

THE NATURAL HEALTHCARE CONSUMER – US – 2023

Consumers' desire for healthier, safer ingredients is the core principle of natural health. Brands can enhance this desire by building familiarity and trust.



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The Natural Healthcare Consumer - US - 2023

This report looks at the following areas:

- OTC usage and frequency
- Motivations and barriers impacting natural OTC usage
- Important claims for natural OTC health products
- Attitudes and behaviors toward natural OTC health products
- Associations of natural ingredients

Overview

Consumers are utilizing natural OTC products more than ever before as concerns rise around the safety of ingredients within traditional OTC products. With this increased attention on ingredients, consumers are turning to natural OTC for its emphasis on simple and fewer ingredients.

Familiar ingredients are a key cornerstone of Natural OTC products. Brands can utilize familiar natural ingredients such as vitamins or popular traditional ingredients that consumers seek out of traditional products to help build trust in the efficacy of natural health solutions.

As the cost of living increases, price is by far the most cited barrier for natural OTC due to the market's niche sizing. Marketers need to consider the impact of pricing and value through the efficacy of natural OTC compared to traditional OTC.



Consumers' desire for healthier, safer ingredients is the core principle of natural health. Brands can enhance this desire by building familiarity and trust.

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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

Natural OTC health product usage

- Traditional OTCs continue to lead but natural is on the rise
 - Graph 1: usage of OTC health products in the past 12 months, trended, 2021-23
- Few consumers strictly stick with traditional options
 - Graph 2: product usage in the past 12 months by health concern, 2023
- Instill trust in natural with familiar ingredients
- Parents utilize more OTC, driving market opportunity
 - Graph 3: product usage in the past 12 months, by parental status, 2023
- Age is biggest natural purchase indicator, especially for mental wellness products
 - Graph 4: natural product usage in the past 12 months for select health concerns, by generation, 2023
- Men are hard to reach for health, but natural can build familiarity
 - Graph 5: product usage in the past 12 months, by gender, 2023

Changes in natural OTC product usage

- Most remain consistent in usage of natural
 - Graph 6: change in usage frequency in the past year, 2023
- Parenthood is the life event that drives consumers toward natural OTC
 - Graph 7: change in usage frequency in the past year, by parental status, 2023
- Younger generations are most rapidly increasing natural product usage
 - Graph 8: change in usage frequency in the past year, by generation, 2023
- Above all else: do better and be safer for natural
 - Graph 9: reasons for increased usage of natural OTC products, 2023
- Gen Z emphasizes what's included rather than excluded
 - Graph 10: select reasons for increased usage, by generation, 2023
- Mothers strive to reduce harm while fathers want effectiveness

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- Graph 11: reasons for increased usage of natural OTC products, 2023
- Price is still a barrier to the mainstreaming of natural

Ingredient associations and claims

- Vitamins are a gateway for natural OTC through established trust and familiarity
 - Graph 12: associated characteristics of specific ingredients, 2023
- More than anything, consumers seek ingredients that do no harm to themselves or the planet
 - Graph 13: claims expected in natural health products, 2023
- Focus on what's not included in natural to strengthen natural appeal among older generations
 - Graph 14: claims expected from natural health products – free from certain ingredients, by generation, 2023

Attitudes toward natural OTC health products

- Consumers will look beyond ingredient labels
 - Graph 15: attitudes toward OTC health products, 2023
- A desire for more information presents new avenues of trust and engagement
- The future of sustainability and natural OTCs are linked
 - Graph 16: attitudes toward OTC products – willingness to pay for sustainability, by age, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Natural claims are on the rise as consumers want simpler ingredients
 - Graph 17: share of health product launches with natural claims, 2018-23*
- Look beyond established botanical claims
 - Graph 18: share of health product launches with select natural claims, 2018-23*
- Free from claims among natural players meet 'simpler' ingredient interests

Marketing and advertising

- Genexa compares itself to big players to demonstrate efficacy, quality

Opportunities

- Help Gen Z navigate the space with clear, symptom-forward messaging
- Make emerging ingredients easy to understand and implement for Gen Z
- Brands need to reduce plastics used in packaging
- Cabinet brings sustainability to OTC

THE MARKET

Market context

Market drivers

- An era of protracted inflation creates cautious spending
- Following 2020 spike, inflation finally begins to simmer
 - Graph 19: consumer price index change from previous period, 2020-23
- Efforts to regulate plastic pollution increase in 2023

Market size and forecast

- VMS market is significant piece of natural OTC

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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