



LATEST STUDY RESULTS

The future of self-care is bright

Better health trends shaping the future of our industry

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Unlocking better growth

The future of self-care is brighter than ever

The sector is experiencing unprecedented growth, driven by market-shaping trends that emphasizes consumer empowerment, advanced technologies, and sustainability.

In our recent study in collaboration with the [Association of the European Self-Care Industry \(AESGP\)](#), we looked into the sector's evolving trends. To understand how the future of self-care will evolve, we conducted extensive research involving multiple methodologies:

- Engaged with more than 60 executives including people from the industry, AESGP members, and experts from other industries
- Collected and analyzed more than 50 reports on AI, etc.
- Based on our own experience working almost 40 years for leading pharma and self-care companies



>60

Interactions with market experts and AESGP members



>50

Industry reports and similar documents



~40

Years of consulting in the healthcare industry

Market-shaping trends driving growth in the self-care sector

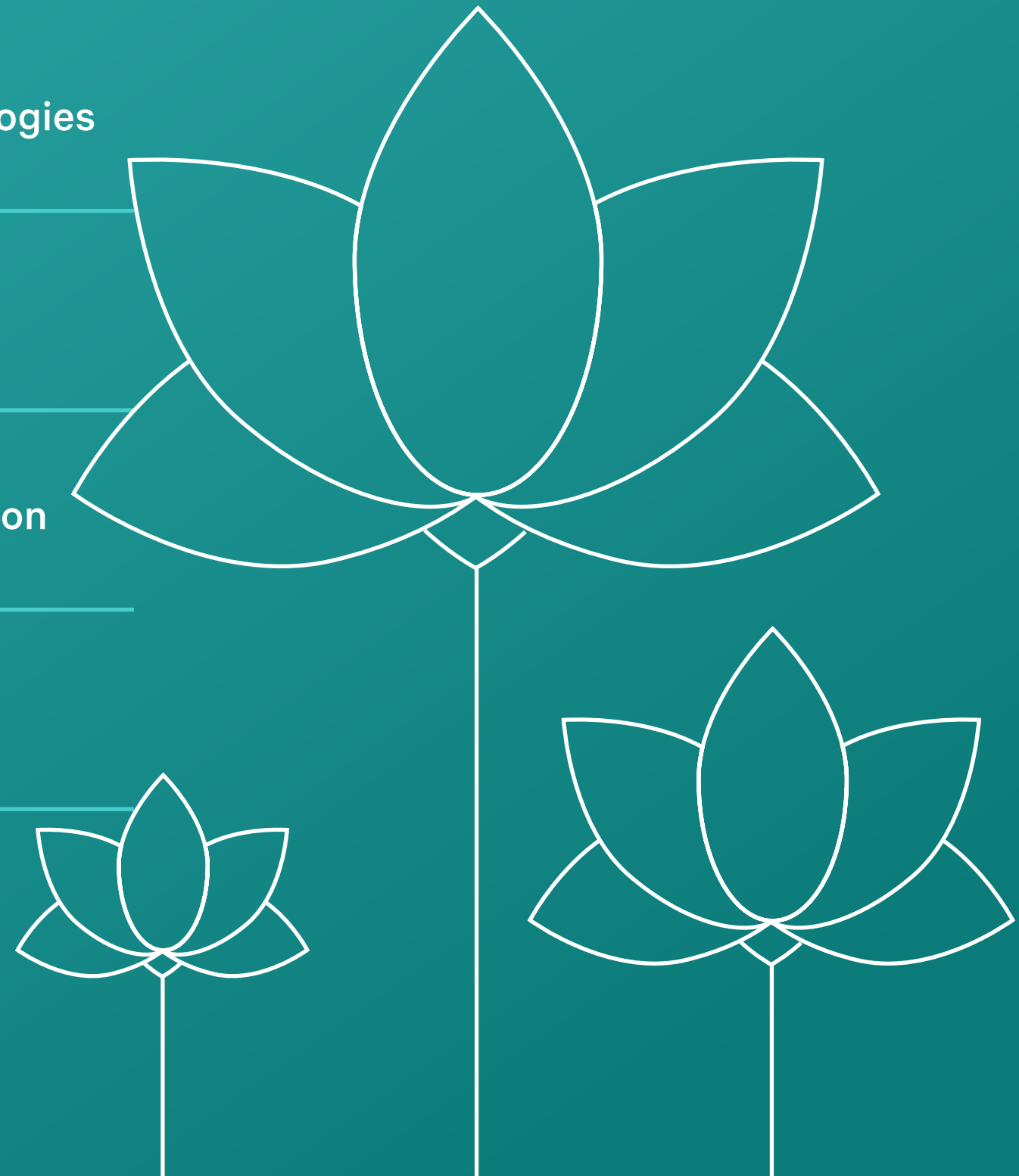
1.  Increasing consumer autonomy via advanced technologies


2.  Empowering HCPs through AI

3.  Enhancing consumer engagement in disease prevention

4.  Growing focus on mental health, aging, and gender-specific health segments

5.  Leveraging sustainability to build brand value





Increasing consumer autonomy via advanced technologies

Consumers today have access to a wide array of health data that empowers them with more autonomous decision-making:



Wearable devices track vital signs and activity levels, providing real-time insights into physical health.



Genetic testing offers personalized information about predispositions to certain health conditions, enabling proactive management.



Electronic health records (EHR) ensure that individuals have access to their medical history, facilitating more informed discussions with healthcare providers.



Data on nutrition and medication helps consumers tailor their diets and treatment plans to improve their overall health.

Insights at a glance

85% of respondents believe patients will be increasingly empowered to take care of their own health. They are well informed thanks to AI and digital tools, and therefore more demanding on treatment efficacy.¹

50% penetration of wearables has been achieved in some European markets.²

Source: ¹ Simon-Kucher survey with the AESGP; ² [Statista](#)

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We are witnessing a significant trend where individuals are increasingly leveraging various tracking tools and advanced technologies to manage their own health.

AESGP survey participant

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We are definitely going to see more digital tech in the world of care management, including things like tracker technology. But it's not going to stop there. We're expecting even more developments down the line that will make a big difference in how patients keep track of and manage their own health.

AESGP survey participant

Emerging trends in digital health

Comprehensive digital health tools

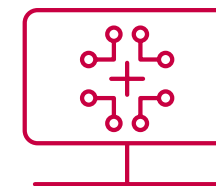
At the center of digital health is the combination of a wide range of data sources and health KPIs allowing individuals to get a deeper understanding of their current health status and even more so, enabling them self-manage their well-being.

A recent [Nature](#) article notes that there are over 350,000 health apps available, but most people stop using them after just three months. Only 1.4% of these apps are approved as medical devices, highlighting the challenge consumers face in identifying reliable options. Despite these difficulties, the number of approved apps with a medical benefit is increasing. Real world evidence and more holistic health platforms further support the trend towards better and more trustworthy digital health.

Health platforms vs. specific tools

A pertinent question is whether the future will see the dominance of specific tools or apps designed to track particular health aspects, or whether there will be a shift towards holistic health platforms. These platforms would allow patients to monitor and manage their health comprehensively, using all available data.

While there is no definitive answer, many believe the trend will lean toward holistic health platforms. Such platforms would enable users to integrate various personal health sources and medical records, offering a centralized and comprehensive view of their health. Apple Health is a prime example, showcasing how diverse health data can be stored and accessed in one place.



Factors influencing the trend

- **Digitalization of health data:** The extent to which health data is digitalized will play a crucial role in the adoption of digital health tools.
- **Data security:** Without robust security measures, individuals may be reluctant to adopt these tools.
- **Access to health data:** The ease with which individuals can access their health data will also impact adoption.

As a result of these varying factors, we might observe different developments across countries, each influenced by their unique digital health landscapes.

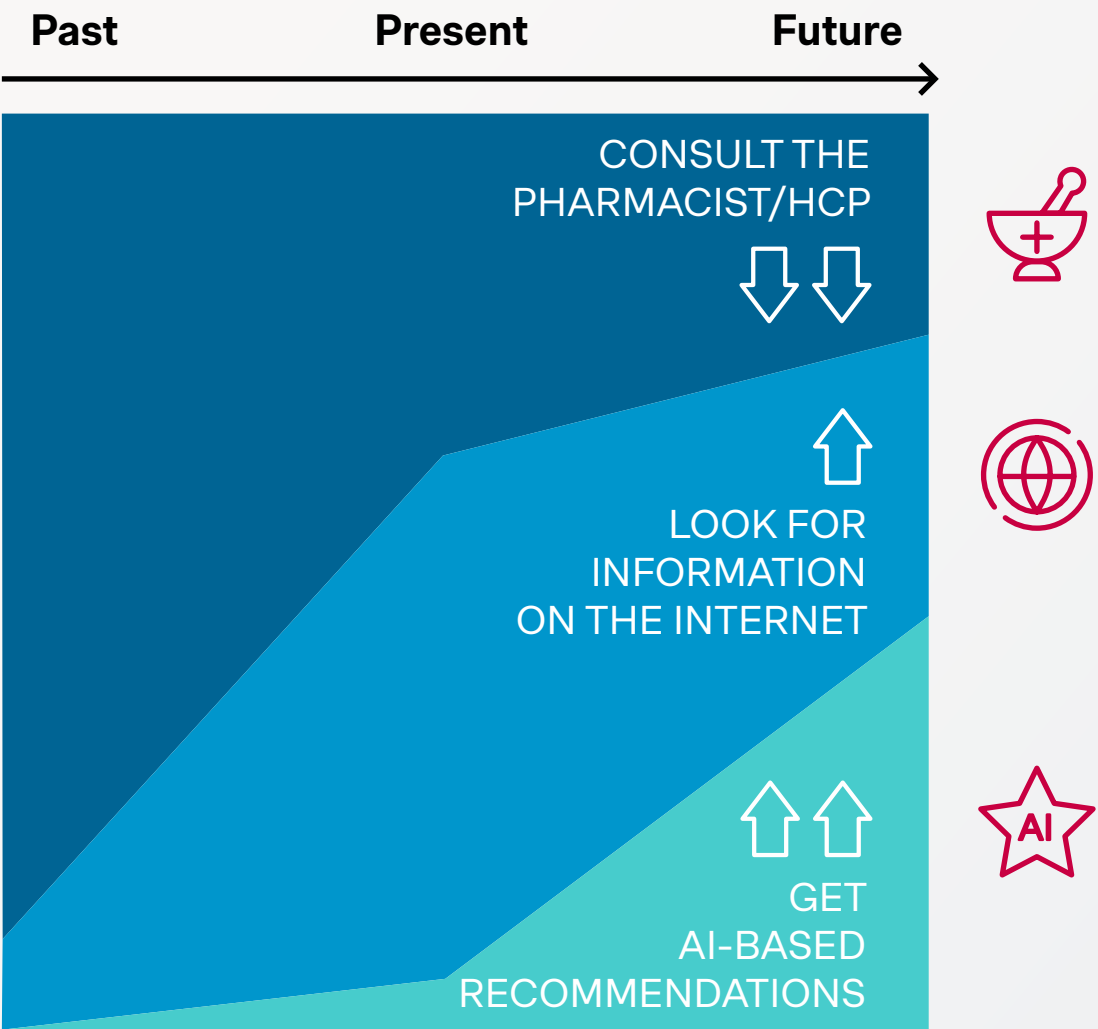


From searching for information to seeking advice

The way consumers seek health information and advice is also evolving. Traditionally, individuals would consult healthcare professionals (HCPs) including pharmacists – or search the internet for information.

Today, advanced technologies, particularly artificial intelligence, are revolutionizing this process. AI is transforming how consumers seek health advice online, offering highly personalized guidance based on their specific situations and needs. This shift from simply searching for information to actively seeking tailored advice is a significant step toward more autonomous and empowered self-care.

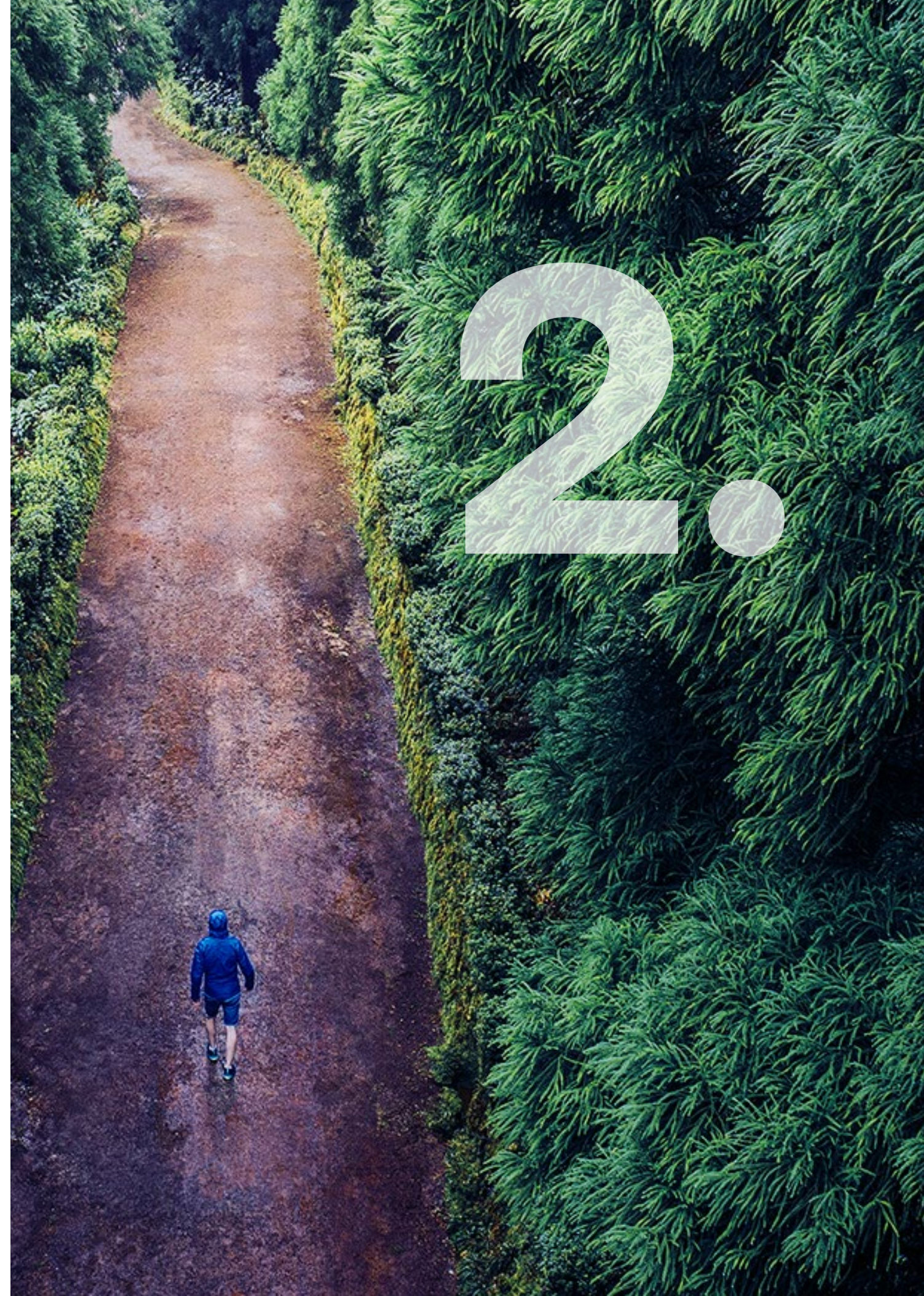
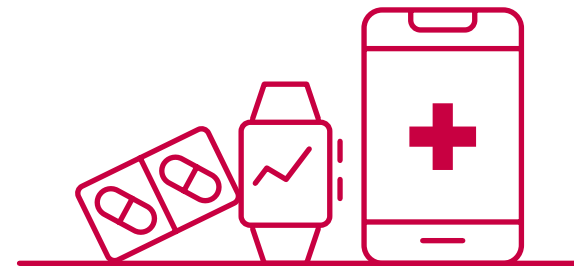
While it took Facebook 4.5 years to reach 100 million users, ChatGPT achieved this milestone in just 2 months. The impact of AI in the self-care industry is set to grow exponentially. AI can analyze vast amounts of data quickly, offering insights and recommendations that are highly personalized and actionable.



Empowering HCPs through AI

The healthcare industry is facing a significant shortage of HCPs. Meanwhile, an aging population drives increased demand for medical services. There is mounting cost pressure on the healthcare system, requiring innovative solutions to maintain quality care while managing expenses. The number of traditional pharmacies is also decreasing, with a noticeable shift to online services.

There is a strong need for efficiency gains and an increased importance for pharmacists in their roles as healthcare providers. AI will be crucial in driving these changes, ensuring that the healthcare system can meet the demands of the future while continuing to provide high-quality care.

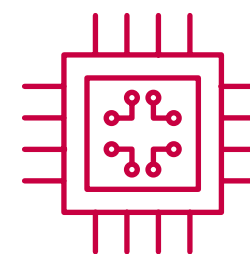


Achieving efficiencies through AI

- AI is transforming the healthcare landscape by streamlining routine administrative tasks such as scheduling, documentation, and billing.
- It assists in clinical decision-making by analyzing large datasets and providing evidence-based recommendations, enhancing the accuracy and efficiency of diagnoses and treatment plans.

Better decision-making for pharmacists

- Dispensing software is evolving and enhancing the role of pharmacists by providing them with up-to-date information on medications, interactions, and health conditions. This enables pharmacists to confidently advise on a broader array of health issues beyond medication-related queries.
- AI could analyze individual patient data to tailor health recommendations, ensuring a more personalized approach to patient care. This trend is expected to impact both community and online pharmacies, with online pharmacies likely to be at the forefront.
- These developments open up the opportunities for pharmacists to have a more prominent role in patients' daily lives and in turn further empowering self-care. By leveraging AI, pharmacists can spend more time with patients, expand their service offering, lower the hurdle to healthcare access and ultimately improving health outcomes.



Insights at a glance

90% of respondents believe overall financial sustainability of healthcare systems is already under pressure, leading to a shift in financial burden to patients (e.g., increased number of Rx-to-OTC switches, de-reimbursement, increased relevance of OTC, increased co-payments, etc).¹

88% believe pharmacists will take over tasks from other HCPs, with 78% seeing a shift to a more advanced health-advisory role, ultimately playing a crucial role in patients' decision-making.²

Source: ^{1,2} AESGP survey

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There's definitely a growing strain on healthcare systems, and it's being driven by things like an ageing population and a shortage of healthcare workers. But with the rise of digital and AI technologies, we're starting to see more and more administrative tasks getting automated. This is really freeing up healthcare professionals to focus on other important tasks.

AESGP survey participant

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I really believe that AI is going to be a game changer for healthcare professionals. From diagnosis to developing therapy plans and beyond, AI is going to make things quicker and more personalized.

AESGP survey participant

3.



Enhancing consumer engagement in disease prevention

Consumers are increasingly adopting behaviors towards disease prevention, and expecting to increase expenditure on aides.

Currently actively engaging in disease prevention

YES

84%



NO

16%



Source: [Simon-Kucher Better Health Report 2023](#)

Our [Better Health 2023 report](#) indicates that the majority of consumers are actively engaging in disease prevention. Almost 50 percent also engage in preventing mental health problems. This reflects a broader shift toward a health-conscious lifestyle where individuals prioritize long-term wellbeing as part of their care routines over reactive healthcare measures.



- **Healthy eating:** Consumers are more informed and selective about their dietary choices, opting for whole foods, organic produce, and functional foods that support health.



- **Restorative sleep:** Consumers are prioritizing sleep hygiene practices, such as maintaining a regular sleep schedule, creating a restful environment, and avoiding screens before bedtime.



- **Regular exercise:** Consumers are becoming more physically active, incorporating regular exercise into their routines.



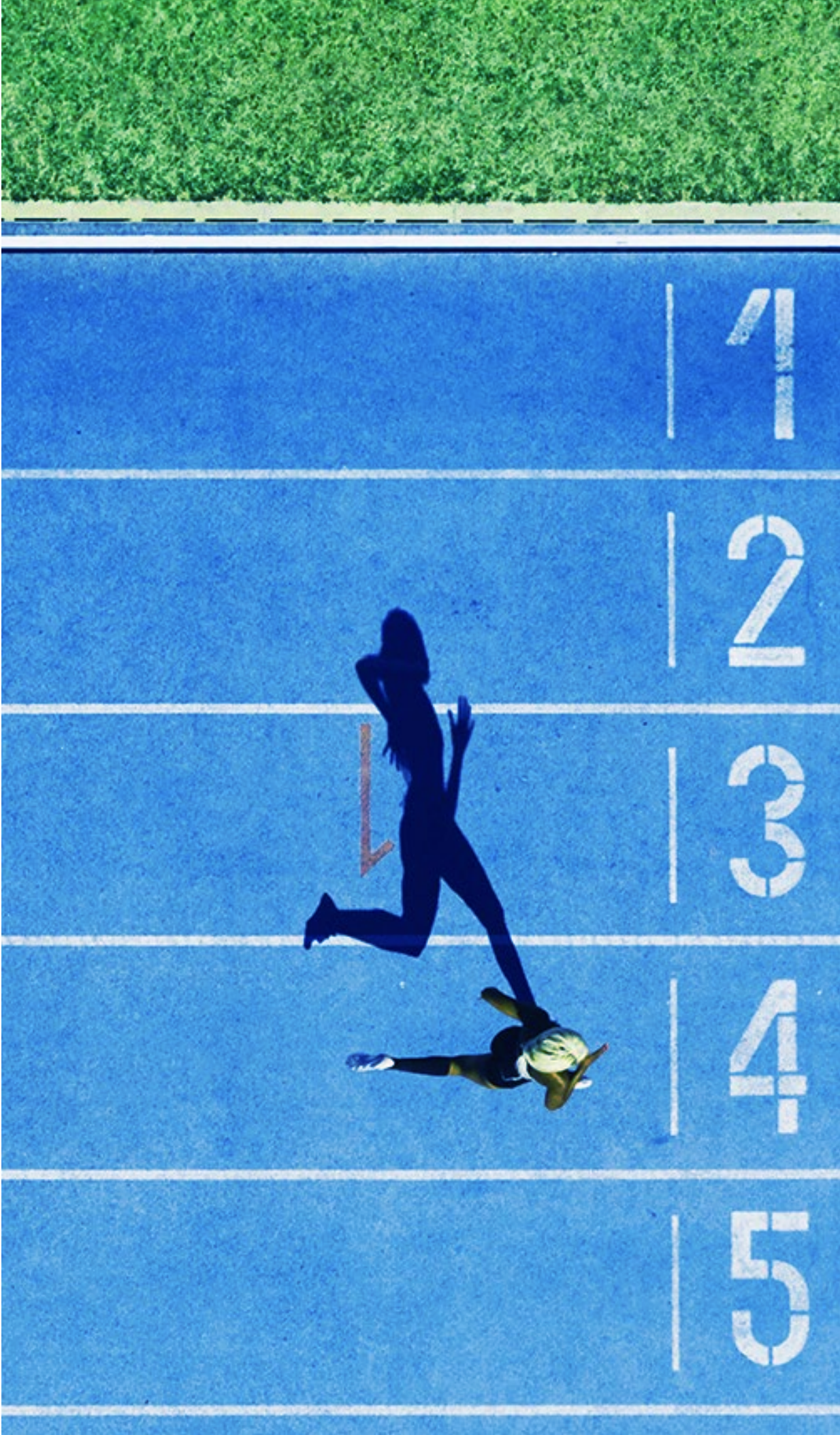
- **Social activities:** Maintaining social connections with friends and family is vital for mental and physical health. Consumers recognize engaging in social activities helps reduce stress, improves mood, and enhances overall wellbeing.



- **Work-life balance:** Consumers strive for a more balanced lifestyle that allows for adequate time for relaxation, hobbies, and family to prevent burnout and maintain mental and emotional health.



- **Meditation:** Mindfulness practices such as meditation are gaining popularity as effective tools for managing stress, enhancing mental clarity, and promoting emotional health.



Insights at a glance

84%

of the population currently actively engaging in disease prevention.¹

45%

engage both in physical & mental disease prevention.²

Source: ^{1,2} [Simon-Kucher Better Health Report 2023](#)

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Right now, we're seeing a surge of new tools that are all about prevention. This includes everything from apps to data technologies. It's giving people a complete picture of their health, including diagnostics. And with that information, they're able to take steps to prevent health issues before they even start.

AESGP survey participant

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I can see a clear shift to prevention-focused approach by consumers, expecting more personalized treatments and recommendations.

AESGP survey participant

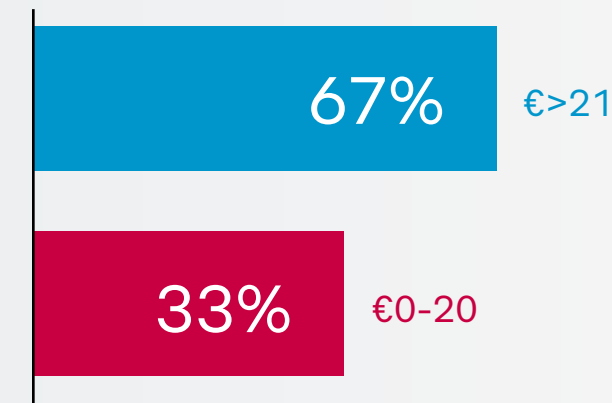
Financial commitment to prevention aides

Consumers are not only adopting healthier behaviors but are also willing to invest financially in disease prevention.

According to [our survey](#), 67% of respondents spend more than €21 per month on aides for disease prevention. This expenditure covers a wide range of preventive measures, including food supplements, fitness equipment, and wellness apps. Most consumers expect their future spending on disease prevention to either increase or remain similar, indicating a sustained commitment to proactive health management.

67% of the surveyed consumers spend more than €21 per month on aides for disease prevention

Average % of respondents



Most consumers expect future spending to increase or remain similar



Growing focus on mental health, aging, and gender-specific health segments

Consumers increasingly demand specialized products and services. This presents a lucrative opportunity for manufacturers to expand their offerings and tap into growing markets.

Fast-growing self-care categories

Mental health

A significant majority believe mental health will increase in relevance. Consumers are seeking products that support mental wellbeing. This includes stress management tools, meditation apps, and supplements designed to enhance mental health.

Age-related health

With an aging population, there's a growing demand for products addressing age-specific health concerns, from mobility aids and food supplements to skin-care products aimed at increasing health span and longevity.

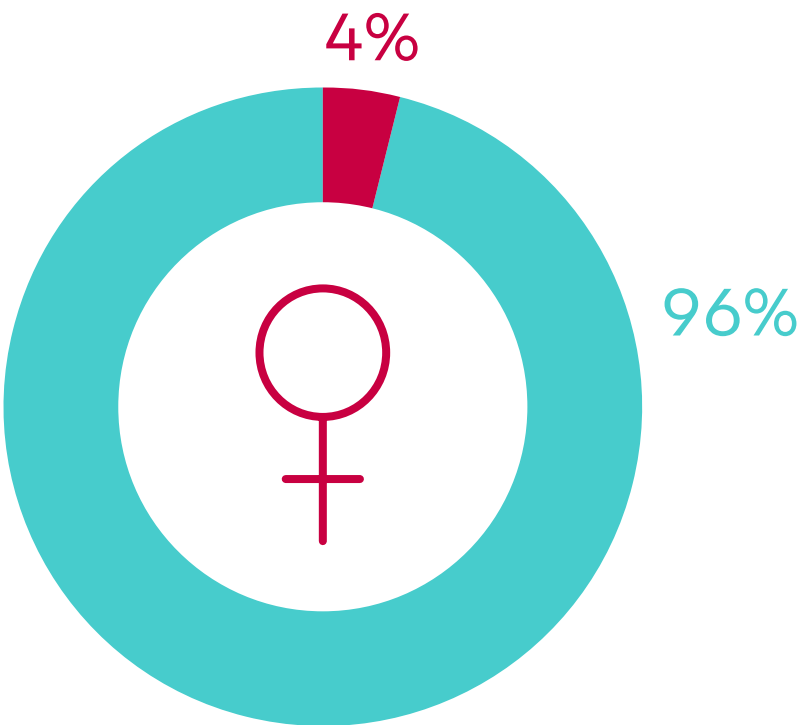
Gender-specific health

Consumers anticipate a growing focus on gender-specific health issues, with women's health seen as an untapped market. Despite making up 50% of the global population and facing unique health conditions, innovation in women's health has traditionally been limited.



Insights at a glance

Share of the biopharma R&D spending directed to women-specific conditions



Source: [Forbes](#)

“

Right now, there might be women who feel like traditional healthcare doesn’t quite fit their needs. This could lead to them feeling more motivated and empowered to take control of their own health. I can totally see a future where more and more women are turning to self-care solutions like mobile apps, even if they have to pay out of pocket for them.

AESGP survey participant

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I've seen that there is also less stigma attached to gender-specific demands, like more broadly talking about menopause or other types of situations that are gender specific.

AESGP survey participant



5.

Leveraging sustainability to build brand value

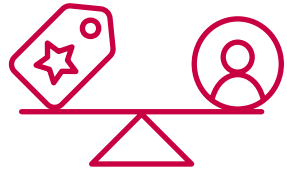
The challenge: Limited willingness to pay for sustainability.

While a minority of consumers, known as the "green segment," are willing to pay a premium for sustainable products, our survey shows that the majority are not. This poses a challenge for companies that want to invest in sustainability. Compliance with regulations is a practical necessity, but there is also potential to leverage sustainability creatively and strategically, beyond simply adjusting prices.

The opportunity: Sustainability as a competitive edge.

Although most consumers are reluctant to pay more for sustainable products, they still prefer to buy them when given the choice. This creates an opportunity for brands that can produce sustainable products at a similar cost to conventional ones. In generic categories like food supplements and vitamins, offering sustainable options can set a brand apart from the competition.





Enhance brand equity

Enhance your brand's reputation, attracting eco-conscious consumers and fostering loyalty.

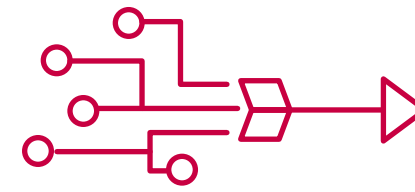
Align with consumer values to attract a dedicated customer base that prioritizes sustainability.



Achieve financial advantages

Appeal to investors looking for responsible and forward-thinking companies, potentially leading to increased investment.

Ensure better compliance with supplier standards, reducing risks and improving supply chain reliability.



Drive innovation

Challenge your company to innovate, leading to new products and processes.

Focus on operational efficiency and resource conservation.

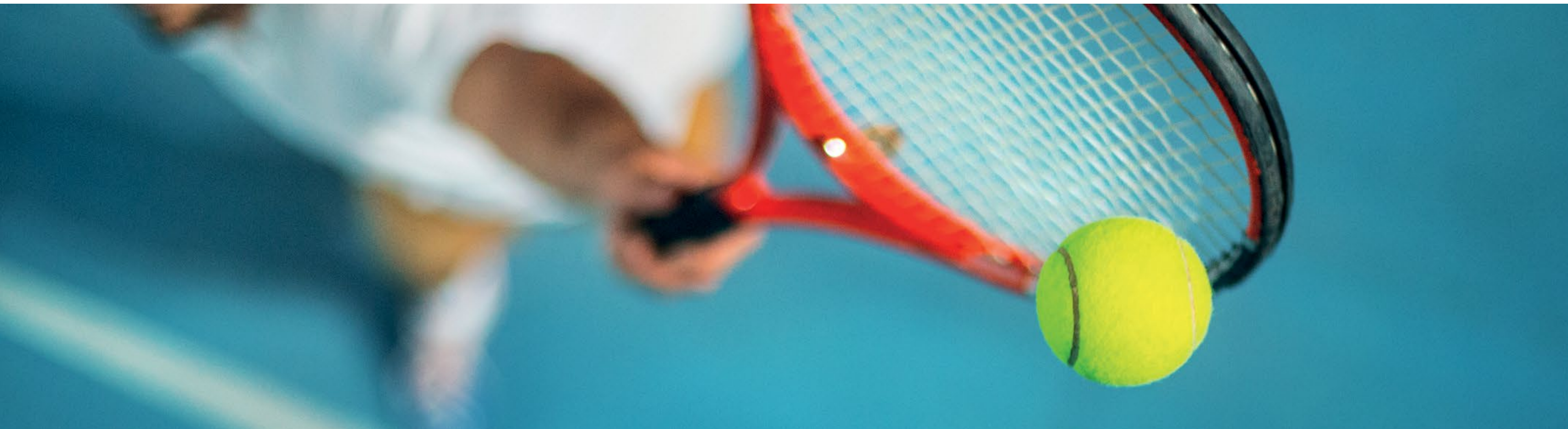
Open up new market opportunities by appealing to niche segments.



Acquire more talent

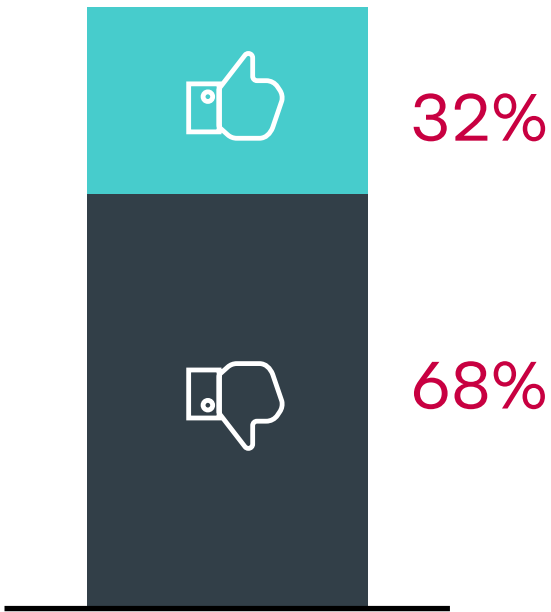
Sustainability is increasingly important to job seekers, helping companies attract and retain top talent.

Employees are more likely to stay with companies that align with their values, reducing turnover and improving retention rates.



Insights at a glance

Do you expect consumers to pay more for sustainability?



Source: AESGP survey

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I don't envision sustainability factors leading to price increases – but it gives you a competitive edge.

AESGP survey participant

“

Shifting towards more sustainable products is not necessarily an opportunity, but it's something you just have to do to stay relevant.

AESGP survey participant

Conclusion: Strategies to remain competitive in the self-care industry

1. Innovation excellence:

The landscape of self-care is evolving rapidly, with notable shifts such as the rise in preventative health and focus on women's health. Sustainability is increasingly pivotal, alongside the growing influence of digital solutions. To remain competitive, companies must innovate continuously, delivering products and digital solutions that align with these evolving categories and meet consumer expectations for sustainability.

2. Go-to-market strategy:

The dynamics of consumer behavior, purchasing decisions, and the roles of HCPs and pharmacies are undergoing significant transformation. Consequently, companies must thoroughly evaluate their go-to-market strategies. This evaluation should encompass their approaches to pharmacies and HCPs, allocation of investments across consumer segments, pharmacies, and HCPs, as well as their overall channel strategy.

3. (Digital) capabilities and operating model:

The self-care industry is poised for a substantial digital transformation driven by AI and other digital advancements. To effectively navigate these changes, companies need to strategically invest in pertinent digital capabilities and reassess their operating models. This reassessment should ensure seamless integration of AI and digital technologies across all functional areas.





About Simon-Kucher

Unlocking better growth

to increase long-term sales, value, and profit.

We achieve this by optimizing every lever of your commercial strategy – product, price, innovation, marketing, and sales – based on deep insights into what customers want and value.

Get this right, and you achieve better, higher-quality growth by creating virtuous cycles of loyalty, advocacy, and trust, increasing sales and long-term sustainable profit far more than cost reduction alone.

That creates value and opportunities for everyone: your customers, stakeholders, and our wider society too.

That's why, for nearly 40 years, we have been unlocking better growth for businesses, both large and small, helping revolutionize how we all live our lives.

Our dedicated consumer healthcare specialists bring extensive project experience, creativity and industry knowledge to help your business grow.

Combining global views with deep local expertise to help you deliver sustained growth and make your project a success.

Services & Capabilities

1. Revenue growth management/
net revenue management
2. Go-to-market and channel strategy
3. Gross-to-net optimization
4. Brand and portfolio strategy
5. New product and assortment life cycle pricing
6. Customer engagement and sales excellence



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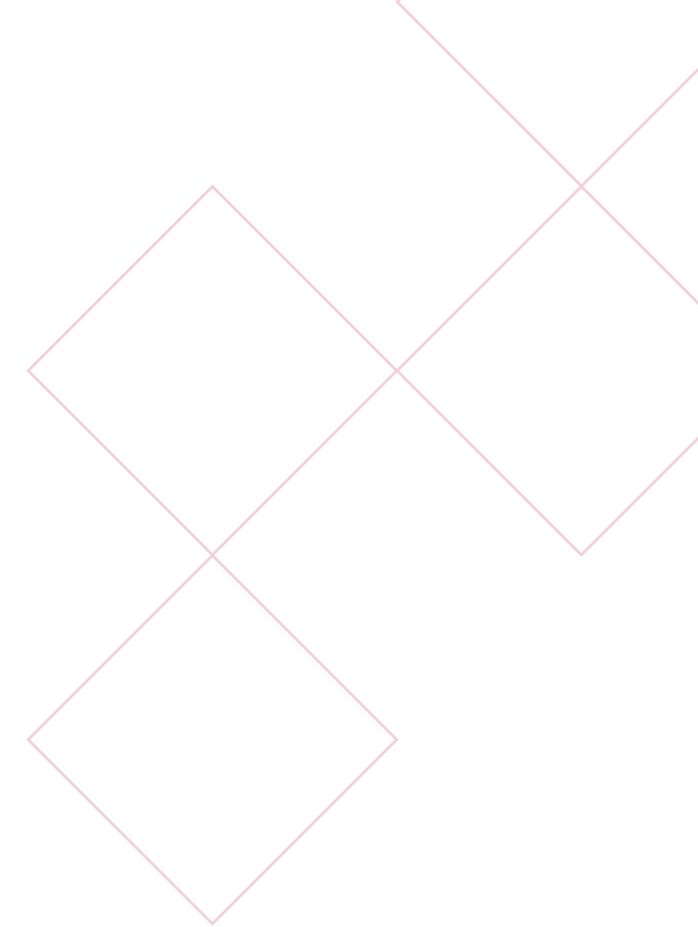
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