

# Digital Marketing & e-Commerce

## Tapping the Potential of Online Sales and Digital Promotion in Consumer Healthcare

(264 Pages)

Definitions & methodology (6 pages)

### Introduction (3 pages)

The rise of digital – shifting the marketing landscape and reconfiguring sales avenues  
Rise of smartphones: implications for the consumer health industry  
e-Commerce is the fastest-growing sales channel in consumer healthcare

### Digital Marketing (75 pages)

#### Overview (5 pages)

Introduction

*Share of global adspend by medium 2018-21 (%)*

Reasons for the healthcare industry to join the digital revolution

Benefits of digital marketing to CHC players

#### The Importance of Digital – Nicholas Hall's View (2 pages)

Nicholas Hall's views on the Digital Revolution

#### GSK shows commitment to digital (1 page)

GSK ramps up its online adspend as it delivers "higher return than TV"

#### Dissenting voices (1 page)

P&G has moved away from "spray & pray" approach to digital advertising

#### Social media (2 pages)

Social media strategy is a central pillar of online success

TikTok brings opportunities for brands to innovate

#### Mucinex case study (2 pages)

Mucinex becomes first OTC brand to partner with TikTok

#### Advil case study (2 pages)

Advil makes use of Spotify in Mexico to target listeners in daily moments

#### SmartyPants case study (2 pages)

Vitamin brand SmartyPants builds trust via an active online presence

#### Tylenol case study (2 pages)

Tylenol's award-winning #HowWeCare campaign puts brand's core identity at its heart

*Emergen-C case study (2 pages)*

"Emerge and See" campaign builds a strong brand identity across wide range of media

*Centrum case study (1 page)*

Centrum has an established multi-platform digital marketing presence in China

*Consumer influencers (2 pages)*

Consumer influencers can play important role in health promotion  
Bloggers beware! Sounding a note of caution to influencers in the healthcare field

*C&C by Clean & Clear case study (2 pages)*

Johnson & Johnson turns to influencers and start-up model to modernise Clean & Clear

*Olly case study (2 pages)*

Olly builds brands via online channel before moving into retail stores

*Paid Search (1 page)*

Search Engine Marketing has numerous benefits

*Clearblue case study (2 pages)*

Clearblue rises to the challenge of getting SEM right

*BabyCenter case study (1 page)*

J&J's BabyCenter offers educational content to forge relationships and earn trust

*Direct to consumer or third party seller? (2 pages)*

The type of product being sold online is key to determining DtC or third party strategy

*Kindra case study (1 page)*

P&G Ventures launches new direct-to-consumer brand into menopause category

*Proactiv case study (2 pages)*

Proactiv dominates online acne remedies sales via direct selling strategy

*Swisse case study (2 pages)*

Cross-border success story utilises social media e-Commerce strategy in its two main markets

*Viewability (1 page)*

Viewability may NOT be key to ad effectiveness

Apps (2 pages)

Few successful apps to support consumer health brands

Digital strategies of the OTC Top 10 (29 pages)

GSK / Pfizer (7 pages)

GSK

Strategic partnerships and use of Big Data key

Pfizer

J&J (3 pages)

Sanofi (4 pages)

Sanofi investing in diverse digital technologies

Digital health strategy in China

Bayer (3 pages)

RB (2 pages)

P&G (4 pages)

Taisho (2 pages)

Takeda (1 page)

Novartis (1 page)

China Resources 999 (2 pages)

Key Lessons (4 pages)

Digital marketing watchpoints for consumer health players

**e-Commerce (130 pages)**

Overview (3 pages)

Overview

e-Commerce huge and growing fast – but who will own the consumer health space?

Factors driving e-Commerce expansion in consumer healthcare

Disrupting factors

Types of e-Commerce (4 pages)

Wide variety of options for consumers to purchase OTCs online

Virtual assistants (1 page)

Voice-activated virtual assistants will grow in prominence

Conversational commerce / Chatbots (1 page)

Texting for online purchases / use of chatbots is facilitating e-Commerce

Global consumer health market (3 pages)

*Global all channels CHC sales 2014-18, split by retail channel*

e-Commerce posting strong growth globally

*Regional share of internet & mail order 2018 sales*

*Leading internet & mail order markets 2018*

e-Commerce markets (34 pages)

China (8 pages)

Cross-border fuels China growth

*China leading internet & mail order brands 2018*

Japan (2 pages)

Japan e-Commerce growing steadily

*Japan leading internet & mail order brands 2018*

Australia (3 pages)

Australian e-Commerce market becoming more competitive

India (4 pages)

Indian e-Commerce market developing rapidly despite lack of regulation

USA (6 pages)

US e-Commerce market flourishing

*USA leading internet & mail order brands 2018*

Multicultural consumers in the USA – Hispanic consumers more likely to shop online

Germany (2 pages)

e-Commerce popular with Germans

*Germany leading internet & mail order brands 2018*

UK (2 pages)

UK e-Commerce continues to grow well

*UK leading internet & mail order brands 2018*

Rest of Europe (3 pages)

Rest of Europe's key markets

Brazil (2 pages)

Brazil a giant in Latin American e-Commerce

Mexico (2 pages)

Mexico's e-Commerce environment held back by social and regulatory issues

Leading marketers (1 page)

*Global leading internet & mail order marketers 2018*

Leading brands (1 page)

*Global leading internet & mail order brands 2018*

Leading e-Commerce brands (22 pages)

Puritan's Pride (2 pages)

US-made VMS range appealing to Chinese consumers

*Puritan's Pride internet & mail order sales 2014-18*

Swanson (2 pages)

Leading US online VMS range with strong heritage

*Swanson internet & mail order sales 2014-18*

Swisse (5 pages)

Australian VMS brand with huge online presence in China

*Swisse internet & mail order sales 2014-18*

Blackmores (3 pages)

Blackmores an Australian online hit in China

*Blackmores internet & mail order sales 2014-18*

Fancl (2 pages)

Fancl makes digital an important part of strategy

*Fancl internet & mail order sales 2014-18*

Blueberry Eye (2 pages)

Blueberry Eye moving to digital in Japan

*Blueberry Eye internet & mail order sales 2014-18*

By-Health (2 pages)

Chinese VMS range posting strong growth online

*By-Health internet & mail order sales 2014-18*

Healthy Directions (2 pages)

Online US VMS range with strong ethical positioning

*Healthy Directions internet & mail order sales 2014-18*

Kobayashi (2 pages)

Japanese brand leveraging popularity in China

*Kobayashi internet & mail order sales 2014-18*

Direct-to-consumer brands (5 pages)

Direct-to-consumer selling an increasingly prominent channel

Ritual

Hims  
Goop  
Elysium Health

*e-Commerce regulations (21 pages)*

USA (2 pages)

OTCs freely available online in USA  
*Availability of medicine classes in USA*

Japan (2 pages)

Japan has highly regulated system for online medicine sales  
*Availability of medicine classes in Japan*

China (2 pages)

Legal framework for online medicine sales in China in flux  
*Availability of medicine classes in China*

India (3 pages)

Online medicines sales framework takes shape, but confusion still reigns  
*Availability of medicine classes in India*

Australia (1 page)

Online sales well regulated in Australia  
*Availability of medicine classes in Australia*

Germany (1 page)

Germany opening up to online sale  
*Availability of medicine classes in Germany*

UK (1 page)

Liberal rules surrounding online medicine sale in UK  
*Availability of medicine classes in UK*

France (2 pages)

France slowly becoming more open to online medicine sale  
*Availability of medicine classes in France*

Italy (1 page)

OTCs now officially permitted for online sale in Italy  
*Availability of medicine classes in Italy*

Spain (1 page)

Online medicines sales formalised in Spain in 2013  
*Availability of medicine classes in Spain*

Poland (1 page)

Poland has fairly relaxed laws surrounding online medicine sale  
*Availability of medicine classes in Poland*

Russia (1 page)

Russia to officially allow online sale?  
*Availability of medicine classes in Russia*

Brazil (1 page)

Strict rules on online sale in Brazil  
*Availability of medicine classes in Brazil*

Mexico (1 page)

Lack of regulation creates grey area in Mexico  
*Availability of medicine classes in Mexico*

Advertising (1 page)

Regulation of online advertising liberal in most countries

Retailer profiles (15 pages)

Flipkart (3 pages)

77% of Flipkart acquired by Walmart in 2018, with PhonePe payment system a desirable asset  
Flipkart expands its business activities 2018-19

Alibaba Group (4 pages)

*Alibaba Group Structure*  
AliHealth  
Alibaba's "New Retail" revolution

Tmall (3 pages)

Tmall increasingly attractive entry point into China for multinational OTCs and pharmacies

Kaola (2 pages)

Amazon (3 pages)

OTC brands on Amazon (19 pages)

Amazon's retail environment offers opportunities and challenges for brand building

Advil (3 pages)

Facts & figures  
*Advil 2-count (50-pack)*  
Promotional imagery  
Manufacturer information  
User-provided content

## Pricing

### Little Remedies (4 pages)

*Little Remedies Infant Fever & Pain Reliever (Natural Grape Flavour 2fl oz)*

*Little Remedies Fast Acting Gripe Water*

*Little Remedies Saline Spray & Drops*

Facts & figures

Fast Acting Gripe Water

Saline Spray & Drops

Infant Fever & Pain Reliever

### Mucinex (3 pages)

Facts & figures

*Mucinex Maximum Strength 42-count*

Promotional imagery & video

Manufacturer information

User-provided content

### Sea-Band (2 pages)

Facts & figures

*Sea-Band*

Promotional imagery & video

Manufacturer information

User-provided content

### Dulcolax (2 pages)

Facts & figures

*Dulcolax*

Promotional imagery

Manufacturer information

### Aveeno (3 pages)

Facts & figures

*Aveeno Eczema Therapy Moisturizing Cream*

Promotional imagery & videos

Manufacturer information

User-provided content

## **e-Pharmacy (35 pages)**

### Overview (2 pages)

e-Pharmacy bridges digital retail and healthcare provision

Digital health revolution improves consumers' knowledge and access to healthcare

### Regulatory overview of key markets (4 pages)

North America

Western Europe



French pharmacies embracing digital opportunities  
Lack of unified telehealth regulation in EU

*Snapshot of digital health in the USA (4 pages)*

US pharmacies at forefront of telemedicine and digital health  
Key learnings from the US e-Pharmacy market

*Walmart (3 pages)*

By working with Jet and Parcel, Walmart enters same-day delivery channel  
Doctor on Demand / RB partnership brings Walmart into telemedicine  
Walmart increases investment in digital health 2018-19

*Amazon (1 page)*

Amazon's acquisition of Pillpack marks move towards next generation of pharmacies

*Snapshot of digital health in the UK (4 pages)*

Digital health in the UK  
NHS Direct a key point of contact in UK digital health channel  
NHS partners with Amazon to use Alexa services

*Boots Online (1 page)*

Boots pharmacies acquire HCP-focused tech company to improve digital infrastructure

*UWell (1 page)*

UWell service helps Italian consumers manage their health online

*e-Health services in China (4 pages)*

Babytree, in association with Wyeth Nutrition, brings together e-Health and e-Commerce  
Ping An Healthcare and Technology Company  
Merck enters digital health partnership with Tencent in 2019

*Other partnerships in Asia (1 page)*

Bayer partners with online health platform Yaoshibang in 2019  
Wyeth Nutrition offers S-MAMA Club in Malaysia

*Kimia Farma (2 pages)*

Kimia Farma's MEDIV marks healthcare specialist's move into e-Commerce services

*Medlife (1 page)*

Medlife builds strong e-Health presence in India via M&A

*a:care (1 page)*

Abbott rolls out a:care in India to provide gamified health advice

*Other e-Health activity in India (2 pages)*

Netmeds acquires KiViHealth  
GOQii an emerging presence in Indian e-Health  
Hello Health present across SE Asia, including India via Hello Swasthya

*Australia's "digital transformation" (3 pages)*

Growing interest in digital health and pharmacy services in Australia  
Sigma partners with Doctors on Demand  
Pharmacy Guild of Australia offers MyPharmacyLink app as part of digital pharmacy services  
MedAdvisor brings mobile health into medication management

*Outlook (1 page)*

The digital health revolution will offer numerous opportunities for pharmacists and retailers

**Conclusion (9 pages)**

*Forecasts for e-Commerce (3 pages)*

*Global all channels forecast CHC sales 2023-28, split by retail channel*  
*Internet & mail order forecast sales 2023-28*

*Key lessons & opportunities (6 pages)*

e-Commerce will grow in importance for consumer healthcare players  
Digital marketing should form part of a holistic integrated promotional strategy