

# WOMEN'S WELLNESS – US – 2024

Education is a crucial element to help reduce shame and help empower women to seek relief instead of opting to deal with struggles on their own.



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- Health & Wellness



# Women's Wellness - US - 2024

## This report looks at the following areas:

- Women's life changes and menstruation status
- Side effects experienced by women in different lifestages
- Information sources for health and wellness information
- Factors considered when selecting period products
- Attitudes toward menstruation and menopause
- Attitudes toward women's wellness



Education is a crucial element to help reduce shame and help empower women to seek relief instead of opting to deal with struggles on their own.

## Overview

Women's health needs and lifestages are closely related. Different phases such as menopause and pregnancy affect women's bodies in varying ways, creating unique needs that benefit from different types of support.

Because of women's need for evolving information as their life progresses, education is a crucial element to help reduce shame and help empower women to seek relief instead of opting to deal with struggles on their own. This is especially true as most women do not feel prepared for menopause until it is already happening.

An aging population means that brands that cater to women can no longer ignore the needs of menopausal women and have to consider how their product offerings can extend throughout a woman's life, not just through menstruation.

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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

#### Life changes and menstruation status

- Near split between women who do and don't menstruate
  - Graph 1: current menstruation status, 2023
- Ages 45-54 have the widest variance in lifestage
  - Graph 2: life changes experienced in the past year – menopausal, by age, 2023
- Menopausal audience larger than maternal journey audience
  - Graph 3: life changes in the past year, 2023
- 25-34 year olds are the primary audience in the maternal journey
  - Graph 4: life changes in past year – maternal journey, by age, 2023
- Increase in women 18-34 opting to have children
  - Graph 5: life changes in past year – maternal journey NET, by age, 2022-23
- Maternal journey doesn't have to equal "traditional" values
  - Graph 6: life changes in past year – maternal journey, by LGBTQ+, 2023

#### Side effects and health issues

- Vitamin deficiency is the most commonly faced issue by women
  - Graph 7: women's health issues and side effects experienced in the past 12 months, 2023
- Women's health issues vary by age
  - Graph 8: women's health issues and side effects experienced in the past 12 months, by age, 2023
- Vitamin deficiency affects nearly a third of women 18-44
  - Graph 9: women that have experienced vitamin deficiency in the past 12 months, by age, 2023
- Younger women experience mental health issues at higher rates
  - Graph 10: select mental health issues experienced in the past 12 months, by age and gender, 2023
- Helping women find ways to destress throughout their day
- More than half of menopausal women experience hot flashes

- Graph 11: women's health issues and side effects experienced by menopausal women, 2023
- Menopausal symptoms are difficult to manage due to the variety and speed of effects
- Fast acting, symptom oriented solutions

### Sources for health and wellness information

- Women are using fewer resources for for health and wellness information
  - Graph 12: sources for health information, 2022-23
- Millennials are using social media for health info more often, Gen Z slightly less
  - Graph 13: social media as a source of health information, by generation, 2022-23
- Hispanic women prefer online, self-sleuthing methods
  - Graph 14: select sources for health information, Hispanic, 2023
- Social media can offer bite-sized, continual information for mothers
  - Graph 15: social media as a source of social media information, by parental status, 2023
- Tushbaby uses their help product and generosity to connect with moms on social
- After age 55, the search for health information dies down
  - Graph 16: has not looked for health/wellness information in the past 12 months, by age, 2023

### Products sought for lifestage

- Menopause symptoms vary, brands should too
  - Graph 17: product usage as a result of perimenopause or menopause, 2023
- Symptom based messaging allows women to find products that suit their needs
- Nearly half of postmenopausal women don't turn to products
  - Graph 18: products used by postmenopausal women in the past 12 months, 2023

### Attitudes toward menstruation

- There is still work to done around removing stigma around menstruation
- Young women want more openness around periods
  - Graph 19: select attitudes toward menstruation, by age, 2023
- Somedays helps bring awareness as to how bad menstruation symptoms can be
- Wearable solutions interest young women 18-34
  - Graph 20: interested in wearable tech devices to track fertility or cycle, by age, 2023
- Black women are not as comfortable discussing their period as other groups
  - Graph 21: select attitudes toward menstruation, by race, 2023

### Attitudes toward menopause

- 61% of women have not talked about menopause with others
  - Graph 22: attitudes toward menopause, 2023
- Increased conversations around menopause have helped younger menopausal women feel more comfortable discussing the topic
  - Graph 23: select attitudes toward menopause, by age, 2023

- Celebrity conversations are helping nudge menopause into the mainstream
- Changing the narrative to help embrace menopause
  - Graph 24: select attitudes toward menopause, by age, 2023
- Mysteryvibe, Masturbation is Medicine
- Despite menopause becoming more mainstream, women are still not prepared for what it will be like
  - Graph 25: women that were prepared for what menopause would be like before they had experienced it, by age, 2023
- Knix perimenopause : The Invisible period

### Purchase factors for menstruation products

- Price and ability to handle flow are top of mind for nearly half of women purchasing period products
  - Graph 26: factors for choosing period products NET any ranking, 2023
- Young consumers care more about what their products are made of
  - Graph 27: select factors in selecting period products any rank, by age, 2023
- Black consumers over-index ranking products with heavy flow
  - Graph 28: select factors in selecting period products any rank, by race, 2023
- Nearly a quarter of LGBTQ+ adults select products based off of environmental factors
  - Graph 29: select factors in menstruation products with any rank, by LGBTQ+, 2023
- Period underwear options help connect sustainability and inclusivity to menstruation products

### Attitudes toward women's health and wellness

- Maintaining relationships with others and broader education appeal to a majority of women
  - Graph 30: women's attitudes toward health and wellness, 2023
- Reproductive care concerns women, brands can connect them with ways to feel more empowered
  - Graph 31: agree that they are worried about the future of women's healthcare, by age, 2023
- Teaming up to support reproductive freedom
- There is a need for better women's health education
- Nearly a third of Millennial women struggle to feel like their health is important
  - Graph 32: health needs do not feel important to society, by age, 2023

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- With growing demand, most health CPG launches target women
  - Graph 33: share of healthcare product launches, by target demographic, 2018-23
- Clearblue positions themselves to help aging women
- Healthcare for women growing bolder

### Marketing and advertising

- The Oura Ring connects with women throughout their lifestage needs

- One product to benefit all women
- The Tampon Tax Coalition repays luxury tampon tax

## Opportunities

- Normalize women's health topics through education and communication
- Finding opportunities to extend offerings to new life events

## THE MARKET

### Market context

### Market drivers

- Following spike, inflation begins to simmer
  - Graph 34: consumer price index change from previous period, 2020-23
  - Graph 35: Consumer Sentiment Index, 2020-23
- Birth rate is in overall decline
- Aging population will demand your support

## APPENDIX

- Definition
- Consumer research methodology
- Consumer qualitative research
- Generations
- Abbreviations and terms

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