

# PAGB Highlights

# 2024



The Consumer Healthcare Association



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*In September, we were honoured to win Best Trade Association at the Memcom Excellence Awards; an accolade that truly reflects our dedication to supporting the consumer healthcare industry.*



## President foreword

2024 has been quite a year for the consumer healthcare industry, and PAGB has continued to react and respond as the expert voice of the sector. I have been pleased to support PAGB's work throughout 2024 in my role as joint Vice-President and am honoured to have been voted in to take up the mantle of President from 2025. I look forward to working with Michelle and the PAGB team to continue the great work and deliver the evolution of our strategy. I want to take the opportunity to thank my predecessor Bas Vorsteveld, for all his dedication and support for PAGB as a champion of self-care.

These last 12 months have seen PAGB wrapping up the end of its five-year strategy and working with members to develop a new strategy moving forward. This evolution of the previous strategy provides a platform to continue to maintain a focus on self-care, improving consumer health, and relieving pressure off the NHS. More specifically looking at the past year, PAGB has continued to promote best practice, addressing non-compliant prescription-only medicine (POM) advertising and ensuring high-quality copy clearance while updating the food supplements review process.

*PAGB has also led the way in navigating regulatory complexities, tackling post-Brexit challenges head on and all the while with a continued dedication to consumer safety.*

There have been great strides in the promotion of self-care which put us in a fantastic place ahead of the change in Government as we continued to advocate for the sector and influence policy. Even as 2024 drew to a close, PAGB has prioritised support for members with new innovations, including the launch of a new eLearning platform.

2024 came with some unexpected challenges, but PAGB was prepared and sprang into action to respond to a general election that came much earlier in the year than expected. This had an impact on the delivery of our work on reclassification, an all-important issue for our sector, slowing the great progress that had already been made. However, PAGB has worked hard to ensure reclassification remains on the agenda for the new Government, and I look forward to seeing how this progresses in 2025.

As we move into a new year, I ask PAGB members to continue supporting our hard work and ensure our key messages remain at the forefront of the new Government's agenda. Together we can help progress a shared interest.

I would like to take the opportunity to give a special thank you to PAGB's CEO Michelle who ended the year on a high and was recognised with an OBE for her work on behalf of the consumer healthcare sector. I would also like to thank the wider team, for all their hard work, in addition to all PAGB's members for their ongoing support and collaboration.



**Mike Knowland,**  
President, PAGB

Mike Knowland is General Manager for Northern Europe at Bayer Consumer Health





## CEO foreword

2024 was another major year for PAGB and our members. We have continued to advocate for and support our members, ensuring we remain the expert voice in consumer healthcare.

I am very proud of PAGB's efforts in responding to the UK's significantly changing landscape across the past year, and the ways in which the team has adapted to ensure we are always on the front foot to advocate on behalf of our members and empower consumers to self-care.

There are so many highlights from the past 12 months for me personally. Every year we listen to our members' feedback about our services, and, in response to this, in February we launched a brand new, more efficient PAGB website so our members can navigate our resources, training and guidance documents in a way that works for them. In September, we won Best Trade Association at the Memcom Excellence Awards, an accolade that truly represents what PAGB means to our members and the hard work and expertise of each individual in our organisation to support them. And to end this extraordinary year, I was honoured and humbled to have been awarded an OBE for services to the consumer healthcare sector. Ensuring continuity of supply of medicines during Brexit and navigating the subsequent challenges was a real motivation for me, and it has been a huge privilege to continue to be a spokesperson for our industry.

We have continued to support members through regulatory complexities related to Brexit on medicines and food supplements, addressing ongoing Medicines Healthcare products Regulatory Agency (MHRA) performance, and providing feedback on key MHRA consultations, raising concerns about prioritising speed over quality and advocating for balanced metrics. In our advertising work we have listened to feedback from members, and made key changes on food supplement advertising, which you can

read more about on page 12, in addition to our work with MHRA on non-compliant promotion of POMs online.

However, it would be remiss of me not to mention one of the biggest changes of 2024, not just for our industry but the wider nation - the general election. We began our preparations at the beginning of 2024, so in the lead up to the election, we hit the ground running with a series of stakeholder engagements, and in April, I was pleased to join the now Secretary of State for Health and Social Care at a panel session on improving the health of the nation through innovation and self-care. We gave a first-hand pitch on the benefits of the consumer healthcare industry to support the NHS and I was thrilled that many of our members were able to attend and engage with the event.

**Since the new Government has stepped in, we have also rolled out a sustained and targeted outreach programme to ensure we are advocating for our members in the right ways, making the most of the opportunities this new Parliament has to offer.**

As I look forward to 2025, I am excited to see where this groundwork leads us and how we can continue to amplify the reputation of the consumer healthcare industry.

I hope as our members read this highlights report that they can appreciate and feel proud of the successes we have collaboratively achieved over this last year, and I know you will join me in thanking the PAGB team for all their hard work in 2024.



**Michelle Riddalls OBE,**  
**Chief Executive Officer, PAGB**

## Tackling the big challenges of 2024

2024 was certainly a bumper year, with several hurdles. The main impact on the work of PAGB being the general election. Pre-election rules meant that much of our active work with Government departments and arms-length bodies had to pause.

This included the work on reclassification that had progressed throughout 2023. Engagement with the Department of Health and Social Care (DHSC) and the Reclassification Alliance was put on hold, and the change in Government has brought a new challenge — building relationships with new stakeholders. As the new Government navigates through their immediate priorities and concerns for the health and social care setting, we have remained in close contact with officials in the DHSC, continuing to bang the drum for reclassification.

**We saw major consultations announced at the end of the year, which included two from the MHRA.**

The first being Medical Devices Regulations: Routes to market and in vitro diagnostics, and the second on Statutory Fees – proposals on ongoing cost recovery. Across the two consultations, PAGB has worked to collate feedback and produce responses that represent a united industry voice. We have liaised with the Medical Devices Working Group and Regulatory Affairs Working Group in addition to creating two separate working groups to support this work. We have also collaborated alongside other trade associations to collectively push back against the MHRA on some of the proposals, and, on the fees consultation as part of the UK MedTech Forum, we wrote to outgoing CEO of the MHRA, Dame June Raine. We also provided feedback on MHRA new performance data that will provide their stakeholders with detailed insights into average timescales and service volumes. Among other comments, we raised concerns about MHRA focusing on speed over quality and highlighted that emphasis on balancing metrics with quality assessments is needed.

But the consultations didn't end there and in the final few months of 2024 we also responded to two new consultations from the Government: the 10-Year Plan for Health, and the Industrial Strategy. On the 10-Year Plan for Health, we have championed asks around empowering and supporting people to self-care, in addition to improving access to over-the-counter medicines, vital for self-care, including through reclassification. Turning to the Industrial Strategy led by the Department for Business and Trade, we have championed calls for the consumer healthcare industry to be recognised as an important partner in the life sciences sector, with a focus on growth.



HSIS has continued to inform the debate about food supplements and nutrition and has tackled and reduced a number of negative and misleading media challenges in the year, including rebutting misleading coverage around omega-3 and fish oils following a complex observational BMJ study that picked up traction. HSIS has also spearheaded a campaign on British dietary habits, with HSIS experts authoring a peer reviewed research paper and a report showing the nutrient demise of the average British diet and signposting to the role that multivitamin and multimineral supplements can play in bridging the gap. The report and its findings were picked up across 20 national media outlets. Throughout the year, HSIS has continued to amplify its previous reports on vitamin D and the menopause, securing coverage with comments from HSIS experts, as well as focusing on seasonal nutrient needs.

## Strategy success – the last five years

With the end of 2024, our previous five-year strategy drew to a close. Moving forward we are focused on its evolution as we look ahead to the next five years. This has also given us the opportunity to reflect on the successes we have delivered and celebrate our achievements over the course of our strategy to 2025.



Here we share some of our favourite highlights:

### Promoting best practice

Excelling in providing expert advice across regulatory and advertising matters, PAGB has supported members and the industry to enable self-regulation and promote best practice. Our innovative approaches have included:

- Developed a toolkit system for self-approval copy based on core claims.
- Updated processes for greater flexibility, limiting materials which need to be resubmitted.
- Supported members creatively, maintaining high satisfaction levels.
- Developed medicines packaging guidance, updating our code and producing a workshop, that is attended by MHRA.
- Launched a booking system to boost collaborative interaction by allowing members to talk directly to our experts with short notice.

This was all supported by the development of our case management system to enhance our copy clearance process, ensuring efficient tracking of submissions and detailed reporting on turnaround times.

A robust process was established for challenging non-compliance in products and advertising, and we liaised with regulators and major platforms, including Amazon and Google, to create a comprehensive guidance document for reporting concerns.



### Going digital

To support our members to navigate the evolving digital advertising and regulatory landscape, we established a Digital Working Group, with five key workstreams to drive forward the use of digital resources.

With the support of the working group, we developed and published a number of new guidance documents for social media, ecommerce, online promotions, real-world evidence and healthcare apps - and we developed new training programmes to cover these.

### Navigating regulatory complexities

Navigating regulatory complexities has been a key focus for PAGB across our 5-year strategy. Managing challenges and providing expert guidance to support members, we have successfully delivered on:



#### Minimal supply disruption following Brexit

We established Brexit subgroups, and distilled complex information on the standstill guidance and NI Protocol in a timely manner. We addressed key post-Brexit issues with MHRA and provided cross-trade association Medical Device guidance for members ensuring minimal supply disruption.



#### Medicines packaging

We've strengthened our relationship with the MHRA to improve submission consistency. We have continued to support members with their self-certification of medicines packaging, and we introduced a new pack design workshop. We also developed new notification scheme guidance which now forms the basis for widening the notification scheme even further.



#### Consumer safety

Continuing our dedication to patient safety, we have ensured our members are kept updated on all the latest regulatory changes and challenges. We developed a heat map, a PAGB ingredient safety process and we conduct regular horizon scanning activities. We also drove discussions with MHRA to manage ingredient issues in a more streamlined way.



#### Medical device regulation implementation

The Regulatory Affairs team were pivotal in implementing the EU Medical Device Regulation, driving discussions in Europe and contributing to consultations on priority topics. We also continued to input into the MHRA implementation plan for the new UK Medical Devices Framework.



#### Food supplements

We've actively supported members in navigating health claim restrictions, empowering companies to stay compliant and innovative. We have updated guidelines, provided new training on CBD products and established a probiotics working group to shape the evolving regulatory environment.





## Strategy success – the last five years

### Empowering self-care

Promoting self-care has been and remains a cornerstone of PAGB's mission, empowering individuals to take responsibility for their health and well-being through increased confidence, education and awareness. All of PAGB's work influencing government and policy has ensured that our members' priorities and concerns are kept front and centre across these key areas.



#### COVID-19

During the pandemic, we collaborated with the MHRA to secure regulatory flexibilities and liaised with the government to ensure the availability of medicines. Our participation in the Life Sciences Covid Response Group and contributions to the Life Sciences Recovery Roadmap were also pivotal in navigating these challenging times.



#### Self-Care Strategy Group

In 2019, we were instrumental in establishing the Self-Care Strategy Group, bringing together key representatives in consumer healthcare to forge a clinical consensus on how best to support self-care in England. Fast-forward to 2021, the group published a blueprint for a new national self-care strategy, and in 2023 our hard work advocating for this in policy paid off as we saw seven out of nine of our recommendations included in the government's Delivery Plan for Recovering Access to Primary Care.



#### Digital self-care

We focused on how digital tools can be harnessed to support self-care. In 2021, PAGB held a landmark online digital conference. The conference had 700 live unique views and attracted over 150 delegates, featuring key workshops on social media and other digital topics.

### Reclassification

Our efforts to widen access to self-care medication have been significant, and we recognise that reclassification presents a major opportunity for both the government and industry. In addition to introducing new reclassification guidance and training for our members, we worked on widening access to self-care medication by developing new reclassification models and securing support from the MHRA. We also reestablished the Reclassification Alliance. This initiative led to a comprehensive list of potential conditions and categories for switching from Prescription - Only Medicines to Pharmacy and General Sales List.

### Influencing government and policy

Leading advocacy efforts, PAGB has effectively continued to represent the over-the-counter (OTC) sector on key issues - from Brexit to reclassification to the environment and legislation - and has influenced the government to drive progress in policy and legislation. Our achievements in the past five years have included:



#### Brexit

Brexit and the UK-EU economic partnership has loomed large in our work influencing government. PAGB co-chaired a deep dive on the Northern Ireland Protocol with DHSC, exposing the challenges it presented the OTC sector. We gave evidence three times at the House of Lords and our influence highlighted supply solutions for all medicines. We ensured a grace period post-Brexit and we ultimately and successfully changed EU law as part of our negotiations. And our work has continued since, including liaising with our members on the impact of the EU acquis on medicines legislation.



#### Environment and sustainability

In our commitment to the environment, a dedicated working group for formed to assess the impact of changing regulations and policies on plastics, Pharmaceuticals in the Environment, and CO2 emissions. We successfully lobbied to exclude medicines from the plastic tax scope.



#### Antimicrobial resistance

On a global level, we have been working with international partners to influence the World Health Organisation and the United Nations' (UN) draft political declaration on the use of antimicrobial products. The Department of Health and Social Care updated their negotiation position at the UN negotiations to reflect PAGB's concerns.

# Highlights of 2024

## Advertising advice and approvals

**4,794** pieces of copy reviewed

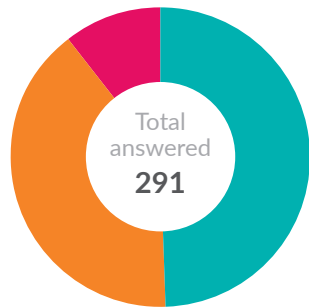
**71%** returned within response time targets

**372** pieces of advertising advice

**218** advice meetings

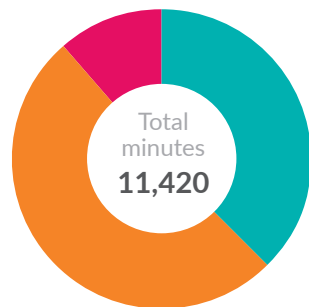
## Supporting on regulatory issues

### Regulatory queries answered



Medicines	<b>144</b>
Food supplements	<b>117</b>
Medical devices	<b>30</b>

### Minutes spent answering regulatory queries



Medicines	<b>4,310</b>
Food supplements	<b>5,820</b>
Medical devices	<b>1,290</b>

### Number of pack design reviews



Medicines	<b>87</b>
Food supplements	<b>27</b>

### Minutes spent on pack design reviews



Medicines	<b>2,390</b>
Food supplements	<b>1,470</b>

Ongoing ingredients issues  
**7**

## Representing your interests

**497** stakeholder meetings on your behalf including:

**15** Consultations responded to on behalf of all members

Position papers, guidance, briefings and letters:

**186** PAGB

**6** in partnership

### PAGB Media coverage - PAGB

**219** Pieces of coverage

**39** Statements and interviews (proactive and reactive)

### HSIS Media coverage - HSIS

**335** Pieces of coverage

**232** Statements and interviews (proactive and reactive)

## Keeping you up to date

**408** Regulatory intelligence updates

**85** Brexit intelligence via member blog

**349** Environment and sustainability updates

**2,000** Website visits since launch

### Most visited pages:

1. Home Page
2. Members Area Dashboard
3. News Page
4. OTC Medicines Hub
5. Membership Page

## Supporting our members

**212** Meetings with PAGB - supporting members to excel

**30** workshops with **193** participants

**17** webinars with **431** attendees



## Regulation and advertising

### Regulation

Throughout the year we continued to establish ourselves as an important partner to Government and key officials in Departments and arms-length bodies, securing meetings with the right people, at the right time.

Key stakeholders we have met with, and groups we have been part of, have included MHRA, DHSC, Department for Environment Food and Rural Affairs (Defra), Business Expert Group, Med Tech Forums, and international organisations like AESGP, Global Self Care Federation. MHRA performance has remained an ongoing issue, and PAGB continually worked to address this, alongside ensuring OTC and self-care medical devices remain a priority for MHRA.

We have continued to collaborate with trade associations such as ABPI and BGMA on the cross-industry UK Electronic Patient (ePI) Task Force with the aim to facilitate a move to digital-first medicine information. Key outputs included the Task Force publishing an evidence review in TOPRA's Regulatory Rapporteur and at PAGB we also ran a webinar on ePI exclusively for our members.

The work didn't stop there, and PAGB has continued to lead the way in sharing knowledge and expertise. In October, we launched a new eLearning platform to offer members a flexible route to training and development, to deepen their understanding of key industry topics, regulations and best practices. These eLearning resources help members stay informed, compliant and equipped to support professional development and knowledge of the self-care sector. We also published an article on medical devices and software applications, in addition to being invited to speak at international events by the Hellenic Society of Pharmaceutical Medicine - ELEFI - and Latin-American Association of Responsible Self-Care (ILAR).

Our regulatory team have continued to support members by pre-vetting changes to pack design and layouts for OTC medicines as part of MHRA's P3 expedited assessment procedure. We have also continued to meet with our members to discuss this service, ensuring and improving consistency and focusing on right first-time submissions.

Finally, we have continued to work on environmental issues impacting the consumer healthcare sector, monitoring the key issues that matter to our members. This includes work on intentionally added microplastics, extended producer responsibility and on packaging labelling requirements, and Forest Risk Commodities Regulations. Across this work we have engaged with UK agencies, in addition to EU and UK associations, to seek clarification on scope, timelines, and potential impact, all with the aim of minimising negative effects to our members and their supply.

### Advertising

Across advertising, we continued to provide expert advice to promote best practice and enable self-regulation. 2024 saw a transition for PAGB members from compulsory copy approvals for food supplements to an advisory-only advertising service.

Through robust consultation with PAGB members, we developed a process that improves flexibility for our members, while continuing to offer the same level of support and expertise.

We also called attention to the issue of non-compliant promotion of prescription-only medicines (POM) online, a key concern for our members. After collating wide ranging evidence, we submitted a dossier of information to the MHRA outlining sectoral concerns, highlighting complaints against specific websites, and sharing proposals on how to tackle this issue going forward.

Finally, the team worked on updating the Professional Code for Medicines ensuring that the rules that apply to advertising material aimed at healthcare professionals for OTC medicines in our membership are reflective of new innovations in advertising, including the introduction of QR codes to share product information.

## Policy and engagement

2024 saw a historic general election take place, and a shift in Government for the first time in 14 years. Prior to the election being called, PAGB started the year with a strategic investment in policy outreach.

In January, we attended the Labour Party's Health Leaders reception with the now Prime Minister, Keir Starmer, and Health and Social Care Secretary, Wes Streeting. This was followed by several roundtables in addition to a co-sponsored panel with Wes Streeting, which provided us with a platform to share our priorities and an opportunity for him to hear directly from PAGB and our members.



Our engagement did not end there, and we moved ahead attending a variety of different roundtables highlighting the benefits of the OTC sector. We also produced an election toolkit with a sector-wide message for our members to use across their engagements and we reached out to key prospective parliamentary candidates in the healthcare space. We met with Parliamentary Under-Secretary for Public Health, Start for Life and Primary Care at the time, Andrea Leadsom, to discuss the opportunities for self-care in supporting primary care recovery.

*Following the election, we acted quickly, rolling out a targeted approach to newly elected MPs based on three main priority areas for our members: self-care, reclassification and Brexit.*

We brought 2024 to a close having built a great foundation with backbench MPs interested in healthcare. The election of the new Government meant the end of pre-election period rules, and we restarted our engagement across Departments on our regular topics, such as reclassification



and access to medicines. PAGB's CEO Michelle Riddalls met with the new Minister of State for Secondary Care, Karin Smyth MP and reignited discussions on reclassification.

PAGB also responded rapidly to new challenges, including an emerging threat to the sale of OTC antimicrobial medicines following a World Health Organisation Resolution, and subsequent United Nations Political Declaration. PAGB led the way in developing a UK position and participating in a global taskforce. Identifying and connecting with key stakeholders in this space, we were able to make contact with the International Directorate at DHSC to express our concerns ahead of the negotiation period.

## Self-care

Throughout the year PAGB has continued to lead the way in actively promoting self-care to empower individuals to take responsibility for their health and well-being.

We worked in our capacity as the Secretariat of the Self-Care Strategy Group to publish a report marking one year since the launch of the 'Delivery plan for recovering access to primary care'. This report reviewed progress to date and makes recommendations to build upon the commitments in the plan to improve support for people to self-care.

In addition to this, PAGB also produced three significant documents in 2024 relating to self-care and the opportunities it provides.



Our second self-care publication was our landmark State of the Nation report, launched at the Labour Party Conference in September 2024. This report aimed to support the Government by setting out key policy recommendations to action as part of their planning to build an NHS fit for the future.

Finally, we also published a compendium highlighting examples of best practice from across England of how Integrated Care Services (ICSs) and local care providers have gone above and beyond to support self-care, and how similar work could be reproduced across the country. The report shines a light on work and projects that have successfully sought to enhance the understanding of self-care among the public and NHS staff, empower people to self-care, and tackle digital inequalities.

**With our focus on promoting the benefits of self-care continuing throughout 2024, we were thrilled that our work in this space was shortlisted at a prestigious industry event, the Communiqué Awards.**



Firstly, we published our 2024 Self-Care Census report, detailing the real-world data from a census of more than 4,000 UK adults to reveal the latest consumer trends in self-treatable conditions and uncovering the evolving attitudes towards self-care. The report highlights the current challenges and opportunities for self-care, revealing that confidence in self-care amongst younger adults is low compared to that of older generations. 23% of adults aged 25 to 34 admitted they would try to get a GP appointment for a self-treatable condition rather than self-care or visit a pharmacist, compared to just 9% of those aged 65 or older.

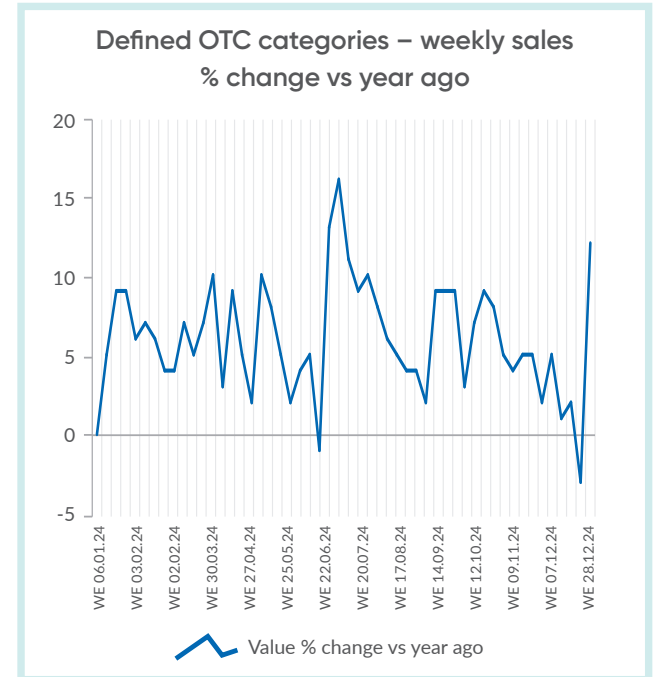
## The consumer healthcare market in 2024

### Economic outlook

2024 began with a general optimism among shoppers and businesses, with inflation easing and finances generally less severe than they had been recently. However, the year did not unfold quite as smoothly as many would have liked. Climbing consumer confidence was brought to a halt by a mid-year change in government, which shone a very public spotlight on the state of the UK economy. Efforts to manage expectations ahead of the Autumn budget did little for confidence, and recent months have seen inflation remain slightly, stubbornly, above the 2% target, as economic growth stagnates. This uncertainty has brought the cost of living back to the forefront of shopper concerns.<sup>1</sup>

The Government will likely reverse their messaging in 2025 to a more positive tone, in a bid to drive confidence, spending and investment growth. April could bring a reality check, as a planned national insurance hike for employers threatens to force the hand of businesses to protect profits. This could be in the form of job cuts, price increases, downsizing or all the above.

We are not only grappling with domestic economic challenges in 2025. The inauguration of the US president brings with it a whole raft of possibilities, ranging from political tensions to global conflicts to international trade tariffs. The potential for supply shocks remains a critical threat for UK businesses. For yet another year, the only certainty is uncertainty.

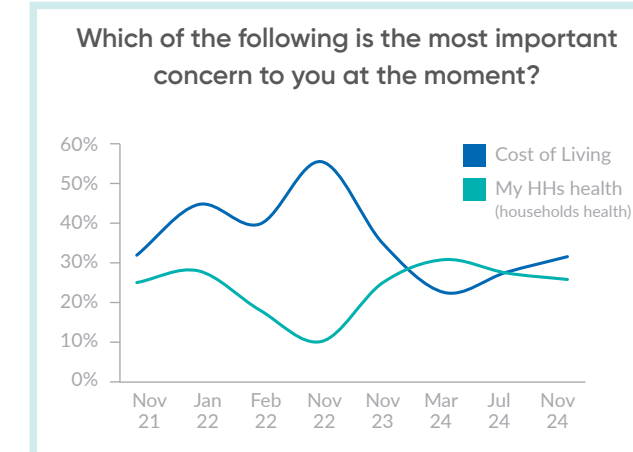


### OTC category sales

In the world of OTC healthcare, price continues to drive value growth, as it did the year before. However, the real headline here is the 2% growth in unit sales. For context, this number was -4% in 2023, so this is a significant swing in momentum. The fact that this is driven by shopper demand rather than prices should spark some optimism for manufacturers and retailers.

A cooler June caused a steep unit sales decline in the hayfever remedies category during its peak season. Cough, cold and throat medicines also saw a lower peak season in December, but steady growth throughout the rest of the year more than offset this decline. Gastrointestinal products warrant a callout as one of four OTC categories to grow units on last year (+1%)<sup>2</sup>, as gut health remains a growing area of interest for consumers.

A more holistic view on health elevation continues to drive growth in vitamins, with retailers launching more Private Label ranges to blend health with affordability. The blurring of health and beauty boundaries has allowed beauty vitamins such as collagen supplements to thrive as an innovation hotspot. This allows retailers to expand the category and generate real, sustainable volume growth.



1. Source: NIQ NIQ Homescan Survey SOTN Nov 2024. "Which of the following is the most important concern to you at the moment?" % respondents

2. Source: NIQ Scantrack, Total Market, 52 w/e 28.12.2023. PAGB defined OTC categories.



# The consumer healthcare market in 2024

## The retail environment

High street stores and pharmacies continue to face tough challenges with footfall and profitability. We have lost established retailers such as Wilko and Lloyds in recent years, while Boots continues to close stores across the country in an effort to consolidate their business. This shift in landscape has moved shoppers back to independent and community pharmacies, accelerated by the Pharmacy First initiative launched in January 2024.



These smaller pharmacies face a tough environment; one that has already forced major retailers to close their doors in town centres. Tight profit margins will become tighter in 2025, but these stores will experience heightened demand due to NHS waiting times and chain stores closing around them.

Smaller retailers will be relying on the expertise of established brands to help them grow baskets, increase profitability and reduce losses. Brands should remember that over a quarter of OTC value is sold through chemists, so ensure that growth challenges are not mistaken for a lack of opportunity altogether.

## The digital marketplace

The digital marketplace continues to evolve, and each stage of evolution brings a wave of opportunities to reach new shoppers. The number of people who sought medical

advice online doubled to six percent from 2023 to 2024.<sup>3</sup> A lot of this can be attributed to the lack of availability of health professionals as opposed to a consumer-driven change in preference, but the result was an increase in online penetration either way. The most common reason for visiting an online pharmacist was for general wellbeing, which creates a clear difference between the shopper mission online vs physical pharmacies. A broader, more general demand for health products opens a sea of opportunity for brands to innovate in holistic health, finding niches in the ambiguity.

OTC ecommerce shoppers behave differently to those seeking medical support in pharmacies. Shopping online indicates a lack of urgency, shifting the focus onto preventative and away from reactive. Three quarters of first aid kit spend (a forward-thinking purchase) is online, while this figure is just 13% for pain relief.<sup>4</sup> This bias away “typical” OTC products steers shoppers to pureplay generalists such as Amazon. Even TikTok is getting in on the action, winning more share of online OTC than any other retailer in 2024.<sup>5</sup> Brands need to be more informed of what shoppers are buying, as well as how they are buying it.

## Dial up, differentiate, disrupt

In 2025, brands and retailers need to **dial up** the basics and win more shoppers. Learn more about the shopper journey, identify new consumer touchpoints, and be available.

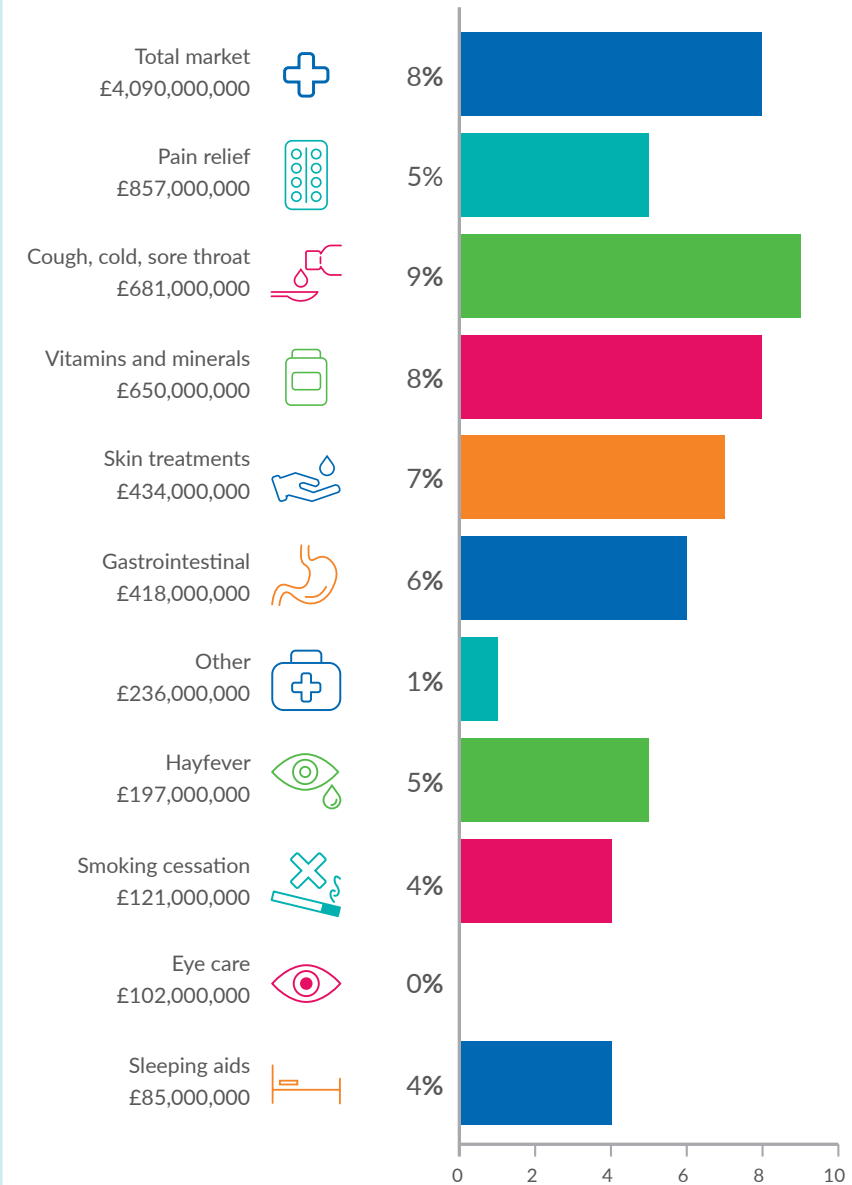
Consumers are looking more generally at their holistic health, which gives brands license to **differentiate** from the competition. Seven in ten shoppers say private label healthcare products are as good as branded. How clear is your value proposition? Why should shoppers buy your product?

Brands need to leverage technological advancements around them to create new occasions, reach new shoppers and **disrupt** the marketplace. This can range from retail media advertising to social commerce strategy. Regardless of the economic backdrop, health is everywhere, which means opportunity is everywhere.



Alex Heffernan,  
Insights Manager - Health, Beauty  
Personal Care and Home, NIQ

## % change in value sales of OTC products 2024 v 2023 (£)



Source: NIQ Scantrack, Total Coverage GB, 52 w.e 28.12.2024. NIQ's OTC read was defined by NIQ in agreement with PAGB and its members. It covers over 75,000 stores, including multiple and independent chemists, grocery retailers and in-store pharmacies, as well as impulse stores.



3. Source: NIQ Homescan Survey Mar 2024 vs 2023 response. "In the last 12 months, have you sought healthcare advice for yourself (or other member(s) of your household) from a pharmacist online?"  
 4. Source: NIQ Digital Purchases YTD 18.05.2024 Online Value Share of Total Country  
 5. Source: NIQ Digital Purchases Full Year 2024 vs 2023, Total Health, Total e-commerce