

Pregnancy - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The US continues to experience low birth rates but the topic of prenatal and postnatal maternal health care for women continues to intensify. Women are seeking out information to better inform themselves. There are opportunities to keep women informed, provide safe health products for mom (and baby), and redesign the way women shop for maternal health care products."
-Marissa Gilbert, Health and Wellness Analyst

This report looks at the following areas:

- Slow sales in the pregnancy self diagnostic market
- Pregnancy isn't easy on the body or mind
- Some women are turning away from medications during pregnancy

This Report provides an overview of the various stages of pregnancy as it relates to the health care industry. The focus of this Report is on the attitudes and behaviors of women trying to get pregnant, are currently pregnant, or were recently pregnant, and their attitudes towards maternal health care.

Also defined in this Report are:

- First time mothers: Females who are trying to get pregnant for the first time, are currently pregnant for the first time or who had their first baby within the past year.
- Experienced mothers: Females who are trying to get pregnant after already given birth to at least one child, are pregnant for the second or more time or who had their second or more child within the past year.
- For the purposes of this report, Mintel includes estimates of total sales of pregnancy related self diagnostic devices:
- Pregnancy tests
- Ovulation kits

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Pregnancy - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Slow sales in the pregnancy self diagnostic market

Figure 1: MULO sales of pregnancy and ovulation tests, rolling 52 weeks 2015 and 2016

Pregnancy isn't easy on the body or mind

Figure 2: Health issues, June 2016

Some women are turning away from medications during pregnancy

Figure 3: Usage of medications, June 2016

The opportunities

Give first time moms more of what they want: information

Figure 4: Don't have information but would like some on prenatal and postnatal topics, by motherhood experience, June 2016

Make prenatal and postnatal a one-stop shopping experience

Figure 5: Interest in a pregnancy specific health section, by pregnancy status, June 2016

Maternal health brands could sponsor content on pregnancy related websites

Figure 6: sources of information, June 2016

What it means

The Market – What You Need to Know

Moderate growth projected for female population in "childbearing years"

Number of births dip back down in 2015

More women are attaining advanced degrees

Birth control accessibility negatively impacts birth rates

Market Factors

Population of women in "childbearing years" set to increase; but not as much as total female population

Figure 7: Female population by age, 2011-21

After a slight increase in 2014, a baby boom in 2015 doesn't transpire

Figure 8: Number of births in the US, 2007-15

Figure 9: Number of births in the US, by age of mother, final 2014 and preliminary 2015

Non-White female populations growing more rapidly

Figure 10: US female population, by race and Hispanic origin, 2011-21

Figure 11: Number of births in the US, by race and Hispanic origin of mother, preliminary 2015

Women are attaining college educations, which could delay childbearing

Figure 12: Educational attainment of the female population aged 25 and older, 2006-15

Market Perspective

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Pregnancy - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Birth control accessibility negatively impacts birth rates

Figure 13: Usage of contraceptive methods among women aged 15-44, 2011-13

Key Players – What You Need to Know

Pregnancy self diagnostic tests experience marginal growth

Health insurance coverage and mental health care improving

Zika and maternal mortality rates threaten the health of pregnant women

Paid maternity/paternity policies and breastfeeding support at a tipping point

Manufacturer Sales of Pregnancy Self Diagnostics

Slow sales in the pregnancy self diagnostic market

Figure 14: MULO sales of pregnancy and ovulation tests, rolling 52 weeks 2015 and 2016

Private label and First Response account for more than half of pregnancy test sales

Figure 15: Used a pregnancy test in the past 12 months, February 2015-March 2016

Figure 16: MULO sales of pregnancy tests, by leading companies and brands, rolling 52 weeks 2015 and 2016

Clearblue is the clear leader in ovulation self diagnostics segment

Figure 17: MULO sales of ovulation tests, by leading companies and brands, rolling 52 weeks 2015 and 2016

What's Working?

More people have health insurance coverage; Affordable Care Act mandates maternal care coverage

Figure 18: Percentage of people with health insurance coverage, by age, 2013 and 2014

Mental health given some much needed attention

Pregnancy: There's countless apps for that

What's Struggling?

The threat of Zika, changing guidelines, and lack of research

The US maternal mortality rate is high, racial disparities exist

What's Next?

US maternity/paternity leave (or lack thereof) put in the spotlight

End breastfeeding taboos

The Consumer – What You Need to Know

Health ailments during pregnancy are par for the course

Prenatal vitamins and internal pain relievers are pregnancy necessities

Health care providers are the gatekeepers for what's safe to take

Women feel they are relatively informed on many pregnancy topics

All women seek out several sources for pregnancy related information; first time moms even more

Women are confirming pregnancy with multiple tests

Health Issues

Pregnancy brings on numerous ailments

Figure 19: Health issues, June 2016

The stage of pregnancy influences prevalence of issues

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Pregnancy - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 20: Select health issues, by pregnancy status, June 2016

Ailments are a newer experience for younger women

Figure 21: Select health issues, by age, June 2016

More children, more problems

Figure 22: Select health issues, by number of children in household, June 2016

Usage of Health Care Remedies

Women are taking their prenatal vitamin

Figure 23: Usage of supplements, June 2016

Pain relievers are used second most, after prenatal vitamins

Figure 24: Usage of medications, June 2016

The majority of women are using menstruation products

Figure 25: Usage of feminine hygiene products, June 2016

Some women are changing their personal care products

Figure 26: Usage of personal care products, June 2016

Attitudes toward Purchasing Health Care Remedies

Health care providers are the gatekeepers for what's safe to take

Figure 27: Attitudes toward purchasing remedies, by motherhood experience, June 2016

A pregnancy specific health care aisle in-store draws interest

Figure 28: Interest in a pregnancy specific health section, by pregnancy status, June 2016

Figure 29: Attitudes toward in-store navigation and product exploration, by Hispanic origin and area, June 2016

In their words

Brand name products are not essential

Figure 30: Attitudes toward brand name and private label products, June 2016

Fair interest for vitamins, minerals and alternative remedies exists

Figure 31: Attitudes toward additional vitamins/minerals and alternatives to medication, June 2016

Information Gap

Women feel they are well informed on many pregnancy topics

Figure 32: Correspondence analysis – Information gap, June 2016

Correspondence methodology

Moderate interest in prenatal vitamin and skincare product information

Figure 33: Information gap of prenatal topics, June 2016

Women feel confident in postnatal knowledge

Figure 34: Information gap of postnatal topics, June 2016

First time moms want more information

Figure 35: Don't have information but would like some on prenatal topics, by motherhood experience, June 2016

Figure 36: Don't have information but would like some on postnatal topics, by motherhood experience, June 2016

Women are more informed on the impact of the Zika virus than travel constraints

Figure 37: Zika information gap, June 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Pregnancy - US - August 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Zika information gap, by race and Hispanic origin, census region, and pregnancy status, June 2016

Sources of Information

Women seek out pregnancy related information

Figure 39: Sources of information, June 2016

In their words

First time moms seek out popular sources for information most

Figure 40: sources of information, by motherhood experience, June 2016

The stage of pregnancy impacts where women turn for information

Figure 41: Medical professional and pregnancy related websites sought for information, by pregnancy status, June 2016

Perceptions of Ovulation and Pregnancy Tests

Good news for pregnancy test sales; women want additional confirmation

Figure 42: Number of pregnancy tests to confirm results, by motherhood experience, June 2016

Women mostly choose pregnancy test brand while in-store

Figure 43: Purchasing influencers for pregnancy tests, by motherhood experience, June 2016

More than one third of women trying to get pregnant research ovulation test brands

Figure 44: Purchasing influencers for ovulation tests, by actively trying to get pregnant, and employment status, June 2016

Store brand pregnancy tests are worth the savings to some

Figure 45: Perceptions of store brand tests, by employment status and pregnancy status, June 2016

Tech options have mixed appeal

Figure 46: Interest in Bluetooth connected test results, by race and Hispanic origin, employment status, and motherhood experience, June 2016

Figure 47: Interest in app to track ovulation test results, by pregnancy status, June 2016

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

Appendix – Key Players

Figure 48: MULO sales of pregnancy self diagnostics, by leading companies, rolling 52 weeks 2015 and 2016

Appendix – Consumer

Additional qualitative data

How women feel about themselves during pregnancy

Brands that understand women during pregnancy

Medications or health care products for baby

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com