

LATEST STUDY RESULTS

Better Health Report 2025

Prevention trends shaping the future
of the self-care industry

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Christian Rebholz

simon-kucher.com



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KUCHER
Unlocking better growth

A brighter path to prevention

Across Europe, consumers are increasingly empowered, informed, and motivated to take health into their own hands.

The Better Health Report 2025, developed in close partnership with the [Association of the European Self-Care Industry \(AESGP\)](#), examines how prevention is gaining momentum as consumers take greater ownership of their health, guided by new habits, new technologies, and a proactive mindset. Prevention is no longer a side note. From digital tools and wearables to advice from pharmacists and AI applications, prevention is becoming more integrated, accessible, and personalized.

Methodology snapshot

- 2,700+ respondents across 7 European markets participated in a quantitative survey exploring behaviors, attitudes, and decision-making in prevention
- Interviews with key experts from the AESGP membership and broader healthcare ecosystem
- Insights cross-referenced with secondary research and Simon-Kucher's 40 years of healthcare experience

73%

of consumers report their awareness of disease prevention has increased over the past five years



81%

actively use some form of digital or non-digital preventive aid, up from 75% in 2023



55%

of consumers now use AI in prevention-related decision-making, among 18-28-year-olds the share is above 80%



48%

of consumers are spending more than €20/month on prevention, demonstrating a strong commitment.



Market-shaping trends driving growth in self-care

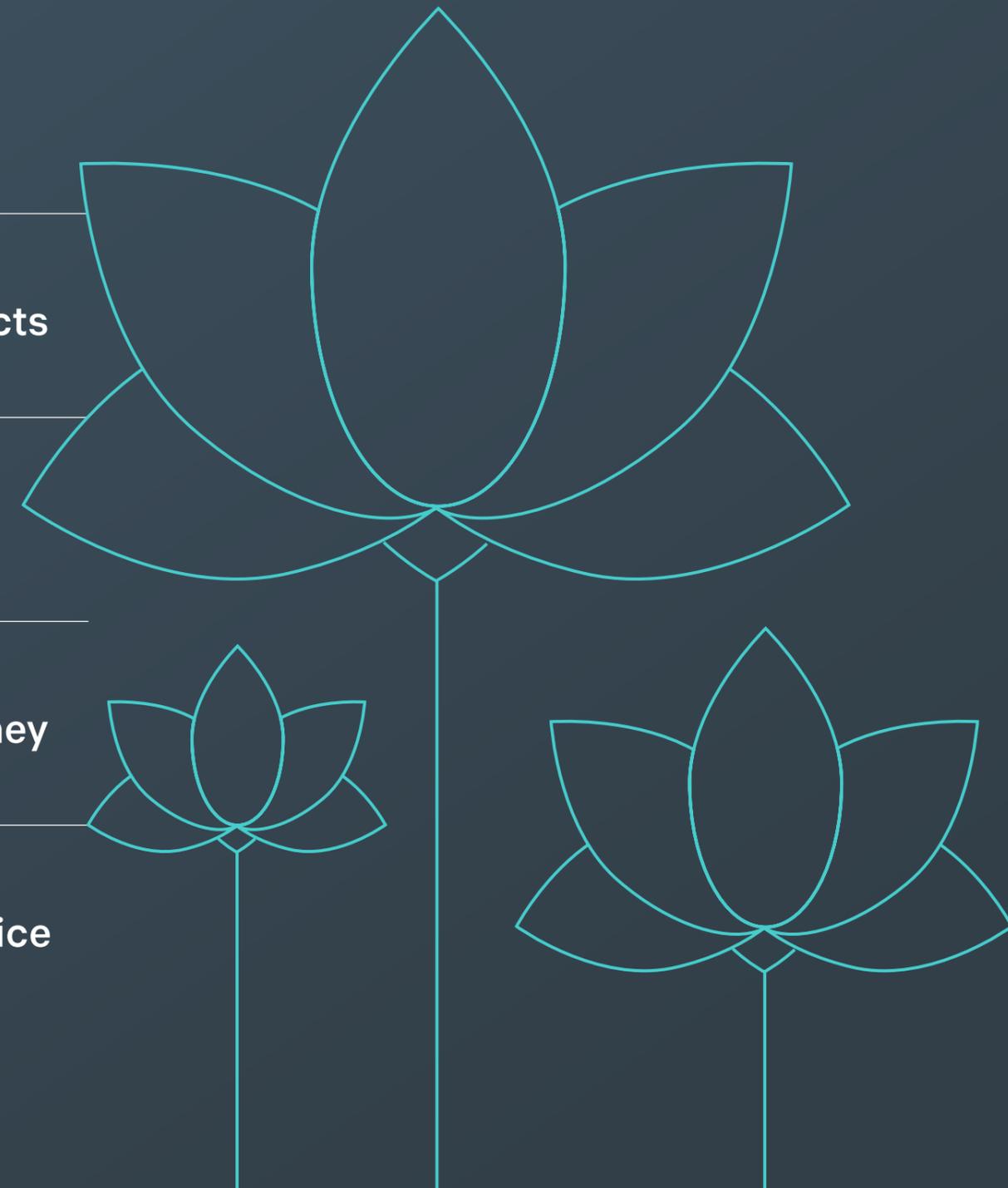
1.  Quality matters, but consumers are still price sensitive

2.  Digital solutions enhance, not replace, traditional products

3.  HCPs remain the most trusted and influential voice

4.  Consumers expect a seamless, hybrid omnichannel journey

5.  Gen AI is gaining traction as a source for prevention advice



Inside the mind of the prevention consumer

To better understand the diversity of behaviors and attitudes across Europe, we've grounded our 2025 findings in three representative consumer personas.

These archetypes bring the survey data to life and help illustrate how different individuals relate to prevention, from awareness and motivation to decision-making and spending. While these personas are stylized, they reflect real patterns observed across the 2,700+ respondents in our study. Throughout this report, you'll see their voices and perspectives reappear as we explore the journey toward preventive health. **Meet our three protagonists:**



Luca

The non-engager

Luca is young, in good health, and prevention feels like something to think about later. He sees prevention as distant and low priority, lacking a clear trigger or personal relevance.



Sabine

The wellness-seeker

Sabine is proactive and practical. A recent health scare or family experience has made prevention a personal priority. She values routine, professional guidance, and accessible tools.



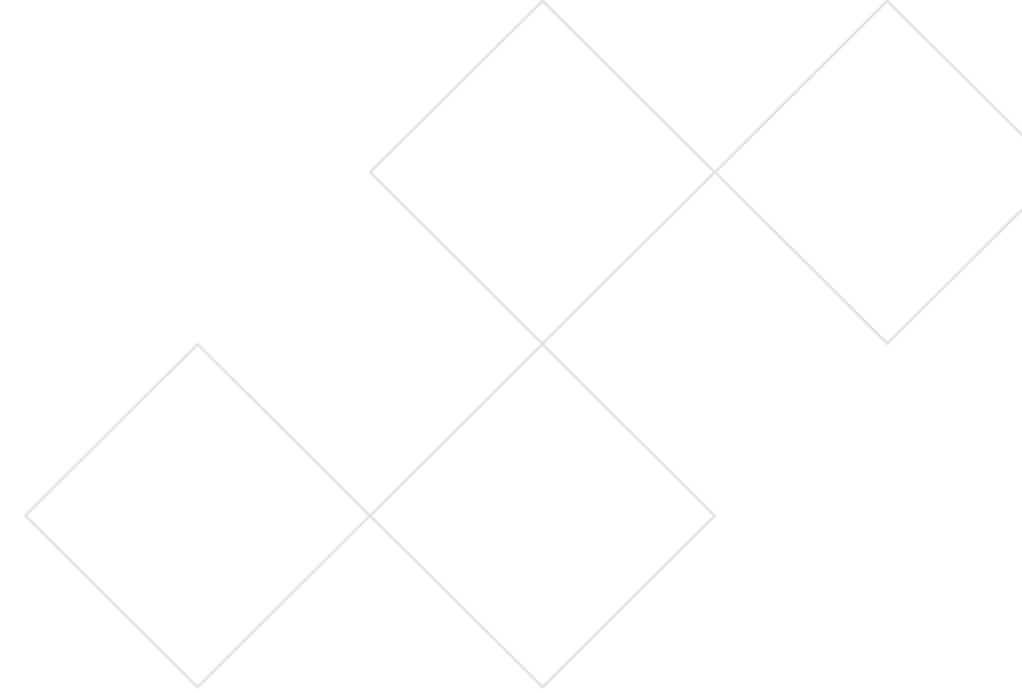
Julian

The longevity-hacker

Julian takes a data-driven approach to prevention. He's an early adopter of digital tools and high-performance health routines, constantly seeking new ways to optimize his health span.

Prevention is a journey

Whether driven by a goal, a wake-up call, or curiosity, every prevention journey is unique. We break the journey into three stages to understand consumer behaviors, motivations, and decisions. Each stage is explored in our report with insights and persona touchpoints.



Activation

Consideration of prevention

The journey begins when consumers become aware of disease prevention and start considering it as part of their lifestyle. In this stage, we explore the triggers (personal experiences, digital content, or advice from others) that motivate individuals to take proactive steps.

Decision

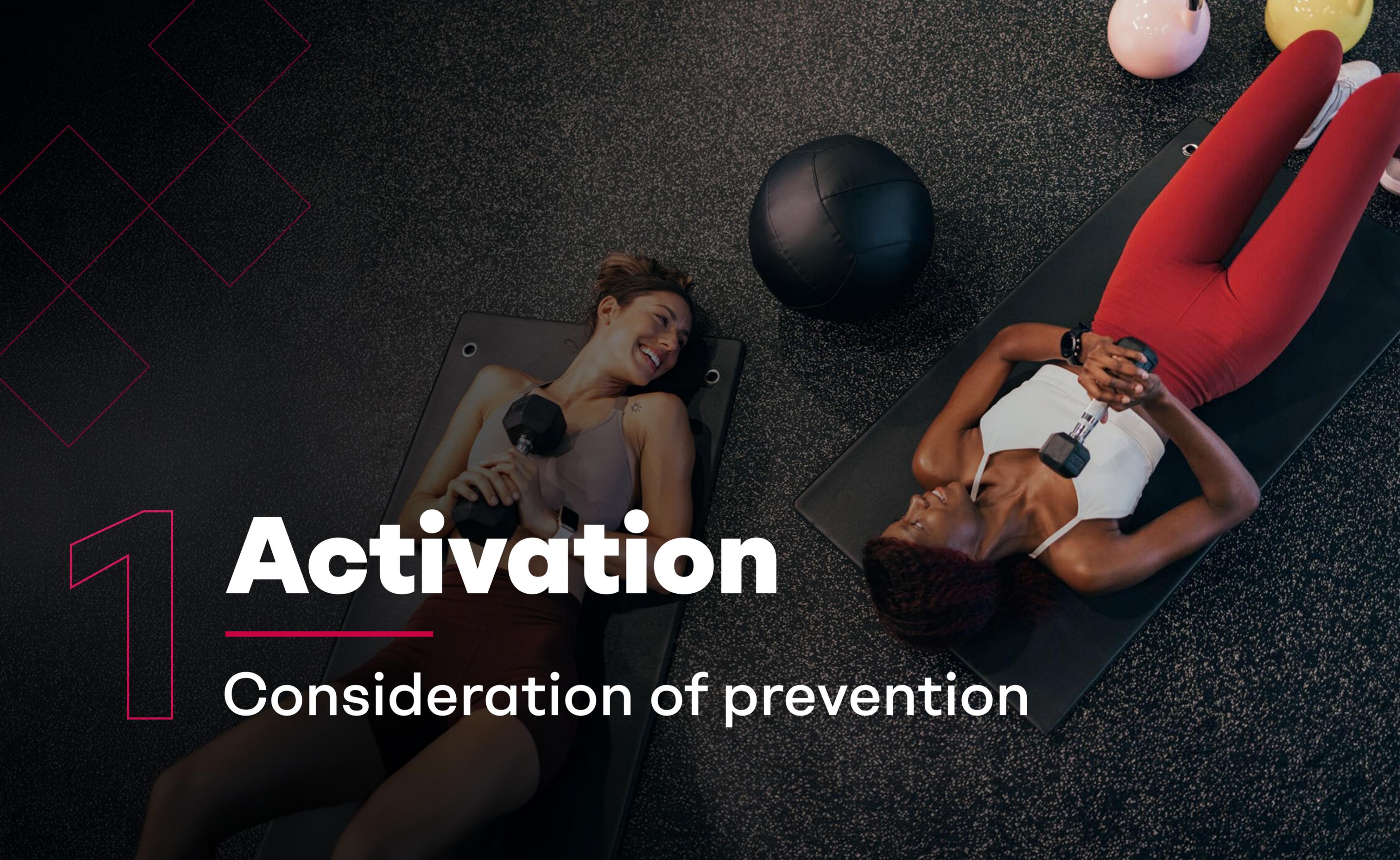
Decision-making in prevention

Once motivated, consumers face a range of choices. Whom should they trust? What tools should they use? This section explores how decisions are shaped, from the influence of HCPs and AI to the role of affordability, efficacy, and credibility in selecting prevention solutions.

Engagement

Selection of prevention solutions

Finally, the journey culminates in action: engagement, purchase, and use of specific prevention aids. We examine what consumers are buying, from supplements to wearables, where they shop, how much they spend, and which attributes matter most when choosing a product.

An overhead view of two women in a gym. They are lying on their backs on black mats. The woman on the left is wearing a grey tank top and dark leggings, holding a black dumbbell with both hands. The woman on the right is wearing a white tank top and red leggings, also holding a black dumbbell with both hands. A black medicine ball is on the floor between them. In the top right corner, there are several colorful kettlebells (pink, yellow, and white). The floor is dark grey with a diamond-shaped grid pattern. The text '1 Activation' is overlaid on the left side of the image, with a red underline under 'Activation'.

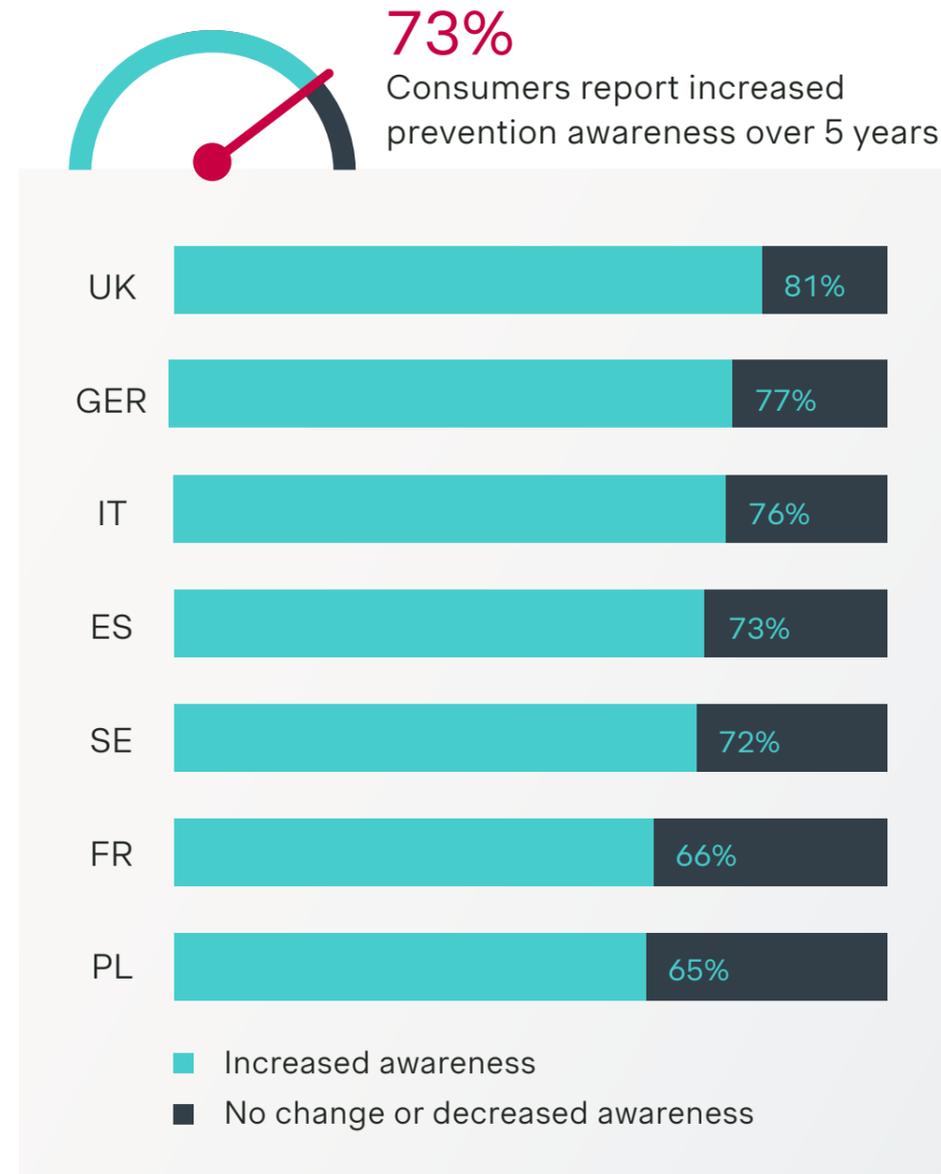
1 **Activation**

Consideration of prevention

Activation begins with awareness

Over the past five years, prevention has moved from background concern to front-of-mind priority for a growing number of consumers across Europe.

73% of people report an increase in their awareness of disease prevention over the last five years, strongly indicating that the topic is resonating more widely. However, this rise in awareness is not uniform. The UK leads with 81% reporting an increase, followed by Germany, Italy, and Spain. Poland and France show the lowest increases, at 65% and 66%, respectively. Still a majority, but a reminder that awareness maturity varies across markets.



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With prevention awareness on the rise, now is the time for the industry to act: Turning attention into engagement, and engagement into impact.

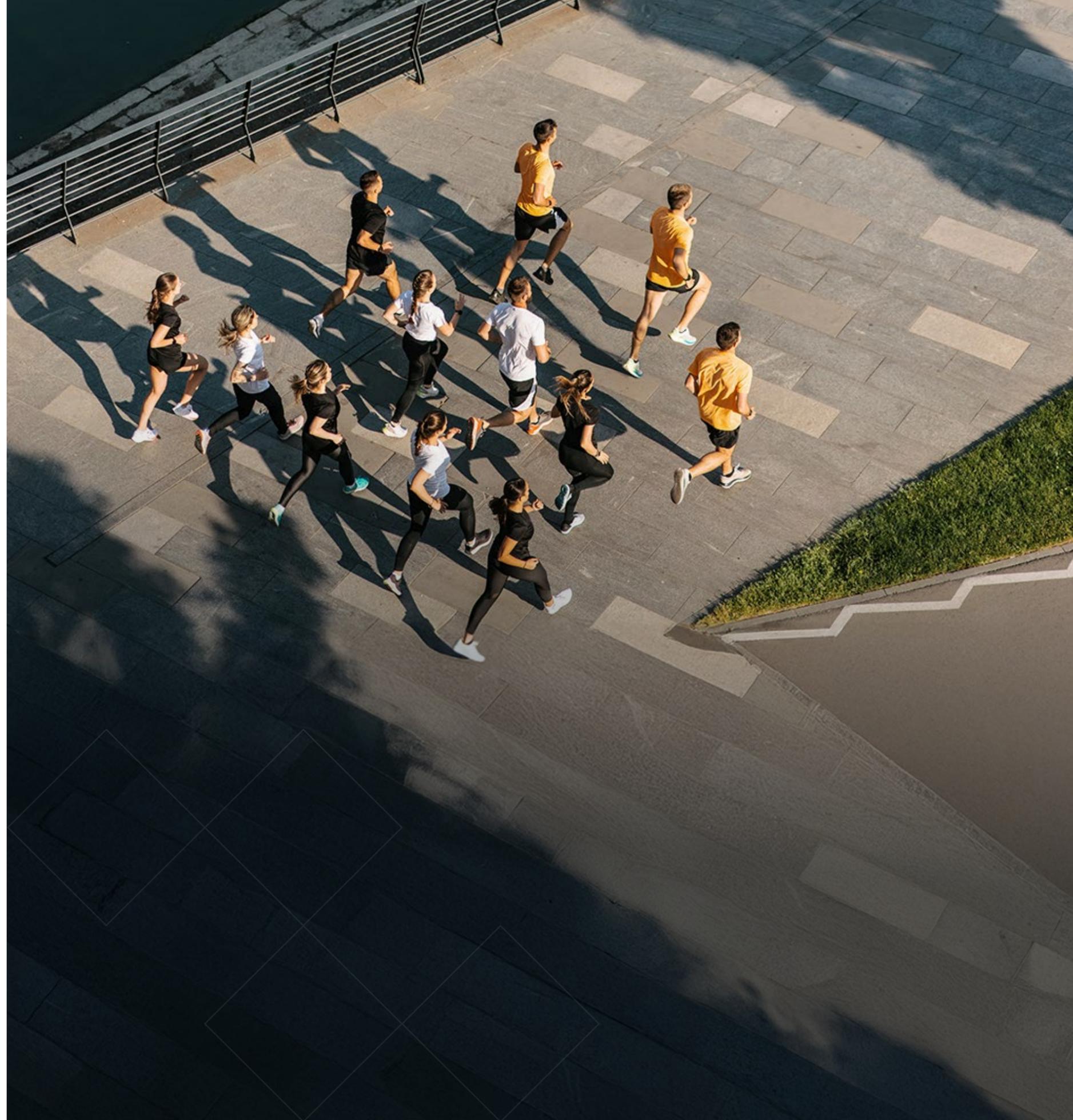
Clemens Oberhammer
Senior Partner

Younger generations drive momentum

Prevention awareness is climbing fastest among younger consumers. Nearly 80% of 18-44-year-olds say they are more prevention-aware today than five years ago. Their **digital fluency and openness to new health content** have made them early adopters of self-care strategies, which is a theme that reappears throughout this report.

But awareness ≠ action

Despite rising awareness, overall engagement levels remain relatively stable. Roughly 80% of respondents consider themselves active in disease prevention, a figure consistent with previous years. These figures show that while awareness has broadly grown, the **journey from recognition to routine still differs** by age, region, and perceived personal risk – all factors that shape how prevention is activated.



Awareness starts close to home – and online

Why are more consumers becoming aware of disease prevention? The answer lies in their lived experiences and what they encounter online.

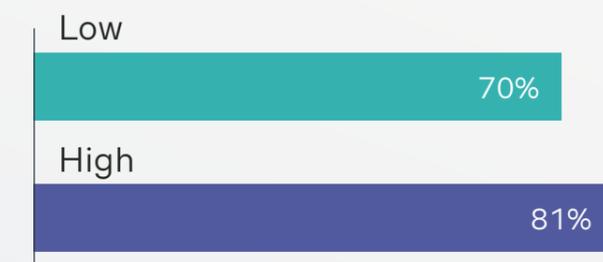
Increased prevention awareness is most pronounced among younger consumers and those in higher income brackets, suggesting that digital fluency and greater health access may be accelerating engagement in these groups. Meanwhile, awareness doesn't come from a single source. It's shaped by a mix of emotional, digital, and interpersonal triggers.

Increase in awareness of prevention relevance

Comparison by age



Comparison by income



Different drivers for different demographics



Younger generations:

Among all mentions made by 18-28-year-olds, 39% referenced online health content or digital health tools as drivers of prevention awareness, highlighting the growing influence of digital media in shaping their health habits.

Older generations:

Among the options selected by over 69-year-olds, 53% were related to personal/family health experiences or more communication with healthcare professionals (HCPs), suggesting a more traditional, event-driven path to awareness.

High earners:

Of all selections made by high-income respondents, 19% were for digital health tools as drivers of awareness, indicating this group's engagement with real-time, personalized digital solutions.

Main drivers for increase in prevention awareness*:



28%

Personal or family health experience

20%

More exposure to health-related content online

16%

More communication with HCPs

14%

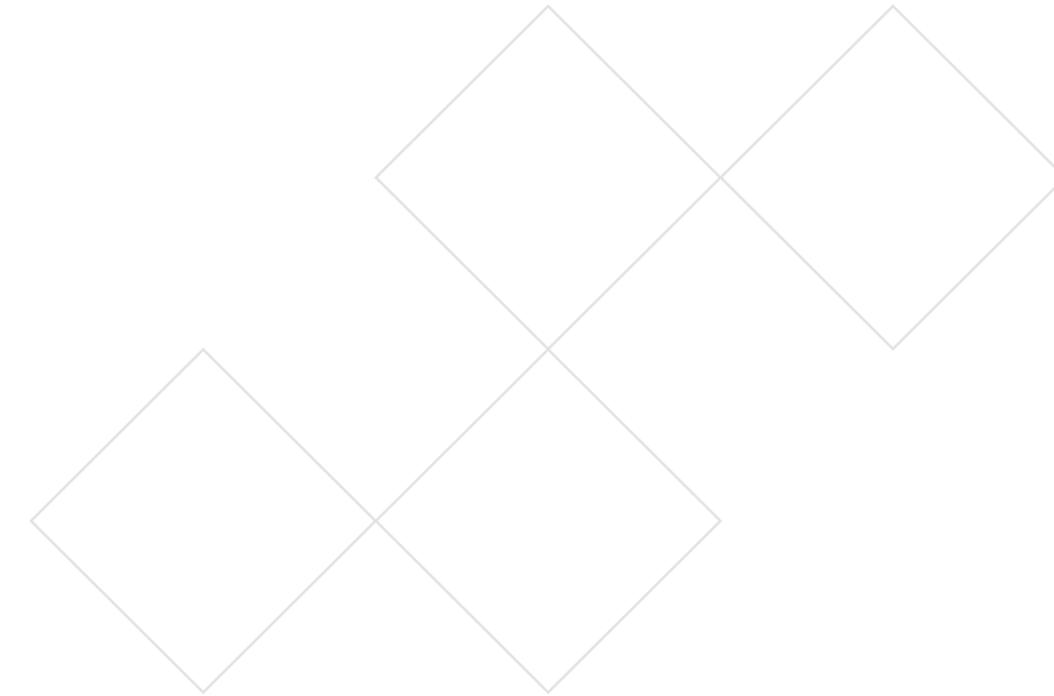
Use of digital health tools

*Share of mentions; multiple answers possible.

When asked why they engage in disease prevention, consumers revealed their focus isn't simply on extending life. It's on improving quality of life.

The top reason cited is the desire to **extend their healthy lifespan**, not just to live more years, but to live better ones. This is closely followed by avoiding disease and prolonging life, suggesting that while longevity remains a goal, maintaining vitality and independence

is what truly drives behavior. Interestingly, goals like **fitness improvement and mental wellbeing lag behind**, indicating that while consumers value prevention, they often deprioritize emotional or psychological goals.



Not just about living longer,
but about living well.



Healthier living is the goal, and prevention is the path.

As consumers age, prevention becomes less about adding years and more about enjoying them.

Among younger consumers, particularly 18-28-year-olds, 16% say that prolonging life is a key motivation for engaging in disease prevention, a higher share than any other age group. As age increases, the emphasis shifts: 31% of over 61-year-olds prioritize maintaining current health over extending lifespan, reflecting a more grounded, quality-of-life-focused mindset. This insight underlines a key message: prevention is increasingly viewed as a means to preserve daily quality of life, not just a long-term investment.

Main drivers to engage in prevention



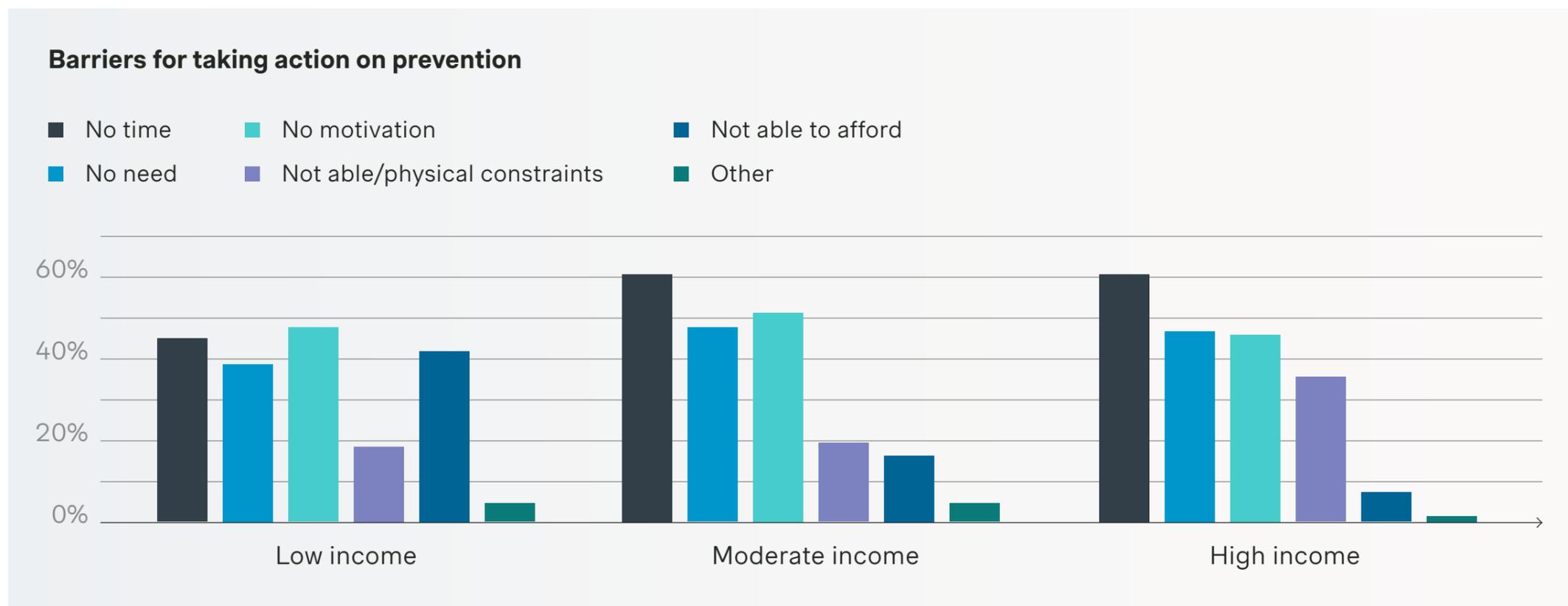
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Health promotion and disease prevention are the most effective ways to improve quality of life and reduce healthcare costs.

Christian Rebholz, Partner

Barriers to action: Why awareness isn't always enough

Time, cost, and confidence remain key barriers, even as awareness grows. Many consumers are willing, but still waiting for the right support.



Affordability is a greater barrier for low-income consumers. Time pressure is the greatest barrier for moderate and high-income earners.



While a prevention mindset is on the rise, integrating healthy living into daily life is a challenge. Barriers remain even as awareness grows, and many consumers lack the right support ecosystem to turn intention into action.

Clemens Oberhammer
Senior Partner

Among those who communicated that they don't engage, **lack of time** continues to be a leading barrier to prevention, with 54% of consumers citing it as a key reason for not engaging. While many recognize the value of preventive health, a significant share (44%) still say they simply don't see the need, revealing an ongoing challenge in communicating relevance and urgency.

Many consumers still feel **unequipped to act**. In fact, most (71%) say they would engage more consistently if they had better support, whether through professional guidance, tailored tools, or clearer recommendations.

Financial limitations are a strong deterrent to prevention engagement, particularly among lower-income consumers. Among this group, 42% cite cost or lack of financial resources as a reason for not engaging in prevention, a markedly higher figure than in middle- or high-income brackets. This suggests a continued need for more accessible, affordable prevention solutions.



How engaged are our protagonists?

To illustrate the diversity of prevention behaviors, let's return to our three representative personas.

Each one reflects a distinct mindset and level of engagement with disease prevention, from distant to disciplined. Their stories bring the data to life, showing that prevention isn't one-size-fits-all. Engagement depends on individual mindset, motivation, and personal context.



Luca

The non-engager

Luca has heard prevention matters, but doesn't feel personally affected. Without an emotional trigger or health scare, it remains abstract and low priority. He may require stronger nudges to activate.



Sabine

The wellness-seeker

Life events, both her own and others', have moved prevention to the forefront of Sabine's lifestyle. She incorporates healthy routines, values guidance, and sees prevention as essential for quality of life.



Julian

The longevity-hacker

Guided by data, Julian is the first one to try out emerging health apps and evidence-based routines, steadily fine-tuning what works to extend and improve his healthy years.



2

Decision

Decision-making in prevention

Who do consumers trust in prevention?

Across all segments, medical doctors are seen as the most trustworthy prevention stakeholders, with 79% of consumers ranking them as highly credible sources of information and advice. The same applies to other HCPs like pharmacists, with 67% citing them as trustworthy in prevention decision-making. In contrast, family, friends, and work colleagues are only viewed as moderately relevant.

Just 43% of respondents consider them a relevant source when selecting prevention products or services. Additionally, AI-based tools are more widely accepted by high-income consumers, with 51% in this group considering AI a relevant part of their decision-making compared to only 23% of low-income respondents.

Trust varies by market

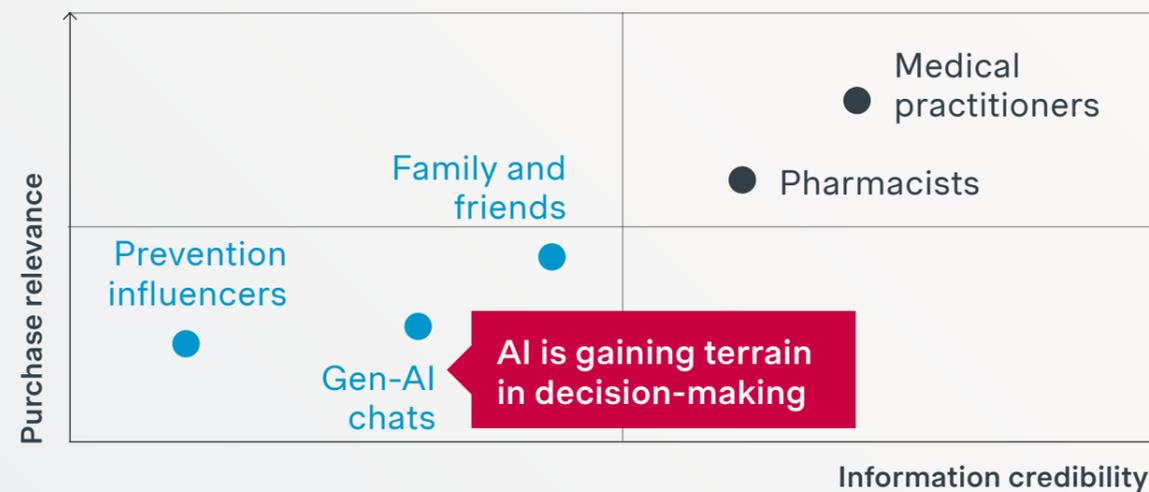
France, Spain, UK: strongest reliance on HCPs

Italy: lower trust in all stakeholder types

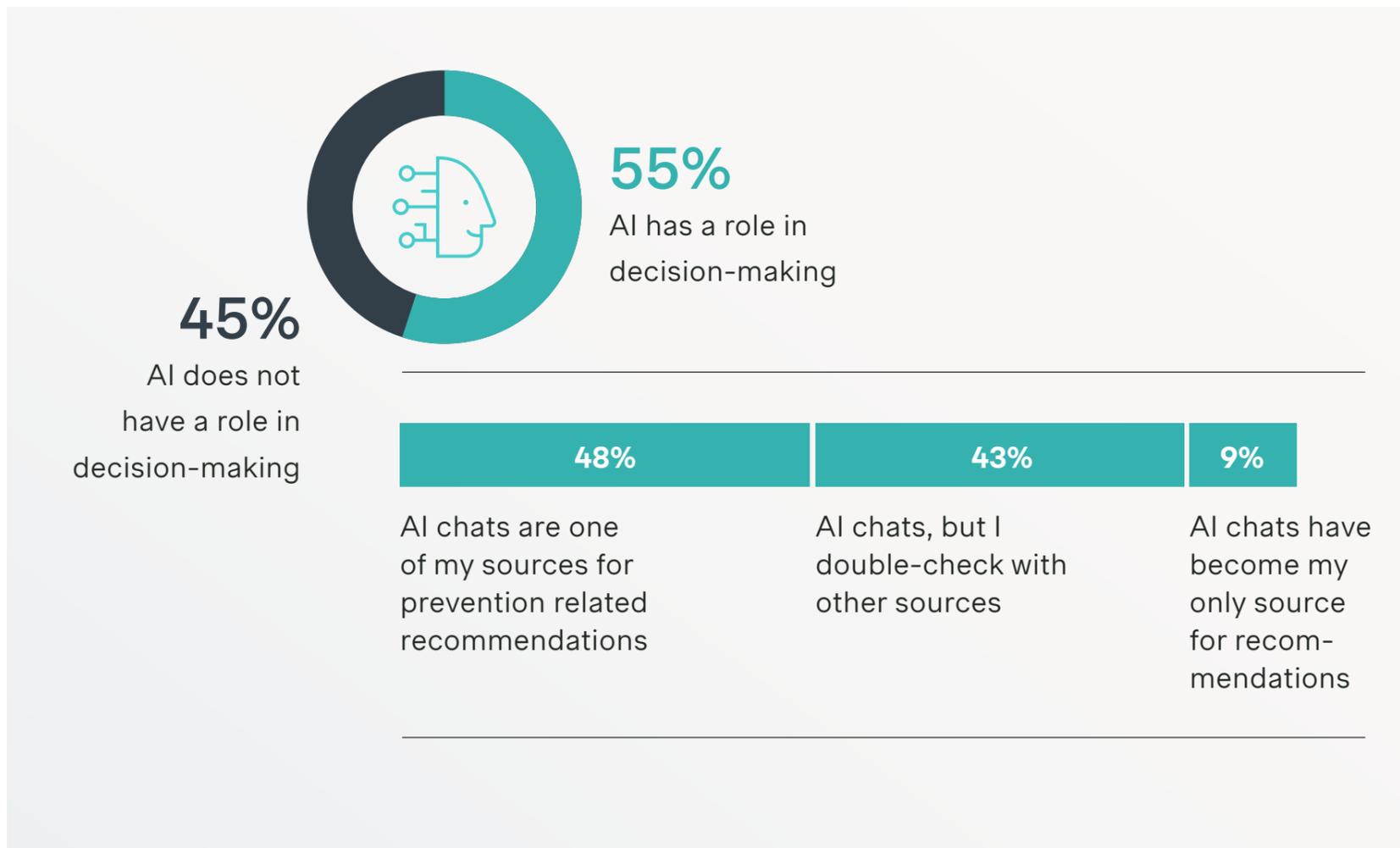
Spain: rank influencers higher than other markets

Sweden: give artificial intelligence tools more weight

The credibility-relevance sweet spot



AI is entering the conversation – but not replacing it, for now



55% of consumers now use AI in some way when selecting preventive health products or services. For younger segments that number jumps to 81%.

Generational trends

18-28-year-olds are far more likely to include AI in their decision mix, with 81% saying they do. In contrast, only 26% of over 61-year-olds report using AI at all in this context. This gap reflects both digital fluency and trust levels with emerging technologies.

National variations

AI adoption in prevention decision-making varies across markets. Sweden reports the lowest usage, with 55% of consumers saying they don't use AI tools at all. However, for those who do use AI, it's a big part of how they make decisions. While adoption differs by country, usage is generally increasing, with cultural and technological infrastructure shaping consumer behavior.

From curiosity to confidence

According to a [2025 HBR study](#), "healthier living" has surged as a GenAI use case, rising from position 75 to top 10 in just one year. "Therapy and companionship" now top the list, further proving that mental health and digital care are converging.

Efficacy first, but price still counts

When consumers choose preventive health solutions, one factor rises above the rest: proven or promised efficacy.

While the overall ranking of drivers is fairly consistent across markets, regional subtleties emerge. In some markets, brand loyalty matters more (e.g., Germany), while aesthetic and user experience score higher in Northern Europe. But in every case, performance remains the entry ticket.



What drives non-digital aid decisions?



Women place greater emphasis on price, ranking it second, while men rank it as third, ranking quality/look & feel as second instead.

Middle-aged consumers (Millennials, Gen X) rank price as second or third. 18-28-year-olds rank price as their number one consideration.

For affluent consumers, perceived value, trust, and experience matter more than price.

What drives digital aid decisions?



When choosing digital prevention aids such as apps, wearables, and virtual health services, consumers apply similar criteria as they do with non-digital solutions: above all, they want to know it works. However, there are important nuances.

For both medium- and high-income groups, price ranks third, behind efficacy and other factors such as convenience or quality. This suggests value perception outweighs upfront cost for consumers with more spending power.



Who do our protagonists consult and trust?

Our three personas show how trust is formed differently, from peer influence to scientific rigor.

Behind every prevention decision lies a mix of influence, instinct, and individual values. Let's explore who Luca, Sabine, and Julian turn to when deciding which preventive health products to buy, and why.



Luca

The non-engager

Luca is highly impressionable, responding to social media trends and visual branding. AI is a validator – not his first step. He's less focused on evidence and more on social proof.



Sabine

The wellness-seeker

Sabine relies on traditional, professional authority. Her decision-making is guided by experience and caution. Trust means expertise, not hype, valuing efficacy and outcomes more than novelty or trend.



Julian

The longevity-hacker

Julian consults scientific literature, specialist influencers, AI platforms, and product data. He trusts logic, innovation, and precision, and he's willing to invest time and money to get it right.

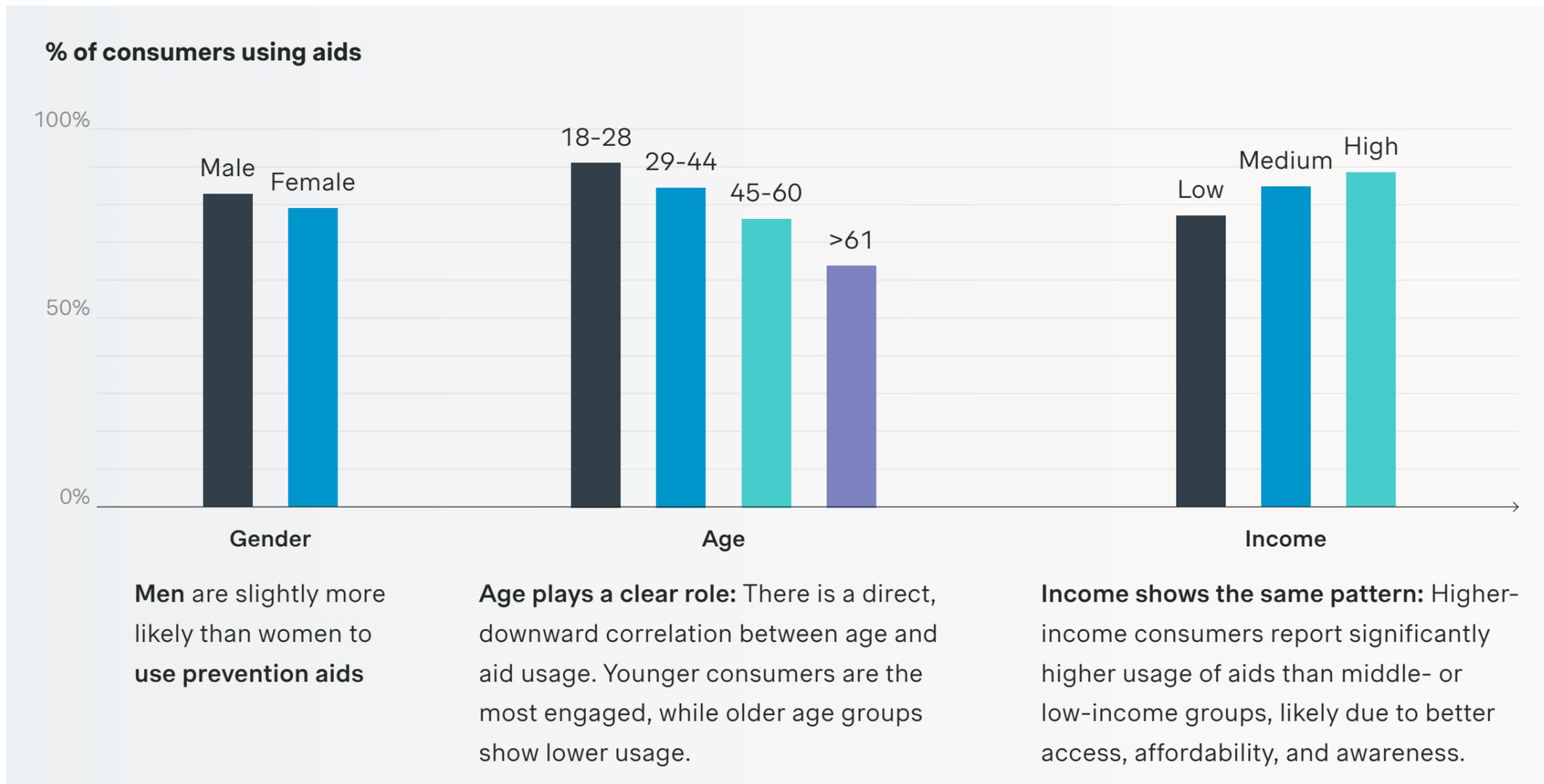
A hand holding several pills in front of a green plant. The background is a blurred indoor setting with a large green plant and a white pot. The text is overlaid on the bottom left of the image.

3

Engagement

Selection of prevention solutions

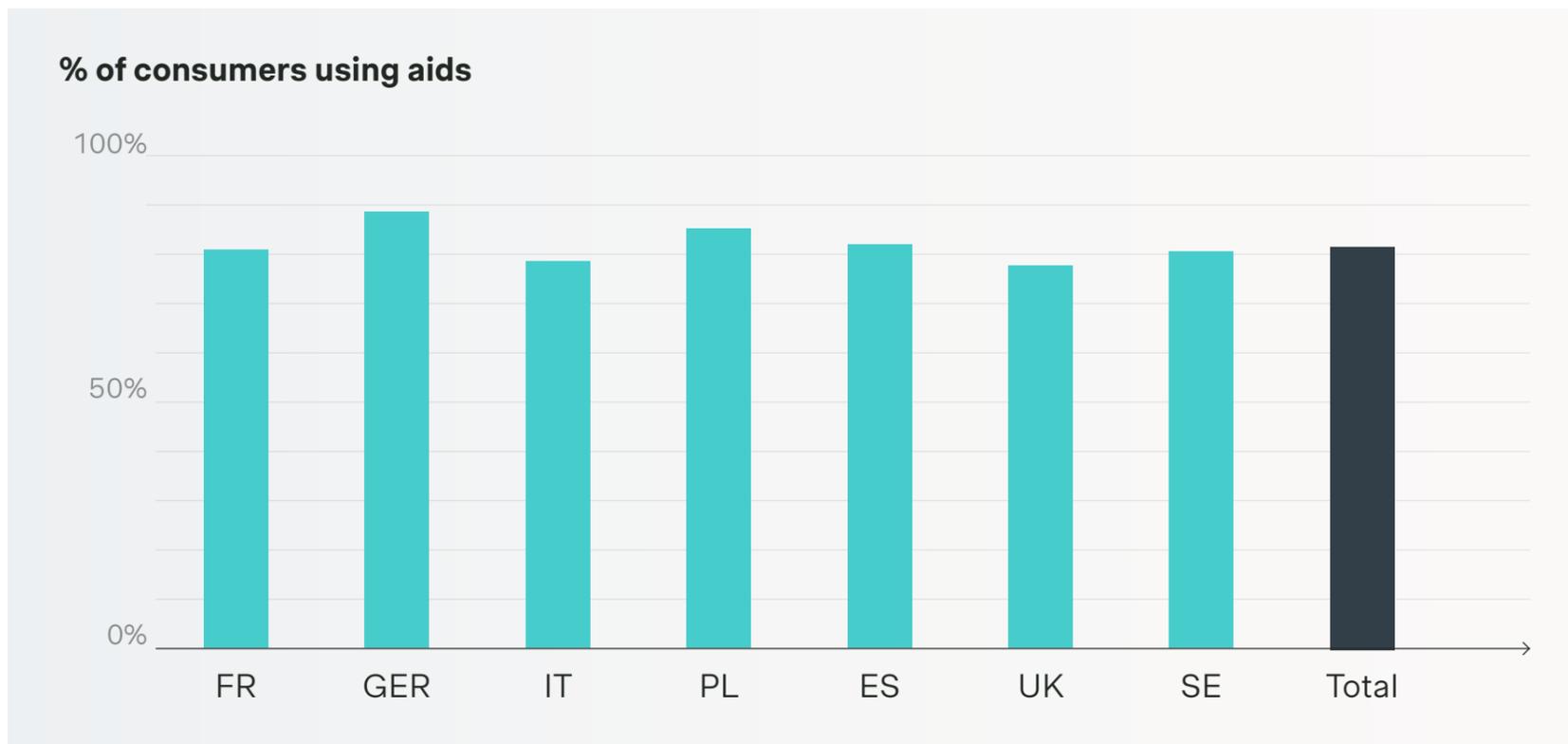
Consumers embrace the prevention toolkit



81% of consumers report using **some type of aid** to support their prevention efforts. 46% of consumers use aids for both **mental and physical reasons**. Even among consumers who don't currently engage in prevention, 68% say they would **consider using some type of support tool**, pointing to broad future potential.

Prevention engagement: Country-level highlights

While most European consumers report using digital or non-digital aids to support prevention, country-level variation reveals important behavioral nuances.

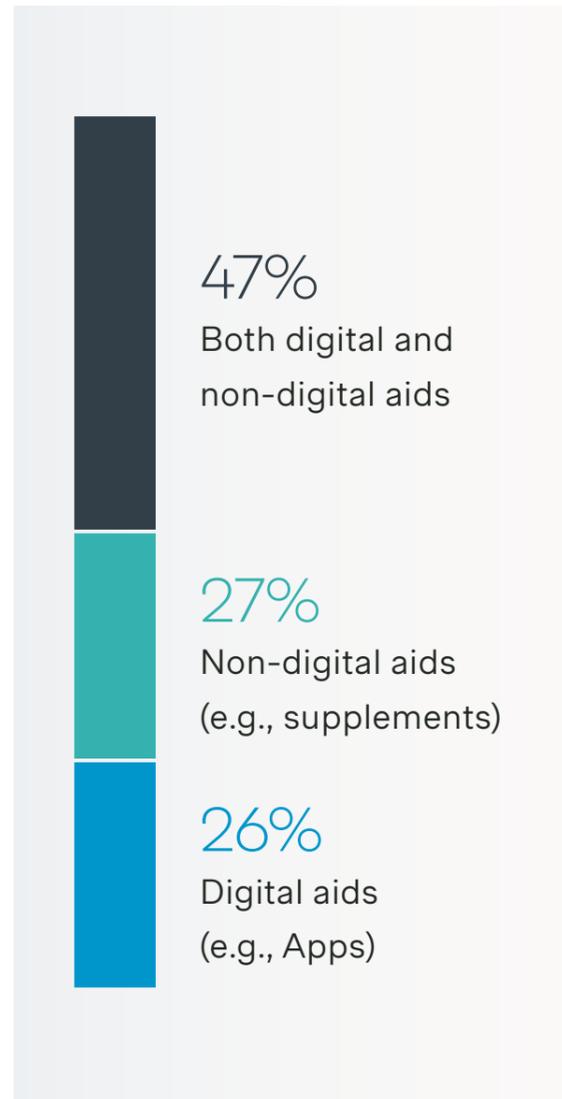


Germany stands out with the highest usage of prevention aids at 88%, suggesting strong integration of self-care tools into daily health routines.

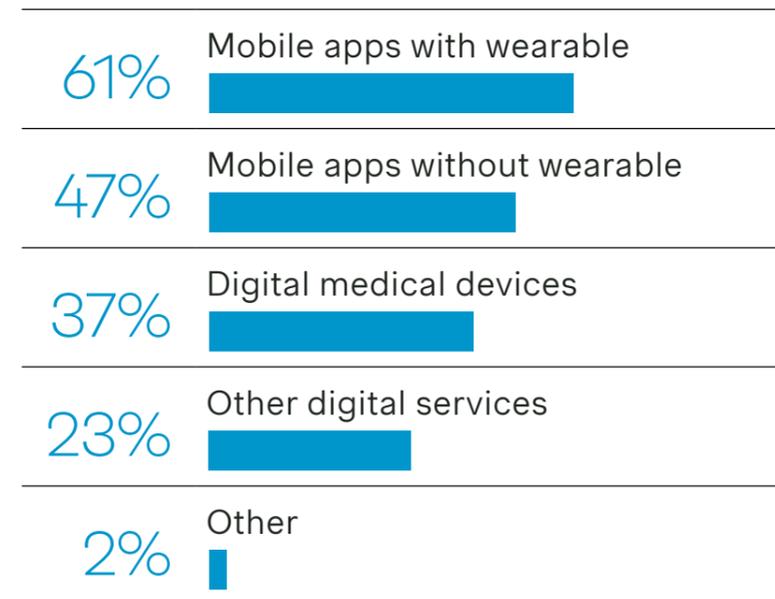
Poland (84%) and Spain (81%) also show above-average engagement, reflecting growing interest in preventive health beyond traditional care pathways.

France (80%) and Sweden (79%) are closer to the European average, while the UK (77%) and Italy (78%) fall slightly below, possibly reflecting affordability concerns, digital adoption lags, greater reliance on HCPs, or cultural attitudes toward self-management.

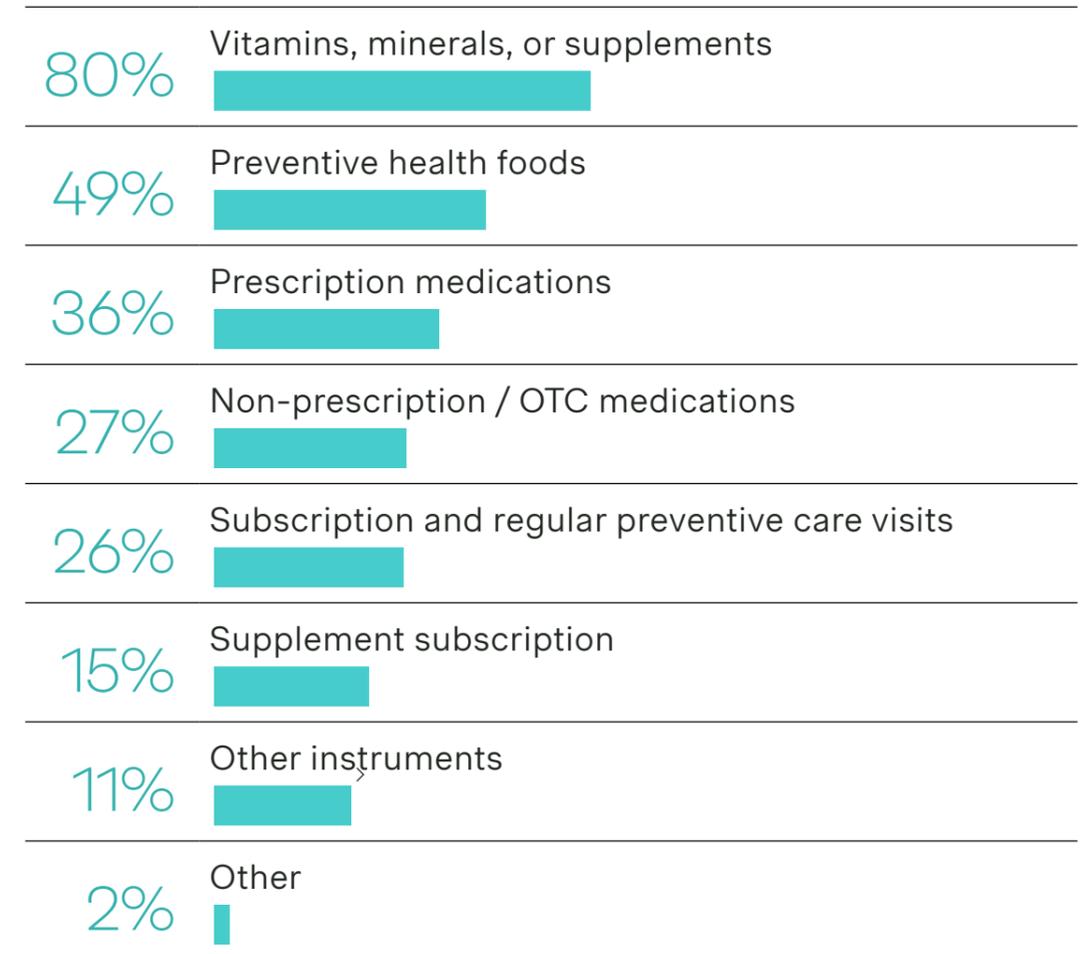
What's in the prevention basket?



Consumers today are using a comprehensive mix of digital and non-digital aids to support their prevention routines.



Mobile apps are consistently the most popular digital aids across genders and regions.



Vitamins, minerals, or supplements are the most used non-digital product categories.

Non-digital staples remain core to prevention routines

While digital tools continue to gain traction, non-digital products still dominate the consumer basket. The top categories actively purchased include vitamins, minerals, or supplements (80%), specific food/diet that promises preventative/health benefits (49%) and prescription medications like weight loss pills and blood pressure medicines (36%).

Digital tools more than just accessories

78% of consumers using digital aids report that those have moderately or significantly influenced their approach to prevention. 57% say they would be willing to share their personal fitness and health data with brands in exchange for more personalized wellness products, [according to the Food Institute](#). Influence is especially strong among younger generations and those with moderate to high incomes.



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As prevention goes digital, the industry must bridge tech and tradition - meeting consumers where trust and innovation intersect.

Christian Rebholz, Partner

Non-digital aids: Country-level highlights

The use of non-digital prevention aids varies meaningfully across markets, revealing different levels of maturity, cultural preferences, and consumer expectations.

 Vitamins, minerals, supplements (VMS)

Highest: Poland (88%)
Lowest: Spain (70%)

VMS are now mainstream across all markets, with the highest penetration in Poland.

 Personalized VMS subscriptions

Highest: UK (30%)
Lowest: Italy (5%)

Personalization in this category is still niche overall. The UK is clearly the early adopter, while Italy is still lagging behind.

 Specific foods/diets with prevention promises

Highest: Poland (60%), Spain (57%)
Lowest: Italy (39%), Germany (42%)

Engagement in Poland is stronger, suggesting these consumers are more open to nutrition-led prevention. Italy is a notable laggard.

 Regular visits to prevention-focused HCPs/clinics

Highest: UK (38%)
Lowest: Sweden (12%)

The UK shows stronger willingness to pay for personalized services, such as ongoing prevention consultations.

 Non-prescription/OTC medications (e.g., sleep aids)

Highest: Poland (38%), Germany (35%)
Lowest: UK (19%), Spain (21%)

Usage varies based on self-medication culture. It's strongest in Poland, and weaker in Spain.

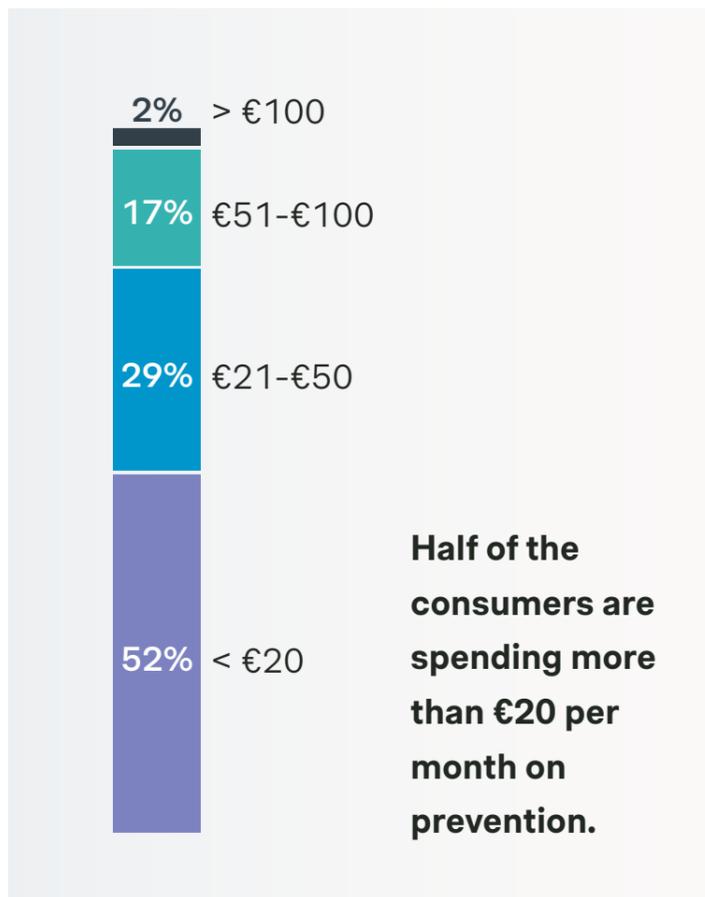
 Prescription medications for prevention

Highest: Poland (42%)
Lowest: Sweden (21%)

Prescription-led prevention is more common in Poland, Spain and Italy while Sweden has a clearly lower uptake.

Spending smarter on prevention

Prevention is no longer an exceptional part of the household budget. Many are prepared to increase spend for quality. Willingness to pay is driven by quality and trust

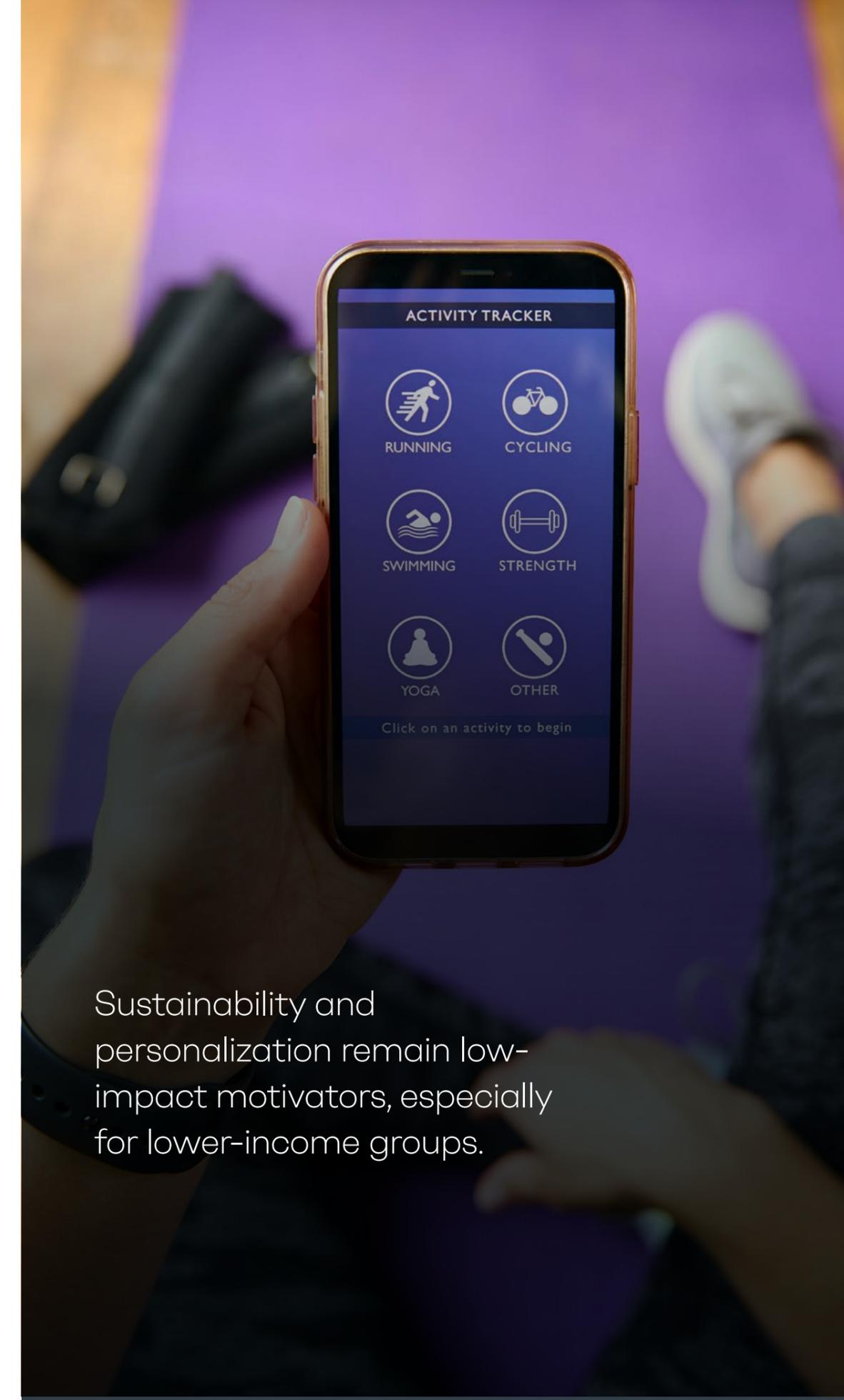


73% cite quality and effectiveness

47% value long-term health benefits

42% trust brand and reputation

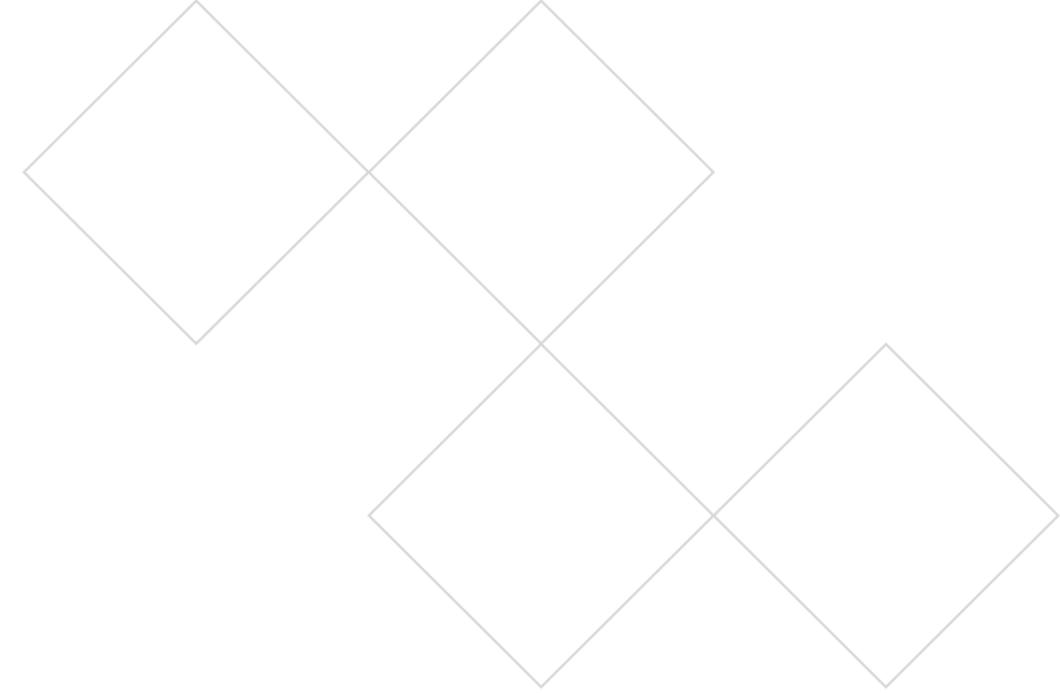
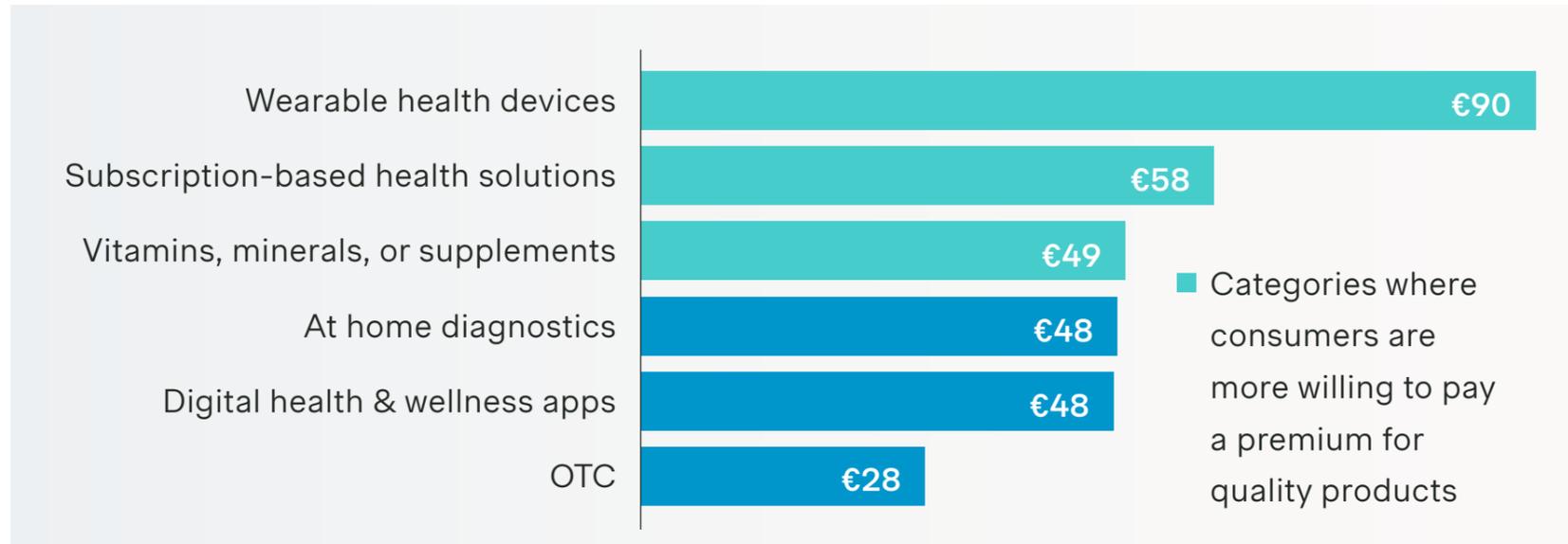
31% care about convenience and access



Sustainability and personalization remain low-impact motivators, especially for lower-income groups.

Consumers pay more where quality is clear

Spending is highest in categories where performance and innovation are more tangible.
Across all segments, value for money matters most, and that value must be clear, credible, and proven.



Spending differs by income

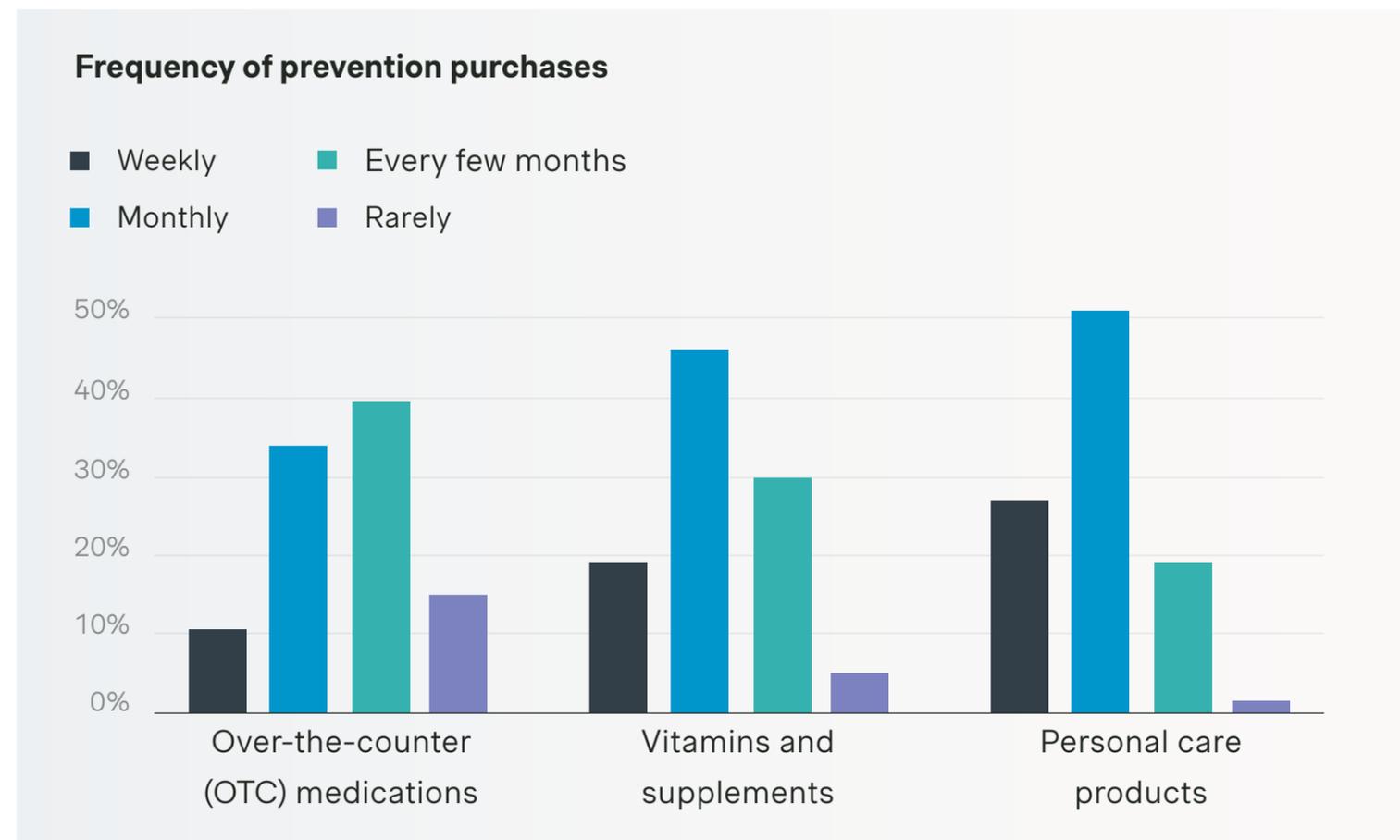
- Higher-income consumers are more willing to invest in categories like wearables and diagnostics, showing more interest in premium digital services.
- Lower-income groups remain more price-sensitive and focused on core product categories like OTCs and basic supplements.



The rhythm of the prevention shopper

Purchase frequency varies significantly across product categories and largely aligns with expectations based on usage cycles and product lifespans.

- Personal care products (e.g., skincare, oral hygiene, hygiene products) and vitamins/minerals/supplements are among the most frequently purchased categories, with many consumers reporting monthly purchases. These items are tied to daily routines and tend to run out regularly, reinforcing consistent buying behavior.
- At the other end of the spectrum, wearables, such as smartwatches, fitness trackers, or digital medical devices, are purchased far less frequently, reflecting their higher cost and longer usage lifespan.



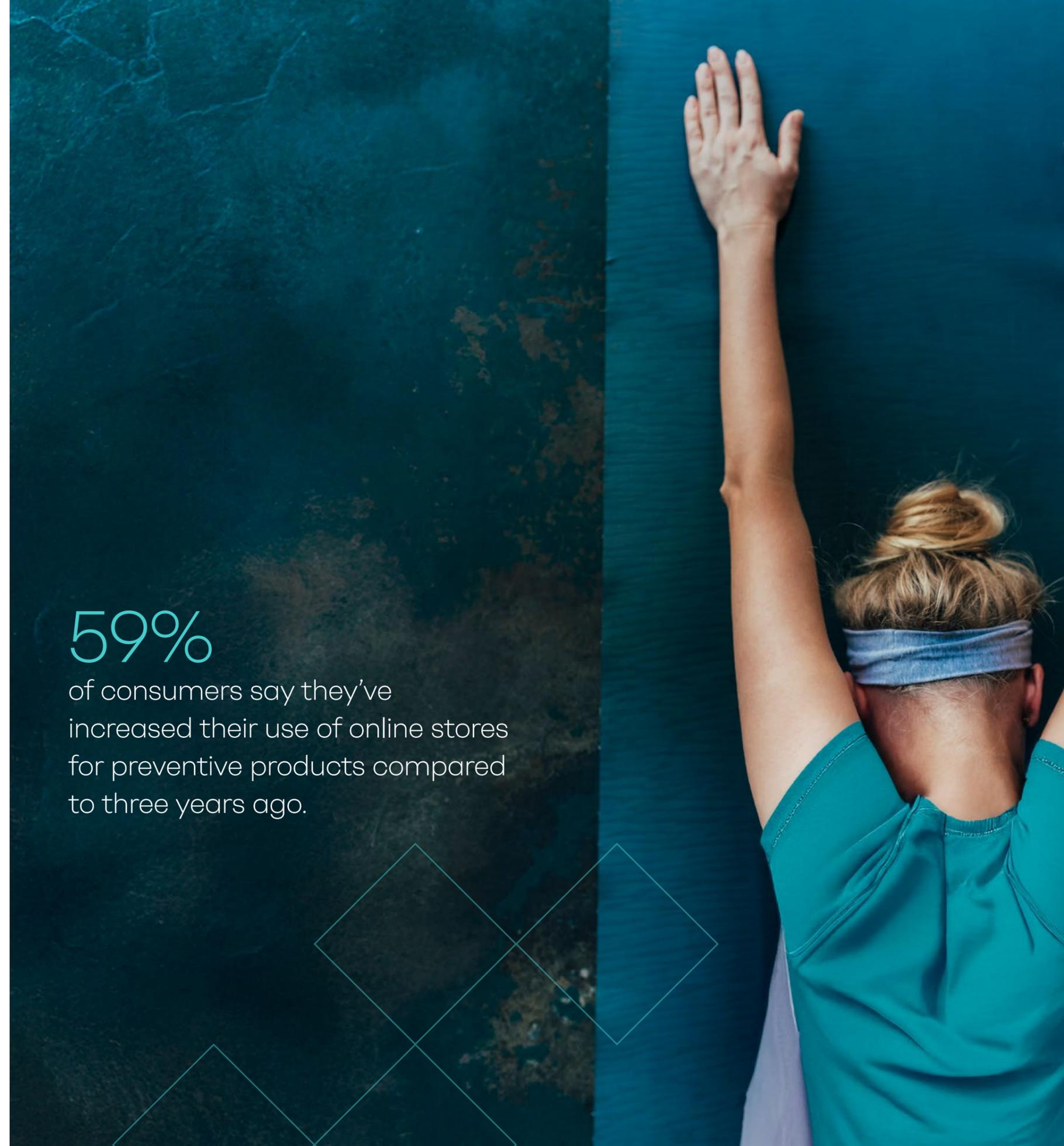
Prevention is a hybrid habit

Preventive health is no longer limited to one category or channel.

Pharmacies and para-pharmacies remain the cornerstone of trust, offering not just products, but professional reassurance. Meanwhile, mass market retailers, with their accessibility and routine convenience, play a key role for everyday items like OTCs and personal care. But the real momentum is online: 59% of consumers say they've increased their use of online stores for preventive products in the past three years. The prevention journey today is no longer tied to a single shelf or screen. It's anywhere, anytime, and increasingly omnichannel.

59%

of consumers say they've increased their use of online stores for preventive products compared to three years ago.



Omnichannel is the preferred journey



68%

say they want a blend of online and offline options

19%

prefer fully offline experiences

13%

prefer fully online journeys

This data reveals a clear shift in consumer expectations: consumers no longer want to be limited to a single channel or format for prevention. Instead, they seek a seamless integration of digital convenience with the trust and reassurance of in-person interactions, browsing, comparing, and validating information across multiple touchpoints before committing to a purchase. The rise of the omnichannel mindset reflects a broader demand for autonomy, personalization, and transparency throughout the prevention journey.

Younger generations are reshaping the future of retail



Digital-first behavior is strongest among younger consumers:

22% of 18–28-year-olds say they primarily engage online, whether researching, consulting digital sources, or buying prevention products.

Even older consumers favor some digital support:

62% of consumers over 60 prefer to have digital and online support during their prevention journey.

As digital-native generations mature and gain purchasing power, retail strategies will need to adapt, blending online research and digital touchpoints with trusted in-person experiences to meet rising expectations for seamless, hybrid journeys.

The takeaway? Channel strategy is no longer about either/or. It's about meeting consumers where they are: **online, offline, and everywhere in between.**

Where our protagonists spend their money

From cautious app-dabblers to high-spend health hackers, each consumer type approaches prevention purchases in their own way.

Here's how our three personas differ, not just in how much they spend, but in what they prioritize.



Luca

The non-engager

Luca's spending is sporadic and minimal. He's drawn to trending, well-designed, digital tools, like wellness apps or entry-level wearables, but he's not building a prevention routine around them.



Sabine

The wellness-seeker

Sabine shops with purpose, consistency, and practicality. Rather than high-end tech, she focuses on trusted, tangible categories like vitamins, OTC and hygiene products, often relying on pharmacists' guidance.



Julian

The longevity-hacker

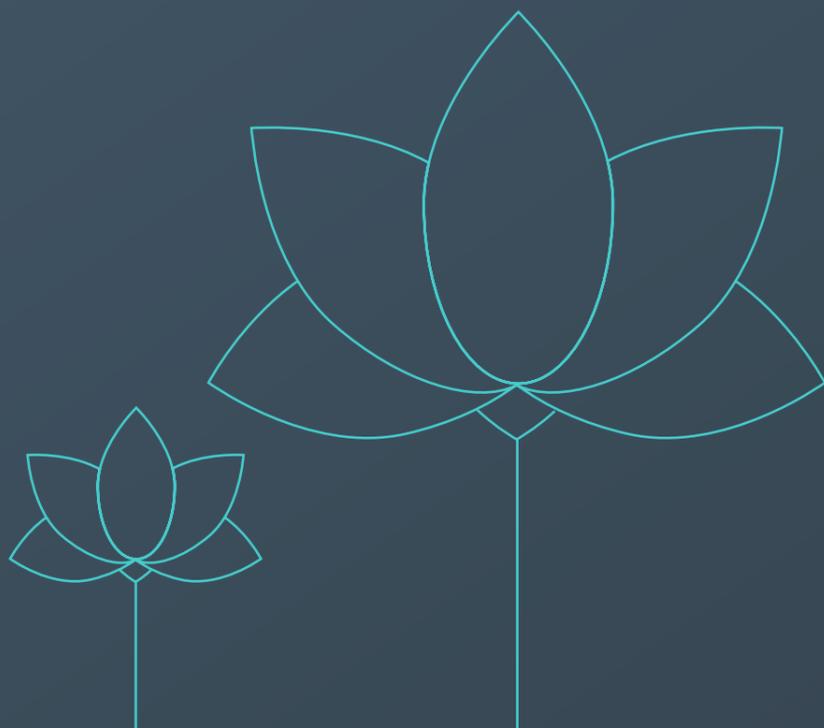
Julian is all in, and spending is part of the strategy. He invests across digital and physical categories, from wearables and diagnostic tools to nootropics, high-performance supplements, and subscriptions.

Winning in prevention

How CHC manufacturers can thrive – with Simon-Kucher at your side

The prevention market is moving fast. To compete, CHC manufacturers need smart strategy, omnichannel fluency, and pricing that reflects perceived value. Here's how to win and how Simon-Kucher can help.

Let's talk. Start with a two-week commercial readiness assessment tailored to prevention to unlock your next wave of growth. [Get in touch today.](#)



What CHC manufacturers need



Compelling portfolios

Proof of efficacy, hybrid ecosystems, strong value story



Stronger demand pull

Targeted activation across diverse segments



Omnichannel & Sales excellence

Seamless online-offline engagement



Smart monetization

Consumers are willing to pay - if value is clear

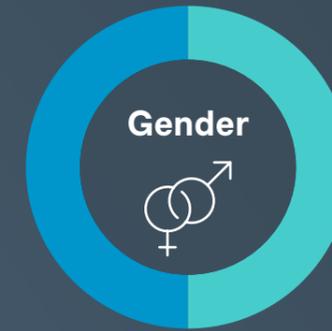
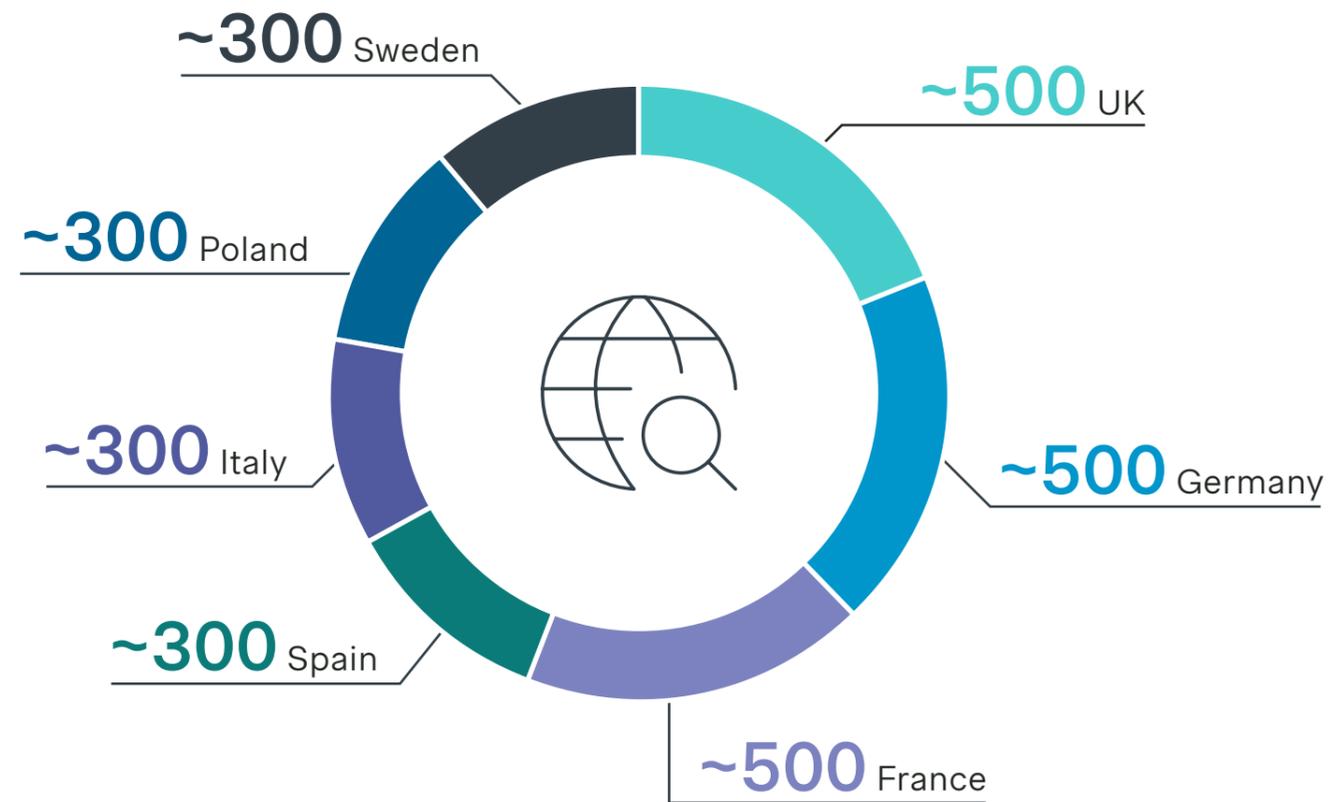
How Simon-Kucher helps

- Portfolio & assortment strategy
 - Innovation & launch excellence
-
- Go-to-market strategy
 - Sales and detailing excellence for pharmacies and doctors
-
- Omnichannel & D2C strategy
 - Sales effectiveness & channel optimization
 - Gross-to-Net optimization
-
- Value pricing
 - Subscription & digital pricing models
 - Digital pricing excellence

Demographics of the study

Countries in scope

This report is grounded in the voices of over 2,700 consumers across seven European countries, representing a balanced mix of age, gender, and income.



50% Female

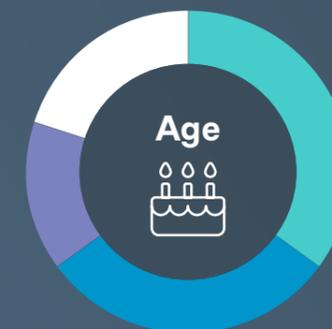
50% Male



55% <€40k

10% >€100k

35% €40k-80k



35% 29-44

20% 18-28

30% 45-60

15% 61+



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.

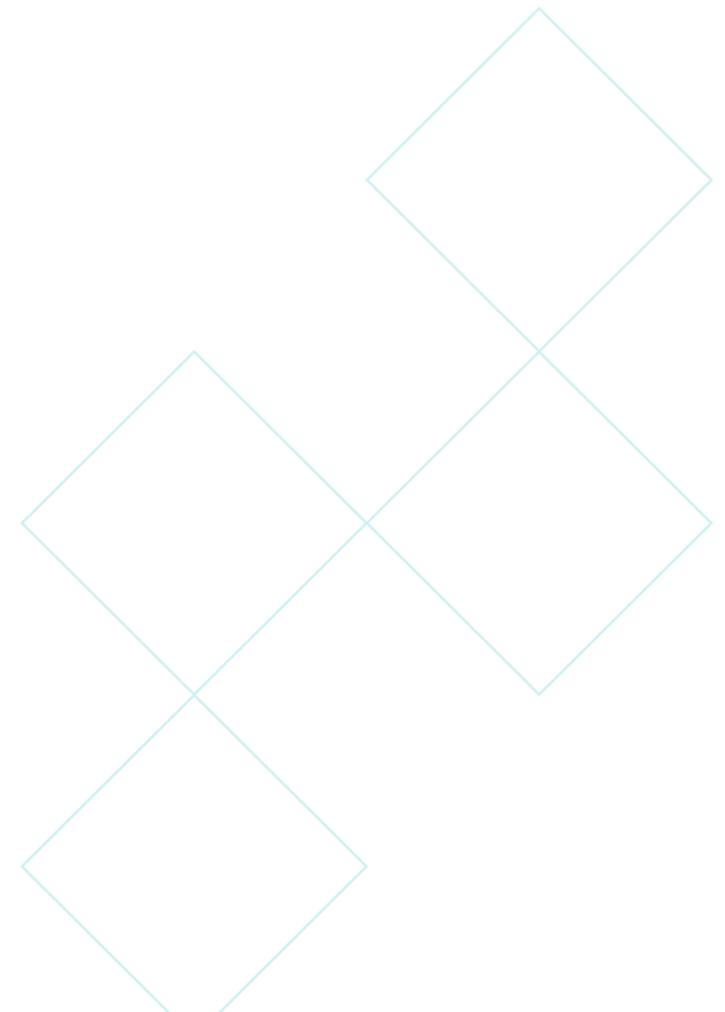
Get this right, and you achieve better, higher-quality growth by creating virtuous cycles of loyalty, advocacy, and trust, increasing sales and long-term sustainable profit far more than cost reduction alone.

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.



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Our sole focus is on unlocking better growth, helping businesses across industries realize sustainable, profitable success. From pioneering pricing strategies to delivering complete commercial growth solutions, we create value, spark innovation, and deliver measurable impact.





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