Key Findings

- 47% of OTC brands do not have an Instagram account due to visual and regulatory limitations, but nondrug brands like Zarbee's Naturals are winning consumer mindshare with natural claims.
- Indie brands* in personal care are scaling up paid media like desktop display, growing their share of impressions against enterprise brands from 3.2% during March 2017 to February 2018 to 10.9% in the following year. Newer upstarts like Quip are finding efficiencies by cross-pollinating creatives between social media and display ads.
- 50% of enterprises** served multibrand display ads featuring a wide assortment of products in their top 10 desktop display ads by share of impressions in 2019. Most of them also drive consumers to custom retailer landing pages in coordination with the creative.

Key Recommendations:

- Offset visual or regulatory limitations in social media marketing, especially in OTC categories, by doubling down on more traditional, scaled digital marketing channels like search through 101 educational content for causes, symptoms and treatments.
- Brands must maintain their visual brand identity and scale costs through consistent imagery and messaging across new digital marketing channels, efficiently repurposing creatives when applicable.
- Best-in-class brands evolve their media mix to orient customers around enterprise offerings and get tactical with custom landing pages to promote complementary assortments and encourage basket building.

* For the purposes of this analysis, an Index brand is classified as an indie brand if it is the only brand representing its parent company in the 2019 Home Care or Personal Care Digital IQ Index reports.

** Five or more brands in the Personal Care Digital IQ Index.

Executive Summary

With the broad spectrum of products covered in the personal care space, there is no one-size-fits-all social media strategy for enterprises to employ. The nuances and challenges in each product category are unique in nature and have to be strategically evaluated against platform merits and subsequently aligned with media objectives. Across enterprises, Unilever leads visual-first platforms like Instagram and Facebook with an average of 3.6 and 3.0, respectively, on a 5-point scale. Unilever is boosted by its digitally native acquisitions including Dollar Shave Club, Seventh Generation and Shea Moisture.1 GlaxoSmithKline, on the other hand, trails on Instagram with a portfolio comprised primarily of over-the-counter (OTC) brands.

Brands in OTC drugs, sexual well-being, smoking cessation and related categories are often unable to mimic successful content types such as product package shots, in-context images or user-generated content (UGC) used by brands in skin care and baby care. Due to regulatory guidelines, they must present both risks and benefits for balanced messaging, making creative real estate scarce and social media an uphill battle.2,3 In such cases, brands should be strategic in leveraging social media through educational or Corporate Social Responsibility (CSR) initiatives like Band-Aid’s Digital Detox campaign on Instagram, Nicorette’s New Year’s resolution campaign on YouTube or Trojan’s CSR campaigns on Facebook. Alternatively, some brands, like Vicks from P&G, eschew social media investment in favor of the more traditional search strategy. Vicks optimizes its site content for top search topics such as causes, symptoms and treatments. Rather than prioritizing social media platforms myopically, brands should be holistic about their media planning and content strategy to maximize payoff.

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2. “Big Pharma and Social Media: How to Avoid Trouble With the FDA,” Forbes.

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