



From TikTok Shop to seed oils: How influencers are changing what we buy

Quirks Chicago 2025



Cara Edwards
Toluna



Dan Frommer
The New Consumer



We believe you can
AMPLIFY the **IMPACT** of
your insights by
adhering to the
following principles...

At Toluna, we've
built our company
around these principles
that will help grow your
brand and business.

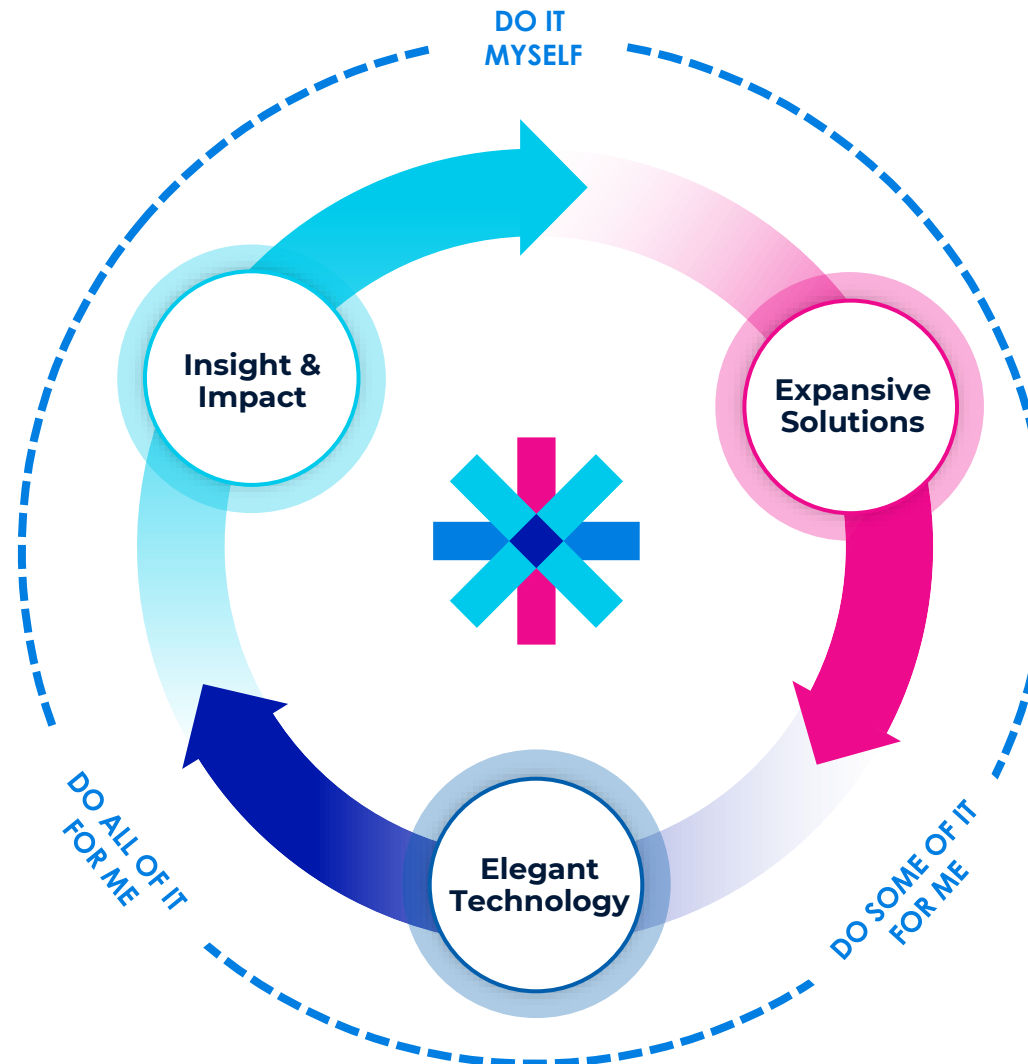
Utilize **Validation** Research and **Learning** Research **together** to transform your insights and get a more complete view of any problem or opportunity

Validation Research

- ✓ Trusted methodologies
- ✓ Linked to in-market
- ✓ Go / No Go

Learning Research

- ✓ Flexible approaches
- ✓ Short timelines
- ✓ Uncover more why's



----- Harmonized servicing

Layer In AI Solutions that **Augment Your Team's Intelligence**, rather than replacing or disrupting it

Example

Our **conversational AI** solution makes it faster and easier for any insight professional to dig deeper into consumer needs, desires, preferences, and motivations

Powered by our proprietary QProbe & SmartCloud technologies

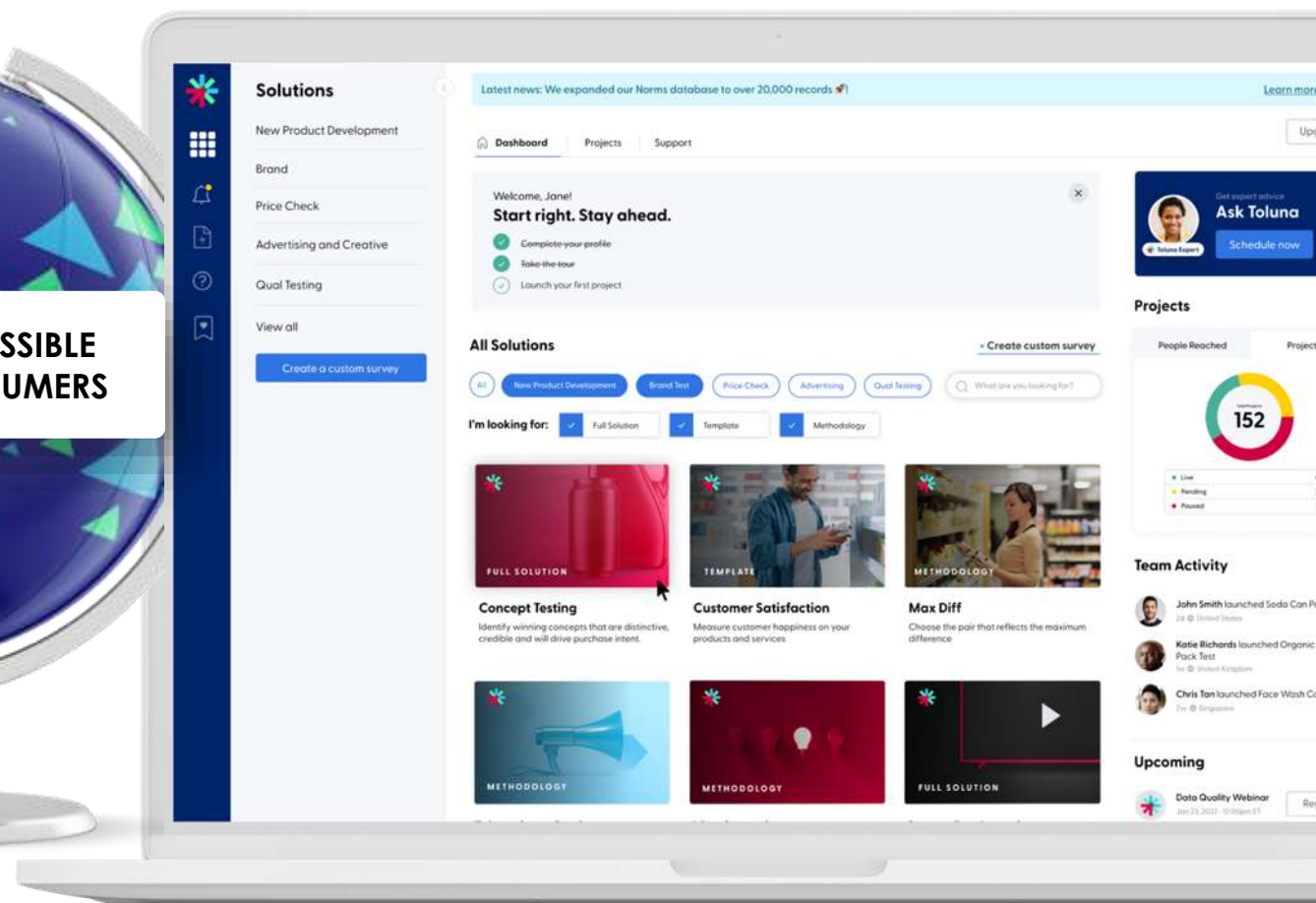


Use **agile** learning tools
to economically
optimize learning
for your category
and company



Example

On demand custom
research published
through our
TolunaStart platform





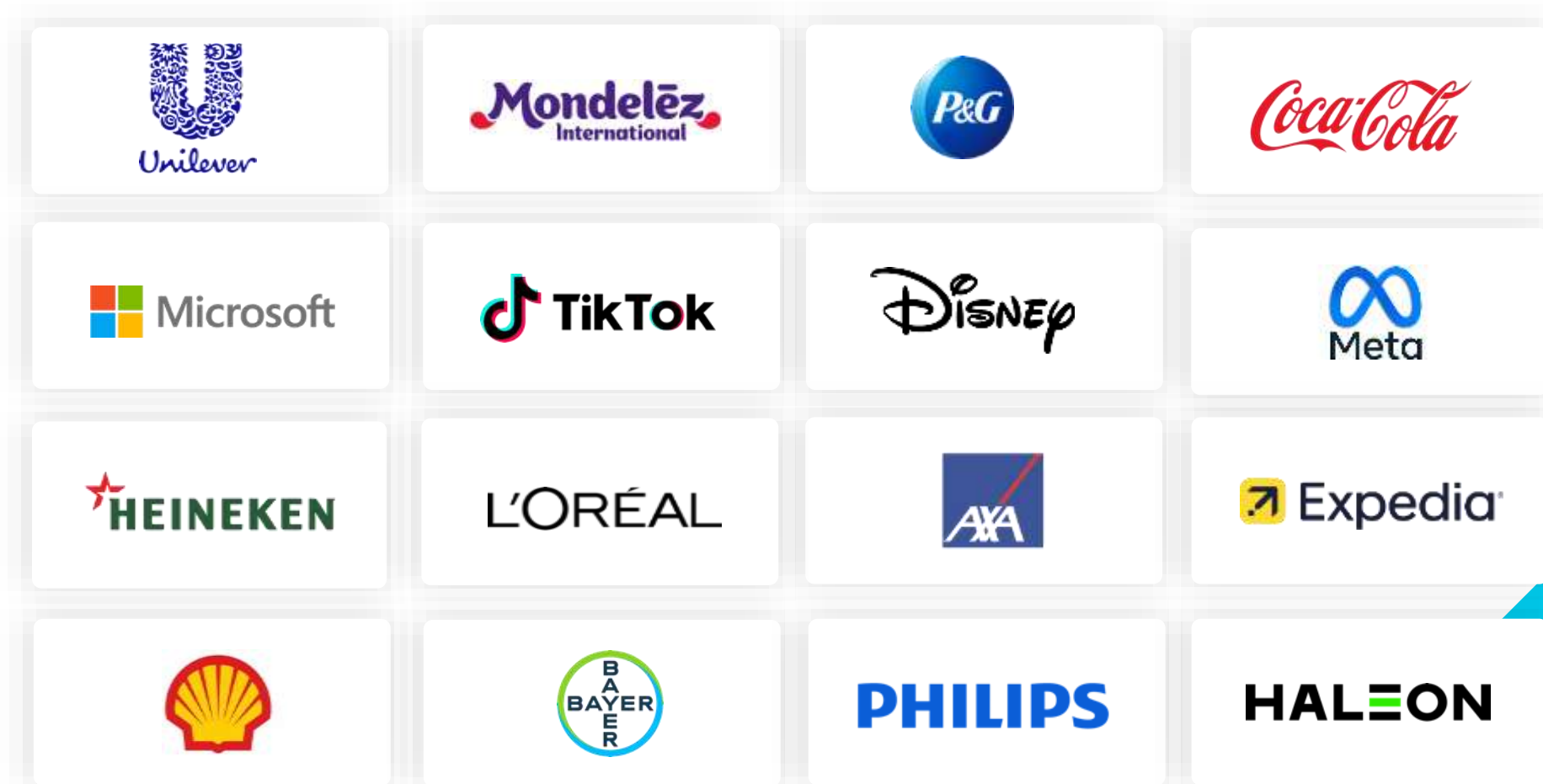
**A combination
that delivers
greater business
impact.**




We build and deliver insight programs with the world's leading brands,
to drive business impact

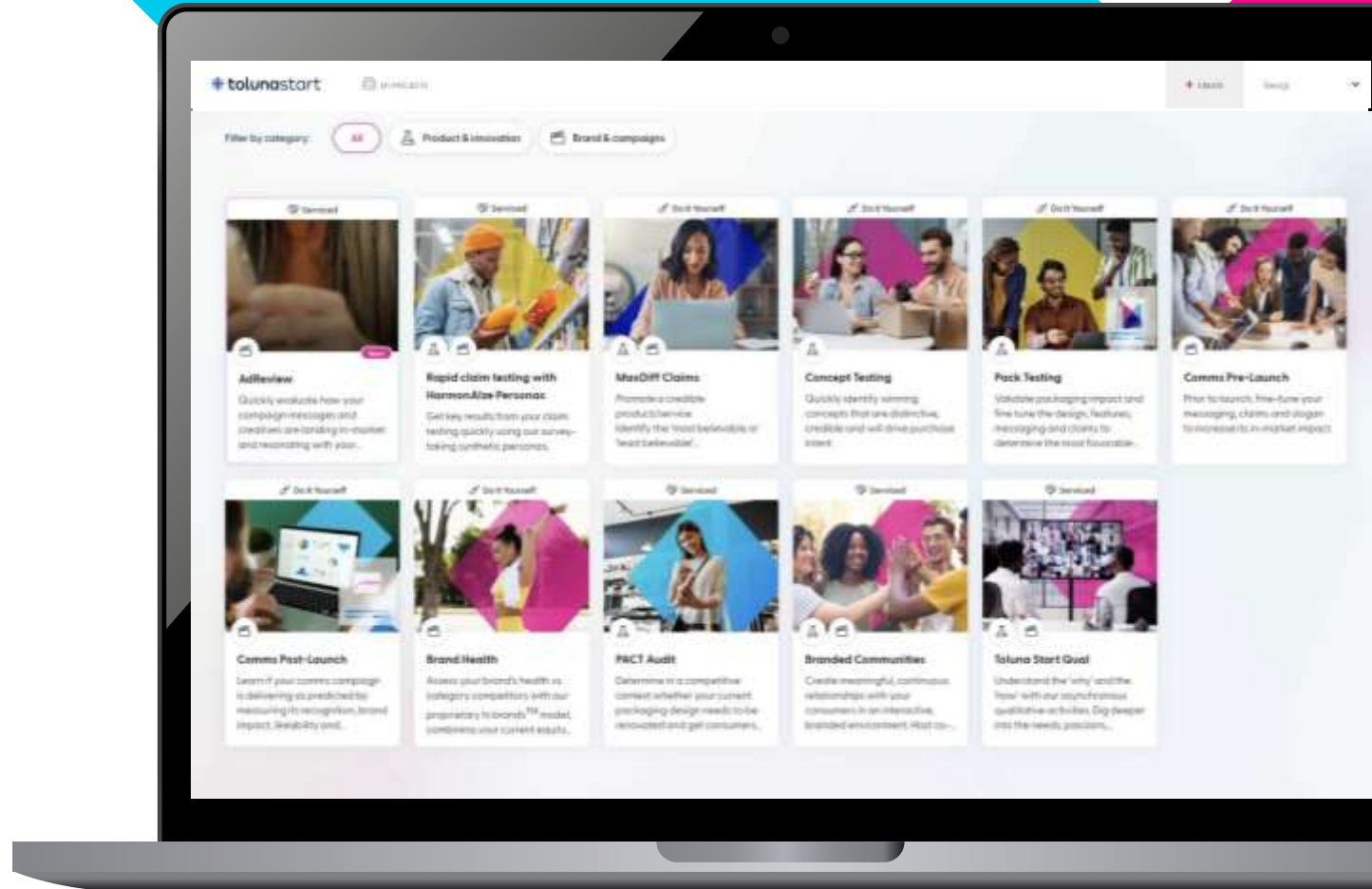


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Come and find us at Booth 420 in the networking area

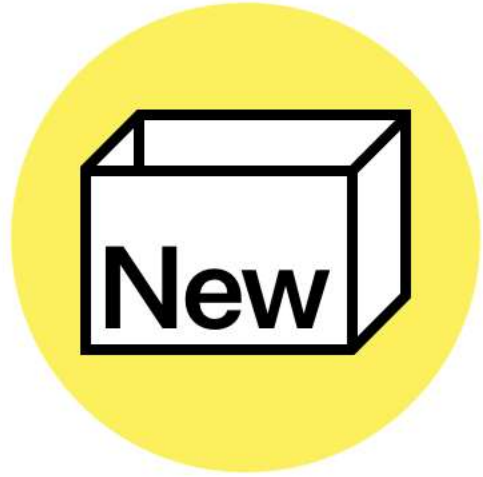
That's why we built
 **tolunastart**
- the single insights
source every
company needs.



Over to Dan for the latest Trends Report

Come and find us at Booth 420
in the networking area

The New Consumer



The New Consumer

- Launched in 2019 by longtime business journalist Dan Frommer
- Exploring how and why people spend their time and money
- Analysis, research, trends, and advisory services
- newconsumer.com

Coefficient
Capital

Coefficient Capital

- Launched in 2018 by Franklin Isacson and Andrew Goletka
- Investments in digitally powered consumer brands
- Focus on transformational consumer shifts
- coefficientcap.com

Coefficient Capital Portfolio

EXIT
NOM NOM

Personalized
pet nutrition

EXIT
**JUST
SPICES**

Cooking solutions for
the new consumer

hydrant

Sustainable,
functional hydration

Hawthorne

Personalized men's
personal care

IPO / EXIT
THE ORIGINAL
OATLY!

Global plant-based
dairy leader

**MAGIC
SPOON**

Low-carb
breakfast innovator

SESAME

Direct-to-patient
healthcare

**MILANO
VICE**

Next-generation
restaurant brand

lemme

Innovative
wellness brand

kate farms

Clinical
nutritional formulas

GORGIE

Functional energy
beverage company

SAUZ

Pasta sauce for the
modern consumer

STARSHIP

Autonomous, robotic
last-mile delivery

NEW
ZOE

Science-backed
personalized nutrition

NEW
KoRo

Healthy
European snacking

Consumer Trends Report

- Today, key points from our latest **Consumer Trends** reports
- We look for profound changes in the consumer landscape and what matters most for the years ahead
- View the full report and previous reports: newconsumer.com/trends

Consumer Trends Survey

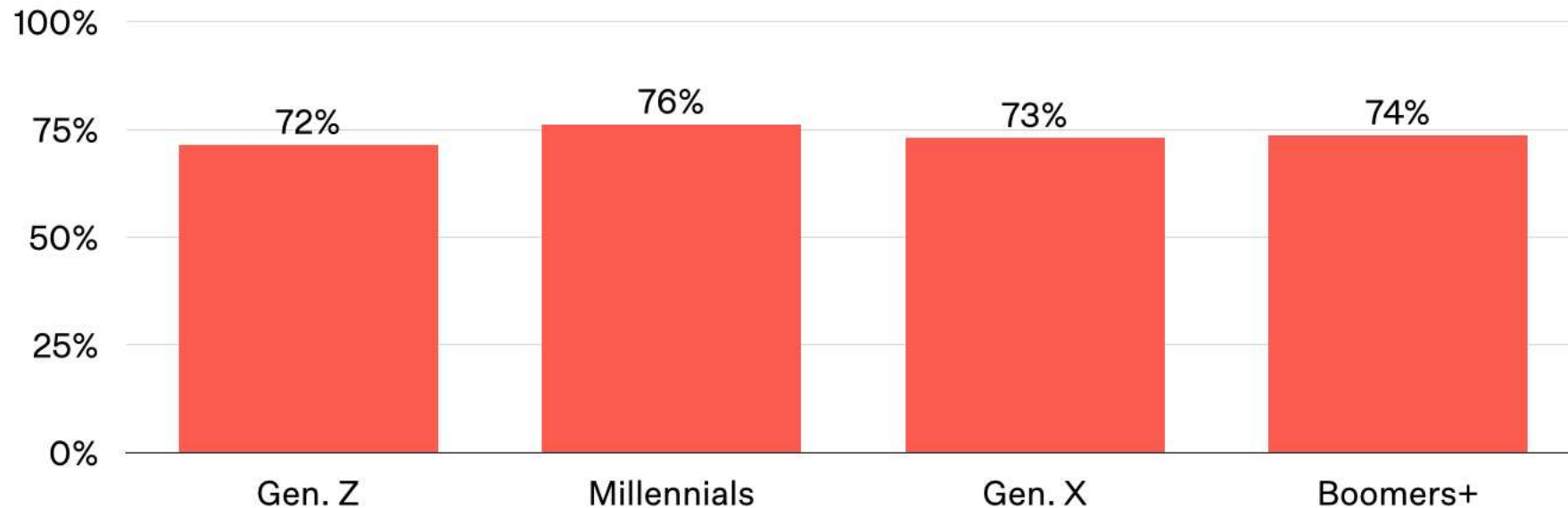
- A big part of our research is our proprietary **Consumer Trends Survey**
- We've now conducted 12 surveys of 3,000+ US consumers, most recently in February 2025
- Powered by Toluna, “delivering real-time consumer insights at the speed of the on-demand economy” tolunacorporate.com

1

There's a new meme-y mandate
that's entered mass culture:
Make America Healthy Again

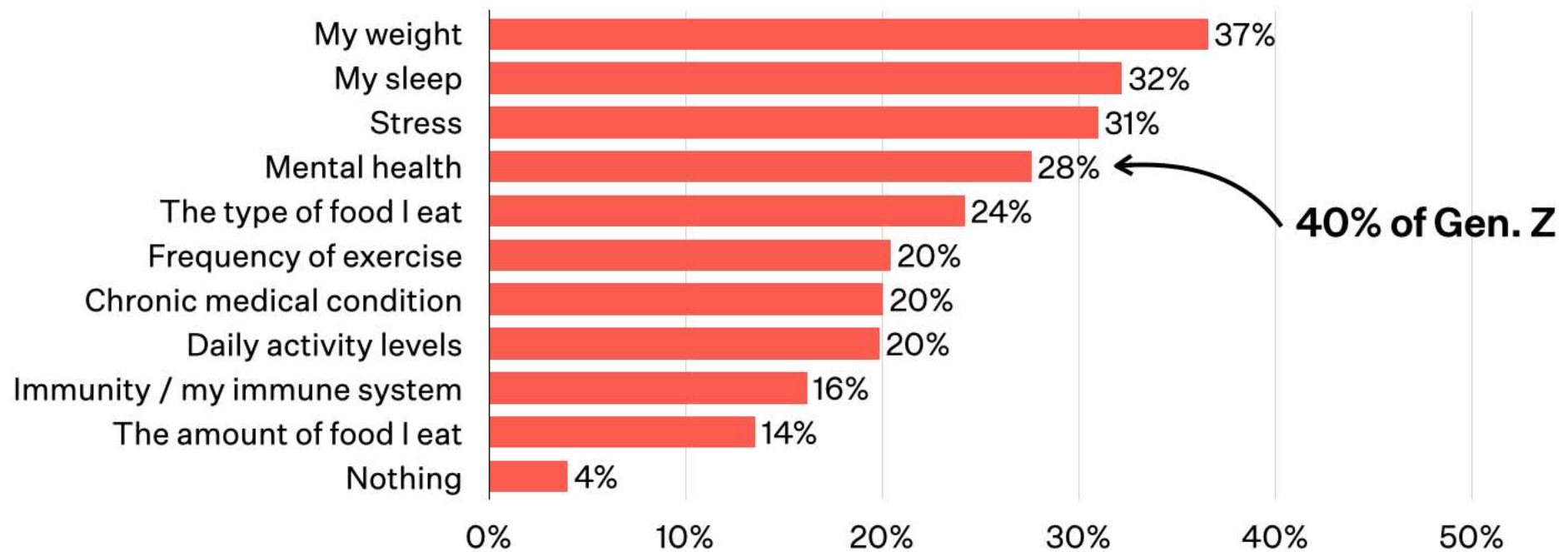
Most Americans plan to prioritize their health and wellness over the next year

Percentage of ‘The top priority’ and ‘A high priority’ responses by generation: Over the next year, how do you plan to prioritize your health and wellness?



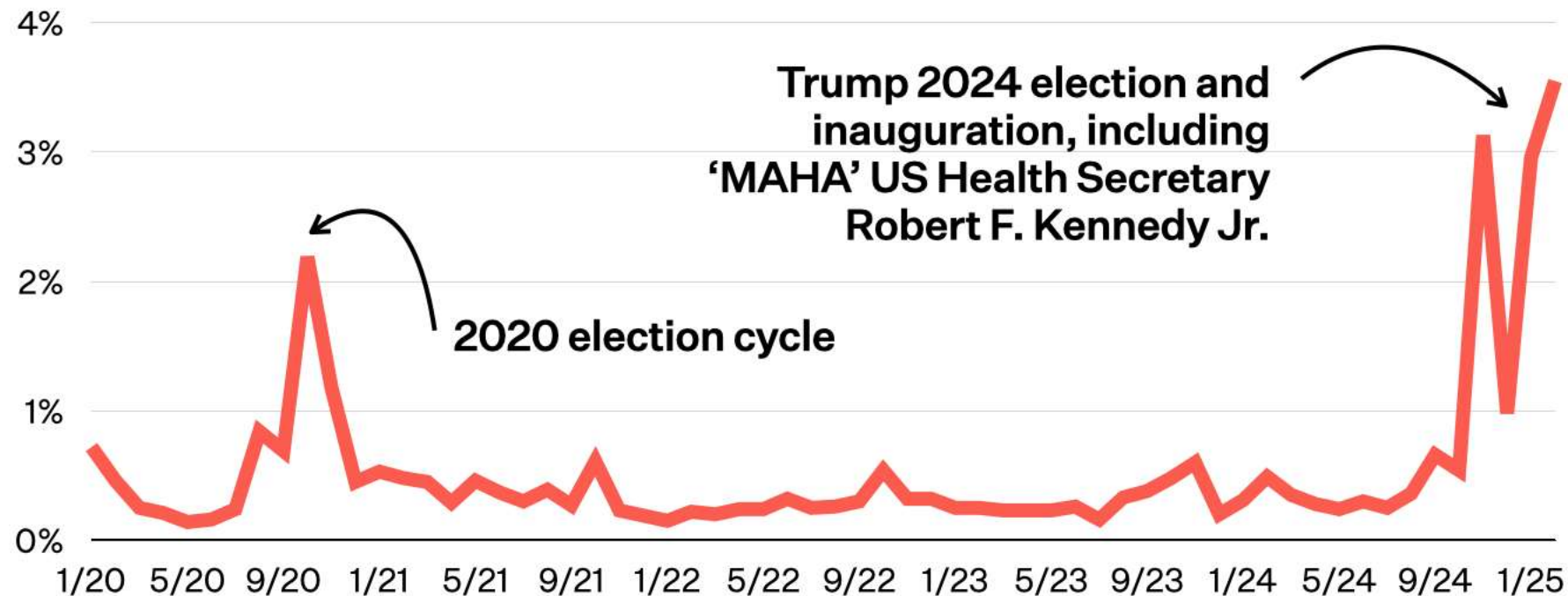
Americans say they're most concerned about their weight, sleep, and stress

Percentage of responses: What aspects of your health are you most concerned about? (Choose up to three.)



‘Make America Healthy Again’ is in the news, in a big way

Percentage of monitored online news articles mentioning ‘Make America Healthy Again’ or ‘MAHA’

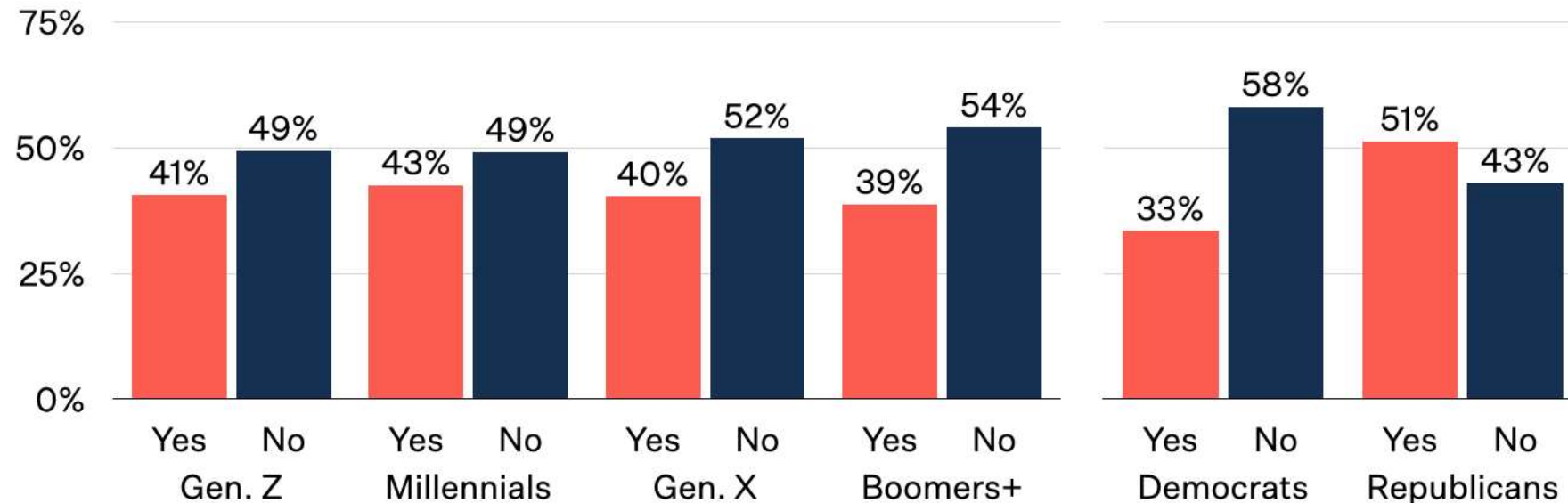


The MAHA basics:

- “To fully address the growing health crisis in America, we must re-direct our national focus ... toward understanding and drastically lowering chronic disease rates and ending childhood chronic disease.” —White House Executive Order, Feb. 2025
- MAHA is also connected to specific, often niche health trends, such as avoiding seed oils (which some think are harmful), promoting the consumption of raw milk, and skepticism around vaccines.

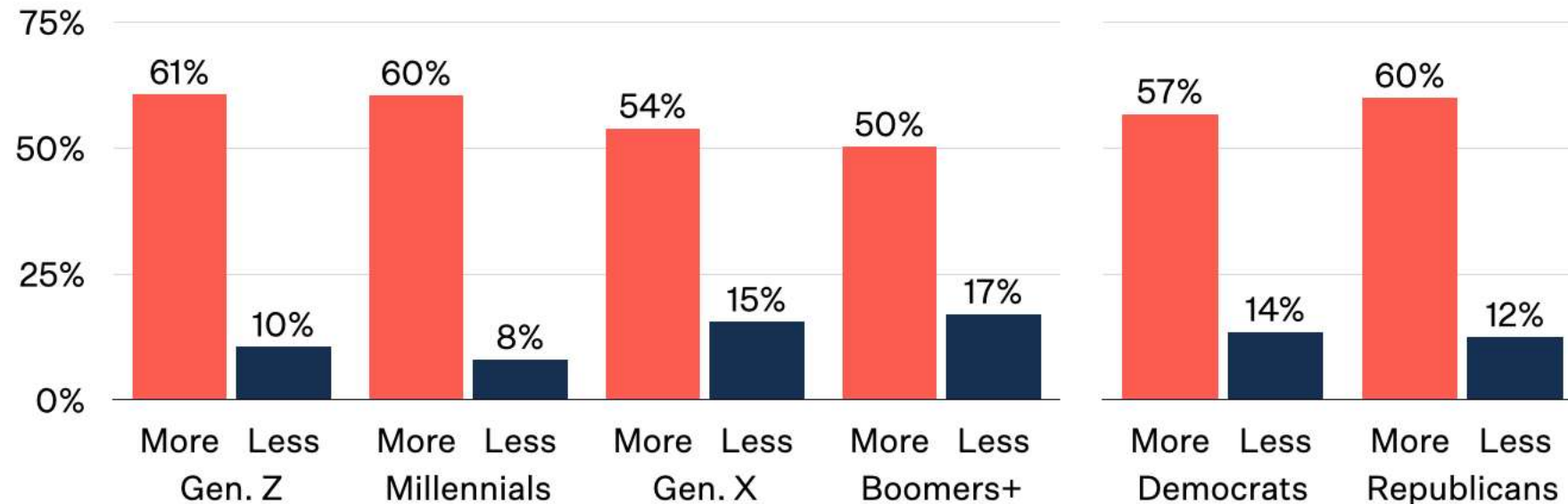
About 40% of Americans say they're aware of the MAHA movement

Percentage of responses: Over the past few months, have you seen, read, or heard any news or discussion about a movement called MAHA – Make America Healthy Again?



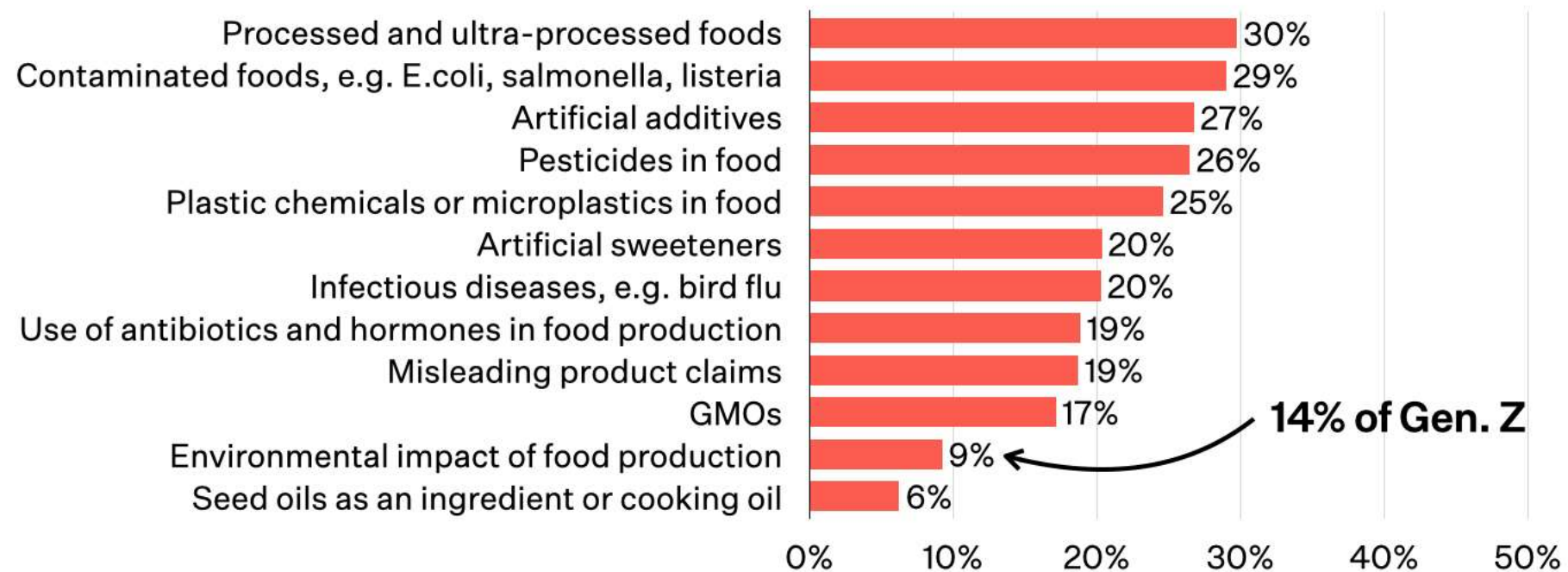
Most Americans think the government should be more involved in our health

Percentage of responses: When it comes to Americans' health, do you think the US government should be more involved or less involved than it currently is?



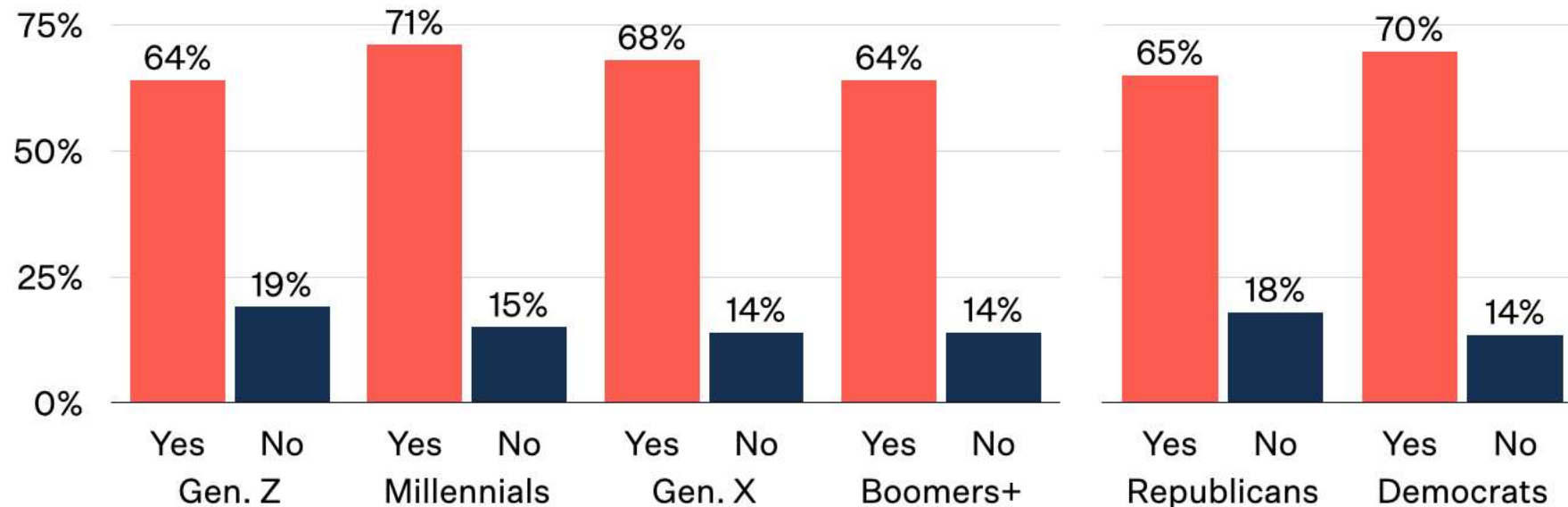
What *are* consumers' top food-health concerns? Processing, contamination

Which of the following are you most concerned about regarding the food you eat? (Choose up to five.)



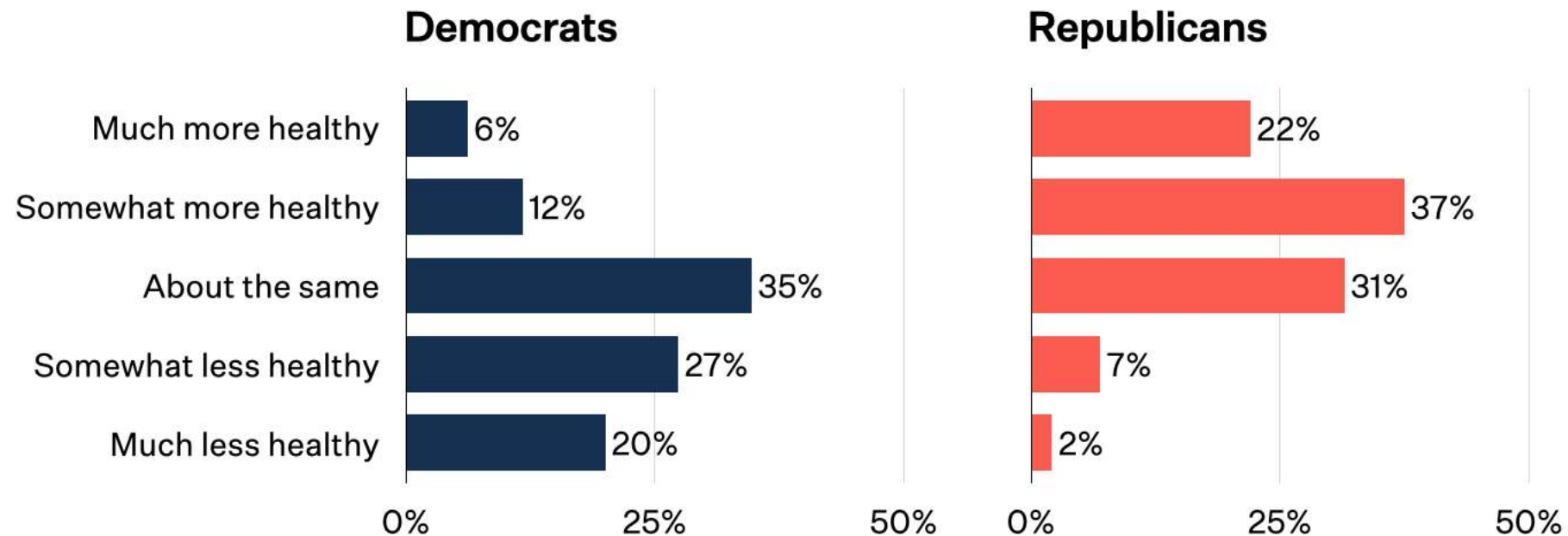
Most Americans believe the government has a responsibility to regulate ultra-processed food

Percentage of responses: Does the US government have a responsibility to regulate ultra-processed food?



Will Americans be healthier in four years? That's largely a political question

In four years, do you think the average American will be physically more healthy or less healthy than today?

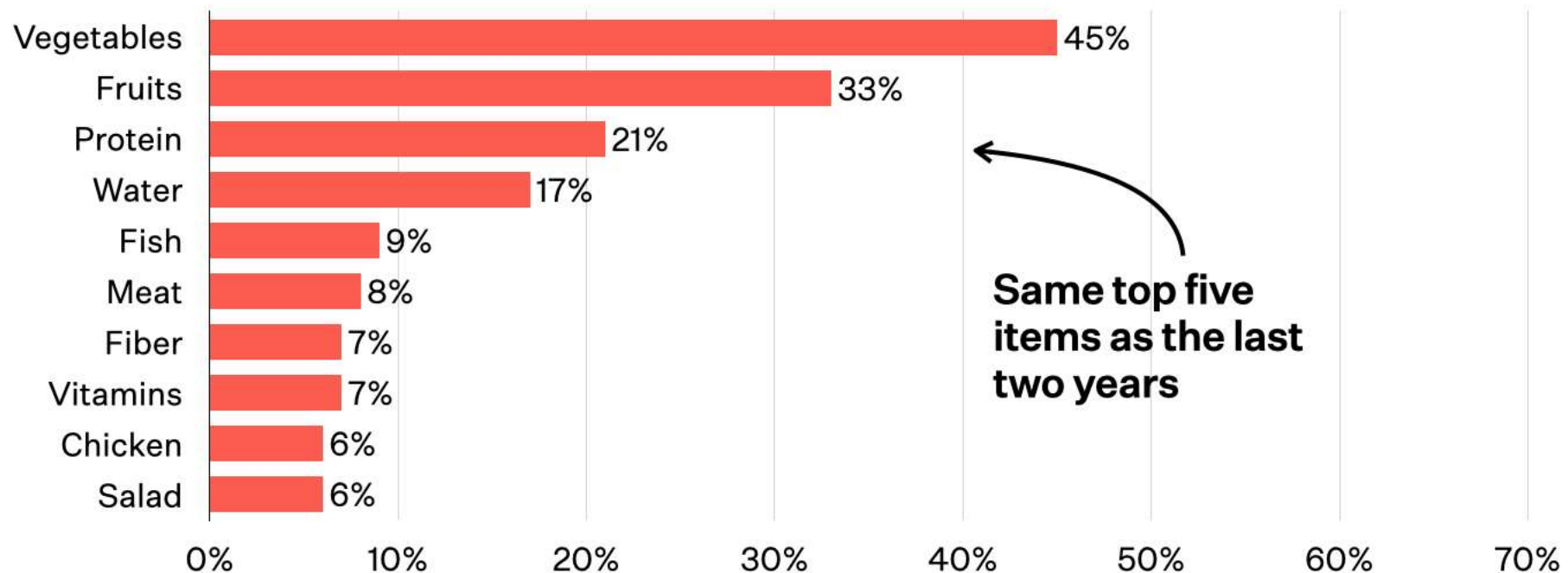


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Food is for fuel,
food is for fun.

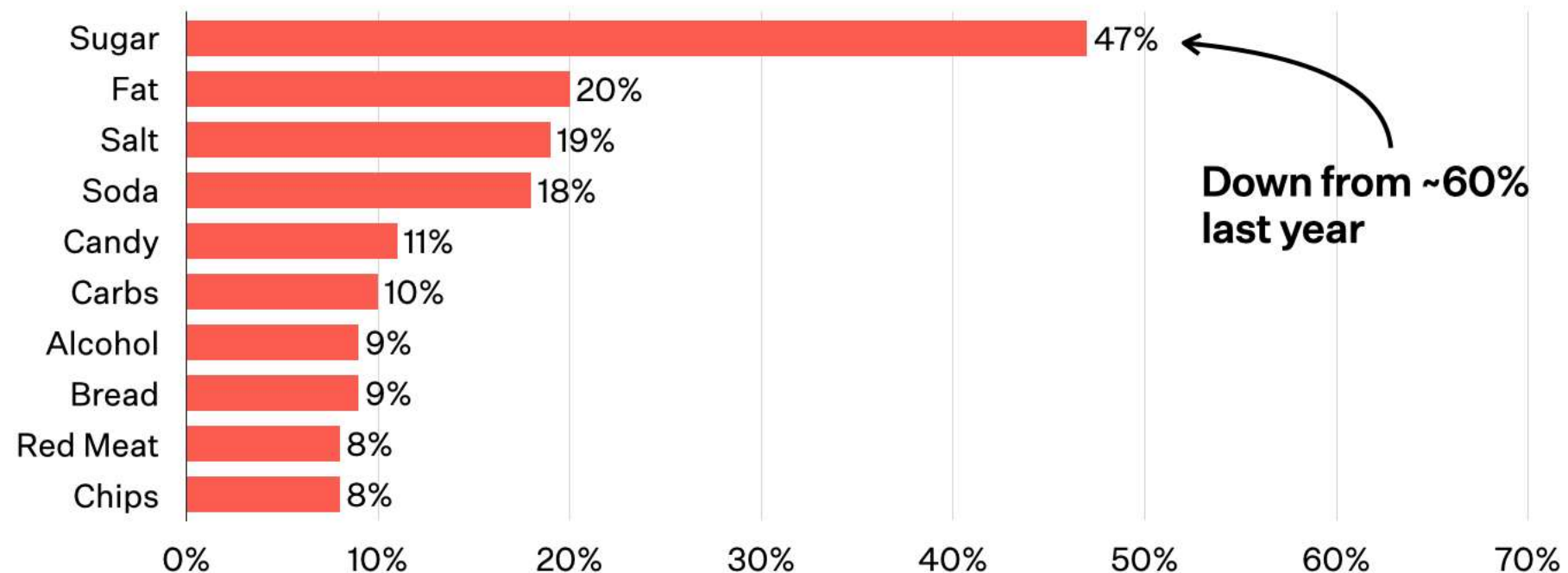
We asked 3,000+ Americans what they want to consume *more* of this year...

Percentage of respondents writing in each specific term
(Submit three.)



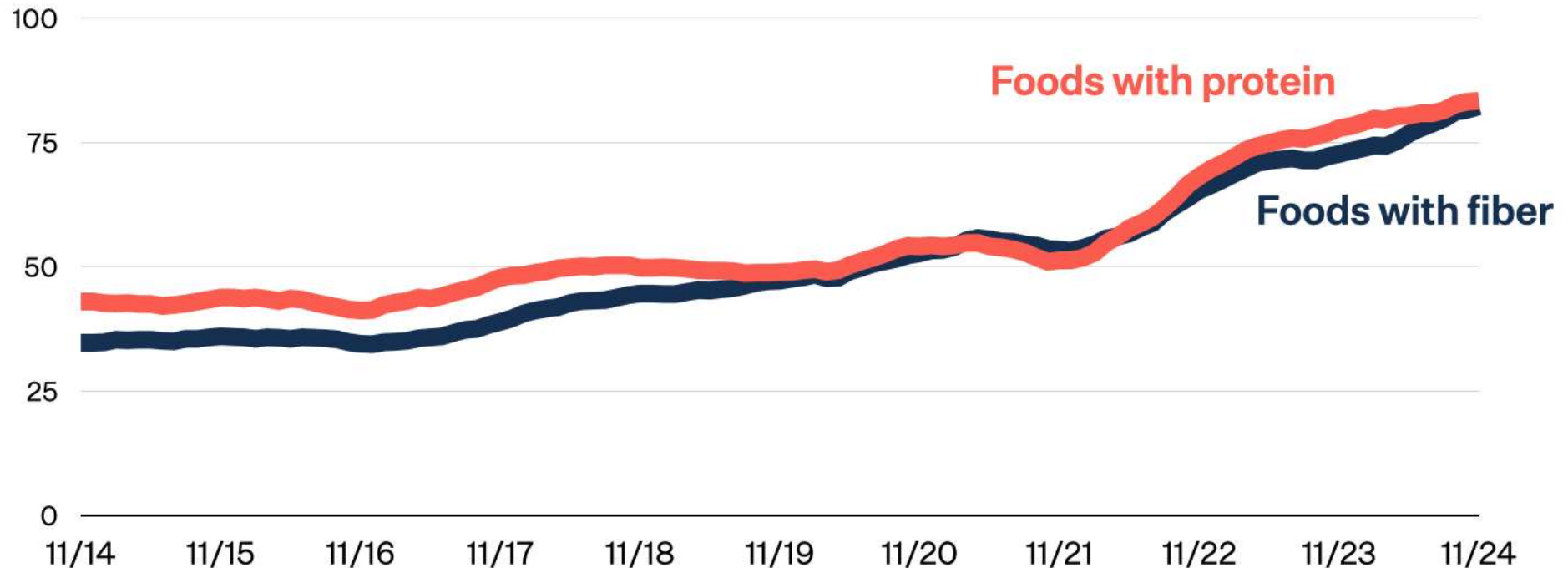
...and what they want to consume *less* of this year

Percentage of respondents writing in each specific term
(Submit three.)



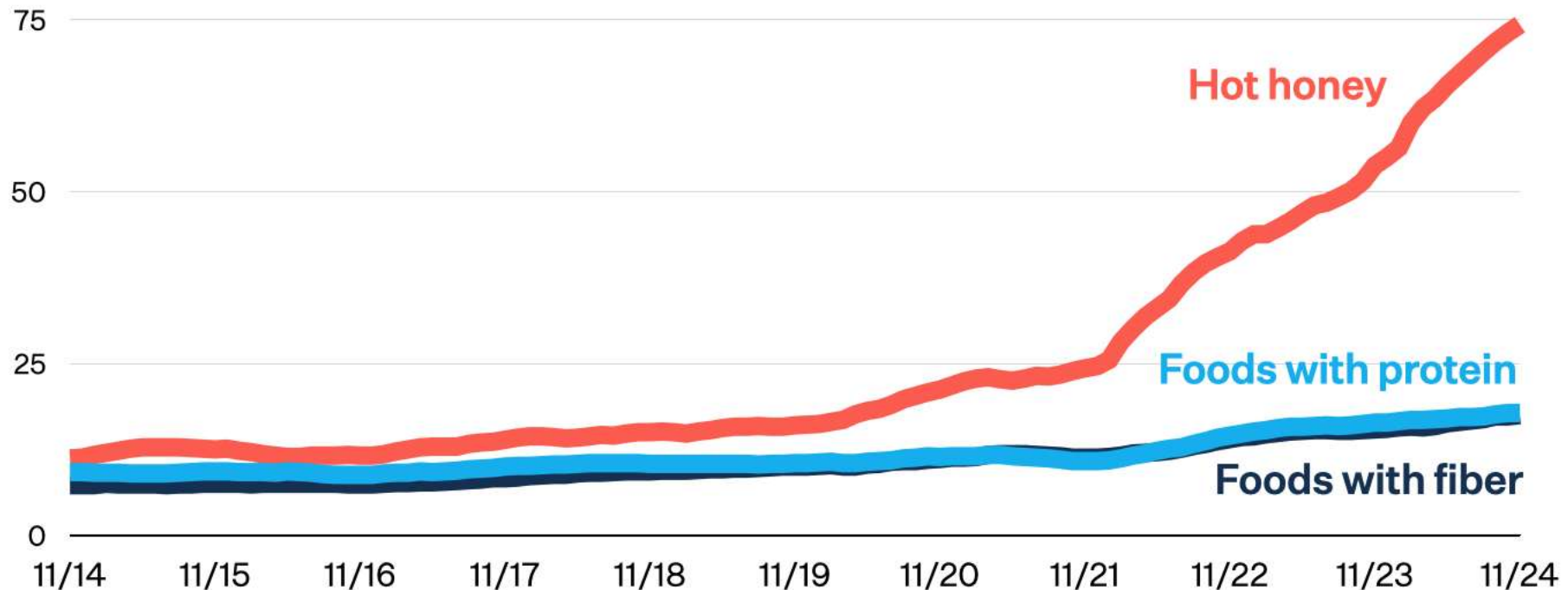
Americans are increasingly searching for foods with protein and fiber

Indexed Google web search volume, US, trailing 12-month average



But what US consumers are *really* looking for is 'hot honey'

Indexed Google web search volume, US, trailing 12-month average

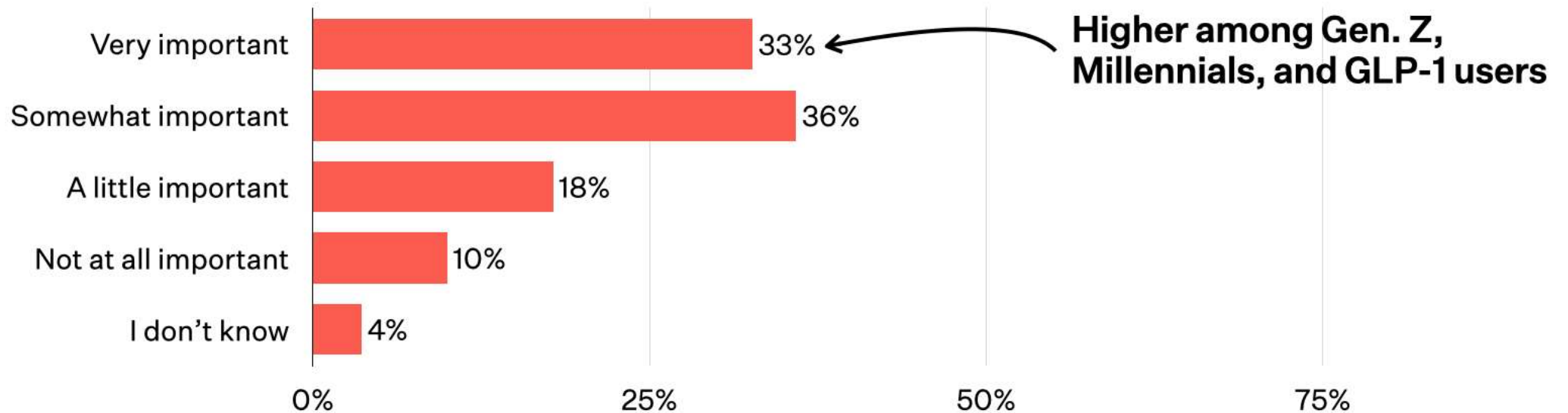


**We count macros and watch sugars,
but we also line up for bagels**



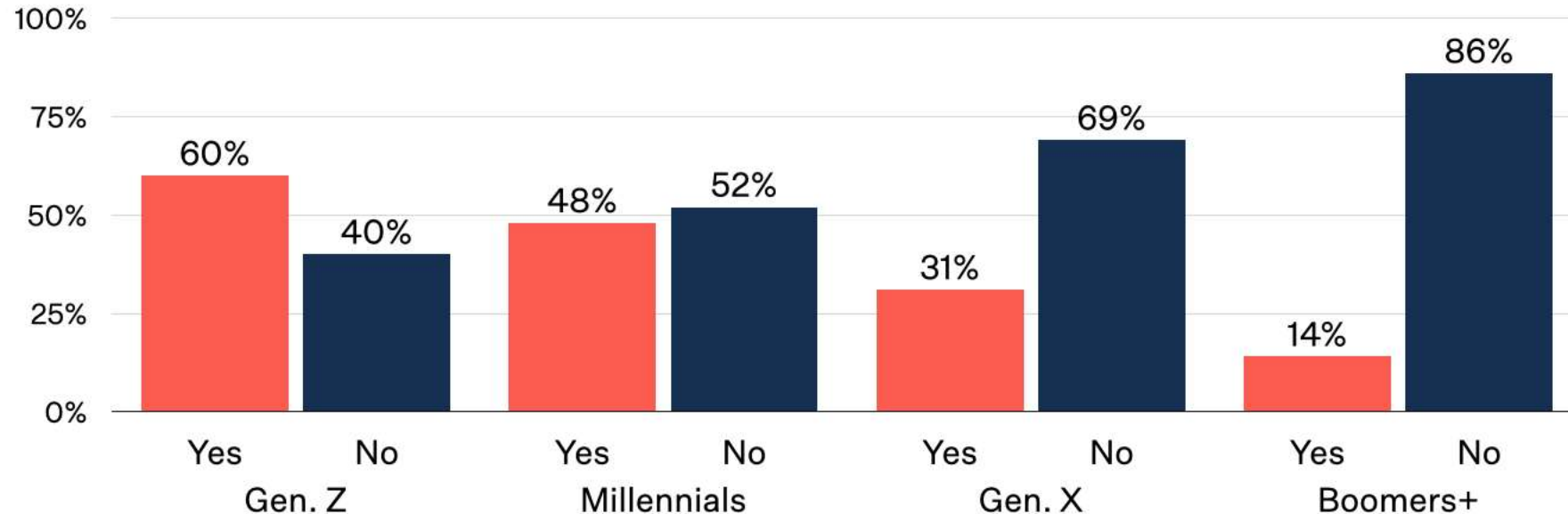
Most people say it's at least somewhat important to their mental health to treat themselves with food

Percentage of responses: How important is it to your mental health to treat yourself with food?



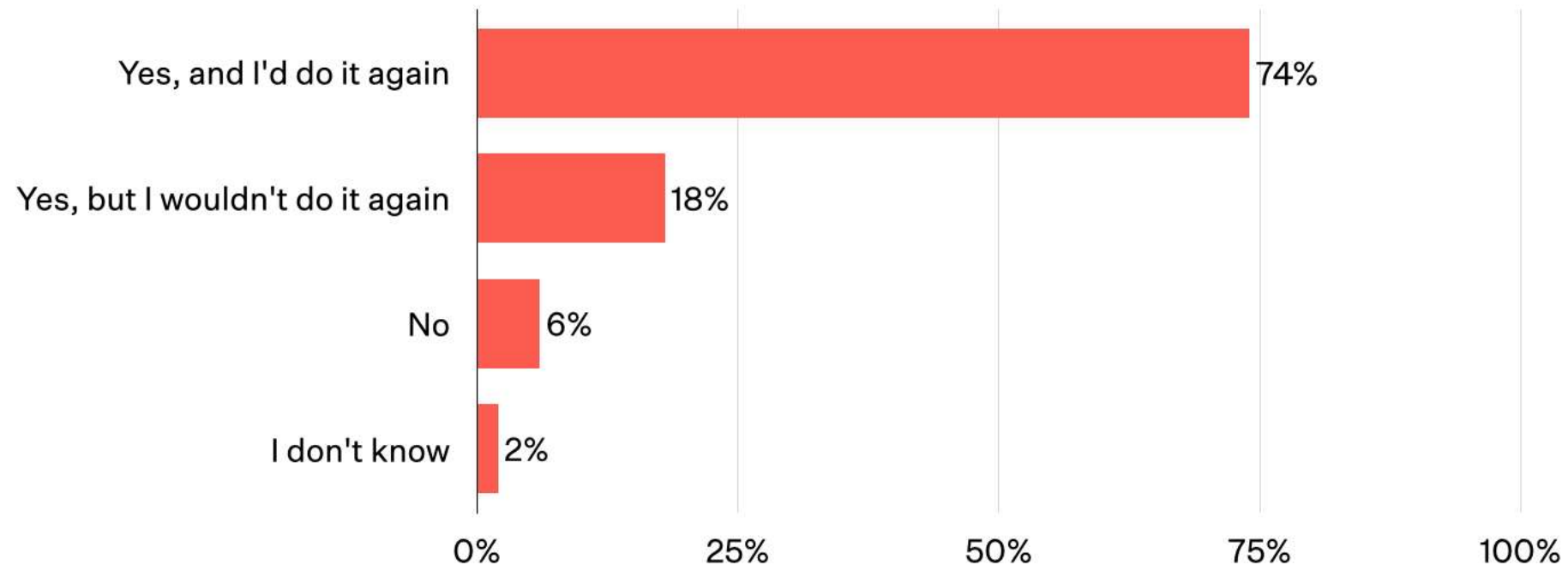
60% of Gen. Z has waited in line to eat a specific food over the past year

Percentage of responses: Have you waited or stood in line for 30 minutes or more to eat a specific food or at a specific restaurant over the past year?



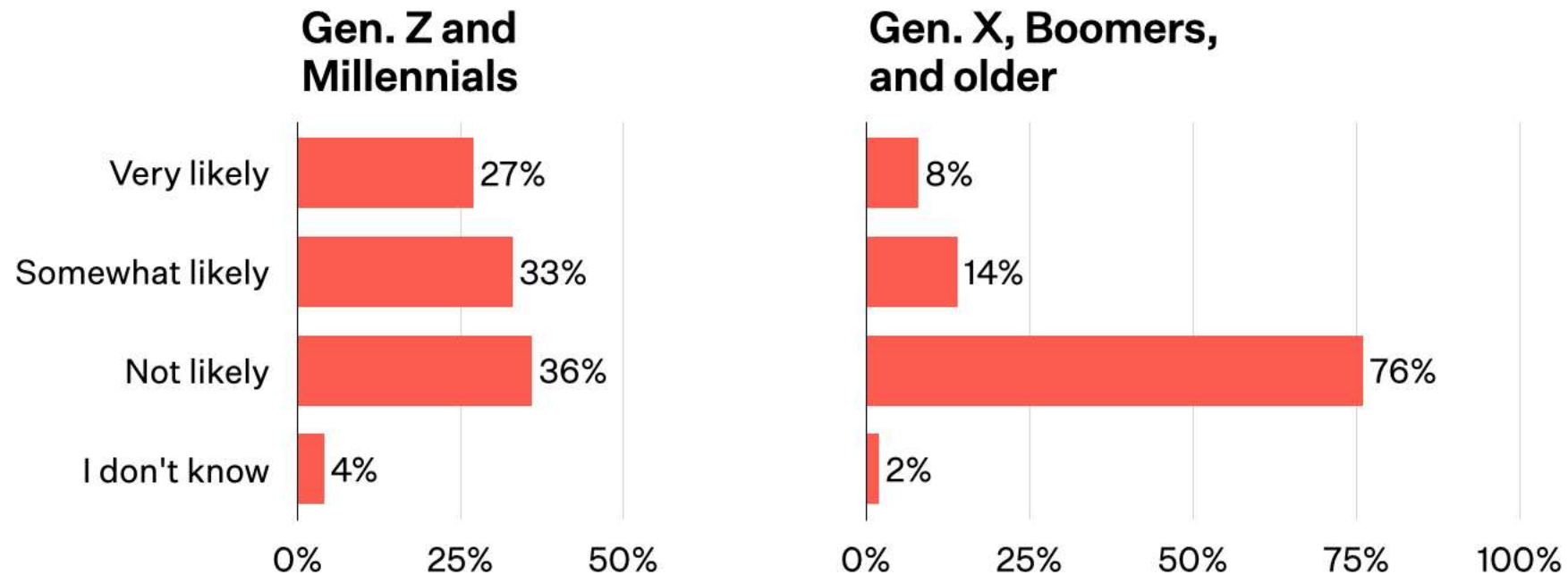
Almost everyone who waited in line for a specific food said it was worth it

Percentage of responses: You said you waited in line to eat a specific food or at a specific restaurant. Was it worth it?



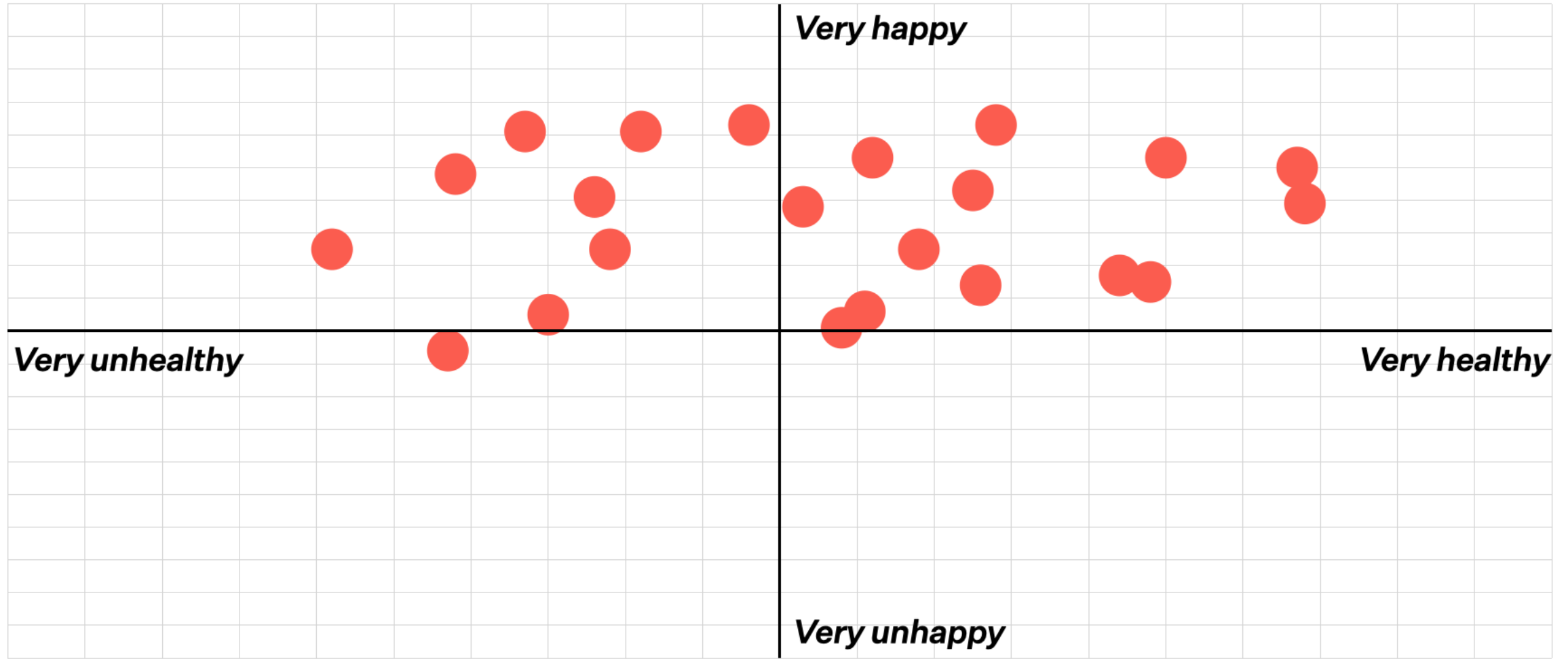
Younger consumers are more likely to be doing it (at least partly) for The 'Gram

If you indulge in a fun food experience, how likely are you to post a photo or video of it on social media?

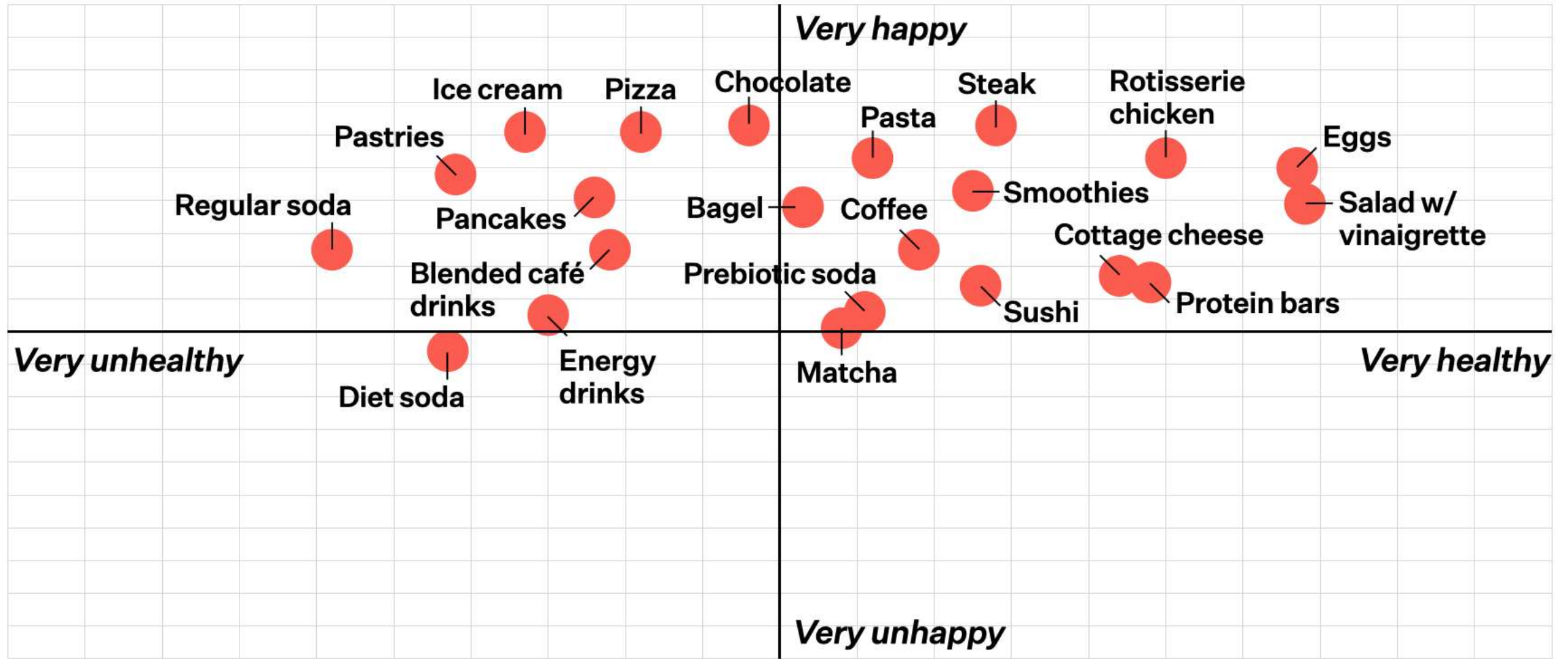


We asked our **Consumer Trends**
Survey panel of more than 3,400
Americans to rank 22 foods on how
healthy they thought they were, and
how happy they made them to consume.

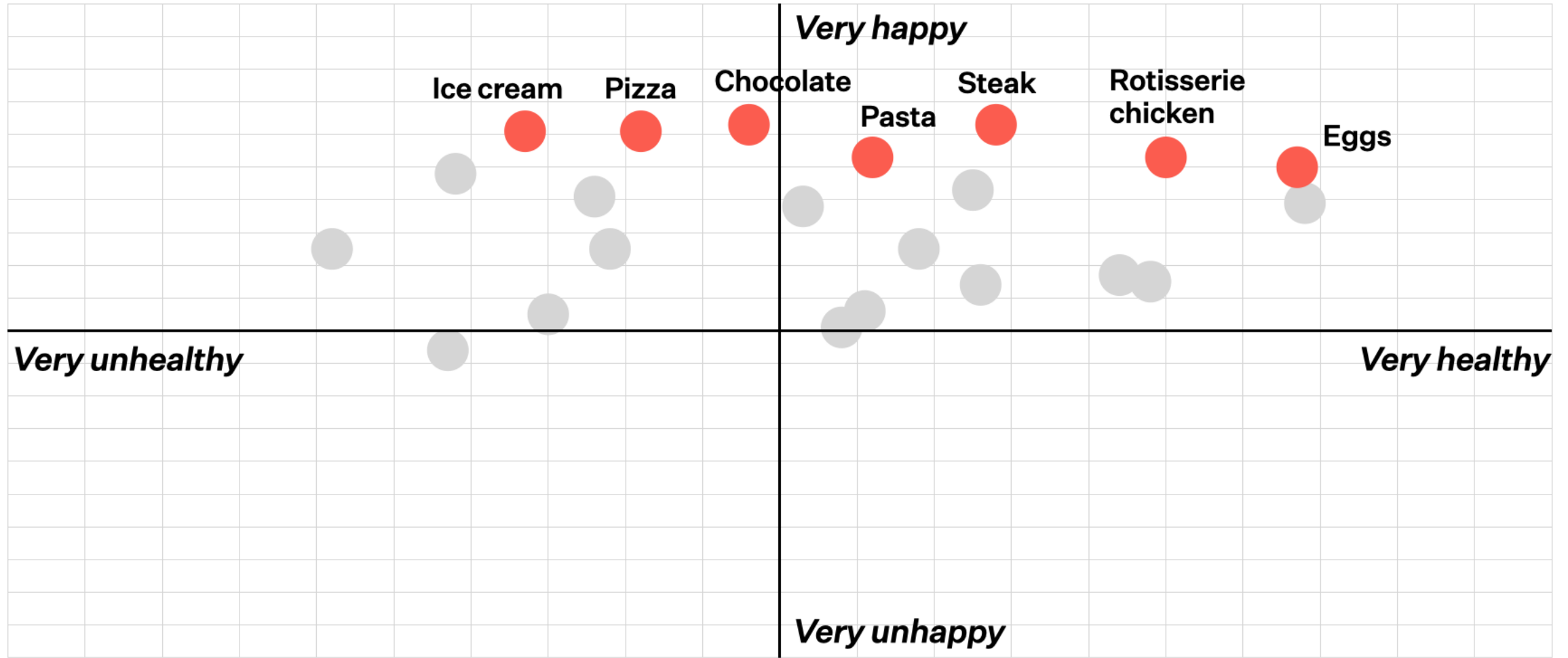
The Consumer Trends 2025 Food Feelings Matrix



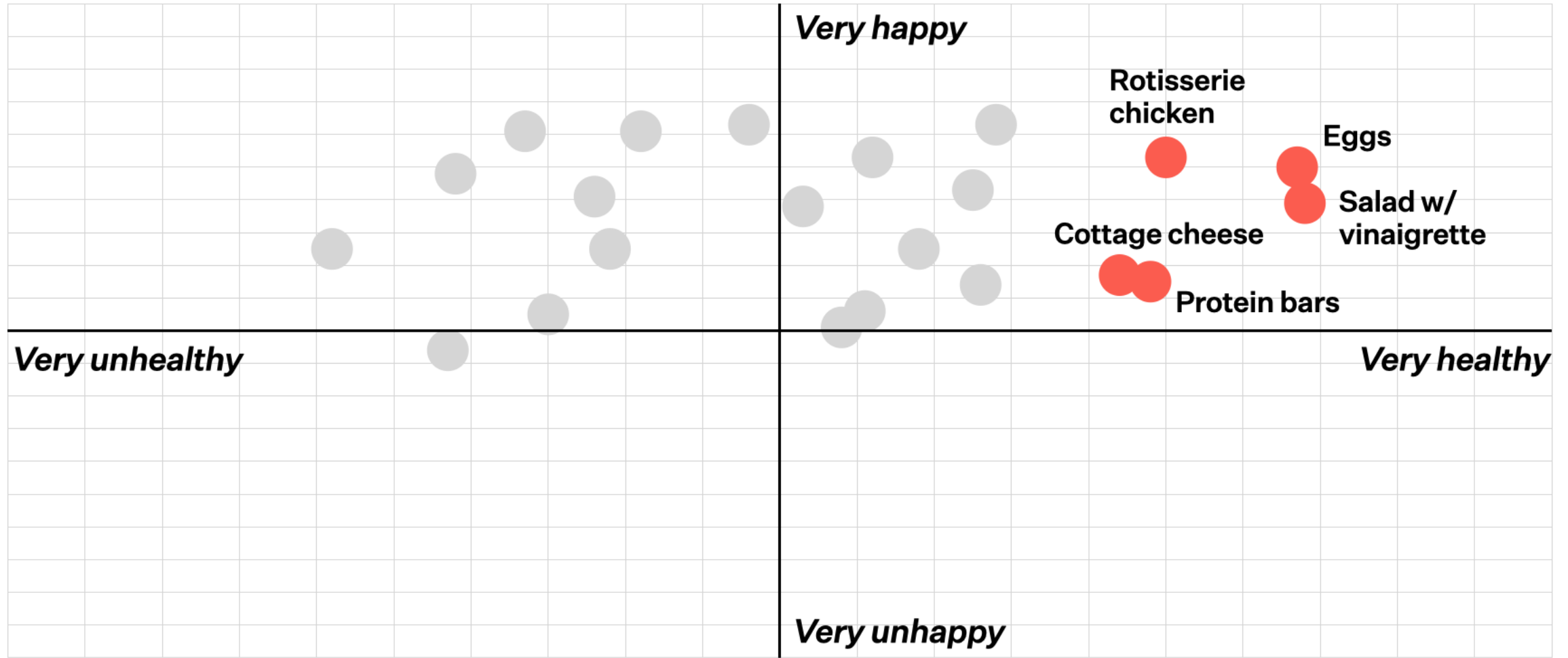
The Consumer Trends 2025 Food Feelings Matrix



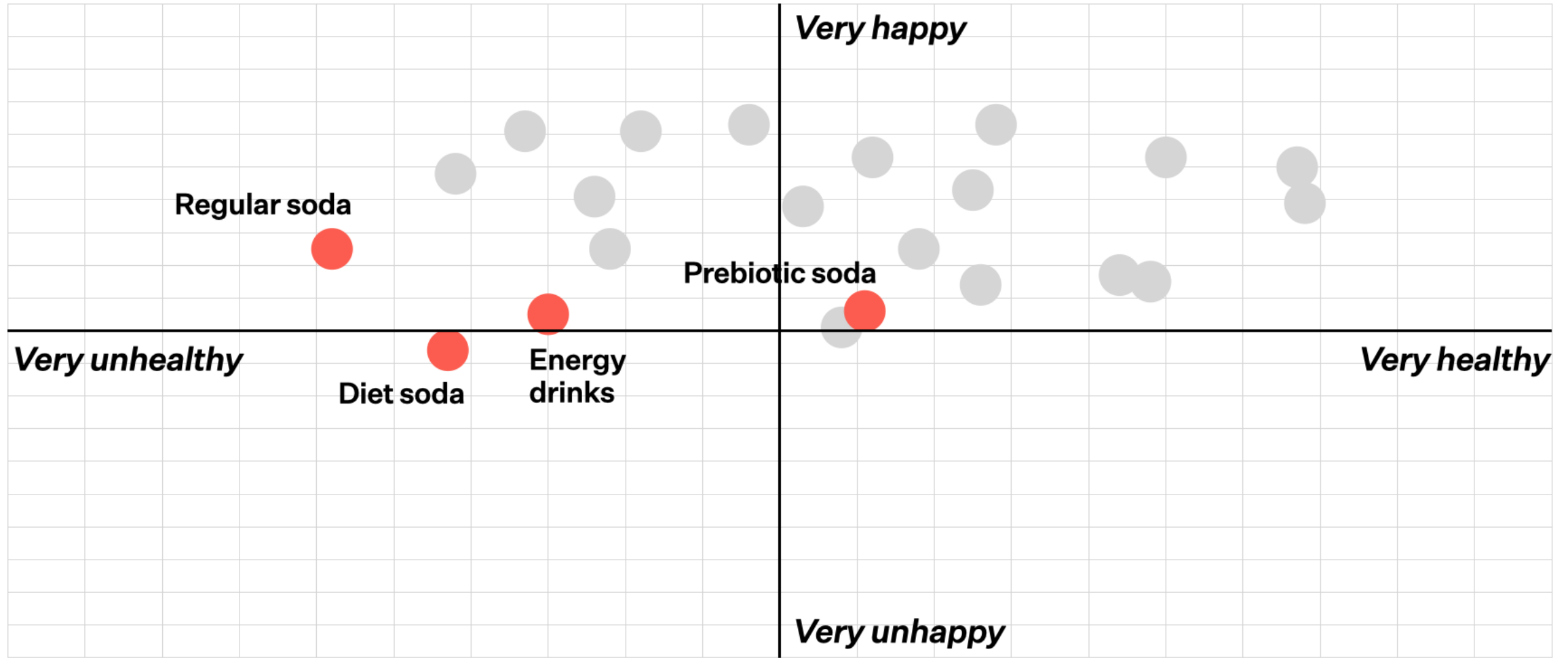
The Consumer Trends 2025 Food Feelings Matrix



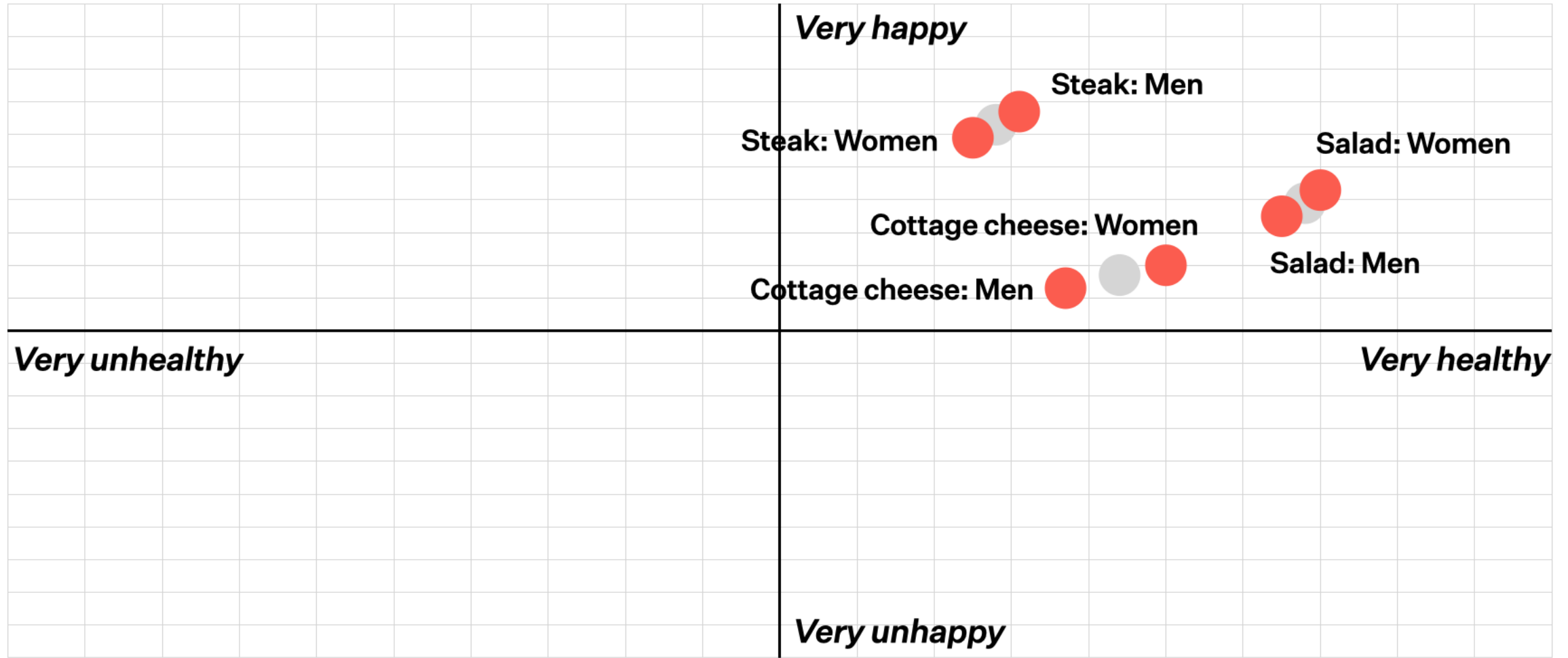
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The Consumer Trends 2025 Food Feelings Matrix



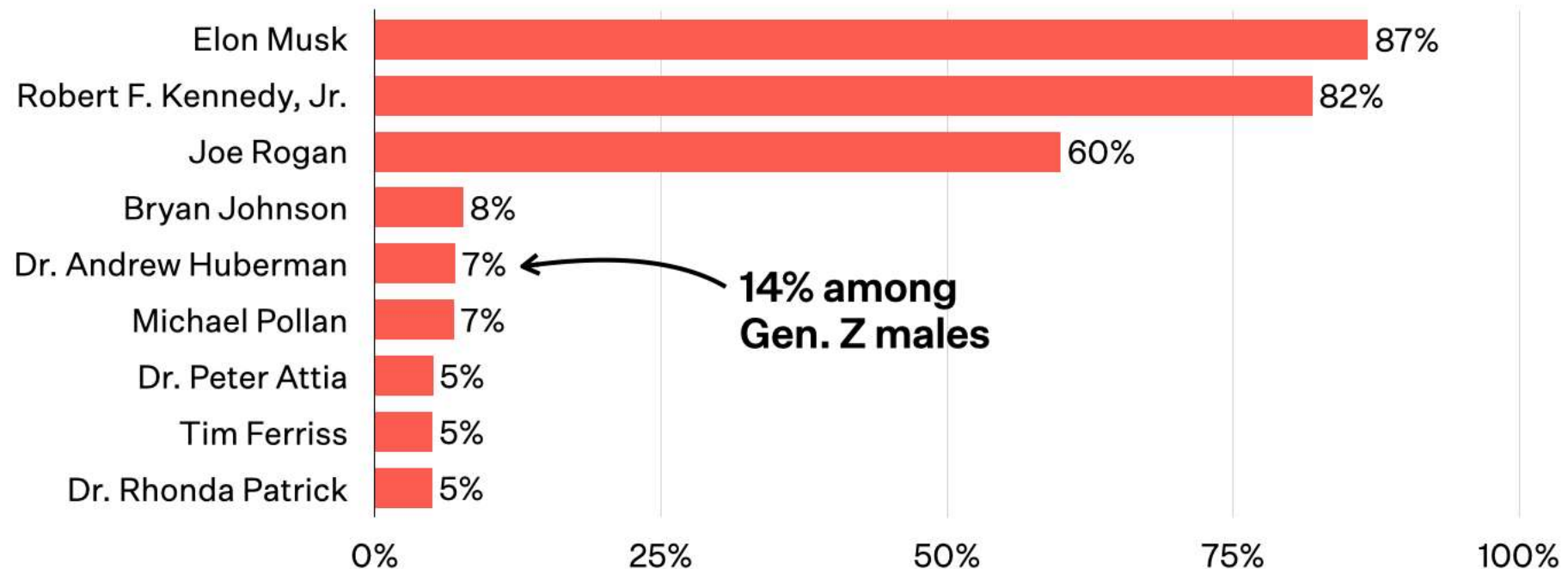
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Seed oils have emerged
as a hot topic among the
health-concerned.

Is this real science or
TikTok science?

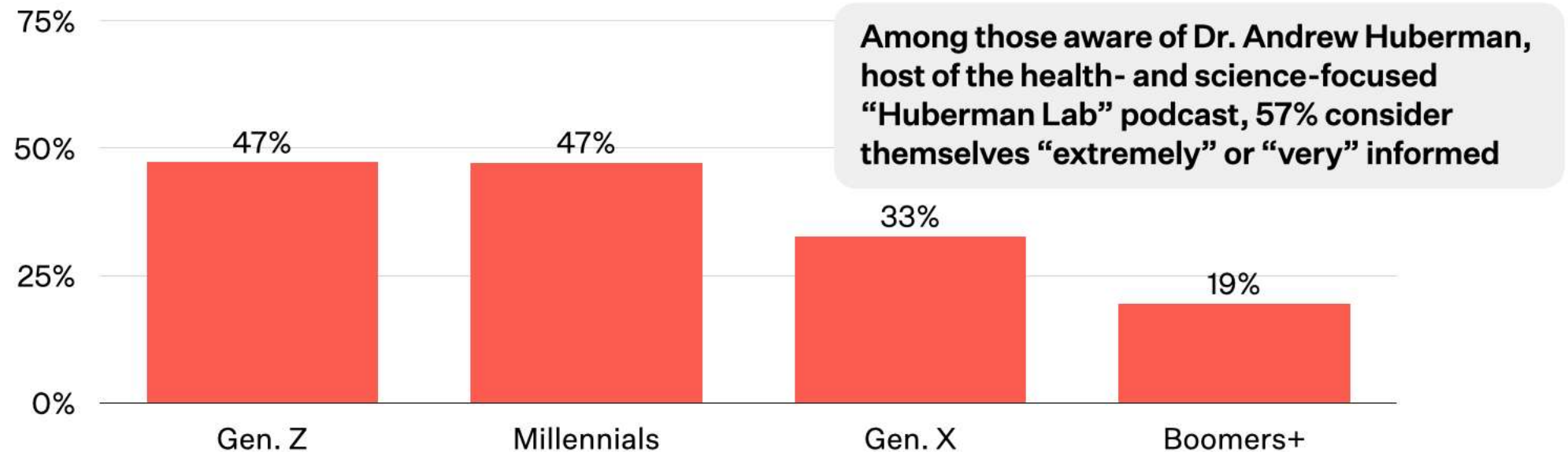
We're deep in the influencer era when it comes to health knowledge and policy

Percentage of responses: Which, if any, of the following people are you aware of?



~Half of younger consumers consider themselves very informed about health

Percentage of 'Extremely' and 'Very informed' responses:
How informed do you consider yourself when it comes to new developments, research, and advice in health and wellness?



The seed oil basics:

- Inexpensive “seed oils” (soybean, canola, vegetable, etc.) have been increasingly discussed as being toxic, inflammatory, and even blamed for America’s health crisis and the rise in chronic disease
- Seed oils are everywhere, but especially in processed, packaged food and fried food that’s already not particularly healthy
- Health and wellness influencers — ranging in credibility and reach — are the loudest voices here

The anti-seed oil thinking:

- People who think seed oils are “toxic” cite claims such as that their omega-6 fatty acids cause excessive inflammation
- They believe industrial processing of seed oils creates harmful compounds and oxidation that damage cells
- They claim that seed oils supposedly contribute to chronic diseases like heart disease, obesity, and cancer due to both their composition and processing methods

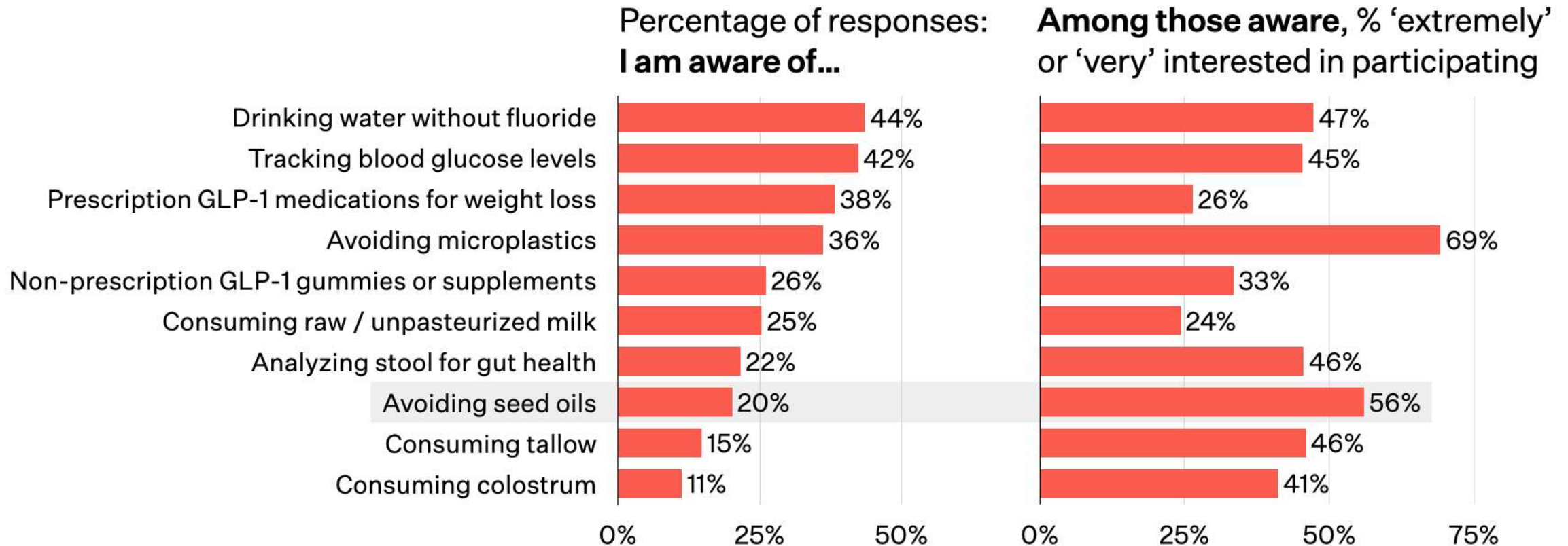
The scientist's rebuttal:

- Zoe's chief scientist Sarah Berry, whose research focus includes the impact of different fats and oils on cardiovascular health, says it's "absolute nonsense"
- In a lengthy podcast episode, she debunks the most common claims, citing scientific research
- For example: Some seed oils, in some quantities, can actually be helpful; omega-6 fatty acids don't cause inflammation; and processing oils doesn't create toxins

The seed oil situation:

- The US FDA considers seed oils generally safe
- We'll see if the government changes its stance under health secretary RFK Jr., who's said that "seed oils are one of the most unhealthy ingredients that we have"
- The truth is that, in an era where influencers are often more trusted than institutions, it's hard for consumers to *really* know
- There's a lot of noise here, and there's not much room for detail or nuance on TikTok or Reels

The seed oil phenomenon has relatively low awareness but high intent



Those who consider themselves 'extremely informed' about health research have more negative views on seed oils

"Seed oils are toxic and I never knowingly consume them"

24% 7%

'Extremely informed' Overall

"Seed oils are pretty bad and I try to avoid them whenever possible"

27% 17%

'Extremely informed' Overall

"Seed oils are fine in moderation and I don't pay much attention to whether they're in my food"

21% 34%

'Extremely informed' Overall

"There is no evidence that seed oils are harmful and I don't pay any attention to whether they're in my food"

11% 16%

'Extremely informed' Overall

The seed oil upshot:

- Some brands have capitalized on the trend, such as the salad chain Sweetgreen, which has marketed “no seed oils” in certain products, and True Food Kitchen, with a “Proudly 100% seed oil-free” banner on its site
- The share of searches containing “seed oil” on Instacart grew 68% last year, and “tallow” tripled
- Seed Oil Scout, an app for finding seed oil-free restaurants, is consistently the no. 3 top-grossing food app on the US iPhone App Store

The seed oil upsell:

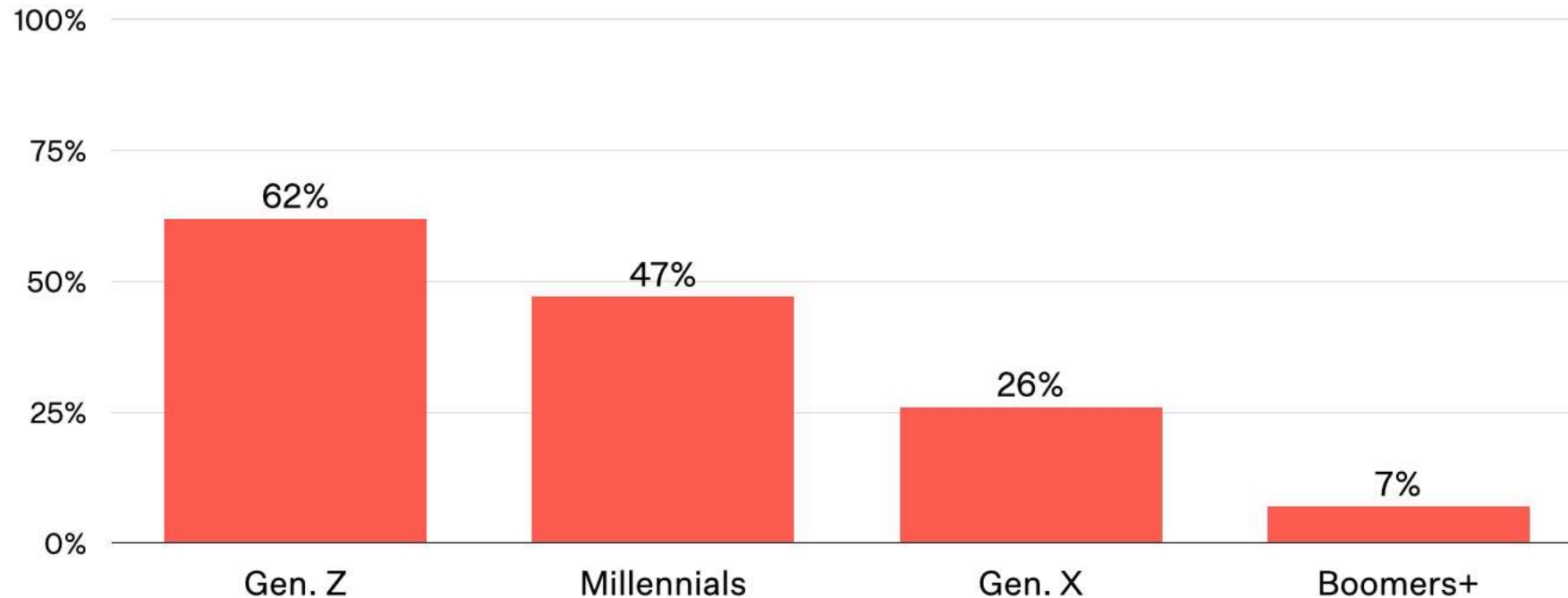
- Would consumers spend more to avoid seed oils? One reason they are so popular is because they're cheap
- In our survey, 9% of consumers said they would spend “a lot more” on an equivalent food item to avoid consuming seed oils, 31% “a little more,” 44% would not spend more, and 16% didn't know
- Among those who think seed oils are “toxic,” 40% would spend “a lot more” and another 40% said “a little more” — 16% said they wouldn't spend more

4

TikTok Shop is huge: A massive marketplace bolted onto a giant entertainment platform.

~60% of Gen. Z consumers aware of TikTok say they use it every day

Percentage of 'Daily' responses by generation, among those aware of TikTok: How often do you use TikTok?



Half of TikTok active users say they've already made a TikTok Shop purchase

Awareness:

80%

of consumers who say they **use TikTok once a month or more** say they are **aware of TikTok Shop**, which only launched in late 2023

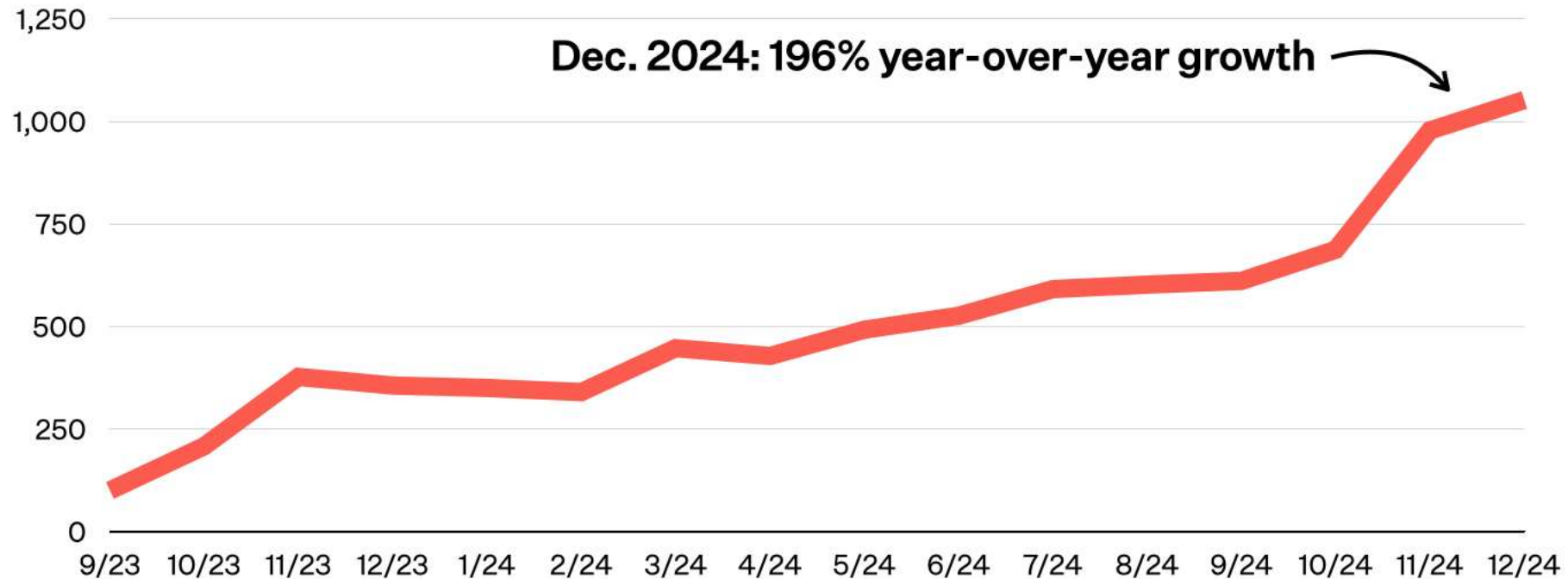
Conversion:

50%

of consumers who say they **use TikTok once a month or more** say they **have already made a purchase** (It's 57% among daily TikTok users.)

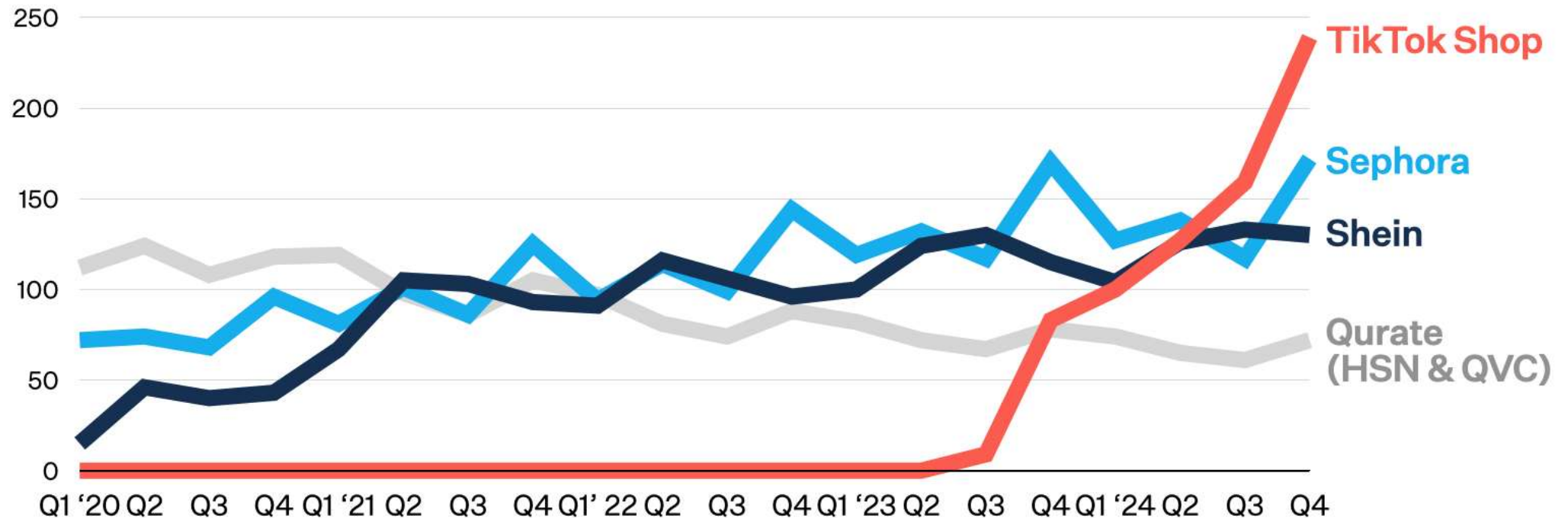
Americans continue to spend more and more on TikTok Shop

Indexed US monthly spending on TikTok Shop — Earnest Analytics



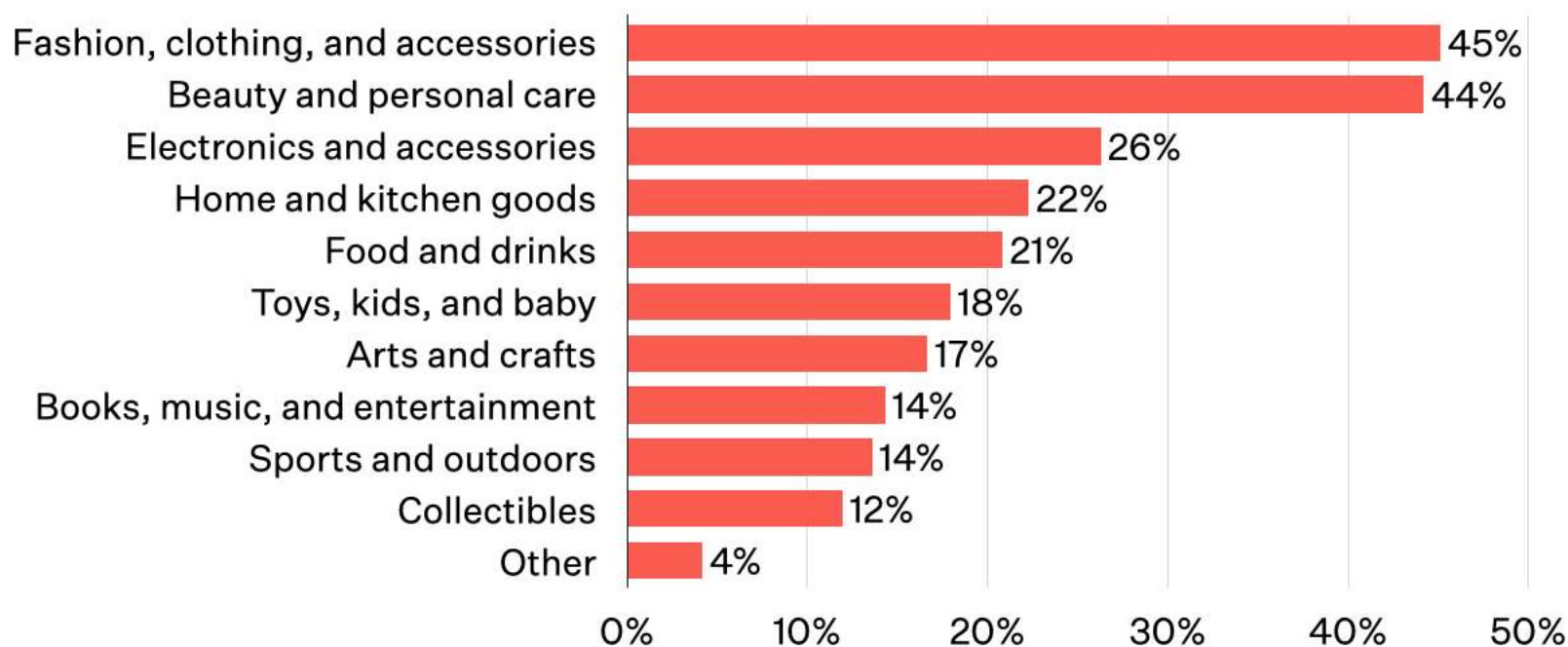
TikTok Shop is already bigger than Shein, Sephora, and home shopping TV

Indexed US quarterly spending at TikTok Shop, Shein, Sephora, and Qurate — Earnest Analytics

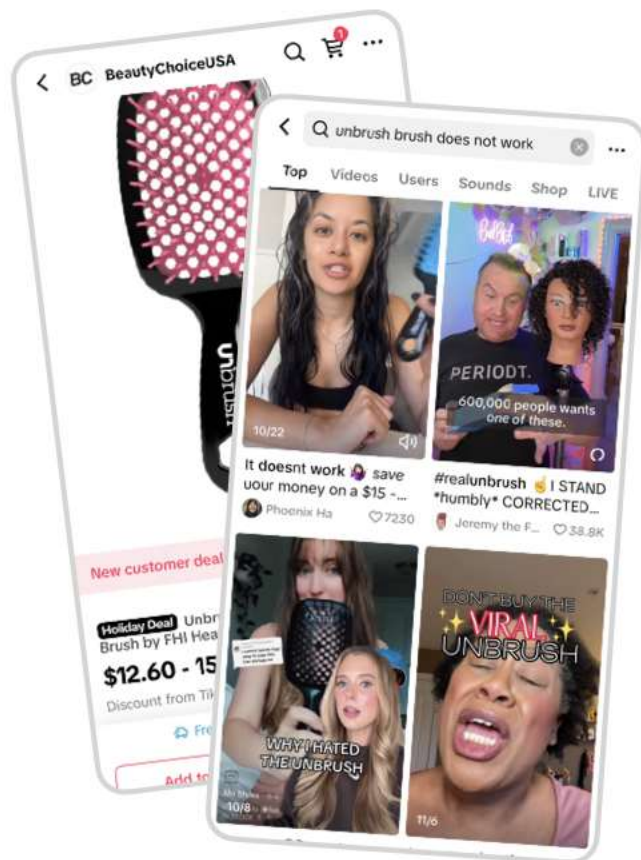


TikTok Shop users buy clothing, beauty, and more cheap (and often random) stuff

Percentage of responses: What categories or products did you buy from TikTok Shop?



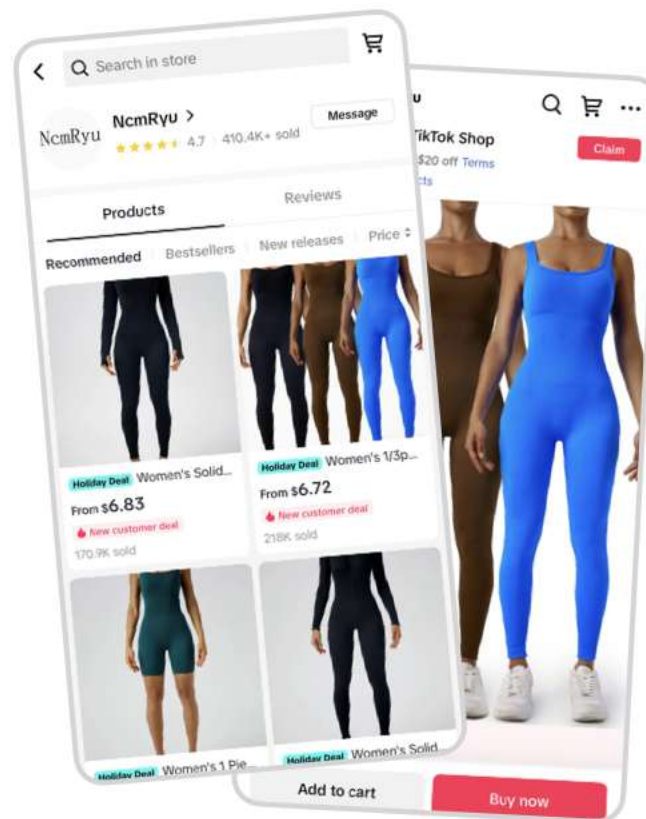
Popular products on TikTok Shop



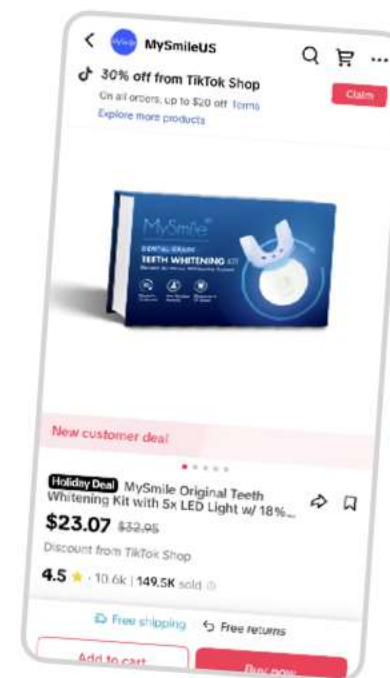
Unbrush hair brush
1.1 million+ sold



The Shadow Work Journal
772,000+ sold



NcmRyu shapewear
2.2 million+ sold



MySmile whitening kit
400,000+ sold

**Average TikTok
Shop order:**

\$35

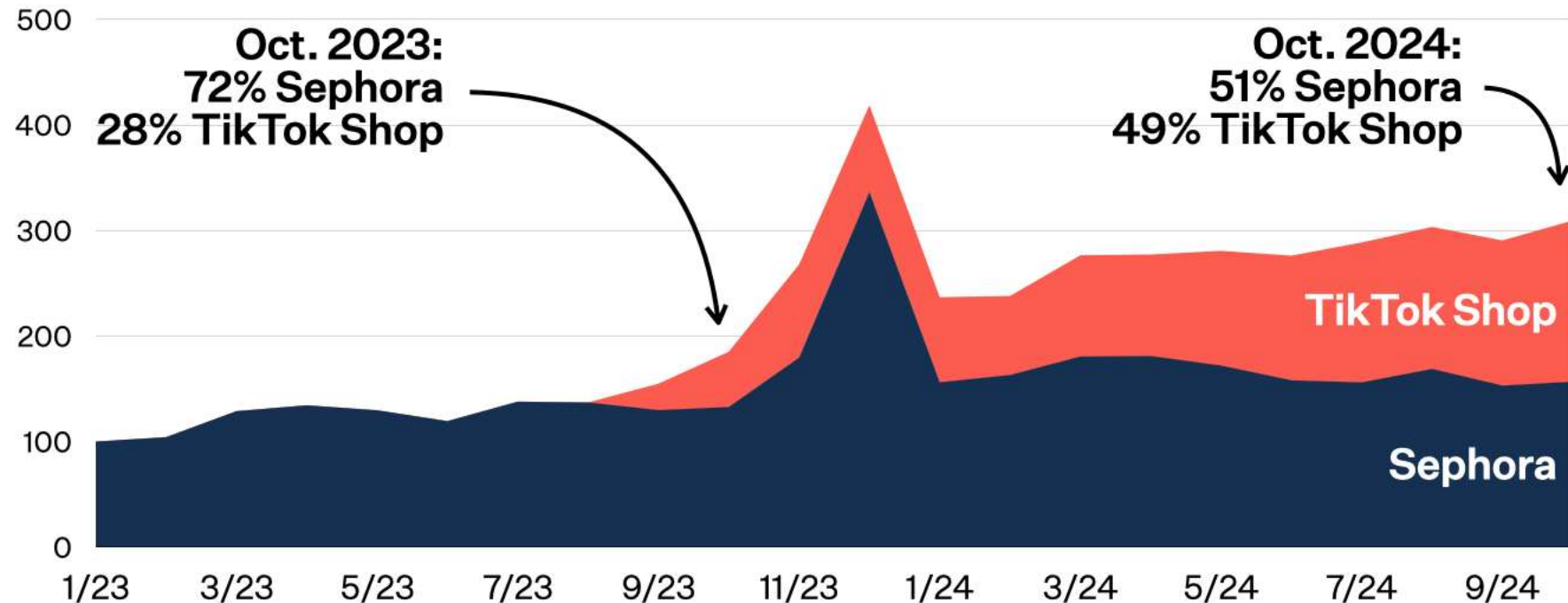
**Average transactions
per customer:**

5.3

over the 12-month period ending November 2024,
according to Earnest Analytics

Sephora shoppers are already spending the same amount at TikTok Shop

Indexed monthly spending at Sephora and TikTok Shop, among US Sephora customers — Earnest Analytics



Data: Earnest Analytics Orion transaction data. 100 indexed to spend among Sephora customers in January 2023. Sephora shopper cohort includes those who have purchased at Sephora since 2022.

Almost all TikTok Shop customers said they'd make another purchase

Satisfaction:

91%

of consumers who say they have made a purchase from TikTok Shop say their purchases have generally lived up to expectations, in terms of quality

Retention:

90%

of consumers who say they have made a purchase from TikTok Shop say they would make another purchase in the future

Integration:

87%

of consumers who say they have made a purchase from TikTok Shop say it felt like a natural extension of the TikTok experience

Special Thanks:

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Helen Long • Jimson Mullakary
Andrew Goletka • Franklin Isacson

Toluna • Earnest Analytics

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