

Consumer Health in the Digital Age

Adapting to a new Marketing and Retail Environment

(215 Pages)

Definitions & methodology (2 pages)

Overview (2 pages)

Consumer Health in the Digital Age (2 pages)

Digital Communication

Digital Health

CHC Players' Digital Strategies

E-Commerce

Digital Communication (37 pages)

Introduction (3 pages)

Consumers' evolving brand expectations

Background: Digital advertising revenue decreasing

Social media advertising stalls, but TikTok provides dynamism

Privacy concerns in advertising raise alarm bells for digital marketers

Shift to interactive content in digital communication

Sanofi uses social media videos and TikTok influencers to raise Enterogermina's profile

Social media strategy (4 pages)

Fundamentals of social media engagement (1 page)

What makes a good TikTok / Instagram / Facebook campaign?

What makes a strong social media campaign? (1 page)

What are the key elements to include in a CHC brand's social media campaign? (1 page)

So what is most important for a CHC brand's social media campaign?

Social media is good for engagement and sales according to latest research (1 page)

New meta-analysis points to benefits of brands using social media for both engagement and sales

TikTok campaigns (8 pages)

Lumify Eye Dance challenge offers a fun and quirky challenge to raise the profile of its eye drops brand (1 page)

Playful TikTok campaign helps position Lumify more firmly as a beauty brand

K-Poop campaign from Dulcolax in S Korea raises awareness of constipation and the brand via humorous dance videos (1 page)

Dulcolax turns K-Pop into K-Poop with a hilarious dance challenge

Canesten's Vagina Academy campaign in Brazil helps to overcome issue of shame in holding back treatment rates (1 page)

Canesten's educational campaign removes the stigma surrounding VYI

Lactacyd's New Year, New You hashtag challenge is a TikTok hit, reflecting Sanofi's commitment to digital in SE Asia (1 page)

Lactacyd encourages a fresh start and tops the TikTok trending topics

Berocca's Get Supercharged at 2pm campaign in Vietnam utilised TikTok to extend positioning for daily use (1 page)

Berocca created a TikTok dance challenge positioning itself as a solution to the daily post-lunch slump

Durex challenges stereotype that penis size is what matters for great sex via educational rap video (1 page)

Durex engages Gen Z audience by embracing rap culture and sparking a conversation

Sanofi regularly makes creative use of TikTok for various promotional campaigns (1 page)

Dorflex Uno in Brazil makes history with 24-hour TikTok event

Sanofi spreads important message on cough etiquette during Covid pandemic

Bayer is one of the heaviest users of TikTok for promotional campaigns among CHC players (1 page)

Alka-Seltzer eases T-Pain of hangovers

Redoxon's TikTok campaign allows users to experience brand benefits virtually

Instagram campaigns (3 pages)

Midol's No Apologies and Real Reasons campaigns encourage period pain sufferers to embrace honesty (1 page)

Bayer used social media to reach a younger audience with its message about honesty

Zarbee's embraces Instagram and other social media apps to offer relevance and engage with trending topics (1 page)

Zarbee's fosters an online community via Instagram

La Roche Posay's Skin is More Than Skin campaign puts the focus on real people (1 page)

La Roche Posay embraces trend for unfiltered lives with images of real people

Facebook campaigns (1 page)

Bausch + Lomb looks to raise awareness of AMD with What Sight Inspires You campaign targeting FB users aged 50+ (1 page)

B+L raises profile of AMD among target audience for its PreserVision eye supplement

YouTube campaigns (2 pages)

ZZZQuil Natura in Italy harnesses YouTube to support limited-edition SKUs with humorous campaign (1 page)

ZzzQuil utilises YouTube videos to highlight the transformative power of sleep for younger users

Fabogestic's The Responsibility Dose delivers a counter-intuitive message for a pain reliever (1 page)

Brave campaign from analgesic brand Fabogestic suggests alternatives to medicated options

Twitter campaigns (1 page)

Arguably the least loved social media site for promotional purposes, but some CHC brands make strong use of Twitter (1 page)

Tums embraces Twitter to live-tweet questions during Superbowl

Elon Musk's takeover sees advertisers pause spending

Salonpas utilises Twitter and other platforms to promote one-day giveaways

Influencers (2 pages)

Choosing the right influencer to front a brand campaign can make all the difference in reaching a target audience (1 page)

Influencers can help reach a wide audience, with Gen Z particularly swayed

The deinfluencer movement

Clampdown on influencer endorsements in China

Goli Nutrition chooses its ambassadors carefully to maximise exposure and associate the brand with luxury, glamour and humour (1 page)

Goli Gummies taps into the huge fan base and positive attributes of its celebrity ambassadors

J&J's original digital-first campaign (2 pages)

Neutrogena Light Mask launch was J&J's first US digital-first campaign (2 pages)

Digital-first campaign for Neutrogena Light Therapy Acne Mask made use of YouTube and Snapchat

J&J takes inspiration from TikTok for new Band-Aid positioning

Interactive audio ads (1 page)

Berocca showcases how consumers can interact with digital ads to place orders and better inform themselves (1 page)

Actionable audio ad for Berocca Boost points to exciting future

Optimised websites for mobile (1 page)

Haleon meets the needs of Voltaren's target audience via website functionality (1 page)

Haleon's Voltaren offers accessible website for arthritis sufferers, including live chat and large buttons

Key arthritis-friendly features on voltarengel.com

Search engine optimisation (1 page)

How important is SEO for marketers and what are the implications of enhanced use of AI? (1 page)

SEO will remain important but the world of search may be about to change

Big Tech players are investing in AI search functionality

Impact of AI on search

In-stream advertising (1 page)

Unskippable pre-roll ads are most effective form of in-stream advertising according to latest research (1 page)

Fresh research points to the benefits of using unskippable pre-roll ads

Digital out-of-home advertising (1 page)

Solgar uses novel light-emitting billboards to boost the mood of UK city dwellers (1 page)

SAD lamps used in Solgar's one-day digital outdoor promotion

Misinformation (1 page)

CHC players need to be proactive in dispelling the misinformation that can spring up on social media around healthcare (1 page)

YouTube sows the seeds of misinformation on hayfever

J&J uses social media and influencers to spread helpful information in early stages of Covid pandemic

QR codes in CHC (3 pages)

QR codes offer benefits to consumers, marketers and regulators (3 page)

A word on O2O

Making use of QR codes

CHPA Foundation educates consumers about pain

Multiple advantages of QR codes for CHC industry highlighted by Sanofi

Shionogi at the forefront of utilising QR codes on its CHC brands

Other innovation combines QR code with glow-in-the-dark packaging

Concluding thoughts (2 pages)

What are the vital takeaways for CHC players looking to build effective digital communication campaigns? (2 pages)

Digital communication is an important aspect of any promotional campaign

So what are the key lessons to keep in mind for effective digital CHC communication?

Digital Health (66 page)

Adoption of digital technologies is redefining healthcare (1 page)

Health Apps (23 pages)

Numerous approaches exist, with regulations still catching up (3 pages)
Healthcare services and CHC marketers are increasingly turning to apps

Promotional apps – Lysol Germcast (1 page)

Promotional apps – Zyrtec Allergycast (1 page)

Always You brings behavioural change and gamification into consumer health (1 page)

Neuriva Brain Gym an example of a branded mental acuity app (1 page)

CoughTracker helps monitor and manage chronic cough, while Metamucil app offers insights into digestive health (1 page)

Reckitt uses apps to support several CHC brands including Enfamil (1 page)

Use of apps in the promotional space can be a challenging prospect (1 page)
Making successful use of apps for promotional purposes brings challenges

Germany and UK at the forefront of app regulation (1 page)
Regulation of the digital health market improving

No specific system of health app regulation in the USA (1 page)
The US FDA makes a clear distinction between medical devices and other wellness products
April 2022 saw the USA FDA set out a definition of “digital biomarker”

Other developments in health apps (1 page)
Rootd

Lumosity a key player in brain training apps (1 page)

Natural Cycles stands apart from competitors in fertility category (1 page)

Healthcare provider uses app to help smoking cessation, with highest impact in underserved populations (1 page)
2Morrow reaches underserved populations via health app

Apps for mindfulness and sleep (2 pages)

No.7 teams up with Clementine for companion app
Sleep Cycle offers “smart alarm clock” app

Top-rated health and wellness apps offer range of benefits (2 pages)

WebMD Symptom Checker
Asleep

Heart health and hypertension developments (1 page)

Japan’s health app market opened up by CureApp
Huma Therapeutics

Amazon committed to digital health and telemedicine (2 pages)

Amazon exploring applications of its home assistants in health
Alexa Health & Wellness became a full-featured suite of health apps

Super Apps (25 pages)

WeChat is China’s No.1 online mobile healthcare destination (1 page)

WeChat combines the functionality of multiple apps into one “super app”

WeChat in numbers (1 page)

Daily usage
Number of users
Demographics
WeChat for business
Mini-programme usage

WeChat Pay opened up the path for WeChat to become indispensable (1 page)

WeDoctor marks WeChat’s expansion into healthcare (1 page)

WeChat in healthcare
Verifiable medical professional provides assurance

WeChat’s healthcare-related functionality has impressive scope (1 page)

Booking doctor appointments
Ordering prescription drugs
Remote consultation
Electronic prescriptions
Health information

WeDoctor’s features and how they work (2 pages)

Doctor appointment booking & telehealth on WeChat

WeDoctor Health Mall offers access to OTC purchases (1 page)

WeChat offers health record management via its Public Services function (2 pages)

Personal Health Record Management

Chronic disease management from Tencent
Heart's Little Love (HuXinXiaoAi) platform

Tencent Medical Knowledge Bank provides health-related information (1 page)

JD Health features on WeChat, providing a healthcare platform and online pharmacy (1 page)

JD Health is available as a mini-programme on WeChat

AliHealth / Yilu offers another avenue for WeChat users to purchase healthcare products and book medical appointments (1 page)

AliHealth (or "Yilu") is another formidable contender on WeChat

JD Health vs AliHealth

Ping An Health becomes a mobile healthcare provider via collaboration with WeChat (1 page)

Ping An Health (previously Ping An Good Doctor) is now a leading healthcare provider

Ping An pilot trials One-Minute Clinic kiosks in China

Building a WeChat mini-programme e-Store (1 page)

How companies promote brands and generate sales on WeChat

CRM and data analysis

CHC players sell directly to consumers via their own company-branded WeChat e-Stores (1 page)

WeChat mini-programme e-Stores are used by CHC brands to engage directly with consumers

CHC players may set up multiple mini-programmes for different products in their portfolios (1 page)

Sunflower sets up multiple mini-programmes to engage with consumers

Bayer makes use of growing popularity of O2O channels and WeChat services to support Canesten in China (1 page)

Online-to-offline purchase options allow discreet convenient method to manage intimate health for women in China

Features of Canesten mini-programme on WeChat (1 page)

With super apps an emerging trend in Asia, Grab teams up with Ping An to offer one-stop healthcare on a mobile platform (1 page)

Grab moves into healthcare via tie-up with Ping An Health

Grab and Ping An team up with SoftBank for another mobile healthcare venture, GDT (1 page)

Good Doctor Technology

Telemedicine + e-Store

Good Doctor's features and how they work (1 page)

Doctor's Workbench offers a chat-based interface

Gojek is another emerging super app, offering a one-stop healthcare mobile platform (1 page)

Gojek offers its users online consultations and swift medicine delivery

Covid-19 pandemic boosted use of super apps (1 page)

Covid-19 lockdowns fostered growth for super apps in Asia

Can WeChat's success be replicated in other markets? (1 page)

WeChat's rapid take-up and that of other "super apps" in Asia is unlikely to be repeated in Western markets soon, but it is possible in the longer-term

Wearables (13 pages)

Latest technology offers new healthcare opportunities (1 page)

Wearables market has numerous potential benefits for consumer health

Wearables potentially a key tool for clinical trials (2 pages)

Smart devices and health tech help reach consumers underserved by existing healthcare services

OHealth H1

Smart clothing offers premium-priced health monitoring options, but currently a very niche sector (1 page)

AIQ Smart Clothing

Wearable X

Sensoria

Fitbit's acquisition by Google brings smartwatch integration (1 page)

Ubiquitous wearables brand Fitbit acquired by Google

Fitbit is at the forefront of heart health monitoring (1 page)

Google Pixel Watch makes use of Fitbit's technology (1 page)

Sounding a note of caution

Happy Ring claims to be "First wearable for the mind" (1 page)

Oura Smart Ring targets fashion-conscious consumers (1 page)

Developments in women's health wearables (2 pages)

Ava

Embr Wave

Evie Ring

Outlook and prospects (2 pages)

Wearables market has numerous potential benefits for consumer health

Gamified Health (5 pages)

Building engagement and compliance in healthcare (5 pages)

Gamification creates opportunities for consumers to build new health routines

Gamification in mental health and acuity is well developed in the consumer health space,

Leading CHC Players' Digital Strategies (15 pages)

Haleon (2 pages)

Haleon sees increased digital adspend as route to sustained growth (2 pages)

Johnson & Johnson (3 pages)

New digital technology and expansion in China major focuses for J&J (3 pages)

Bayer (2 pages)

Strategic collaborations and acquisitions boost Bayer's digital presence (2 pages)

Sanofi (2 pages)

French giant accelerates its digital transformation (2 pages)

Reckitt (2 pages)

Digital strategy draws heavily on lessons learned in China (2 pages)

Procter & Gamble (2 pages)

P&G focuses on digital innovation (2 pages)

China Resources Pharmaceutical (1 page)

Focused on strengthening positioning in e-Commerce (1 page)

Nestlé (inc. Nestlé Health Science) (1 page)

Nestlé has big digital plans (1 page)

e-Commerce (15 pages)

e-Commerce in numbers (2 pages)

Exploring the scope of the global internet and mail order channel according to DB6 (2 pages)

Internet & mail order channel growing rapidly ahead of wider CHC market

Chart: Global internet and mail order CHC sales 2017-21 (MSP, \$mn)

Chart: Global internet & mail order CHC sales by category 2021 (MSP, \$mn)

Chart: Global leading internet & mail order CHC markets 2021 (MSP, \$mn)

Global e-Commerce (7 pages)

Covid-19 pandemic accelerates development of the channel (7 pages)

E-Commerce continues to increase in importance for CHC players

Europe

Germany

France

Italy

UK

Poland

USA

Latin America

Brazil

Mexico

China

Japan

India

Australia

Indonesia

Thailand

e-Commerce Regulations (3 pages)

An overview of the main markets (3 pages)

USA

Canada

EU

Germany

France

Italy

UK

Spain

Poland

India

China

Japan

Australia

South Korea

Indonesia
Thailand
Brazil
Mexico

Distribution Partnerships (2 pages)

A flurry of recent activity in the field of rapid, on-demand delivery offers added convenience (2 pages)

Rapid delivery services provide convenient access to OTCs

Outlook (1 page)

e-Commerce forecast to continue strong growth, although sector will face some hurdles (1 page)

Online CHC sales may lose momentum but will remain pivotal to growth

Chart: Global internet & mail order 5 & 10 year forecast CHC sales by category 2026 & 2031 (MSP, \$mn)

Brand storefronts (28 pages)

Amazon (3 pages)

Branded storefronts on Amazon a key part of e-Commerce strategy for leading CHC players (3 pages)

Many advantages to having brand stores on Amazon

The Amazon Bestseller List is an important feature for promoting brands

Most leading companies have dedicated storefronts on Amazon for their leading brands

Hero Mighty Patch (2 pages)

Acne brand launched on Amazon becomes an internet sensation (2 pages)

India (3 pages)

VMS players making a play on Amazon in India, while Cipla launches new derma product via the platform (2 pages)

Australian VMS players see big potential online in India

Cipla launches new derma product via Amazon (1 page)

Feminine intimate care is thriving in the online channel in India

BioGaia (1 page)

Probiotics player increasing presence on Amazon (1 page)

Probiotics player BioGaia sees Amazon as an important part of its omnichannel strategy

Germany & UK (3 pages)

Key European markets for Amazon storefronts (3 pages)

Storefronts on Amazon are a key online outlet for leading CHC brands in Germany and UK

Reckitt (1 page)

Reckitt vaunts its partnership with Amazon (1 page)

Collaboration expands Reckitt's reach on Amazon

Smoking control (1 page)

NRT active on Amazon in Western Europe (1 page)

Mexico and the US Latino diaspora (2 pages)

Growing target market (2 pages)

CHC players have strong presence on Amazon in Mexico (and among Hispanics in USA)

SE Asia (7 pages)

Availability on Shopee and Lazada increasingly important to CHC players (7 pages)

Key among online retailers in SE Asia are Shopee and Lazada

Shopee a key sales channels for international CHC players

Alibaba-owned Lazada expanding in SE Asia

Tmall / Taobao (5 pages)

Chinese e-Commerce giant Alibaba offers platform for CHC brands to reach mass audience (5 pages)

Two major platforms dominate China's online marketplace for CHC brands

CHC Brand & Company Online Stores (19 pages)

Introduction (2 pages)

More CHC companies are launching their own online stores to take a share of the growing DTC market

Pros & cons of CHC players launching a dedicated online store

Nestlé (2 pages)

Nestlé sees DTC channels as key part of future strategy (2 pages)

Nestlé analyses the benefits of selling directly to consumers via its own online platforms

Haleon (2 pages)

Haleon aims to launch more online brand stores (2 pages)

Haleon expanding its DtC presence

India (5 pages)

More CHC players launching online stores in India (5 pages)

Indian heavyweights (and increasingly MNCs) investing in DtC platforms

Blackmores (1 page)

Australian longline VMS player invests more in its online store (1 page)

Blackmores looks to enhance share of revenues from online channel

Japan (3 pages)

CHC players increasingly adding OTCs for sale via their online stores (3 pages)

Key Japanese CHC players highlight the importance of their DtC operations

Hypera Pharma (1 page)

Brazilian giant launches e-Commerce platform (1 page)

Europe (3 pages)

Online stores less common for major CHC players in the region (3 pages)

Fewer consumer health players & brands sell directly to consumers online in Europe

Digitally Native Brands (16 pages)

Launching a brand online offers advantages for CHC brands but there are limitations (1 page)

While there are several CHC success stories, launching digitally native brands is not an easy option

Nourished personalised supplement range embraces its online-only status (1 page)

Personalisation is a key selling point for Nourished vitamins

Hilma is a VMS range capitalising on trends such as “clean-label” goods and sustainability (1 page)

Proactiv is an established player in skincare regimen and subscription services (1 page)

Supplement brand Zooki offers clear point of difference and uses online and offline promotion effectively (1 page)

Thorne Research differentiates via at-home tests that provide meaningful insights for a personalised plan (1 page)

Subscriptions (3 pages)

An established method of building brand loyalty (1 page)

Subscription sales models relatively established in consumer health

Personalised beauty products increasingly popular (2 pages)

Birchbox

Skin And Me

Sephora Beauty Box

Dermatica

FaceTheory

Personalised Health (3 pages)

Developments in personalised supplements (1 page)

Bioniq GO

GenoVit

Evy shakes up feminine intimate care (1 page)

Awesome Woman brings personalisation to FemTech services (1 page)

Awesome Woman

Regimen (4 pages)

Developing CHC brands into complete healthcare solutions (2 pages)

Ultra Immune

Vedix

Olly is an agile and trendy VMS range moving into the supplement regimen segment (1 page)

Haleon explores possibility of drug-free pain management regimen (1 page)