CONSUMER PRODUCTS INDUSTRY

Why Women's Consumer Health Needs Go Unmet—and What to Do About It

By Renee Frantz, Alexandra Friedman, Aftab Hussain, Aileen Lee, Yasmin Mulla, Nidhi Singh, Paolo Vicino, and Tracy Zeinoun

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Women drive the consumer health market. They are often their household's primary health decision maker and account for the majority of related spending. Yet in category after category, their needs are not well understood—or simply overlooked.

One reason is a lack of foundational research. Few studies have examined women's unique symptoms, health journeys, and product needs. With a limited evidence base, consumer health players have lacked the information needed to develop and position solutions effectively. To help address this, BCG conducted a large survey of women's consumer health needs, capturing input from women across the US. (See "About Our Research.")

About Our Research

To better understand the unmet needs in women's consumer health, we captured insights from nearly 4,000 US consumers (60% women, 40% men) aged 18 to 65, each of whom reported at least 1 of 23 common health concerns—including digestive issues, sleep problems, thyroid conditions, and menopause.

Our goals were to understand the differences in how men and women experience health concerns and pinpoint where women feel underserved or dissatisfied with current consumer health solutions.

We analyzed a broad set of product types, including over-the-counter remedies (such as for pain, allergies, and coughs and colds), as well as personal care items, dietary supplements, and weight management aids. Prescription medications and services were reviewed for usage patterns but excluded from spending estimates.

What we learned is that women are proactive in managing their health. Yet many are dissatisfied with what's available over the counter. Others aren't using any products at all. Our findings reveal the scale of the gap: roughly $36 billion in unmet demand across a $77 billion addressable market for women's consumer health.

At its core, the problem is how women's consumer health needs are researched, understood, and translated into products. For companies that address the problem, the upside is significant—meeting real consumer needs while capturing lasting growth in a large and largely untapped market.

Women Experience Consumer Health Differently—But Are Treated the Same

Some consumer health concerns are unique to women, such as menstruation and menopause. For many other conditions—such as digestive health, skin health, nutrient deficiencies, and bone health—women are affected differently or disproportionately compared with men. Even where women and men may share similar health concerns, women's needs and preferences often diverge. Understanding these differences is critical to addressing women's consumer health effectively. (See Exhibit 1.)

EXHIBIT 1

Women Experience Consumer Health Issues Differently Than Men Do

Unique impact	Different impact	Similar impact
6 of 23 concerns — **~$14 billion**	10 of 23 concerns — **~$37 billion**	7 of 23 concerns — **~$26 billion**
Health concerns that **impact only women**	Health concerns that **affect women more** or **with different symptoms**[1]	Health concerns that **impact women less than, or the same as, men,** with both genders experiencing similar symptoms
• Pelvic health • Postnatal health • Menstruation • Prenatal health • Fertility health • Menopause	• Thyroid issues • Mental health[2] • Digestive and gut health[2] • General health and wellness • Eye health • Skin, hair, and nail health • Nutrient deficiencies • Sexual health • Bone health • Urinary health	• Weight management • Headaches and migraines • Heart and blood health • Sleep issues • Oral health • Cognitive health • Immune health

Source: BCG's Women's Consumer Health Unmet Needs Survey, July 2024.
Note: n = 3,949.
[1]Health concerns that affect women and men equally or less but with different symptoms.
[2]Health concerns that disproportionally affect women, with similar symptoms between men and women.

Thyroid disorders are a clear example. While fatigue and weight changes are commonly ranked as top symptoms for both genders, women frequently report additional symptoms—such as changes in their hair and nails, hormone imbalances, and mood changes—that differ from those noted by men. Not surprisingly, only 59% of women with thyroid concerns said they're satisfied with their current consumer health products, compared with 78% of men.

Where women seek guidance also sets them apart. For health concerns specific to them, they rely more heavily on trusted medical sources than do men—turning to health care professionals (77% versus 68% of men), medical sources (38% versus 27%), and scientific journals (16% versus 9%).

The product features women value differ as well. For instance, in weight management, women prefer ready-to-use formats, trusted ingredients, and clear labeling of active ingredients and amounts. Men prioritize in-store availability, endorsements, and science-backed formulations. Yet many consumer health brands still market to an "average" consumer, resulting in only 35% of women being satisfied with product features (versus 50% of men) and missed opportunities for conversion.

Unless companies develop products with these differences in mind, they will continue to underserve women—and fail to realize substantial growth and revenue potential.

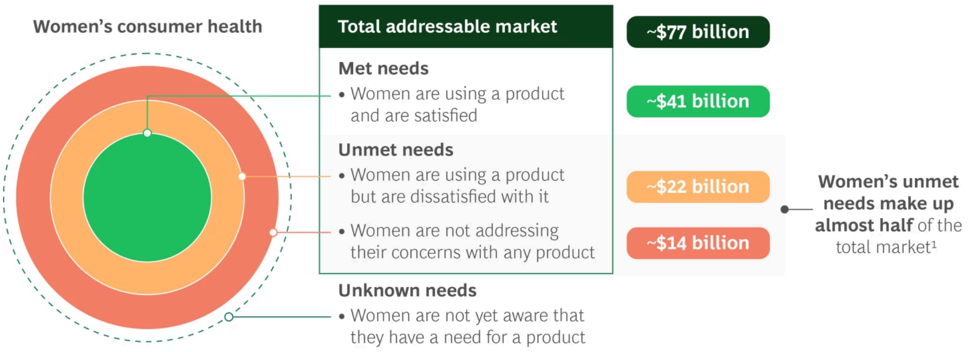
The $36 Billion Gap

Women reported markedly lower satisfaction with consumer health products—54% versus 65% for men across 23 health concerns.

That equates to nearly half the women's consumer health market—about $36 billion of a $77 billion addressable opportunity. (See Exhibit 2.) Roughly $22 billion comes from women who are dissatisfied with their current products, while another $14 billion reflects women who are not using any consumer health products at all.

EXHIBIT 2

Unmet Needs in Women's Consumer Health Offer a $36 Billion Opportunity



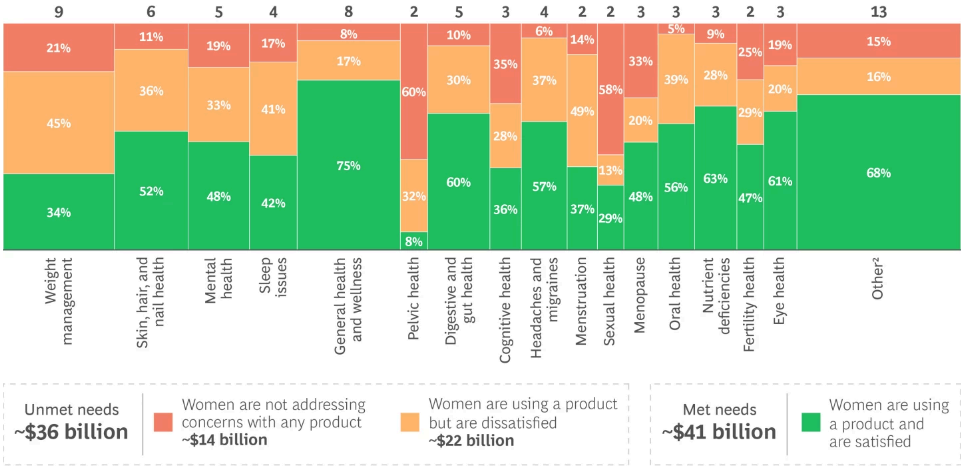
Source: BCG's Women's Consumer Health Unmet Needs Survey, July 2024.
Note: n = 3,949.
[1]Products and solutions not included in the survey are baby formula, sports nonprotein products, over-the-counter narcotic overdose treatments, nicotine replacement therapy or smoking cessation aids, antifungals, pediatric vitamins and dietary supplements, pediatric analgesics, antipruritics, hair treatments, hemorrhoid treatments, rash treatments, motion sickness remedies, prescriptions, services, and functional food.

Nearly a third of unmet demand ($11 billion) relates to three health concerns: weight management; skin, hair, and nail health; and mental health. (See Exhibit 3.) For weight management, two-thirds of women reported dissatisfaction or nonusage. For skin, hair, and nail health, the figure is nearly 50%. In other categories, such as sleep, digestive health, and headaches and migraines, satisfaction also lags—often by double-digit margins compared with men's satisfaction.

EXHIBIT 3

Three Health Concerns Account for One-Third—$11 Billion—of Unmet Demand

Addressable market for women's consumer health ($billions)[1]



Source: BCG's Women's Consumer Health Unmet Needs Survey, July 2024.
Note: n = 3,949. Because of rounding, not all percentages add up to 100.
[1]Products and solutions not included in the survey are baby formula, sports nonprotein products, over-the-counter narcotic overdose treatments, nicotine replacement therapy or smoking cessation aids, antifungals, pediatric vitamins and dietary supplements, pediatric analgesics, antipruritics, hair treatments, hemorrhoid treatments, rash treatments, motion sickness remedies, prescriptions, services, and functional food.
[2]Other health concerns include heart and blood health, prenatal health, bone health, immune health, urinary health, postnatal health, and thyroid issues.

The net result is a major growth opportunity for brands. Capturing it will require a tighter link among real-world needs, research and product development, and go-to-market plans, particularly in categories where dissatisfaction and low product usage are most concentrated.

What's Holding Brands Back?

Several systemic issues contribute to the persistent gap.

One is that research and development has long underrepresented women's needs. In the US, women weren't required to be included in clinical research studies until 1993. Even today, just 4% of research spending targets women's health. For concerns where prescription-level clinical trials aren't required, some pharma players still model products on male-centric symptom profiles.

A second issue is that many women say that they do not know enough about their health concerns and the potential consumer health products that can address them. Product marketing that relies on conventional channels may not align with how women seek health information. For pelvic health, for example, nearly 40% of women who experience concerns are not aware of products that can help. Our study shows that brands should inform women through sources that they trust—such as doctors and medical references—in the case of pelvic health.

> Nearly 40% of women who experience concerns about pelvic health are not aware of products that can help.

Finally, there's a design and marketing gap. The form factor and packaging features women value can vary by health concern and often are a key decision point for women. Getting these right matters. Women seek products that are evidence-backed and transparent about their effects, making labeling that's understandable and informative especially important. For sleep aids, for instance, women rank clear labeling of ingredients, dosage, and length of effect in their top three product attributes, while men did not rank these in their top five.

These are solvable problems. But they require companies to go to market differently—with sharper insights and more intentional design and communication.

How Leaders Will Win

Most companies are still struggling to compete effectively in women's consumer health. A few are beginning to test new approaches to gain a foothold and break through in the market. Those that succeed will rethink how they generate insights, design and market to meet women's needs, and build credibility. Here's how to start:

- **Adapt the company's strategy to its starting point.** Companies need a disciplined view of where to play—based on market size, growth, competition, fit with capabilities, and synergies with their existing portfolio. New entrants should focus on women-specific R&D and innovation to define a distinctive value proposition and build awareness through entry channels. Incumbents with a broad presence in a health concern need to drive relevance with women-specific subbrands and experiences. Established leaders with a women-centric presence in a health concern must protect their advantage by segmenting more deeply and strengthening activation in areas where they already hold credibility.
- **Build a granular view of women's journeys.** A deep understanding of how health concerns arise—and the physical, emotional, and practical needs they create—is essential. Building this

view requires deliberate methods, such as fielding women-centric surveys and focus groups, investing in symptom-specific research, and analyzing real-world usage data. Companies must also track differences in health concerns and needs among women—across age groups, ethnicities, and life stages—to fully capture the diversity of needs and preferences. Leaders can then use these needs to determine where and how to influence consumers across critical purchase pathways and brand touch points.

- **Execute with go-to-market precision.** Start with the product. Develop solutions grounded in credible evidence, with R&D and formulations that directly address women's real needs. Successful execution also requires marketing that communicates the information women are actively seeking through clear packaging, authentic branding, and partnerships with specialists who can raise awareness and provide trusted recommendations. Finally, ensure a presence in the right channels to deliver a consumer experience that makes it easy for women to access solutions.

Leadership in women's consumer health will come when companies gather credible evidence, create relevant product design, and develop solutions that fit women's lives and address needs that have too often been overlooked. Companies that deliver on those dimensions will set the pace —and capture significant growth.

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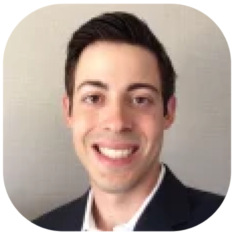

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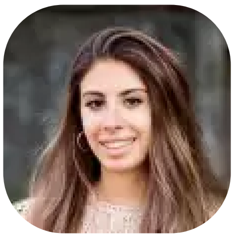

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