“In a mature market, finding growth can be a challenge. Gastrointestinal remedies has faced this issue, but brands have benefited from an increase in consumers seeking to alleviate GI symptoms arising from stress, IBS and shifts in dietary habits.”

– Hera Crossan, Research Analyst

This report looks at the following areas:

- **Rising stress levels affecting GI health**

The GI (gastrointestinal) remedies market is forecast to continue on its growth trajectory in 2018.

Although the market is broadly a mature one, marked by low levels of true NPD (New Product Development), pockets of faster growth remain. For example, remedies for IBS (irritable bowel syndrome) represent a growth area, as more people are diagnosed – or indeed self-diagnose – with the condition, whilst rising levels of stress are expected to drive GI complaints and subsequently sales of products to help ease symptoms.

**DID YOU KNOW?** This report is part of a series of reports, produced to provide you with a more holistic view of this market
Gastrointestinal Remedies - UK - November 2018

Overview
What you need to know
Products covered in this Report

Executive Summary
The market
Strong growth continues – for now
Figure 1: Best- and worst-case forecast of UK value sales of gastrointestinal remedies, 2013-23
Companies and brands
Pockets of faster growth emerge
Figure 2: UK brand shares in value sales of gastrointestinal remedies, year ending July 2018
The consumer
Gastrointestinal issues widespread
Figure 3: Gastrointestinal health issues experienced in the last 6 months, October 2018
General OTC remedies more popular than GI remedies
Figure 4: Treatments sought in the last 6 months, October 2018
Stress as the leading cause of GI ill health
Figure 5: Causes of gastrointestinal health problems, October 2018
Few adults come prepared
Figure 6: Behaviours around gastrointestinal health and remedies, October 2018
Remedies easier than lifestyle changes
Figure 7: Attitudes towards gastrointestinal health and remedies, October 2018

What we think

Issues and Insights
Rising stress levels affecting GI health
The facts
The implications

The Market - What You Need to Know
Strong growth continues – for now
IBS remedies see boost in value
Chemists enjoy substantial market share
Growth in older consumers a boon for indigestion remedies
‘Free-from’ market on the rise
Obesity levels continue to increase
Millennials drinking less
Stress contributing to GI issues

Market Size and Forecast
Strong growth continues...
  Figure 8: UK retail value sales of gastrointestinal remedies, at current and constant prices, 2013-23
...but is forecast to slow
  Figure 9: Best- and worst-case forecast of UK value sales of gastrointestinal remedies, 2013-23
Forecast methodology

Market Segmentation
  Indigestion and IBS remedies drive growth
  Figure 10: UK retail value sales of gastrointestinal remedies, by segment, 2016-18

Channels to Market
  Chemists enjoy substantial market share
  Figure 11: UK retail value sales of gastrointestinal remedies, by outlet type, 2016-18

Market Drivers
  Growth in older consumers a boon for indigestion remedies
  Figure 12: Trends in the age structure of the UK population, 2013-23

  Norovirus makes its mark
  Cuts to NHS Minor Ailments Scheme could aid sales
  Figure 13: Number of gastrointestinal prescription items dispensed, 2008-17

  'Free-from' market on the rise
  Obesity levels continue to increase
  Figure 14: Trends in BMI, England, 1995-2016

  Millennials drinking less
  Figure 15: Drinking frequency in the week before the interview, Great Britain, by age, 2005-17

  International travel recovers past pre-recession levels
  Figure 16: UK residents’ visits abroad (thousands), 1997-2017

  Ethnic restaurants and takeaways rise in popularity
  Stress contributing to GI issues
  Figure 17: Causes of stress over last 12 months, February 2018

Companies and Brands – What You Need to Know
  Pockets of faster growth emerge

  True NPD remains low
  Own-label now well established
  GI remedies market sees rise of ‘free-from’ claims
  Gaviscon still top dog by adspend
  Adspend falls as NPD stagnates

Market Share
  Pockets of faster growth emerge
  Figure 18: Brand shares in gastrointestinal remedies, years ending July 2017 and 2018

Own-label value slips
Launch Activity and Innovation

True NPD remains low
- Figure 19: NPD in the gastrointestinal remedies market, by launch type, January 2015-August 2018
- Figure 20: Examples of new packaging in gastrointestinal remedy launches, 2017-18

Tablets take lion’s share of NPD
- Figure 21: NPD in the gastrointestinal remedies market, by format type, January 2015-August 2018
- Figure 22: Examples of capsule format in gastrointestinal remedy launches, 2017

Own-label now well established
- Figure 23: NPD in the gastrointestinal remedies market, branded vs own-label, January 2015-August 2018
- Figure 24: Examples of own-label gastrointestinal remedy launches, 2017-18

GI remedies market sees rise of ‘free-from’ claims
- Figure 25: Top 10 claims in the UK gastrointestinal remedies market (based on leading claims for 2017), 2016 and 2017
- Figure 26: Examples of gastrointestinal remedy launches with free-from claims, 2017-18

Advertising and Marketing Activity

Adspend falls as NPD stagnates
- Figure 27: Total above-the-line, online display and direct mail advertising expenditure on gastrointestinal remedies, January 2015-August 2018

Adspend decreases across the board
- Figure 28: Total above-the-line, online display and direct mail advertising expenditure on gastrointestinal remedies, by top advertisers (based on 2017), January 2015-August 2018

Gaviscon still top dog by adspend
- Figure 29: Total above-the-line, online display and direct mail advertising expenditure on gastrointestinal remedies, by top brands, 2017

TV remains the best way to access consumers
- Figure 30: Total above-the-line, online display and direct mail advertising expenditure on gastrointestinal remedies, by media type, January 2015-August 2018
- Figure 31: Gaviscon ‘Go On’ campaign, July 2018

Nielsen Ad Intel coverage

The Consumer – What You Need to Know

Young women suffer stress-induced issues
General OTC remedies more popular than GI remedies
Men struggle with emotional aspect of GI health
Few adults come prepared
Under-35s believe in detoxing...
...though remedies easier than lifestyle changes

Types of Ailments Experienced

Young women suffer stress-induced issues
- Figure 32: Gastrointestinal health issues experienced in the last 6 months, October 2018

Treatments Sought

General OTC remedies more popular than GI remedies
- Figure 33: Treatments sought in the last 6 months, October 2018

Managing through diet
Causes of Gastrointestinal Health Problems

- Stress as the leading cause of GI ill health
  
  Figure 34: Causes of gastrointestinal health problems, October 2018

- Poor diet and lack of sleep as additional leading lifestyle factors

- One in 10 feel the impact of viruses

Behaviours around Gastrointestinal Health and Remedies

- Young adults need guidance
  
  Figure 35: Behaviours around gastrointestinal health and remedies, October 2018

- Few adults come prepared

- Total wellbeing plays a role for GI health

Attitudes towards Gastrointestinal Health and Remedies

- Men struggle with emotional aspect of GI health
  
  Figure 36: Attitudes towards gastrointestinal health and remedies, October 2018

- Under-35s believe in detoxing...

- ...though remedies still seen as easier than lifestyle changes

Appendix – Data Sources, Abbreviations and Supporting Information

- Abbreviations

- Consumer research methodology

- Forecast methodology