

# CONTRACEPTIVES AND SEXUAL HEALTH – US – 2023

Consumers are embracing their sexual wellness more than ever, embracing the merging of sexual health and self-care.



Lindsay Cameron, Analyst  
- Health & Wellness



# Contraceptives And Sexual Health - US - 2023

## This report looks at the following areas:

- Sexual health activity and product usage.
- Important factors that influence consumers' selection of condoms, personal lubrication, and personal devices.
- Consumer attitudes toward the purchasing of sexual wellness products
- Current use and interest in sexual health product areas
- Attitudes toward sexual health



Consumers are embracing their sexual wellness more than ever, embracing the merging of sexual health and self-care.

## Overview

Consumers are embracing their sexual health and wellness more than ever before which is blurring the lines between sexual health and self-care. Brands need to focus on the self-care benefits within their products to encourage consumers, especially women, to enter and engage with the category.

Destigmatization has driven consumers' increased desire for satisfaction through sexual activities and product usage, especially seen in young consumers. Marketers need to consider how to further remove the negative stigma that surrounds the category through communication, education, and advocacy that will help young consumers feel more comfortable engaging.

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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## CONSUMER INSIGHTS

### Consumer fast facts

#### Assessment of sexual activity

- Almost all adults are sexually active
  - Graph 1: assessment of sexual activity, 2023
- Ages 18-24 increase their sexual activity
  - Graph 2: assessment of sexual activity, ages 18-24, 2021-2023

#### Product usage

- Safety is still important but pleasure is top of mind
  - Graph 3: sexual health product usage, 2023
- Sexual enhancement products are being used more than ever
  - Graph 4: NET product usage, by category, 2019-2023
- Destigmatization drives search for satisfaction
  - Graph 5: select sexual enhancement product usage, 2021-2023
- Women gravitate toward personal devices
- Enhancing pleasure is important to all ages
  - Graph 6: usage of sexual enhancement products, by age, 2023
- Contraceptives can lean into pleasure for their young consumers
  - Graph 7: contraception product usage, by sexually active age groups, 2023

#### Sexual health activities

- Pleasure drives participation in sexual activities
  - Graph 8: sexual health activities, 2023
- Embracement of self love in young consumers drives masturbation
  - Graph 9: masturbation as a sexual health activity, by age, 2019-23
- Masturbation is more common among men but women are not far behind
  - Graph 10: masturbation as a sexual health activity, by gender 2021-23

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- Selfmade helps inspire women to explore sexuality through journaling
- Sexual health activities decline with age, but interest is still present
  - Graph 11: select sexual health activities, by age, 2023
- Enhancing sexual activities for mature audiences

## Important factors in product selection

- Established, familiar branding is key in condom selection
  - Graph 12: factors in condom selection, 2023
- Consumer preference in lubricant base types drives selection
  - Graph 13: factors in personal lubricant selection, 2023
- Bloomi creates plant-powered sexual wellness products
- Consumers search for personal devices based on materials
  - Graph 14: factors in personal device selection, 2023
- Luxury brands can enhance pleasure through premium features and quality
- Above all, men look for familiar brands
  - Graph 15: brands as a key factor in product selection, men, 2023
- Women prioritize safety in sexual wellness products
  - Graph 16: select important factors when choosing sexual health products, women, 2023

## Purchasing sexual health products

- Consumers are comfortable shopping for sexual health products both online and in-store
  - Graph 17: purchasing sexual health products, 2023
- Age builds comfortability with purchasing sexual health products
  - Graph 18: select purchasing behaviors of sexual health products, by gender and age, 2023
- Young women have an elevated interest in purchasing products online
  - Graph 19: sexual health purchasing behaviors, females by age, 2023

## Attitudes toward sexual health

- Despite efforts to destigmatize sexual topics, most consumers are still uncomfortable with the topic
  - Graph 20: attitudes toward sexual health, 2023
- Young audiences lead the way to destigmatization
  - Graph 21: attitudes toward sexual health products, by age, 2023
- Interest in further education exists in younger consumers
  - Graph 22: attitudes toward sexual health education, by age, 2023
- Reproductive rights are important to both men and women
  - Graph 23: attitudes toward sexual health products, by gender and age, 2023

## Trial or interest in sexual health products

- New product areas are not being heavily used, but the interest exists.
  - Graph 24: trial or interest in sexual health products, 2023

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- Attractive packaging can help differentiate products for young consumers
  - Graph 25: trial or Interest in products with attractive packaging, by age, 2023
- Products that look good, feel good
- Women are interested in self-care through sexual products
- Sexual wellness merges with personal care

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- FDA approves first OTC birth control pill in the US
- Linking pleasure in condoms through innovation
- Sephora elevates sexual wellness as self-care
- Establishing trust through free-from claims
  - Graph 26: share of healthcare product launches featuring free from claims, 2018-23\*

### Marketing and advertising

- Changing reproductive landscape gives niche players opportunity for trust
- Challenging negative stigma around sexual products for women

### Opportunities

- Help women navigate the space through self care and safety
- Better-for-you products for women
- Increase conversations to further destigmatization

## THE MARKET

### Market context

### Market drivers

- Consumers are cautious, but still want to prevent unwanted pregnancy
  - Graph 27: consumer price index change from previous period, 2020-23
- Birth rate is in overall decline
- Overturning of Roe vs Wade affects decision-making

### Market size and forecast

- Retail sales and forecast of contraceptives
- Retail sales and forecast of personal lubricants
- Retail sales and forecast of pregnancy and ovulation tests

### Market share/brand share

- Sales of contraceptives, by company

- Sales of personal lubricants, by company
- Sales of pregnancy and ovulation tests, by company

### APPENDIX

- Market definition
- Drug stores maintain their dominance as the main channels for sexual health products.
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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