

Report Price: £1995.00 | \$2583.33 | €2370.86

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



"A need to power through at work not only increases demand for products that can alleviate the symptoms of coughs and colds, but also helps spread those coughs and colds through the workplace, whilst climate change and exposure to a wider range of exotic ingredients are impacting on allergy rates."

Lucy Cornford, Category Director – Personal
Care

This report looks at the following areas:

- Powering through colds and flu
- Modern life and allergies

The value of the cough, cold, flu and allergy relief market increased by 5% to £720 million in 2016, as UK employees turned to the category to help them power through illness.

In order to maintain growth, cold and flu brands need to ensure they are fending off the threat of ownlabel remedies, or even the use of paracetamol/ibuprofen. Within the allergy segment, building awareness and guidance around the treatment of allergies amongst a younger audience is key to increasing value.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Products covered in this Report

Excluded

Executive Summary

The market

Category benefits from healthy growth

Figure 1: Best- and-worst-case forecast of UK value sales of cough, cold and flu relief, medicated confectionery and allergy remedies, 2011-21

Companies and brands

Lemsip retains lead for cold and flu remedies

Figure 2: Retail value sales of cold and flu remedies, by brand, year ending February 2017

Covonia extends market share of cough liquids

Figure 3: Retail value sales of cough liquids, by brand, year ending February 2017

Strepsils still a go-to for medicated confectionery

Figure 4: Retail value sales of cough liquids, by brand, year ending February 2017

Lack of strong players in allergy remedies benefits own-label

Figure 5: Retail value sales of cough liquids, by brand, year ending March 2017

Own-label brings true innovation back

Figure 6: New product development in the cough, cold, flu and allergy remedies market, by sub-category, January 2014-March 2017

The consumer

Cold and flu rates rise

Figure 7: Experience of coughs, colds and flu, and any usage of OTC remedies as treatment, in the last 12 months, January 2016 and

Oral OTC remedies for colds and flu remain the most sought after

Figure 8: Treatments sought for cold and flu ailments in the last 12 months, March 2017

Mothers drive cold and flu experience amongst women

Figure 9: Cold and flu symptoms experienced in the last 12 months, by gender, March 2017

Consumers want cheap, effective cold and flu relief

Figure 10: Barriers to using cough cold and flu remedies, March 2017

Dedicated branded products lack appeal

Figure 11: Behaviours towards cold and flu remedies*, March 2017

Experience of non-food allergies stays consistent

Figure 12: Experience and treatment of allergies in the last 12 months, March 2017

Oral OTC in allergy relief preferred

Figure 13: Treatments sought for allergies in the last 12 months, March 2017

Respiratory-related symptoms of allergies most common

Figure 14: Allergy symptoms experienced in the last 12 months, March 2017

Young adults go online for information about allergies



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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 15: Behaviours towards allergies and allergy remedies, March 2017

Treatment patches for allergies appeal to under-35s

Figure 16: Attitudes towards allergy remedies, March 2017

What we think

Issues and Insights

Powering through colds and flu

The facts

The implications

Modern life and allergies

The facts

The implications

The Market - What You Need to Know

A market in growth

Cold and flu relief drive growth

'Other' channels benefit from price focus

Flu jab limits growth...

...but prescription changes could benefit cold and cough brands

Market Size and Forecast

Market benefits from healthy growth...

Figure 17: UK retail value sales of cough, cold and flu relief, medicated confectionery and allergy remedies, at current and constant prices, 2011-21

...which is expected to continue

Figure 18: Best- and-worst-case forecast of UK value sales of cough, cold and flu relief, medicated confectionery and allergy remedies, 2011-21

Forecast methodology

Market Segmentation

Cold and flu relief drives value growth

Figure 19: UK retail value sales of OTC cough, cold, flu and allergy remedies, by segment, 2015 and 2016

Channels to Market

'Other' channels benefit from price focus

Figure 20: UK retail value sales of OTC cough, cold, flu and allergy remedies, by outlet type, 2015 and 2016

Market Drivers

The ageing population poses a challenge

Figure 21: Trends in the age structure of the UK population, 2011-21

Flu jab extension could be a further threat to the category

Figure 22: Total fertility rate (TFR) and number of live births, England and Wales, 2009-14

A need to keep working

Figure 23: Employment and unemployment, by gender, 2011-21

Rising self-employment increases the incentive to work through a cold

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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Dietary boost

Figure 24: Vitamins taken in the last 12 months, by frequency, June 2016

Better health through improved diet

NHS England eyes cuts to cold remedy prescriptions

Allergies are on the rise

Companies and Brands - What You Need to Know

Lemsip dominates sales of cold and flu remedies

Lack of players in allergy remedies benefits own-label

Own-label brings true innovation back

Raising the appeal of OTC remedies

Investment in advertising grows

Out-of-season approach could be lucrative

Market Share

Lemsip retains lead for cold and flu remedies

Figure 25: Retail value sales of cold and flu remedies, by brand, years ending February 2016 and 2017

Night Nurse and Day & Night Nurse outperform the broader market

Covonia extends market share of cough liquids

Figure 26: Retail value sales of cough liquids, by brand, years ending February 2016 and 2017

Strepsils still a go-to for medicated confectionery

Figure 27: Retail value sales of medicated confectionery, by brand, years ending February 2016 and 2017

Jakemans benefiting from a distinctive positioning

Lack of strong players in allergy remedies benefits own-label

Figure 28: Retail value sales of allergy remedies, by brand, years ending March 2016 and 2017

Launch Activity and Innovation

Own-label brings innovation back

Figure 29: New product development in the cough, cold, flu and allergy remedies market, by launch type, January 2014-March 2017

Figure 30: Examples of own-label new variety/range extension launches in the cough, cold, flu and allergy remedies market, 2016

Figure 31: New product development in the cough, cold, flu and allergy remedies market, branded vs own-label, January 2014-March 2017

Market lacks an NPD leader

Figure 32: New product development in the cough, cold, flu and allergy remedies market, by top ultimate companies, 2016

Cold, flu and allergy relief drive NPD

Figure 33: New product development in the cough, cold, flu and allergy remedies market, by sub-category, January 2014-March 2017

Figure 34: Examples of new product launches in the cough, cold, flu and allergy remedies market, 2016

NPD for non-ingested remedies continues to grow

Figure 35: New product development in the cough, cold, flu and allergy remedies market*, by format, January 2014-March 2017

Drug-driving laws could affect NPD

Figure 36: Examples of non-ingested launches in the cough, cold, flu and allergy remedies market, 2017

Raising the appeal of OTC remedies

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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 37: % change in most frequently used claims of launches in the cough, cold, flu and allergy remedies market, 2015-16

"Natural ingredients" is a common claim, despite consumer scepticism

Figure 38: Examples of new product launches featuring botanical/herbal ingredients in the cough, cold and flu market, 2016

Advertising and Marketing Activity

Investment in advertising grows

Figure 39: Recorded above-the-line, online display and direct mail advertising expenditure on cough, cold and allergy remedies,

Figure 40: Recorded above-the-line, online display and direct mail advertising expenditure on cough, cold and allergy remedies, by media type, January 2014-March 2017

Out-of-season approach could prove beneficial

Figure 41: Recorded above-the-line, online display and direct mail advertising expenditure on cough, cold and allergy remedies, by segment, 2014-16

GSK dominates advertising spend

Figure 42: Recorded above-the-line, online display and direct mail advertising expenditure on cough, cold and allergy remedies, by top

advertisers, 2014-16 Figure 43: Sudafed online campaign, February 2017

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 44: Attitudes towards and usage of selected brands, March 2017

Key brand metrics

Figure 45: Key metrics for selected brands, March 2017

Brand attitudes: Strepsils has most positive associations

Figure 46: Attitudes, by brand, March 2017

Brand personality: Beechams struggles with 'boring' brand image

Figure 47: Brand personality - Macro image, March 2017

Piriteze most likely to be viewed as effective

Figure 48: Brand personality - Micro image, March 2017

Brand analysis

Piriteze appeals to the most affluent

Figure 49: User profile of Piriteze, March 2017

Strepsils is a preferred brand

Figure 50: User profile of Strepsils, March 2017

Day & Night Nurse not viewed as 'good value'

Figure 51: User profile of Day & Night Nurse, March 2017

Benylin lacks standout appeal

Figure 52: User profile of Benylin, March 2017

Beechams has old-fashioned image

Figure 53: User profile of Beechams, March 2017

The Consumer - What You Need to Know

Cold and flu rates rise

Consumers want cheap, effective cold and flu relief

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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Preference is for rest

Experience of non-food allergies stays consistent

Young adults seek online information about allergies

Experience and Treatment of Coughs, Colds and Flu

Cold and flu rates rise

Figure 54: Experience of coughs, colds and flu, and any usage of OTC remedies as treatment, in the last 12 months, January 2016 and March 2017

Workplace pressure could be increasing OTC remedy use

Oral OTC remedies remain the most sought after

Figure 55: Treatments sought for cold and flu ailments in the last 12 months, March 2017

Mothers drive cold and flu experience amongst women

Figure 56: Cold and flu symptoms experienced in the last 12 months, by gender, March 2017

Barriers to Using Cough, Cold and Flu Remedies

Consumers want effective solutions

Figure 57: Barriers to using cough, cold and flu remedies, March 2017

Tackling the cost issue

Behaviours towards Cold and Flu Remedies

Dedicated branded products lack appeal

Figure 58: Behaviours towards cold and flu remedies*, March 2017

Preference is for rest

Younger adults struggle most with understanding cold vs flu

Figure 59: Understand of cold vs flu, by age, March 2017

Experience and Treatment of Allergies

Experience of non-food allergies stays consistent

Figure 60: Experience and treatment of allergies in the last 12 months, March 2017

Younger adults most likely to experience allergies

Figure 61: Experience of allergies in the last 12 months, by age, March 2017

Natural and allergen-free cleaning products should appeal to under-35s

Oral remedies preferred

Figure 62: Treatments sought for allergies in the last 12 months, March 2017

Respiratory symptoms most common

Figure 63: Allergy symptoms experienced in the last 12 months, March 2017

Behaviours and Attitudes towards Allergies and Allergy Remedies

Preparing for allergy season

Figure 64: Behaviours towards allergies and allergy remedies, March 2017

Under-35s seek online information

Young adults open to treatment patches

Figure 65: Attitudes towards allergy remedies, March 2017

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



Report Price: £1995.00 | \$2583.33 | €2370.86

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

Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

Appendix - The Market

Figure 66: Best- and-worst-case forecast of UK value sales of cough, cold and flu relief, and medicated confectionery, 2011-21

Figure 67: Best- and-worst-case forecast of UK value sales of allergy remedies, 2011-21

Appendix - Companies and Brands

Figure 68: % change in leading claims of launches in the allergy remedies market, 2015-16

Figure 69: % change in leading claims of launches in the cough, cold and flu remedies market*, 2015-16

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com