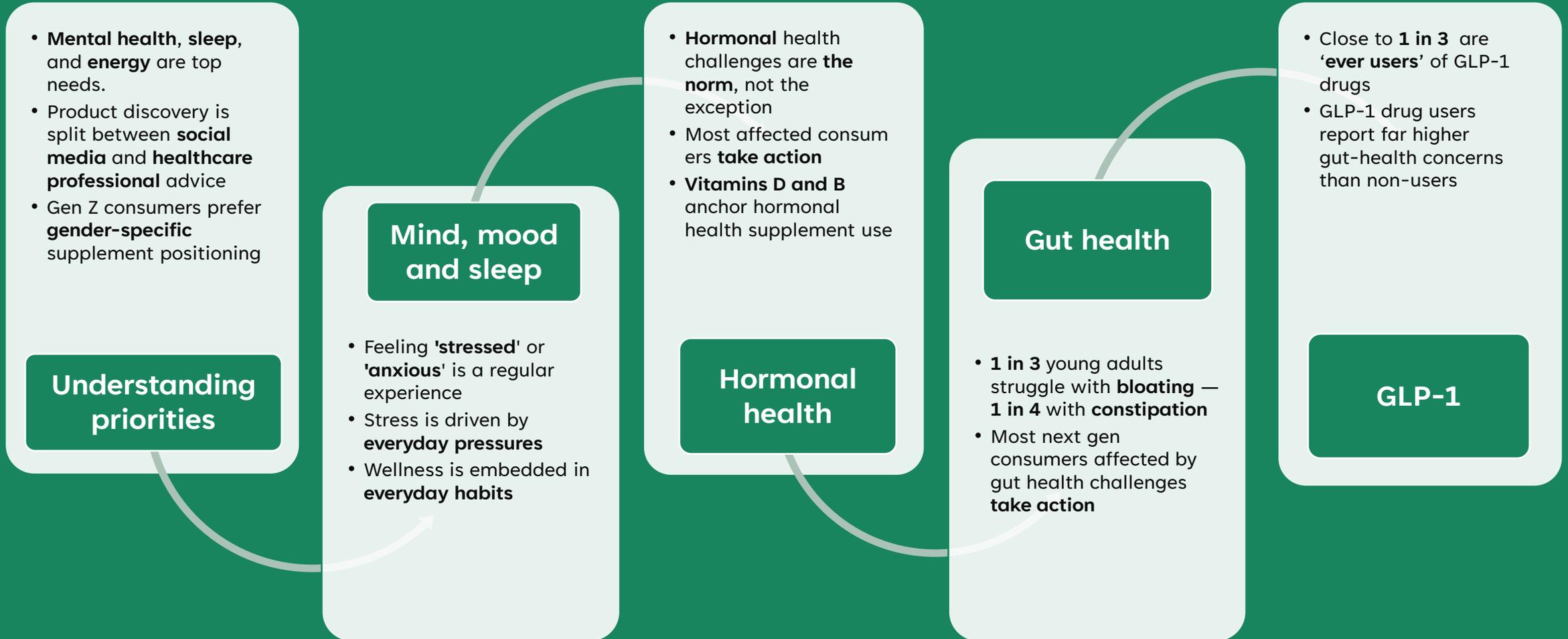
Ultimately. What they buy depends on who they trust.

How product information sources influence supplement format preferences

(Solid red = strong positive correlation; hollow red = weaker but still significant correlation)



Gen Z Wellness Rewritten



Lumina Intelligence

Thank you!



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Director of Insights

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www.lumina-intelligence.com



Lumina Intelligence helps you understand the “why” behind consumer behaviour

- Consumer research in the fast-changing world of diet, health tech, social commerce, health concerns and fitness goals
- We design, develop and deliver global consumer research solutions for ingredients providers, brand owners and retailers
- Our custom data projects allow you to drill down into specific markets, demographics, or categories to uncover the insights that matter most to your growth

Gen Z Wellness Rewritten

78% affected,
66% of the affected
take action



100% affected,
81% use nutra
for stress and mood

81% affected,
60% of the affected
take action

29% ever users,
far higher gut
health concerns