

# WOW! Brands 2023

## Case Studies of the Brightest & Best Consumer Health Brands (204 Pages)

Definitions & methodology (2 pages)

### Executive Summary (5 pages)

What is a WOW! Brand? (1 page)

Defining a WOW! Brand

15 profiled WOW! Brands (4 pages)

United in success, but for many different reasons

*Chart: Featured WOW! Brands all channels sales 2022 (MSP, \$mn)*

### CeraVe (12 pages)

Brand Story (1 page)

Internationally-successful personal care brand has thrived under sequence of owners

*Chart: Brand Development Timeline*

Sales Performance (1 page)

Rapid growth under L'Oréal's stewardship

*Chart: CeraVe sales by channel 2018-22 (MSP, \$mn)*

*Chart: CeraVe store sales by subcategory 2022 (MSP, \$mn)*

Geographic Analysis (1 page)

Geographic reach is strongest in USA but continually expanding

*Chart: CeraVe all channels sales by market 2022 (MSP, \$mn)*

NPD & Innovation (3 pages)

High level of NPD activity builds on core brand identity

Marketing Highlights (2 pages)

Standout formulation and HCP recommendation key claims

#21DaysofSPF campaign highlights sun protection presentations

Digital Strategy (2 pages)

Social media marketing allows L'Oréal to reach younger audiences

E-commerce (1 page)

Use of diverse local e-commerce channels aids international presence

Prospects & Opportunities (1 page)

Opportunities to build digital presence and international portfolio

## **Dettol (12 pages)**

### Brand Story (1 page)

90-year heritage of expertise in health & hygiene

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

NPD and professional partnerships contribute to high sales

*Chart: Dettol sales by channel 2018-22 (MSP, \$mn)*

*Chart: Dettol store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (1 page)

Asia a critical region for Dettol

*Chart: Dettol all channels sales by market 2022 (MSP, \$mn)*

*Chart: Dettol all channels sales by region 2022 (MSP, \$mn)*

### NPD & Innovation (2 pages)

Brand extends across personal hygiene and home cleaning

### Marketing Highlights (4 pages)

Education campaigns central, particularly in Indian Subcontinent

### Digital Strategy / E-commerce (2 pages)

Strong e-commerce presence in Asia

### Prospects & Opportunities (1 page)

While opportunities for geographic expansion are limited by existing scale, future is bright for Dettol

## **Dulcolax (12 pages)**

### Brand Story (1 page)

Sanofi takes global laxative franchise Dulcolax to new heights

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Covid-19 provides big boost to Dulcolax

*Chart: Dulcolax sales by channel 2018-22 (MSP, \$mn)*

*Chart: Dulcolax store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (2 pages)

Dulcolax enjoys strong global coverage

*Chart: Dulcolax all channels sales by market 2022 (MSP, \$mn)*

### NPD & Innovation (2 pages)

Focus on extending beyond core bisacodyl presentations

### Marketing Highlights (2 pages)

Global message and campaign themes characterise marketing

### Digital Strategy (2 pages)

Memorable digital campaigns boost brand's presence

### E-commerce (1 page)

E-commerce small but growing asset to Dulcolax

*Chart: Dulcolax internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Further line-up diversification for Dulcolax?

## **Garden of Life (14 pages)**

### Brand Story (1 page)

Nestlé picks up on sustainability trend in acquisition of Garden of Life

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Huge sales growth since 2018

*Chart: Garden of Life sales by channel 2018-22 (MSP, \$mn)*

*Chart: Garden of Life store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (2 pages)

Focus is on domestic market, although brand is starting to expand globally

### NPD & Innovation (4 pages)

Frequent NPD targets on-trend niches

### Marketing Highlights (2 pages)

Marketing mixes humour and seriousness about sustainability

### Digital Strategy (2 pages)

Endorsers and influencers play a big role

### E-commerce (1 page)

Garden of Life an e-commerce star

*Chart: Garden of Life internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Garden of Life confident it can continue to ride the wave of the sustainability trend

## **Lumify (10 pages)**

### Brand Story (1 page)

Beauty-focused eye care brand takes US market by storm

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Genuinely new offering / ingredient brings sales success

*Chart: Lumify sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (1 page)

Focus is on domestic market, although brand is starting to expand globally

### NPD & Innovation (1 page)

NPD looks to adjacent eye products with cosmetic focus, plus future allergy option

### Marketing Highlights (2 pages)

TV ads and coverage in beauty magazines helped build awareness of the brand

### Digital Strategy (2 pages)

Social media and engaging website create “buzz” and build a user community

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

### E-commerce (1 page)

Lumify generates sizeable and dynamic online revenues

*Chart: Lumify internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

A bright future for this trend-setting eye-brightening brand

## **Mucinex (10 pages)**

### Brand Story (1 page)

Novel cough remedy thrives under Reckitt

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Blockbuster recovery from pandemic thanks to NPD

*Chart: Mucinex sales by channel 2018-22 (MSP, \$mn)*

*Chart: Mucinex store sales by subcategory 2022 (MSP, \$mn)*

### NPD & Innovation (3 pages)

High levels of launch activity sustained since 2014

### Marketing Highlights (2 pages)

Mr Mucus mascot at the heart of marketing

### Digital Strategy (1 page)

TikTok has been a key platform for Mucinex marketing campaigns

### E-commerce (1 page)

Strong presence on Amazon and rapidly-growing online sales

*Chart: Mucinex internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Bold advertising strategy and adaptation to market trends will drive growth

## **Natrol (14 pages)**

### Brand Story (1 page)

US No.1 drug-free sleep aid brand

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Strong growth sees Natrol climb to No.1 in US sleep aids

*Chart: Natrol sales by channel 2018-22 (MSP, \$mn)*

*Chart: Natrol store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (1 page)

USA: generates over 95% of brand topline sales

Russia: minor presence via partner Level 99

International expansion via partners

*Chart: Natrol all channels sales by market 2022 (MSP, \$mn)*

### NPD & Innovation (5 pages)

Longline VMS range found most success in herbal & natural sleep aids space, but stretches beyond

Natrol Melatonin sleep range

Natrol Cognium range for brain health

Scientific backing key

### Marketing Highlights (3 pages)

100% drug-free natural remedy is an important brand value

2016's Sleep Owned campaign

2018's Get Your Hour Back campaign

2023's Back on Track campaign

### Digital Strategy (1 page)

Social media became part of Natrol strategy in 2018

### E-commerce (1 page)

Use of diverse local e-commerce channels aids international presence

Improvements needed on SEO

*Chart: Natrol internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Natrol may widen its reach beyond US and / or look to expand its portfolio

Natrol Cognium could expand to target children and young adults

## **Neurobion (13 pages)**

### Brand Story (1 page)

Neurobion, the world's "Nerve Care" expert brand

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Global No.2 vitamin B brand outpaces the market

Systemic analgesic Dolo-Neurobi3n only available in Mexico and Philippines

*Chart: Neurobion sales by channel 2018-22 (MSP, \$mn)*

*Chart: Neurobion store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (2 pages)

Mexico is Neurobion's No.1 market thanks to the popularity of analgesic option

India receives regular A+P investment

*Chart: Neurobion all channels sales by market 2022 (MSP, \$mn)*

Nervive: Neurobion's sister brand in the USA

*Chart: Nervive sales by channel 2018-22 (MSP, \$mn)*

*Chart: Nervive store sales by subcategory 2022 (MSP, \$mn)*

### NPD & Innovation (2 pages)

Broad-spectrum vitamin B supplement positioned as neurotropic vitamin

Dolo-Neurobi3n most popular presentation in Mexico

Nervive range expanded significantly in USA

### Marketing Highlights (4 pages)

Building science-related trust

Campaigns across Asian markets amplify Neurobion's health message

P&G collaborates with HCPs to raise neuropathy health in India

P&G leveraged Neurobion's heritage to give Nervive a strong start in the USA

### Digital Strategy / E-commerce (2 pages)

Digital campaigns used sparingly in Asia

Nervive enjoys success via online channel, while Neurobion may be missing out

*Chart: Nervive internet & mail order sales 2018-22 (MSP, \$mn)*

Nervive website directs customers to retailer websites

Amazon's product comparison table aids selection

### Prospects & Opportunities (1 page)

Neurobion will capitalise further on its strong heritage and has scope to expand its currently limited portfolio

Nervive can build on strong start with new options

## **Olly (14 pages)**

### Brand Story (2 pages)

Olly takes US supplements market by storm

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Strong growth sees Olly shoot up the US brand rankings

*Chart: Olly sales by channel 2018-22 (MSP, \$mn)*

*Chart: Olly store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (1 page)

USA main market, but cautious international expansion began in 2020

### NPD & Innovation (4 pages)

Olly adopts a considered approach to line extension

### Marketing Highlights (3 pages)

Consumer promotion is bold, aimed at younger women

### Digital Strategy (1 page)

Social media big part of Olly strategy

### E-commerce (1 page)

E-commerce important (but secondary) presence for Olly

*Chart: Olly internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Olly to position itself as an essential companion in Millennials' health & wellbeing journey

## **Omni-Biotic (11 pages)**

### Brand Story (1 page)

Probiotics specialist AllergoSan builds successful brand with scientific heritage

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Omni-Biotic rocketed up probiotics rankings

*Chart: Omni-Biotic sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (1 page)

Germany and Austria are the dominant markets, but brand is looking to expand presence elsewhere in Europe (and USA)

*Chart: Omni-Biotic all channels sales by market 2022 (MSP, \$mn)*

### NPD & Innovation (3 pages)

Wide but focused range of probiotics for most-relevant health concerns

### Marketing Highlights (2 pages)

Marketing traditionally HCP-focused, but increasingly aimed at consumers

### Digital Strategy (1 page)

Brand is increasing its digital presence globally

### E-commerce (1 page)

Comprehensive e-commerce coverage in Germany

*Chart: Omni-Biotic internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

AllergoSan will continue its studies into the potential of probiotics

## **Ritual (8 pages)**

### Brand Story (1 page)

Fast-growing, sustainable women's health supplement range

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Rapid growth driven by effective e-commerce strategy

*Chart: Ritual sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (1 page)

Limited geographic reach but growing offline presence in USA

### NPD & Innovation (2 pages)

Multivitamins at core of Ritual's portfolio

### Marketing Highlights / Digital Strategy (1 page)

Transparency central to brand's marketing image

### Digital Strategy / E-commerce (1 page)

Online presence focused on building strong reputation

### Prospects & Opportunities (1 page)

Bright future and high potential for portfolio and geographic expansion

## **Thorne (11 pages)**

### Brand Story (1 page)

A successful transition from practitioner channel to CHC

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Rapid growth since launch of consumer health tests

*Chart: Thorne sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (2 pages)

USA a key market, but growing presence elsewhere

### NPD & Innovation (2 pages)

Continued NPD adopts latest innovations in supplements and testing

### Marketing Highlights / Digital Strategy (2 pages)

Social media and brand ambassadors key to marketing

### Digital Strategy / E-commerce (2 pages)

Practitioner heritage converted into digitally-native DTC brand

### Prospects & Opportunities (1 page)

Growth driven by strong brand identity and commitment to expansion

## **Tums (12 pages)**

### Brand Story (1 page)

Tums is a long-time fixture of the US CHC market

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Simple, speed-of-action claims push Tums to the top

*Chart: Tums sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (1 page)

Tums' strength is in Americas, with limited presence beyond

*Chart: Tums all channels sales by market 2022 (MSP, \$mn)*

### NPD & Innovation (2 pages)

Tums expands into adjacent segments

### Marketing Highlights (2 pages)

Focus evolves from fighting food to loving food

### Digital Strategy (3 pages)

Tums makes waves on social media with #TUMSworthy

### E-commerce (1 page)

Tums has basic e-commerce presence for a big brand

*Chart: Tums internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Tums' most likely priority is cementing its position as the US's No.1 antacid brand

## **Xyzal (7 pages)**

### Brand Story (1 page)

Innovative switch stands out in crowded category

*Chart: Brand Development Timeline*

### Sales Performance (1 page)

Rapid growth sustained 2018-21

*Chart: Xyzal sales by channel 2018-22 (MSP, \$mn)*

### Geographic Analysis (1 page)

Lack of promotion in European markets limits sales

*Chart: Xyzal all channels sales by market 2022 (MSP, \$mn)*

### Marketing Highlights (1 page)

Nigel the Owl mascot communicates brand's unique selling points

### Digital Strategy (1 page)

Social media presence mirrors wider marketing strategy

### E-commerce (1 page)

Strong e-commerce presence in core US market, but visibility low

*Chart: Xyzal internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Geographic expansion most likely route to growth

## **ZzzQuil (15 pages)**

### Brand Story (2 pages)

ZzzQuil transformed mindset from sleep medication to sleep enjoyment

*Chart: Brand Development Timeline*

P&G saw opportunity in consumer anxiety about dangers of misusing OTC analgesics as sleep aids

"Not for colds. Not for pain. Just for sleep."

### Sales Performance (1 page)

Remains No.1 globally despite losing lead in core US market

*Chart: ZzzQuil sales by channel 2018-22 (MSP, \$mn)*

*Chart: ZzzQuil store sales by subcategory 2022 (MSP, \$mn)*

### Geographic Analysis (3 pages)

Core US market remains key focus even as brand expanded to new markets since 2019

*Chart: ZzzQuil all channels sales by market 2022 (MSP, \$mn)*

Success in Canada despite more limited range

ZzzQuil Natura No. 1 in Italy

Wick ZzzQuil Gute Nacht a novel launch in Germany

Spain: Strong growth thanks to frequent promotion

Poland: ZzzQuil Natura makes a promising start since 2020 rollout

### NPD & Innovation (3 pages)

In core US market ZzzQuil has expanded via intelligent line extension

Pure Zzqs range enjoys considerable line extension, particularly in USA

ZzzQuil Natura rolled out across Europe

Other brand developments

### Marketing Highlights (3 pages)

Vicks strong brand heritage inspires consumer confidence

ZzzQuil's highly innovative and integrated marketing campaign at launch

### Digital Strategy (1 page)

Digital an important strategy to engage younger audience

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

### E-commerce (1 page)

Use of diverse local e-commerce channels aids international presence

*Chart: ZzzQuil internet & mail order sales 2018-22 (MSP, \$mn)*

### Prospects & Opportunities (1 page)

Little obvious room for range expansion, but additional benefits an option

Potential geographical expansion opportunities