

MANAGING SKIN CONDITIONS AND ALLERGIES – UK – 2024

Experiences of skin conditions and allergies are relatively high and expected to rise, driven by climate change, but innovation is limited with ample room for NPD.



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Managing Skin Conditions And Allergies - UK - 2024

This report looks at the following areas:

- How many people experience skin conditions and allergies
- Consumer behaviours related to skin conditions and allergies
- Opportunities for brands to disrupt the skin conditions and allergy remedies categories
- The impact of climate change on the demand for allergy remedies
- How brands can lead with authority to appeal to those experiencing skin conditions



Experiences of skin conditions and allergies are relatively high and expected to rise, driven by climate change, but innovation is limited with ample room for NPD.

Overview

While the impact on value sales is limited, due to the essential nature of these products, the cost-of-living crisis poses an opportunity for more value-led own-label NPD, as private-label allergy innovation remained low in 2023 and skin condition launches are dominated by prestige products.

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Report Content

EXECUTIVE SUMMARY

Opportunities for the skin conditions and allergies market

- The allergies category needs NPD to facilitate its growth
- Tout authority to appeal to experiencers of skin conditions
- Opportunity for own-label NPD as consumer sentiment is positive

Market dynamics and outlook – allergy remedies

- Allergy remedies market size and forecast
- Steady growth is undermined by inflation
- Market predictions – allergy remedies
- Increasing allergy experiences fuel growth
- Allevia grows substantially and own label declines
 - Graph 1: retail value sales of allergy remedies, by brand, 2022-23
- The experience level of hay fever is increasing

What consumers want and why

- Collectively, the experience of skin conditions is high
 - Graph 2: skin conditions experienced in the last 12 months, 2021 vs 2023
- The authority of prescriptions and OTC treatments appeal
 - Graph 3: treatments used for skin conditions in the last 12 months, 2023
- Skin conditions spur consumers into action
 - Graph 4: skin condition and allergy experiencers who have consulted a medical professional about their condition, 2023
 - Graph 5: skin condition and allergy experiencers who would be interested in taking vitamins/supplements to help treat their condition, 2023
- The experience of hay fever is widespread
 - Graph 6: experience of non-food allergies in the last 12 months, 2021 vs 2023
- Topical remedies can drive usage by leaning on the lack of side effects
 - Graph 7: treatments used for non-food allergies in the last 12 months, 2023
- At-home testing appeals to those with skin conditions and allergies
 - Graph 8: skin condition and allergy experiencers who get advice about their condition from online forums, 2023
 - Graph 9: skin condition and allergy experiencers who have used an at-home test to investigate their condition, 2023

Innovation and marketing

- Boots launches medical devices and invests in skin diagnosis technology

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- An opportunity for mass launches as prestige dominates skin disorder launch activity
 - Graph 10: BPC launches with skin disorder claims, by beauty price positioning, 2023
- GlaxoSmithKline updates packaging to highlight convenience
- Skin disorder marketing showcases real skin

MARKET DYNAMICS

Market size – allergy remedies

- Steady growth is undermined by inflation
 - Graph 11: retail value sales of allergy remedies, 2019-23

Market forecast – allergy remedies

- Increasing allergy experiences fuel growth
- Opportunities
- Threats
- Learnings from the last income squeeze

Market segmentation – allergy remedies

- Oral remedies far outpace alternatives

Channels to market – allergy remedies

- Grocery stores continue to outcompete chemists
- Grocery retailers see growth as convenience resonates
- Amazon Subscribe & Save appeals

Market share – allergy remedies

- Brand shares remain fairly consistent
- Consumers opt for drowsy tablets to save money
- Own label can innovate to gain back market share
- Allevia sees substantial growth in market share

Macroeconomic factors

- Consumer sentiment: the recovery is continuing...
 - Graph 12: the financial wellbeing index, 2016-23
- An increase in 15-24 year olds bodes well for allergy remedies
 - Graph 13: predicted change in the age structure of the UK population, 2023-28
- Skin disorders are perceived as stressful
- The experience of hay fever is increasing
- Ingredient education bodes well for managing skin disorders
 - Graph 14: sources of facial skincare ingredient information, 2023

- Household blurring with BPC represents a threat
- Pet ownership increases may impact allergy remedy usage

WHAT CONSUMERS WANT AND WHY

Types of skin conditions experienced

- Collectively, the experience of skin conditions is high
 - Graph 15: skin conditions experienced in the last 12 months, 2021 vs 2023
- Skin disorders are relatively common
- Educate consumers on skin conditions to increase the consumer base
- Opportunity of hormonal care to target women's spots
 - Graph 16: experience of spots and acne, by gender, 2023
- Link city pollution to skin conditions
 - Graph 17: experience of select skin conditions in the last 12 months, by city vs rural location, 2023
- Take an integrated approach to skin conditions and allergies
 - Graph 18: experience of non-food allergies, by number of skin conditions experienced, 2023

Where skin conditions are experienced

- Experience is evenly split between the body and head
- The face sees the highest experience of skin conditions
 - Graph 19: where on the body/head skin conditions were experienced in the last 12 months, 2023
- Facial skincare products may appeal the most
- Create multifunctional products suitable for the whole body
 - Graph 20: repertoire of where on the body/head skin conditions were experienced in the last 12 months, 2023
- Tap into growing scalp care trends

Remedies used to treat skin conditions

- The authority of prescriptions and OTC treatments appeal
 - Graph 21: treatments used for skin conditions in the last 12 months, 2023
- Medical devices can bridge the authority gap
- Pharmacy brands can lean on authority

Sought-after claims when choosing skin condition remedies

- Dermatologist-approved claims resonate
 - Graph 22: sought-after claims when choosing non-prescription and non-OTC treatments for a skin condition, 2023
- Demystify products for men
 - Graph 23: % who look for dermatologist-approved claims when choosing non-prescription and non-OTC treatments for a skin condition, by gender, 2023
- Launch multifunctional products...

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- ...or include multiple formulas in one pack
- Bridge the gap between naturals and sensitive skin

Diagnosing and tracking skin conditions

- Consumers struggle to track skin conditions
- Younger consumers look to brands for diagnostic help
- Prescriptions do not appeal to younger consumers
- Draw inspiration from period-tracking apps
 - Graph 24: % who have experienced a skin condition and agree that it is difficult to track what causes skin conditions to flare up, by age, 2023

Skin condition treatment behaviours

- Proactive treatments appeal
 - Graph 25: behaviours related to skin condition treatment, 2023
- Offer a holistic approach with supplements
- Consumers are confident but still require education

Attitudes towards skin conditions in advertising

- Those with skin conditions want more representation
- Support ethnic minorities with informative advertising...
- ...and invest in researching underrepresented groups

The experience and treatment of non-food allergies

- Seasonal allergies see the highest experience level
 - Graph 26: experience and treatment of non-food allergies in the last 12 months, 2023
- Allergy experience is high
- The experience of hay fever has increased
 - Graph 27: experience of non-food allergies in the last 12 months, 2021 vs 2023
- Topicals can drive usage by leaning on their lack of side effects
 - Graph 28: treatments used for non-food allergies in the last 12 months, 2023
- Adopt aesthetic packaging to appeal to younger consumers
 - Graph 29: % of non-food allergy sufferers who rested/did nothing to treat their condition, by age, 2023
- Advertise allergy remedies in urban settings
 - Graph 30: experience of non-food allergies in the last 12 months, by city vs rural location, 2023

Advice sought when experiencing non-food allergies

- Consumers are less likely to consult a doctor for a non-food allergy
- Create online communities to combat misinformation
- Encourage older consumers to take up at-home testing
 - Graph 31: % of allergy experiencers who have used an at-home test to investigate a non-food allergy, by age, 2023

Treating non-food allergies

- Allergies are less bothersome than skin disorders
 - Graph 32: treatment of non-food allergies, 2023
- Private label can win back market share with NPD
- Holistic approaches will appeal if effective
- Prevention appeals amid the Kenalog ban

Severity of allergies

- Allergy symptoms have worsened
- The allergy experience level is likely to increase year on year

INNOVATION AND MARKETING TRENDS

Skin condition launch activity and innovation

- Innovate in colour cosmetics as innovation dwindles
 - Graph 33: BPC launch activity carrying skin disorder claims, by category*, 2019-23
- Boots launches medical devices...
- ...and invests in skin diagnosis technology
- Skin disorder products can better align with barrier repair claims
 - Graph 34: BPC launch activity carrying skin-barrier-related claims*, 2019-23
- Innovation taps into the growing interest in skin health
- Opportunity for mass market as prestige dominates launch activity
 - Graph 35: BPC launches with skin disorder claims, by beauty price positioning, 2023
- Prestige launches point to their suitability for disordered skin
- Summer Fridays fills the gap for gift sets
- Innovation targets eczema-prone skin
- Anti-acne launch activity is prominent
- Blur with exercise and wellness in the build up to the 2024 Olympic Games
- Dandruff products need added benefits to compete

Allergy remedy launch activity and innovation

- Non-ingested formats dominate allergy remedies
 - Graph 36: new product development in the allergy relief sub-category, by format type, 2019- 23
- Drug-free topical formats can boost usage
- Make allergy remedies more appealing to children
- GlaxoSmithKline updates packaging to highlight convenience
- Opportunity for niche eco-ethical claims to grow

Advertising and marketing activity

- CeraVa highlights authority in its meta campaign
- Boots No7 'Rehab Your Skin' advert is a call to action
- E45 campaign shows real skin amid a relaunch
- The INKEY List launches its 'Acne Happens' campaign
- Cult Beauty introduces 'Beyond Skin Deep' series

APPENDIX

Market forecast data and methodology

- Market size and forecast: constant and current prices
- Market forecast: prediction intervals
- Forecast methodology

Report scope and definitions

- Market definition
- Abbreviations and terms

Methodology

- Consumer research methodology

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