



The Consumer Health Brand Strategy Evolution 2024

May 15th 2024

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Speakers



Matt Stewart

*Global Marketing
Manager, IQVIA
Consumer Health*



Amit Shukla

*Vice President, Global
Consulting Services,
IQVIA Consumer
Health*



Dr Volker Spitzer

*Vice President, Global
R&D/RWE Services
and Thought
Leadership, IQVIA
Consumer Health*



Carrie Evans

*Director of GTM
Strategy & Offering
Development, IQVIA*



David Gray

*Head of Healthcare
Brand Strategy; Ceuta
Group, an IQVIA
business*

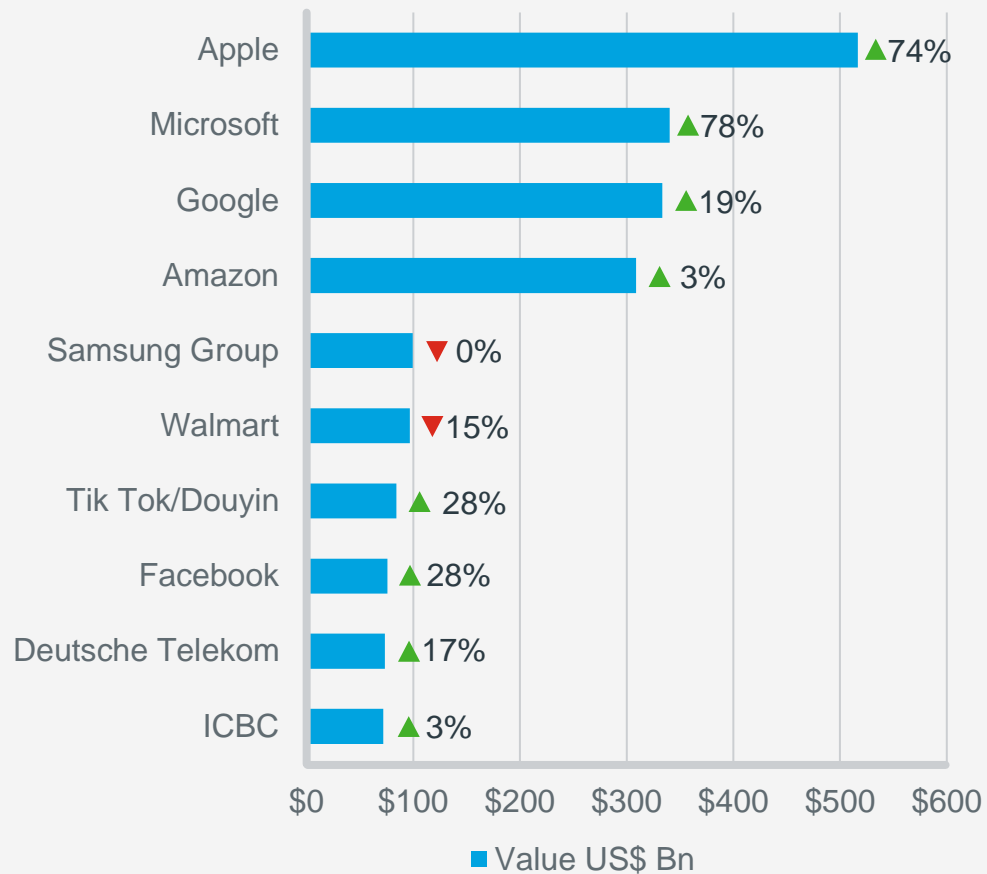


Brands and the changing consumer landscape

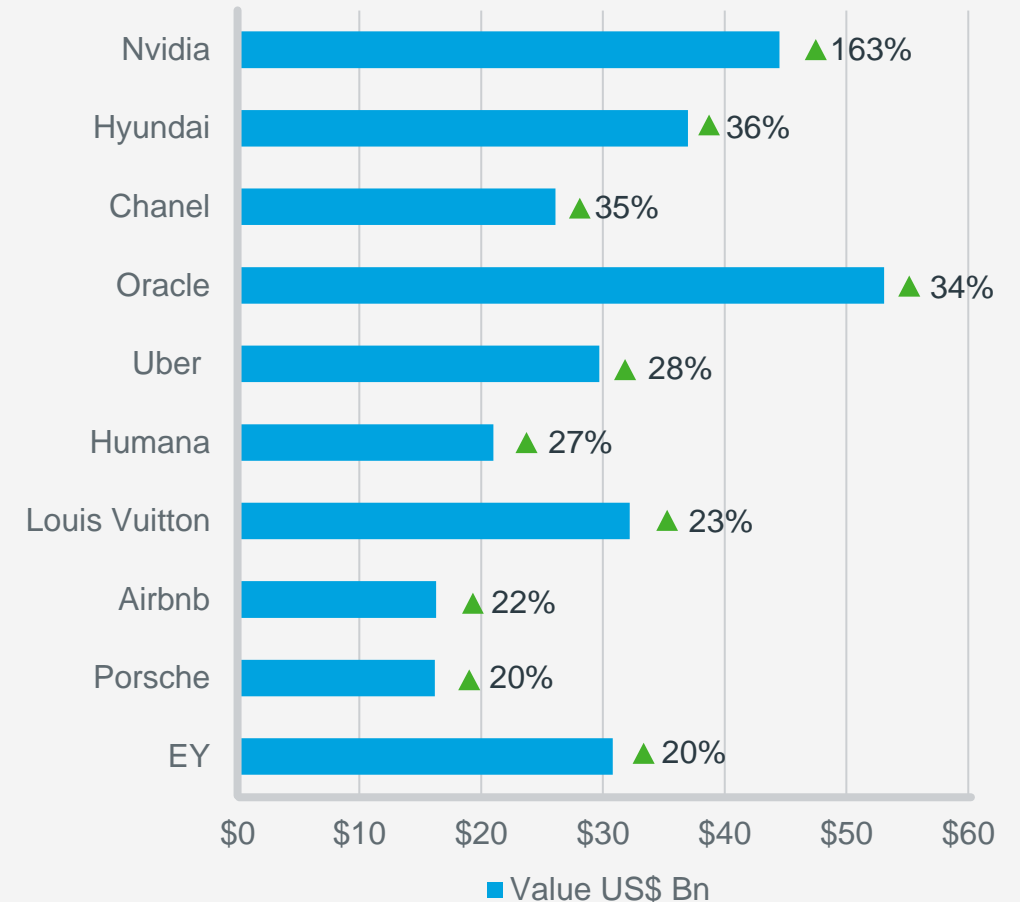


Brands are woven into the fabric of all of our lives

Growth of Top 10 Most Valuable Brands

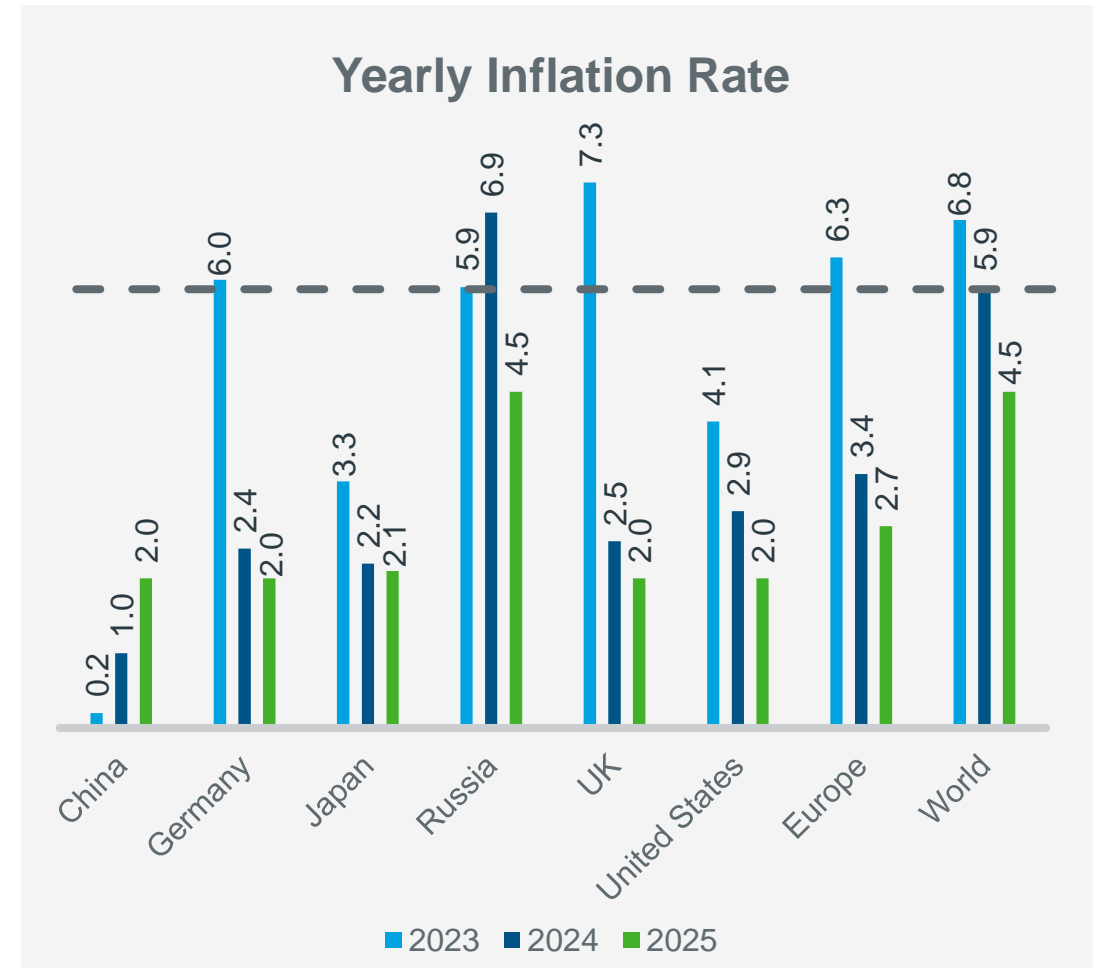
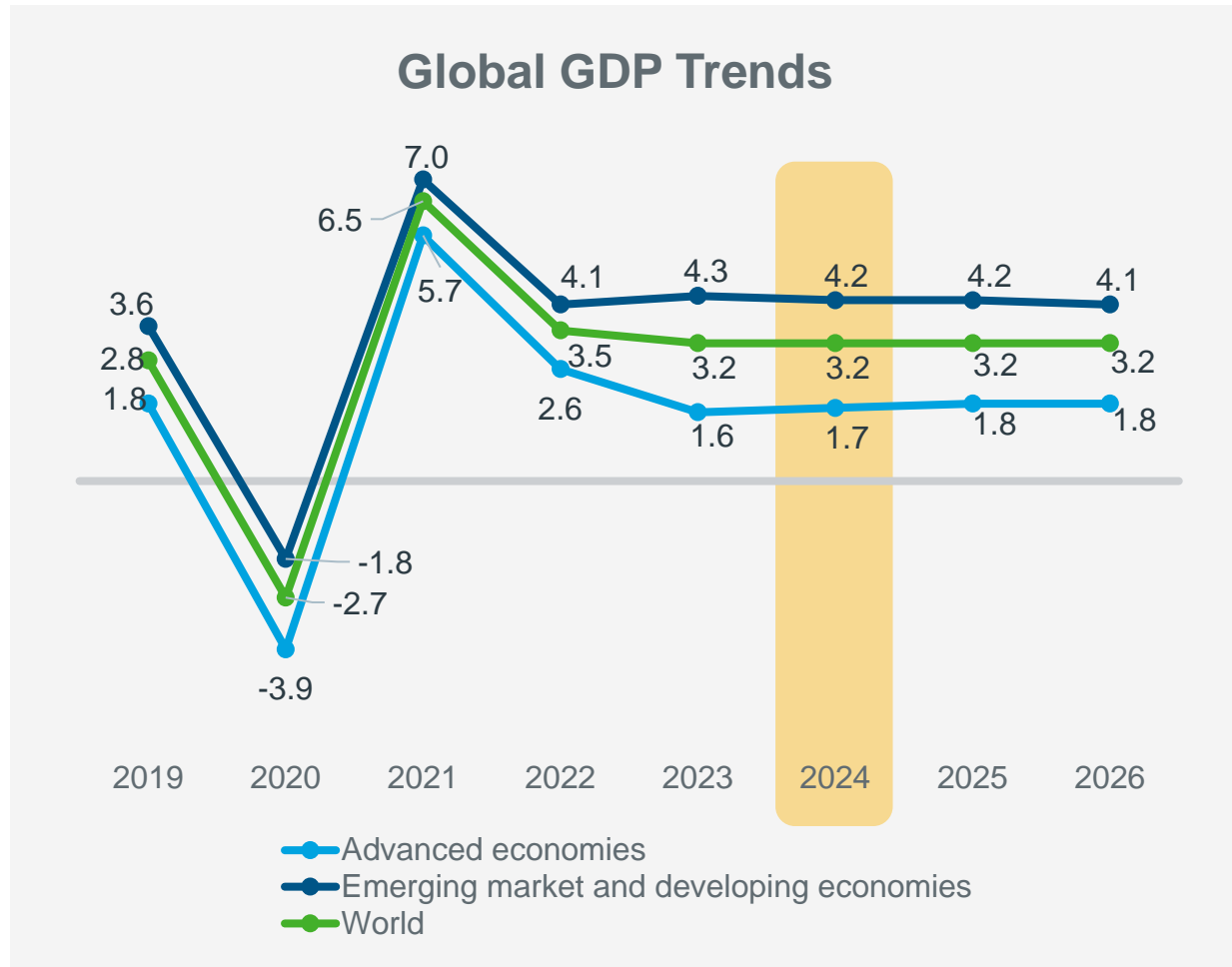


Top 10 Fastest Growing Brands



Volatile economic environment is impacting all social classes

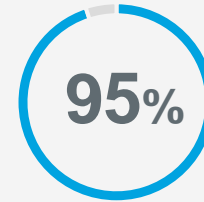
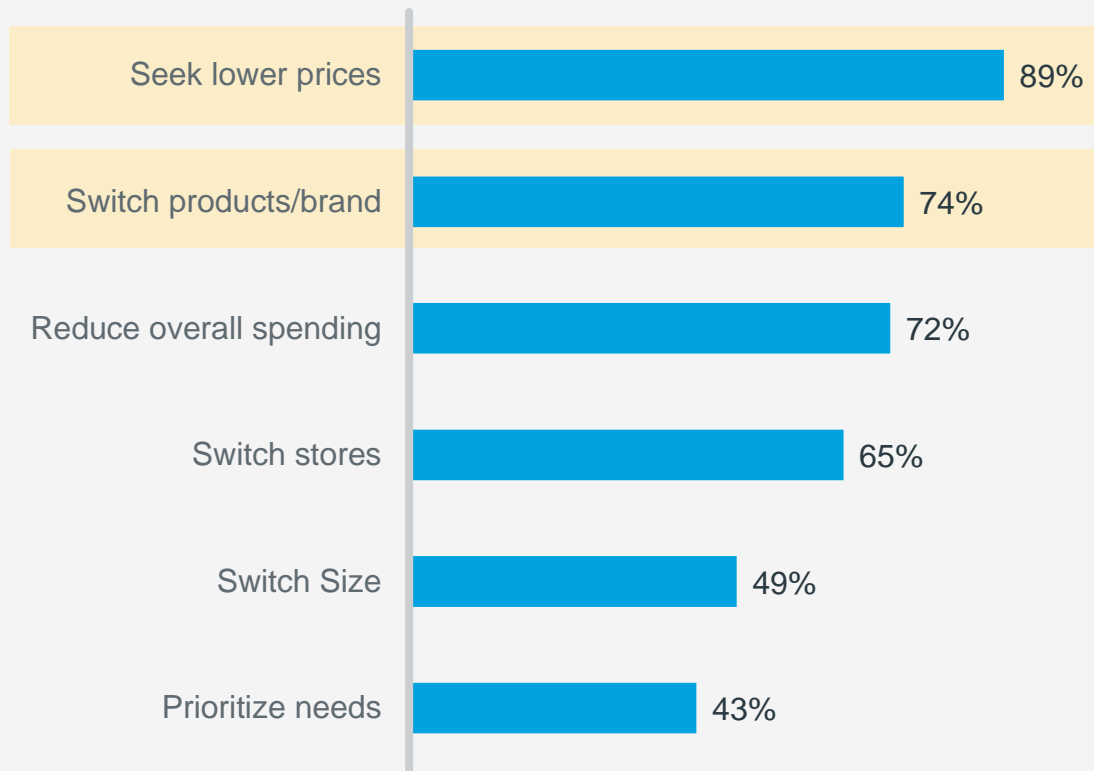
Muted growth expected in 2024; Inflation on a downward trend gradually in 2024 and into 2025



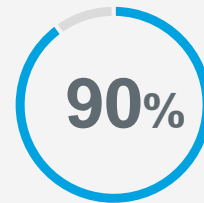
Uncertainty means consumers are budgeting and trading down

This cautious behaviour in light of economic pressure could impact your brand

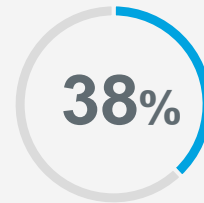
Saving motivators for consumers around the world



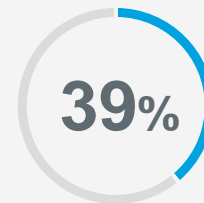
of shoppers have changed how they shop for FMCG in order to manage expenses



of consumers are making changes to manage their financial situations



of global shoppers feel they only have enough to spend on food, shelter, and basics



of shoppers identify as "cautious spenders"



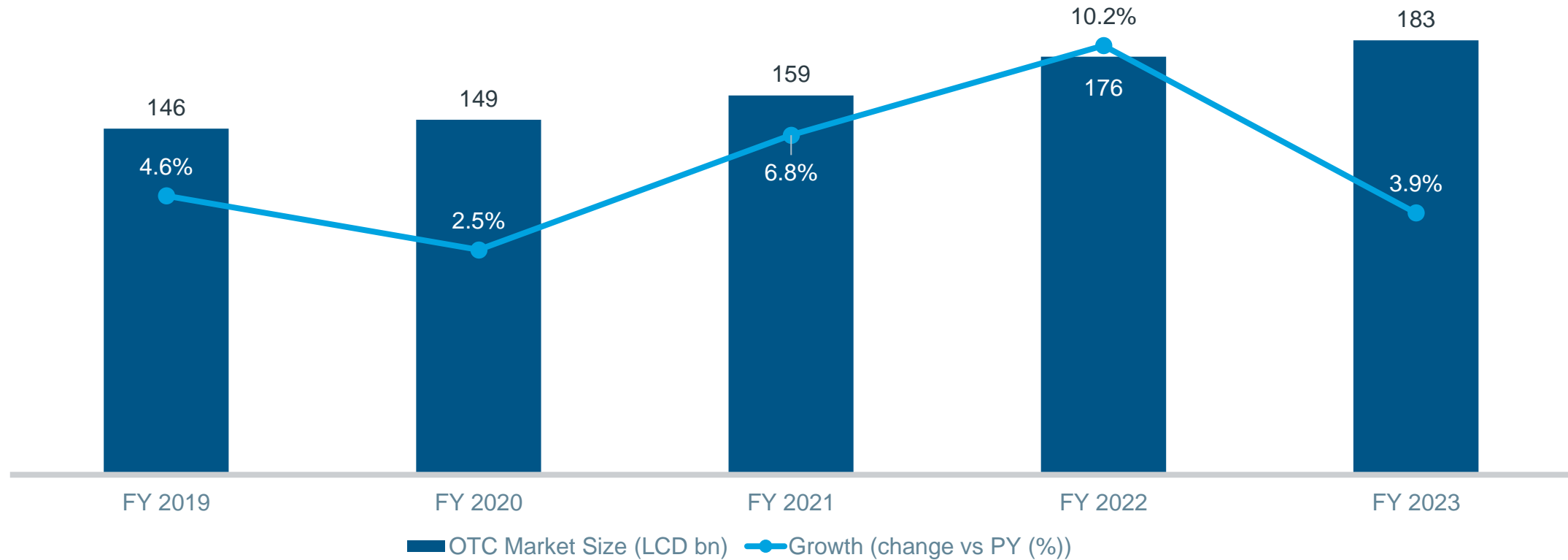
Consumer health brands today



Global OTC Performance – FY 2023

Slowdown in market growth impacted by consumers pulling back spend on discretionary categories

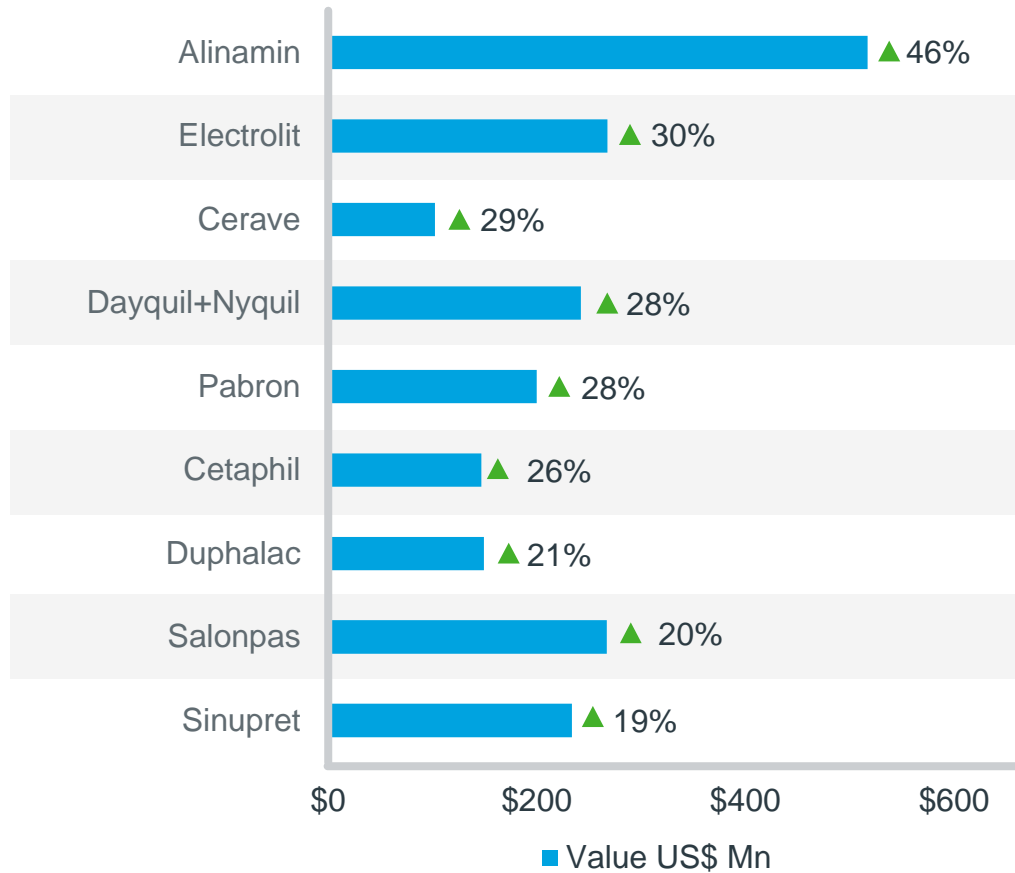
Global OTC Market Size (\$ bn) & growth



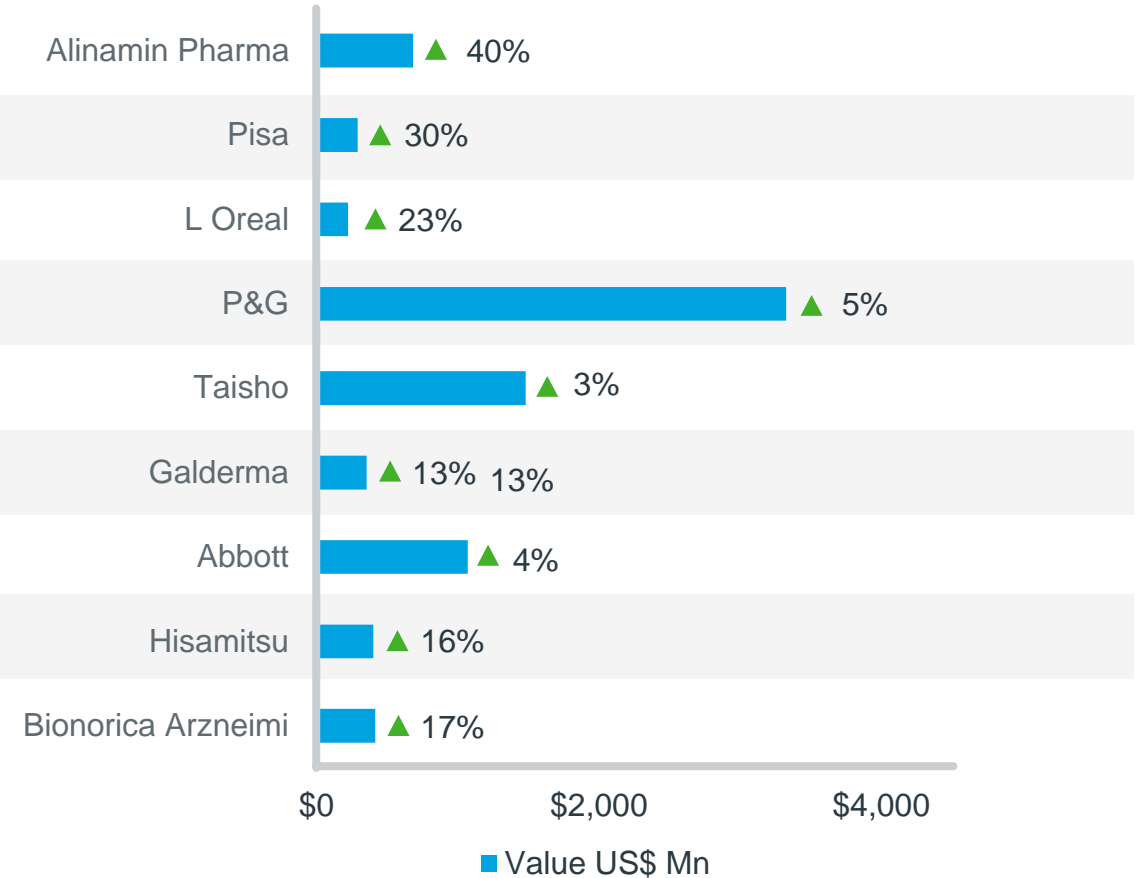
Regional/Local brands are competing on par with global brands

Globally fastest growing OTC brands— 2023 vs. 2022

Top Fastest Growing Brands



Firms

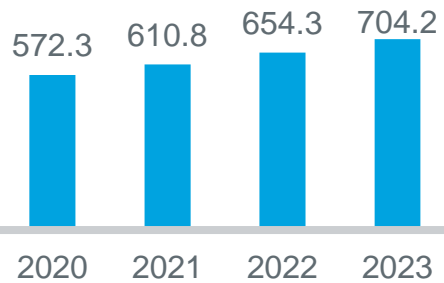


Brands with FY 2023 Sales > \$100 million

Bepanthen/thol brand built on special ingredient dexpanthenol and on its well documented wound-healing properties

Brand performance

FY Sales (€ mio RSV)



P3Y CAGR 7.2%

PY Growth 7.6%

Brand history and positioning

Bepanthen launched in Switzerland in 1944 and has a heritage built in Wound healing. Contains dexpanthenol (provitamin B5), which has skin healing, regeneration properties. The brand has recently expanded into other skincare areas such as body care, face, eyes or nose care or tattoo care in specific countries

Top 3 markets :



Positioning

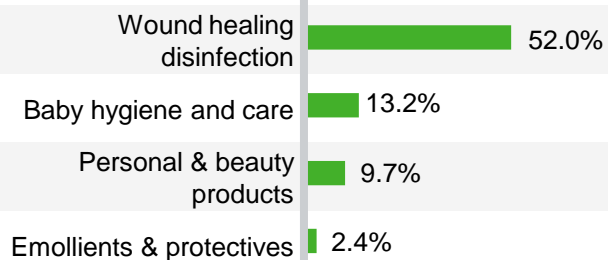
Effective, medicated moisturizing range built on the efficacy of dexpanthenol, and the positive image of the baby rash products

Bepanthen[®] Bepanthol[®]

Expansion to Eye/Nose care and Baby Care

Groups

Splits

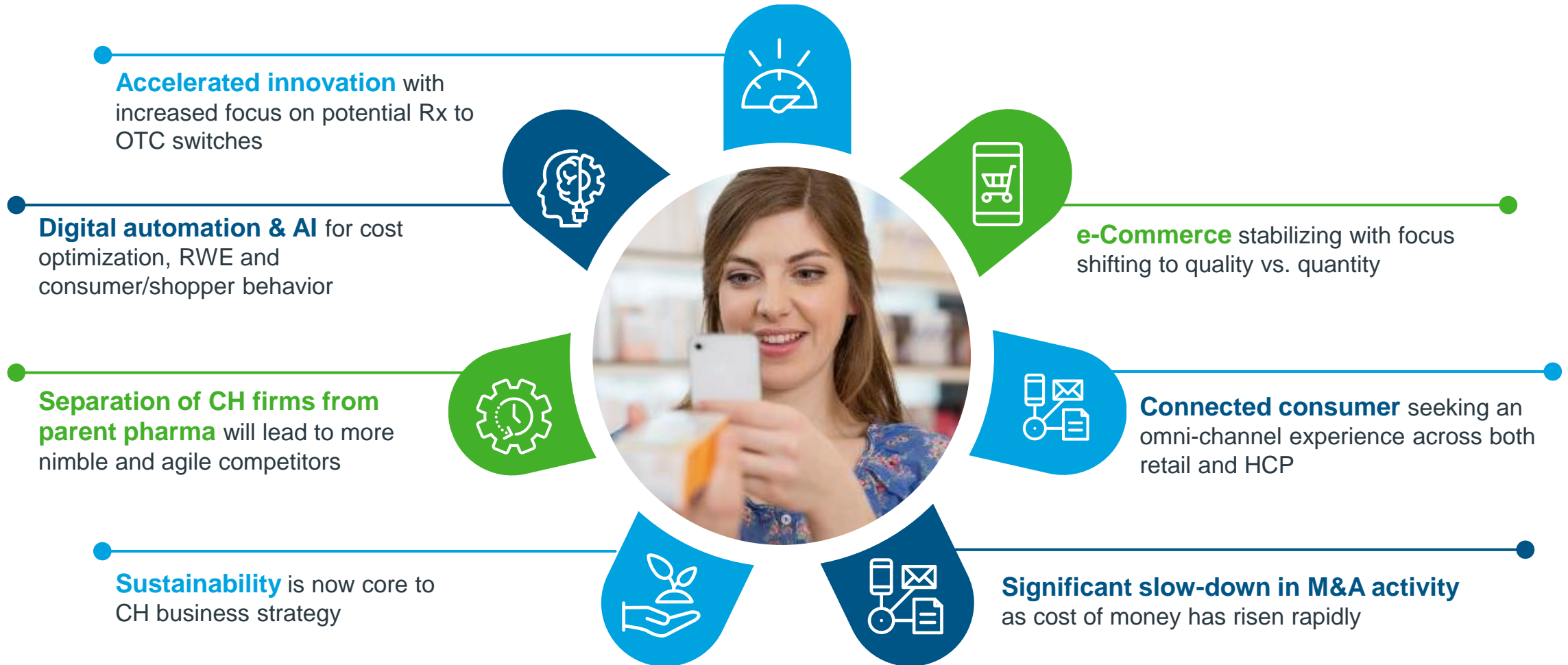


Heritage in Wound Healing



Top seven trends for consumer health in 2024 and beyond

Post COVID-19 the CH industry is seeing a shift in priorities

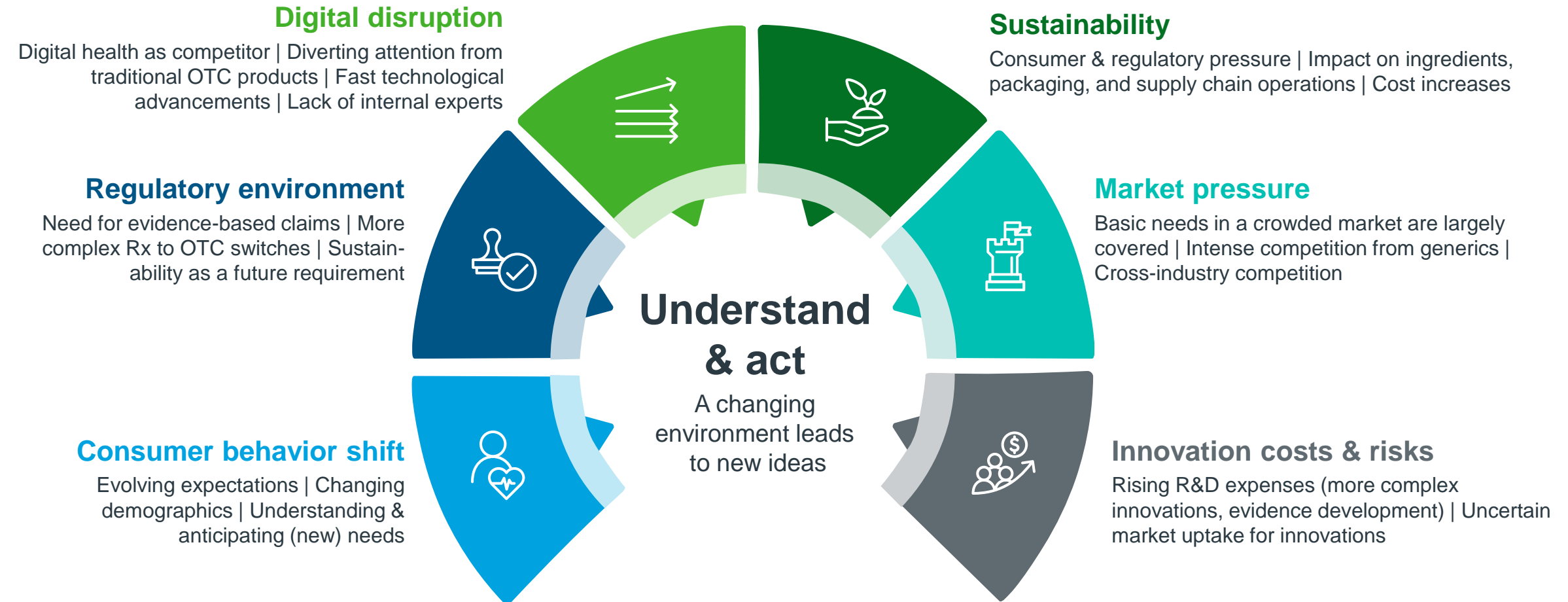




Innovation to drive brand relevance

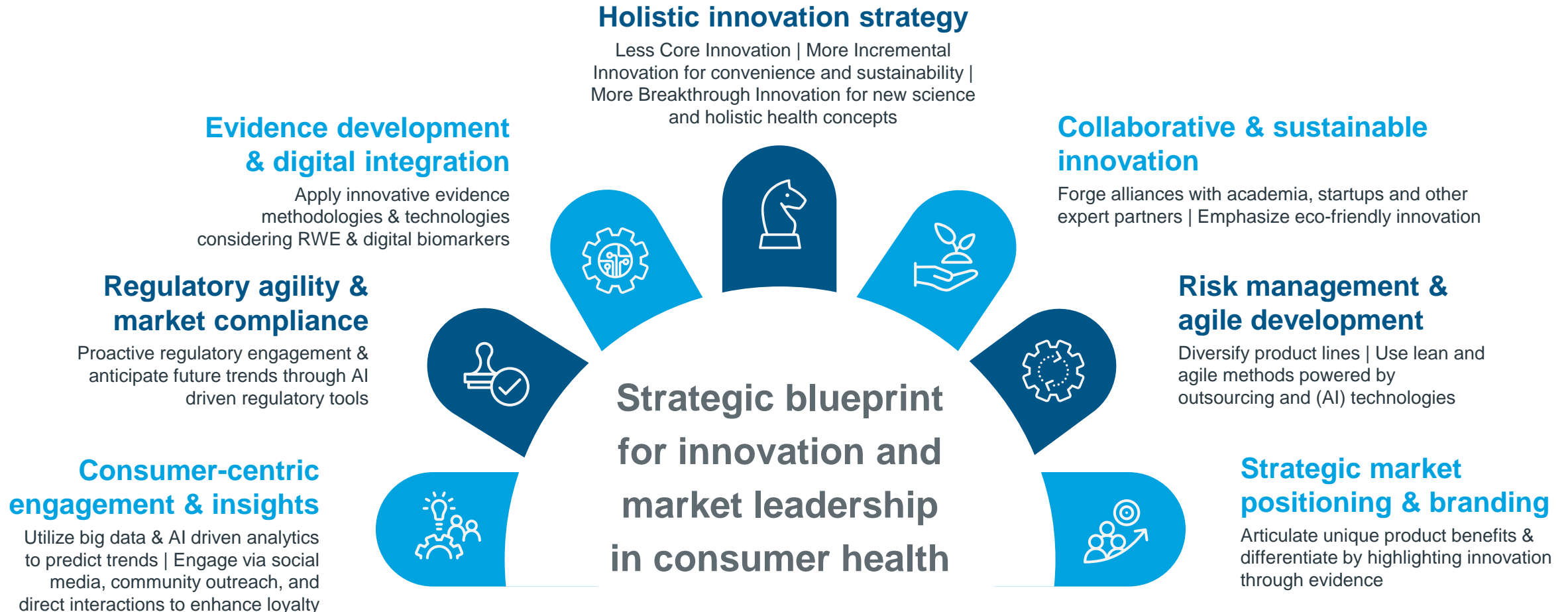


Six Frontiers: Navigating the innovation challenges of the consumer health industry



Beyond barriers: Seizing opportunities in the face of industry challenges

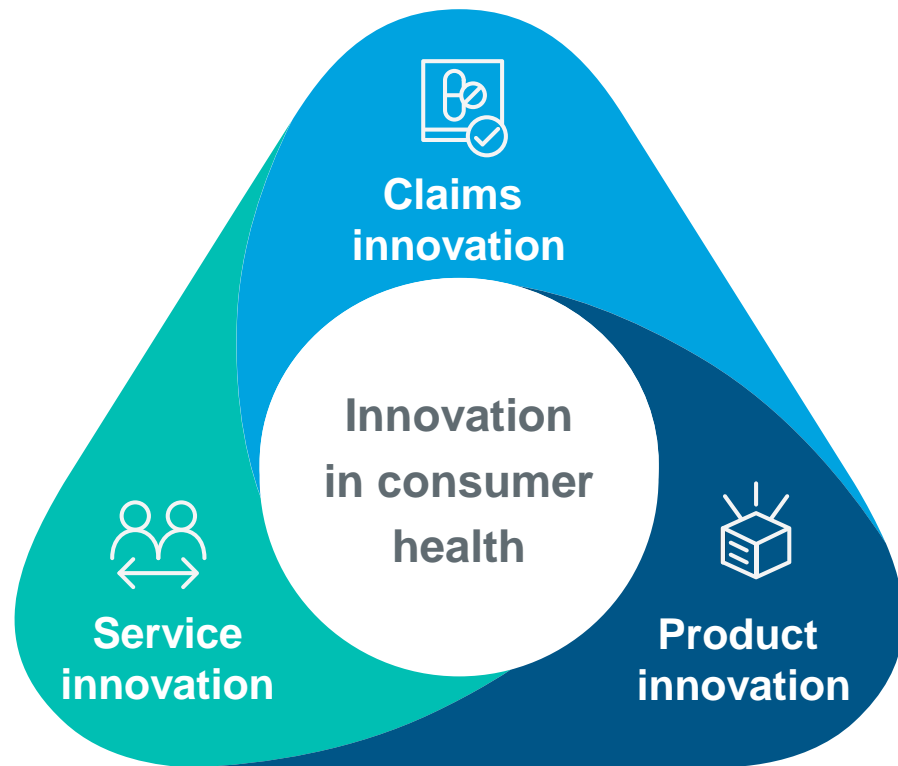
Fresh strategic perspectives needed to tackle today's challenges



Innovation strategies need fresh perspectives

Reimagine, reinvent, and revolutionize to keep brands relevant

To stay competitive, the consumer health industry must continually evolve its approaches



Claims innovation — Without change of the product

- New claims on package
- New indications
- New marketing claims

Clinicals / RWE required

Physical product innovation — Lead to claims

- New formulations
- New ingredient / combinations
- Rx-to-OTC switch
- Packaging / Sustainability

Clinicals / RWE required

In-depth regulatory process

Service innovation — Lead to new claims

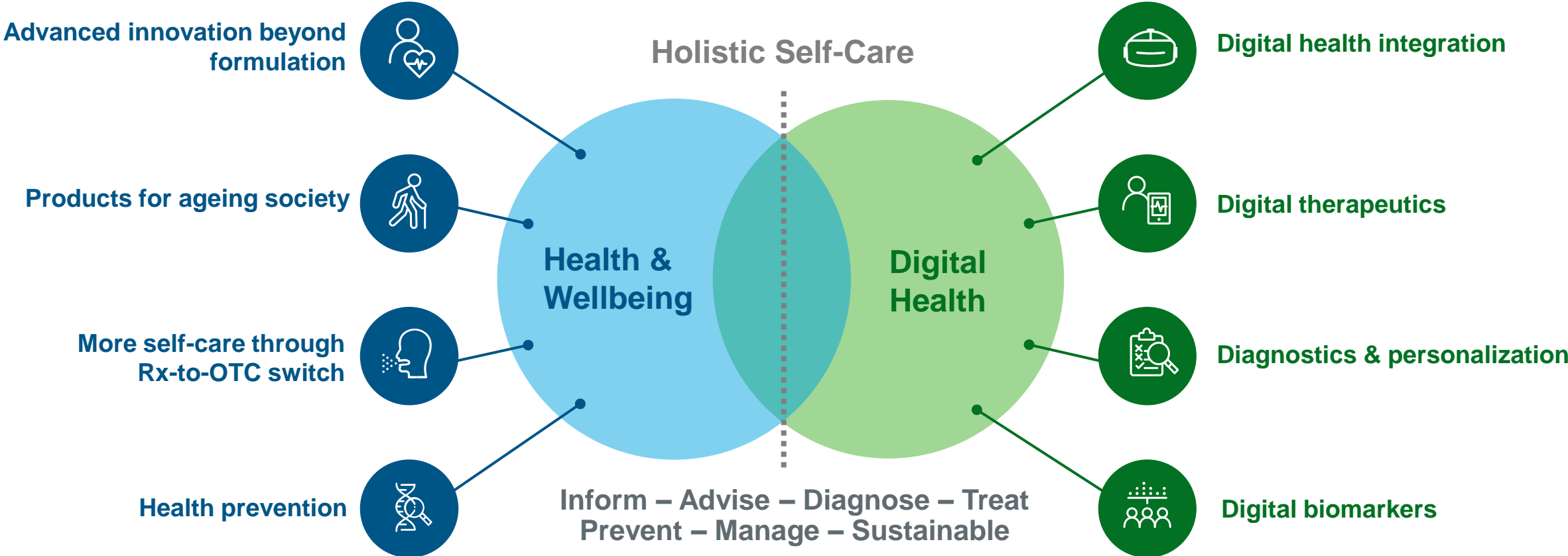
- Digital solutions
- DIY diagnostics
- Personalized offerings

Clinicals / RWE required

Consumer-centricity and evidence is key: Benefits need to be meaningful and relevant

The self-care future: Focus on outcomes and value-based services

Holistic self-care moving beyond symptom treatment is being driven by rise of digital health tools



Strong evidence and convenience are key to success

The time is now for industry to move beyond the ‘pill-in-a-pack’



Embrace a tiered innovation model



Leverage digital technologies / AI for competitive edge



Foster consumer-centric engagement



Build strategic alliances



Raising your brand right



WHAT IS A BRAND?

A brand is product or service that has a unique and immediately recognizable visual, verbal and behavioural identity that distinguishes itself from others in its industry.

- BRAND IS MEANING
- BRAND IS EMOTION
- BRAND IS CHOICE

NUROFEN



Rennie[®]

GAVISCON

Benadryl

Alleuvia[®]




WHAT IS BRAND STRATEGY


Brand strategy revolves around attempting to marshal all the tangible and intangible elements that over time drive brand awareness, equity and sentiment.



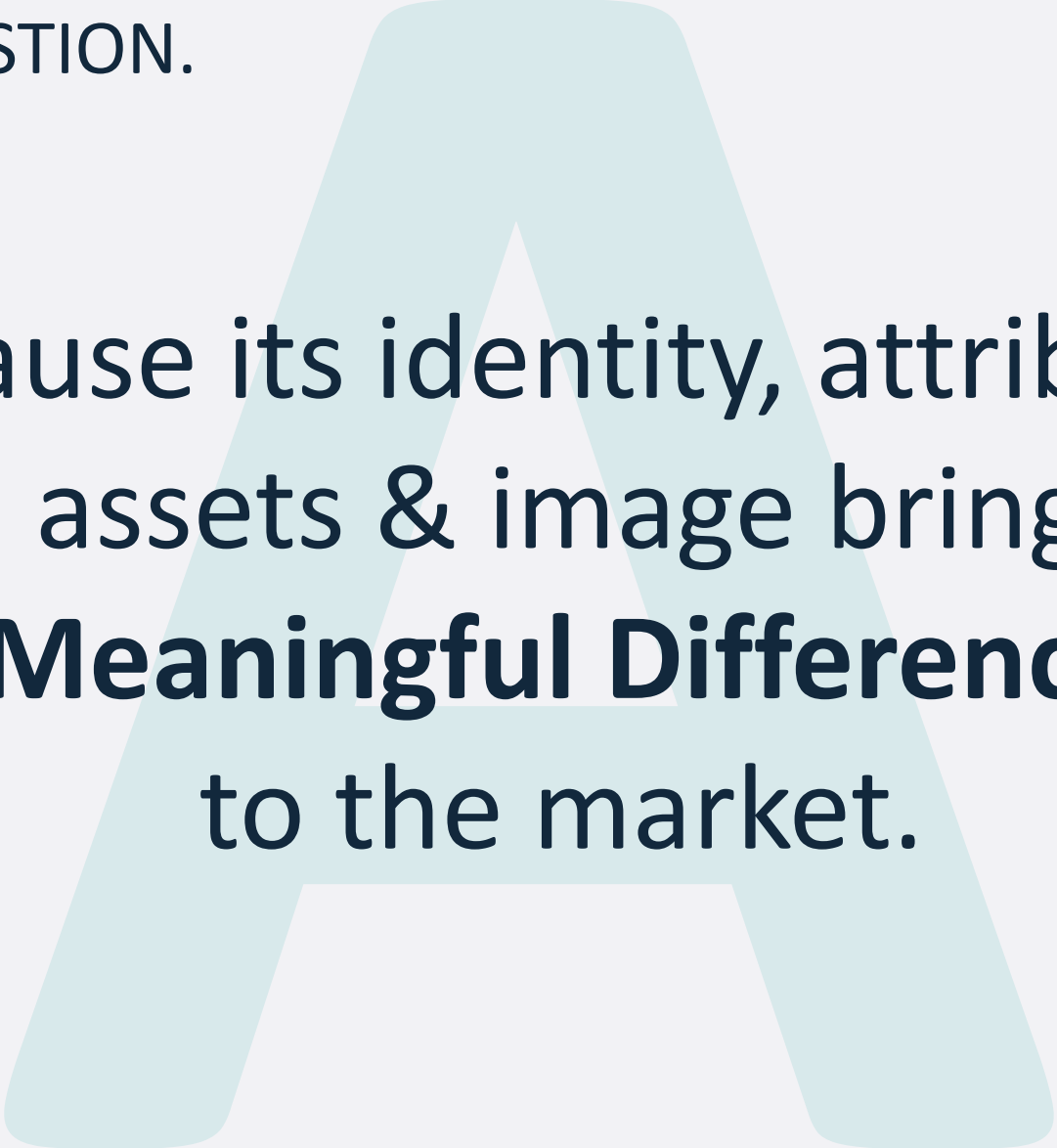
ONE HARD QUESTION.



Why should anyone choose to
buy your brand instead of one
of your competitors?



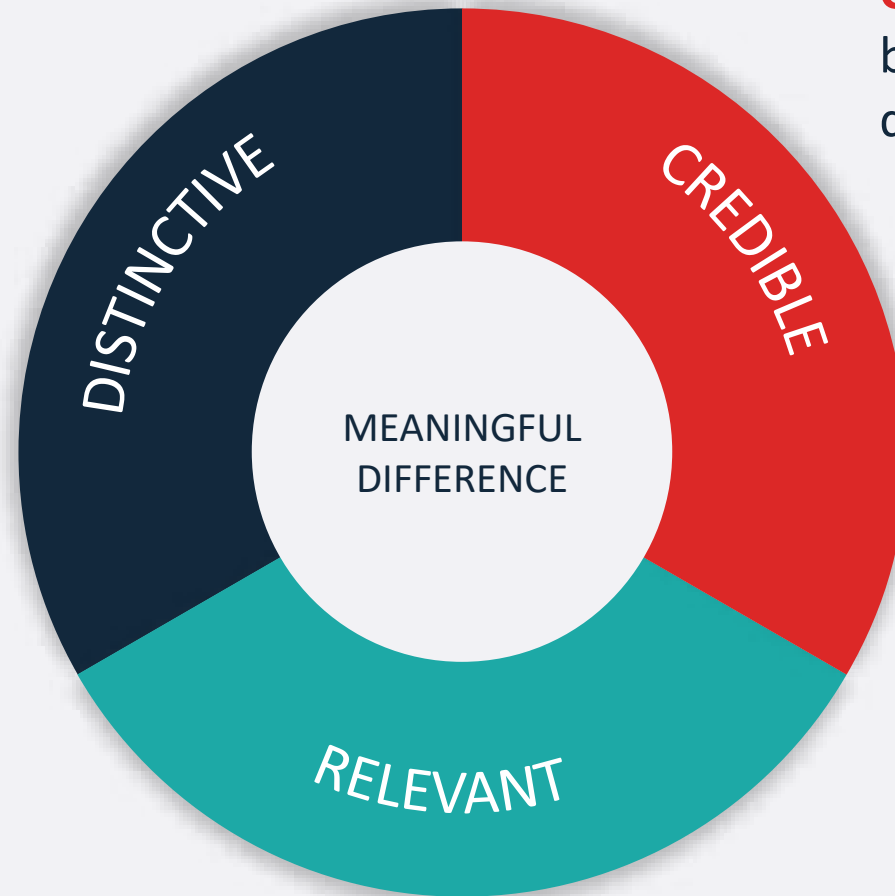
ONE HARD QUESTION.



Because its identity, attributes,
assets & image bring
Meaningful Difference
to the market.

MEANINGFUL DIFFERENCE

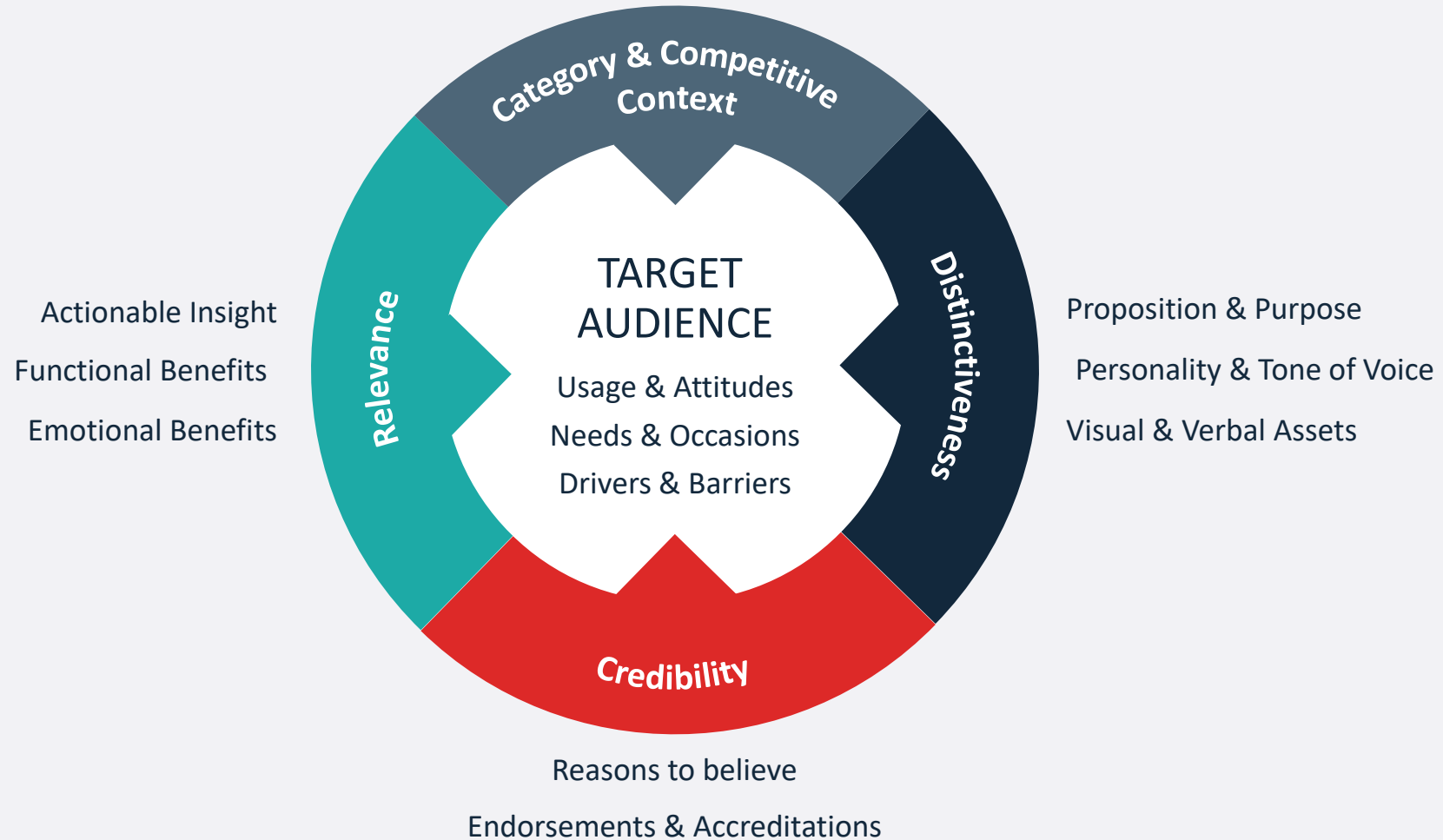
DISTINCTIVE:
perceived very clearly so it is noticed and remembered



CREDIBLE:
believed to be able to deliver against its promise

RELEVANT:
aligned with practical & emotional consumer needs

EXPLORING MEANINGFUL DIFFERENCE





THE UK'S MOST TRUSTED BRAND OF FRIENDLY BACTERIA

Relevance: Gut and immune health are increasingly a consumer priority

Credibility: Rated 'Excellent' on Trustpilot the independent online review platform

Distinctiveness: The hill, sunshine & yoga pose communicate holistic health & wellbeing

New listings in Boots, Tesco & Sainsburys



HELPING YOU STAY ACTIVE FOR LONGER

Relevance: Best Agers looking to keep doing the things they love later in life

Credibility: Experts in Omega3 – Helping people live a healthier life since 1993

Distinctiveness: Harnessing the health of the sea to provide essential fatty acids

#1 supplement brand for ageing well



FAST ACTING, LONG LASTING RELIEF FROM HEARTBURN & INDIGESTION

Relevance: Managing heartburn can be a daily struggle for many patients

Credibility: Unique mode of action in forming a reflux limiting protective barrier

Distinctiveness: Blue man & flame icon. Multiple solid & liquid formats

#1 Digestive Health brand



NOTHING IS MORE EFFECTIVE WITHOUT PRESCRIPTION

Relevance: Coughs affect a high proportion of the population every year

Credibility: Clinically proven expertise in cough for over 50 years

Distinctiveness: The Benlyn 'Wellburst' registered trademark & colour palette

UK #1 OTC cough brand

A large, stylized letter 'C' composed of three concentric, slightly offset curves, rendered in a lighter shade of teal against a darker teal background. The 'C' is centered on the left side of the page.

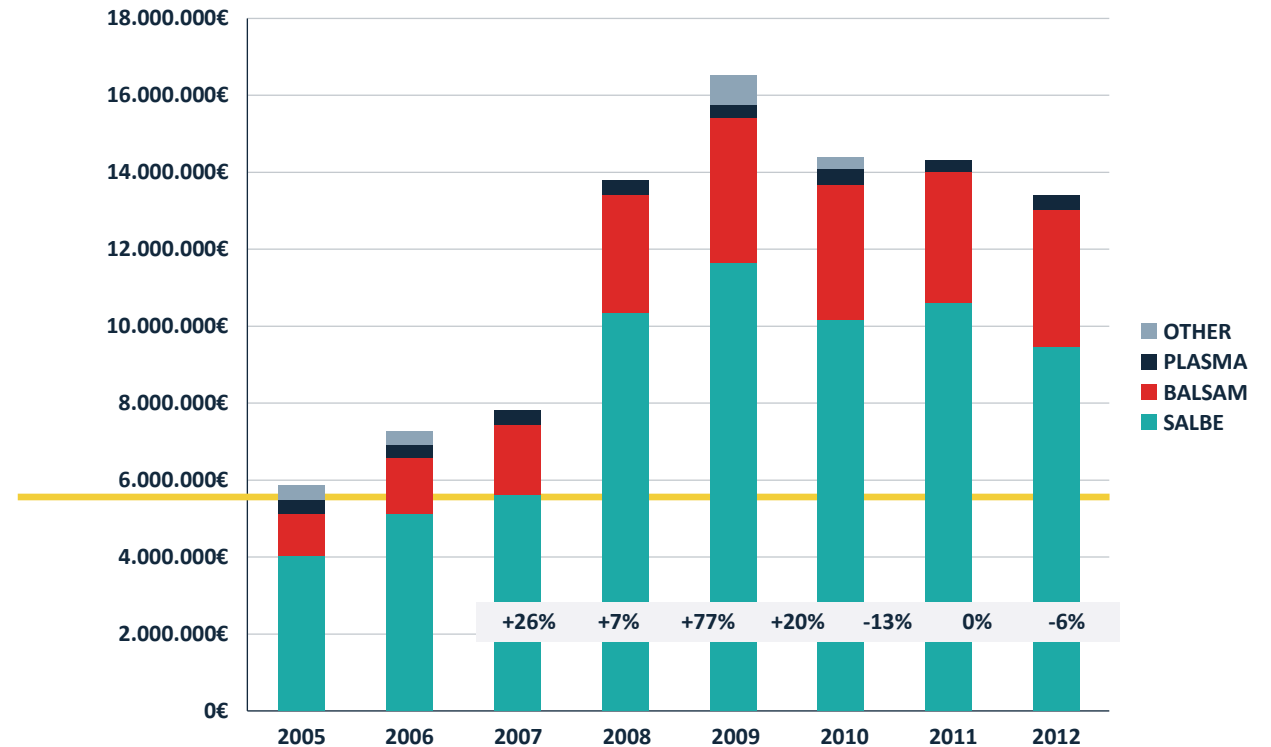
CASE STUDY

KYTТА – BRAND RESTAGE



A BRAND TRAPPED BY ITS POSITIONING?

Poor response to continued ATL investment prompting a strategic review



BULLSEYE TARGET: PRODUCT & BRAND ATTRIBUTE RANKINGS

EFFICACY, SPECIFICITY AND SPEED

Reduces pain significantly
Fights pain effectively
Topical application

HIGHER ORDER BENEFITS

Significantly improves
mobility

MEANINGFUL DIFFERENCE

PLUS TOLERABILITY

Very good tolerability
No additional burden for
my organism
Suitable long term pain/
recurring usage
Enables reduced intake of
pills
No interactions between
medications

Source: Kytta Claims Test Germany. Top 2 box scores

Reduces significantly muscle-, joint- and back pain	84%
Very good tolerability	84%
Fights pain effectively	80%
Especially suitable for often recurring pain	79%
No additional burden for the organism	78%
Especially suitable for regular usage	78%
Works strongly against pain	77%
Enables a reduced intake of pain killers	76%
Works quickly	76%
Improves significantly mobility	76%
Especially suitable for a long-term usage	75%
Works deeply in the muscles	74%
No need to always take pills	73%
Less side effects than chemical active ingredients	72%
No known interaction with other medication	72%
Precise - works targetted	72%
Reduces 95% of acute back pain	70%
Effective on the spot	66%
Effective within 1 hour	65%
The strong herbal alternative against pain	57%
Reduces significantly joint pain due to osteoarthritis in the knee	56%
Effective within minutes	56%
Proven by clinical studies	55%
More efficient than the chemical substance diclofenac	50%
Tolerable it can also be used for children age of 3	17%

DEVELOPING THE KYTTA BRAND EYE

BRAND PERSONALITY

A knowledgeable expert:

- Empathetic & Human
- Reliable & Supportive
- Encouraging, Optimistic & Upbeat.

BRAND ROOTS

From the oldest pharmaceutical company in the world – 345 years of developing, sourcing & manufacturing products that care for people's health and wellbeing within a culture of clinical expertise & innovation.

MARKET CONTEXT

Topical Pain Relief market Category driven by 'Brand Goliath' Voltaren commanding up to four times relative MS and high spend. Other (generally) NSAID based brands (Diclofenac and Ibuprofen).

THE TARGET CONSUMER

People who strive to fulfil their personal ambitions and to keep doing the things they love in later stages of their lives despite the obstacles muscle, joint and back pain can pose for them.

MEANINGFUL DIFFERENCE

Responsible Pain Management

Helping people safely manage pain to enjoy a better quality of life in later years.

POD

Clinically proven, unrivalled efficacy, specifically formulated for long-term use.

BENEFITS

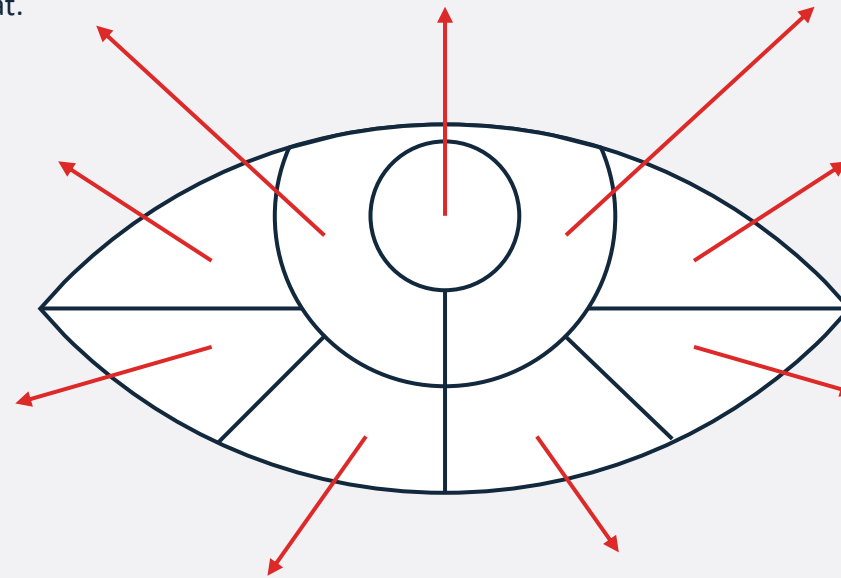
Safe, effective relief from muscle, joint and back pain. Gives me the confidence to treat regularly over the long term. Allow me to get on with life.

BRAND BELIEFS

As we age, we all have the right to remain independent and active without unnecessary recourse to the potentially harmful chemicals and medical interventions often used to treat and relieve the burden of chronic muscle, joint and back pain.

KILLER INSIGHT

Muscle, joint and back pain annoys me, preventing me from being who I am and from doing the things I need and like to do. I want to find a solution that works quickly & effectively whilst being safe for regular, long-term use.



BRINGING BRAND STRATEGY TO LIFE

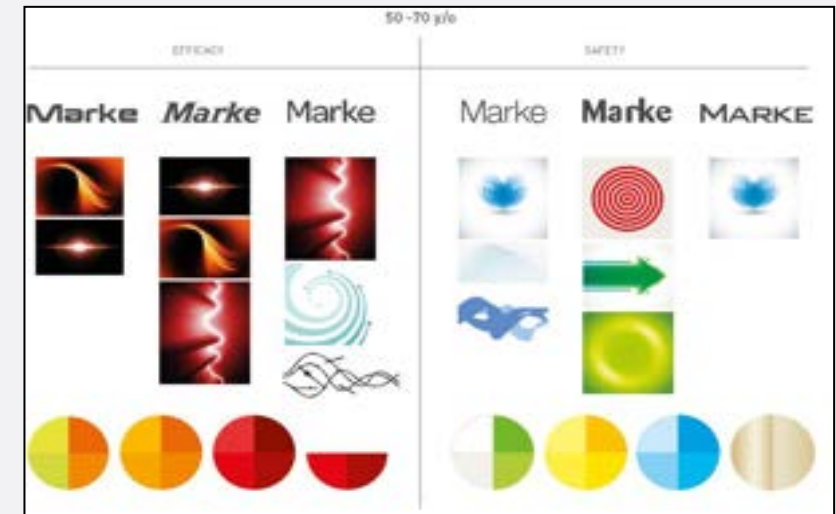
Consumer Co-creation workshops

Unbranded concept statement

'A topical pain relief treatment from an established German pharmaceutical manufacturer that not only **effectively** relieves the body from muscle, joint and back pain but is also **safe to use**.

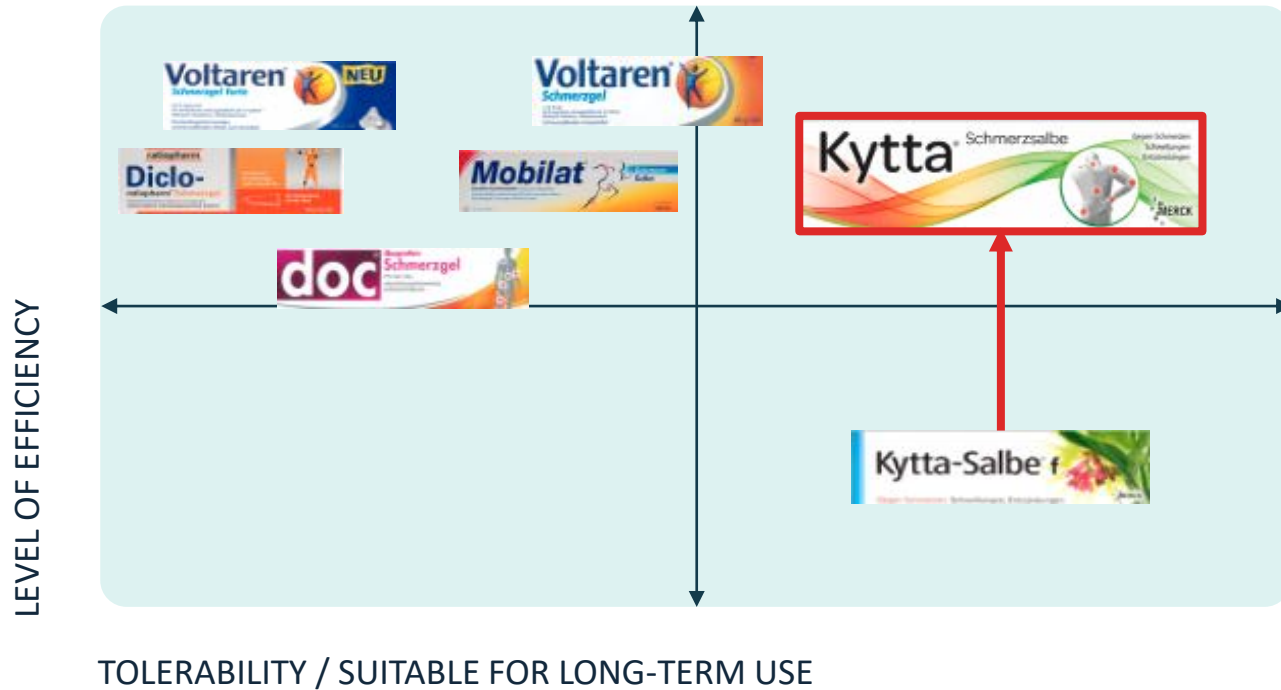
Compared to other pain relief ointments it shows no known interactions with other oral medication and no limitations concerning the frequency and period of usage.'

Consumers asked to create 2 mood & tone boards for Efficacy & Safety/Tolerability using pre-prepared stimulus: Colour Typography Imagery



THE STRATEGIC IMPERATIVE: QUALITATIVE RESEARCH FINDINGS

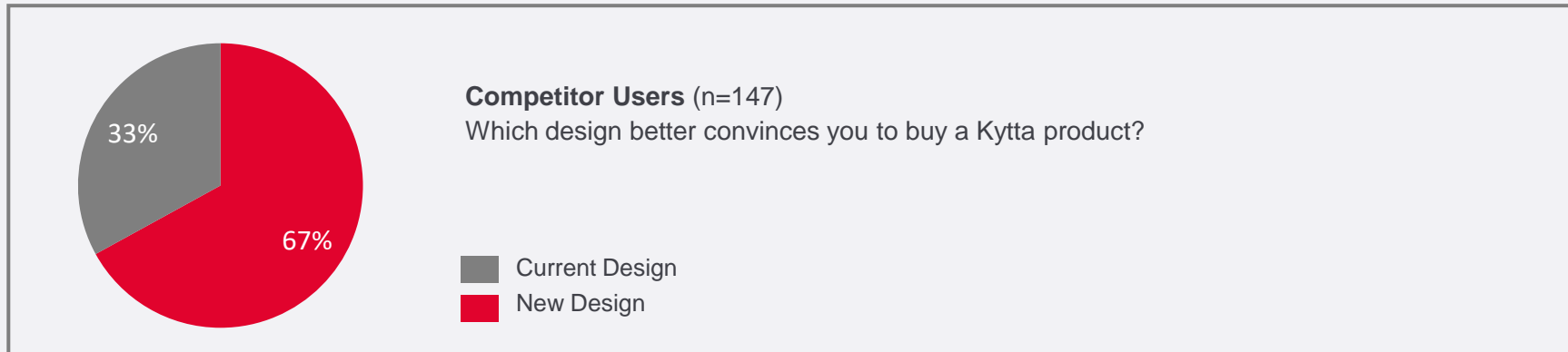
Unanimity across 8 consumer groups around 1 lead concept



VALIDATING THE FINDINGS

Action Standard	New Design
Total Sample	
Total Involvement + 5 pp. to TNS norm	✓
Motivation + 5 pp. to TNS Norm	✓✓
Kytta Users	
Buying Intention not below current design	✓✓
Competitor Users	
Motivation + 5 pp. better than current design	✓✓
Buying Intention not below current design	✓✓

✓✓ = Action standard over performed / ✓ = Action Standard fulfilled / ○ = Action Standard not fully met / - = Action Standard clearly missed



BRAND IDENTITY, PACKAGING DESIGN & NPD



LAUNCH ADVERTISING AND MARKETING COLLATERAL

Kytta® in neuem Design!



Kytta
Schmerzsalbe

Bewährt starke Wirksamkeit

Kytta®. Die gute Wahl gegen Schmerzen.



MERCK



Kytta

Die gute Wahl gegen Schmerzen

Kytta

Die gute Wahl gegen Schmerzen

Kytta®.
Die gute Wahl gegen Schmerzen.



9 von 10
Anwendern sind zufrieden.*

Kytta® Schmerzsalbe wirkt so stark wie Diclofenac!*

Gegen Muskel-, Gelenk- und Rückenschmerzen!

- stark und schnell wirksam
- sogar langfristig anwendbar



Produkt	Schmerzreduktion
Kytta® Schmerzsalbe	-81%
Diclofenac	-75%

MERCK

COMMERCIAL RESULTS



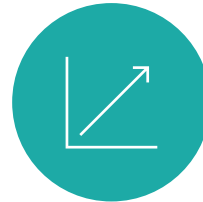
A **highly successful** brand re-positioning and re-staging



An additional **17% sales growth** in the following quarter



A **'textbook'** insight-driven program of work



The only established brand to **grow YOY** versus the previous



38% share growth in the first year following launch

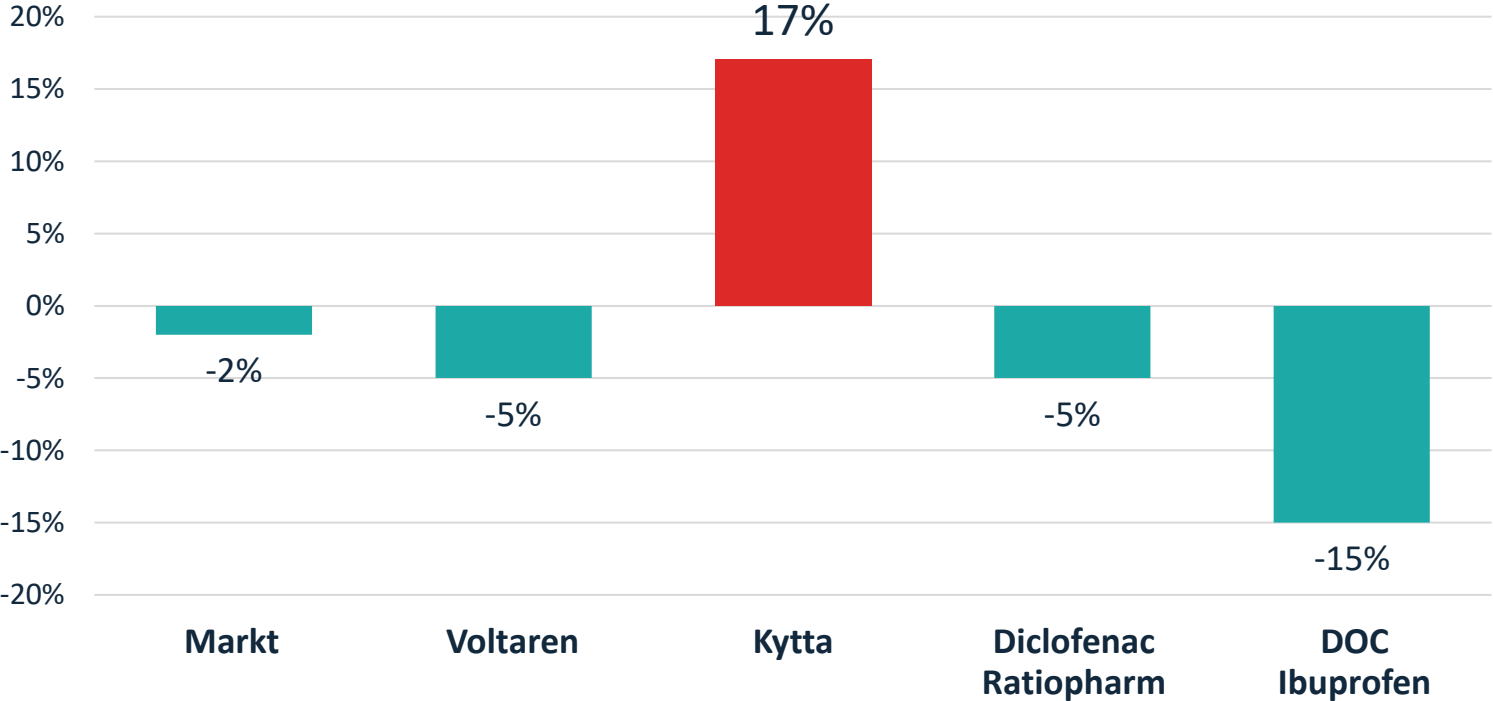


New products being launched from a revitalised, brand platform

Q1 YOY MARKET SHARE GROWTH

Market growth units Q1 vs. last year

(Source: Insight Health Q1 2015)

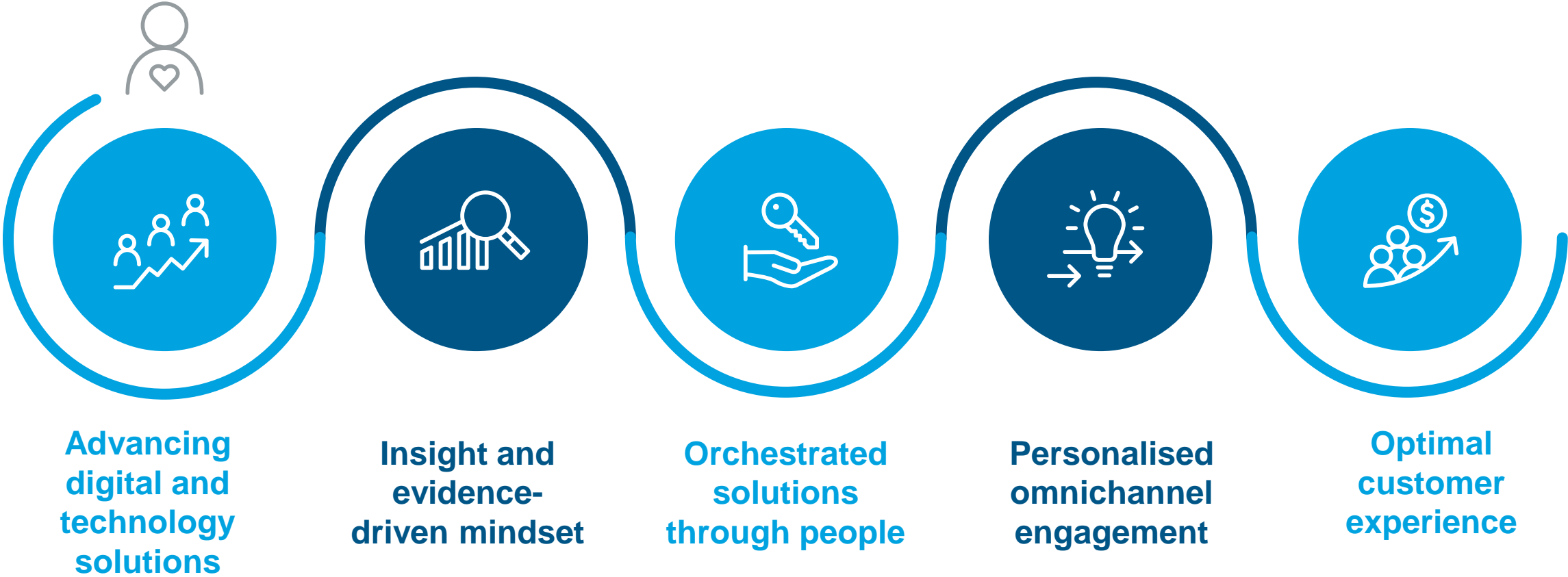




The evolution of HCP engagement

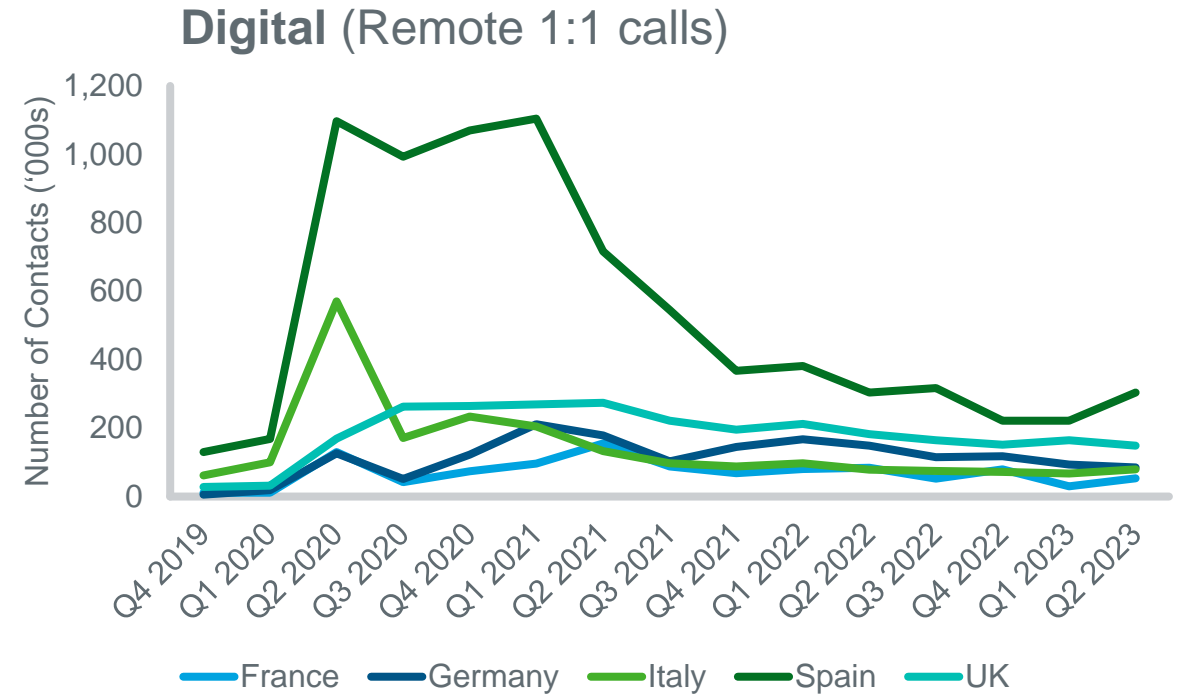
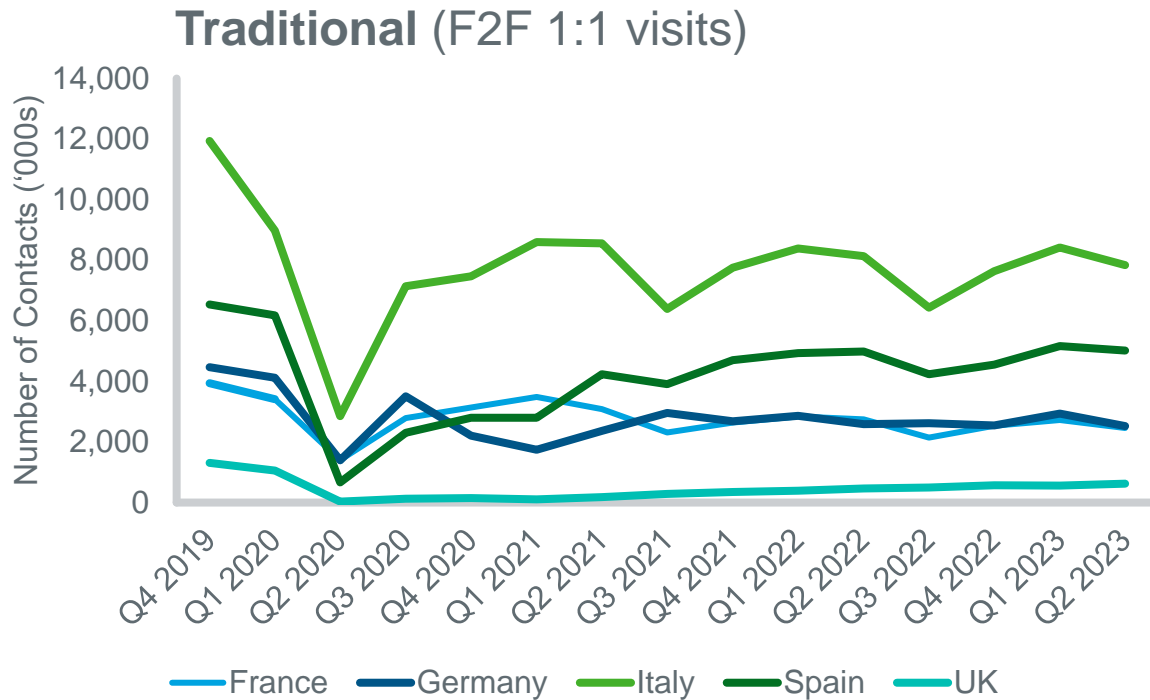


The future Go-to-Market models for HCP engagement requires the integration of 5 key elements



Countries are now finding a new post-pandemic equilibrium for traditional and digital interactions

F2F and virtual remote contacts with HCPs



- Culture and expectations
- HCP channel preferences
- COVID-19 response
- Access to physicians

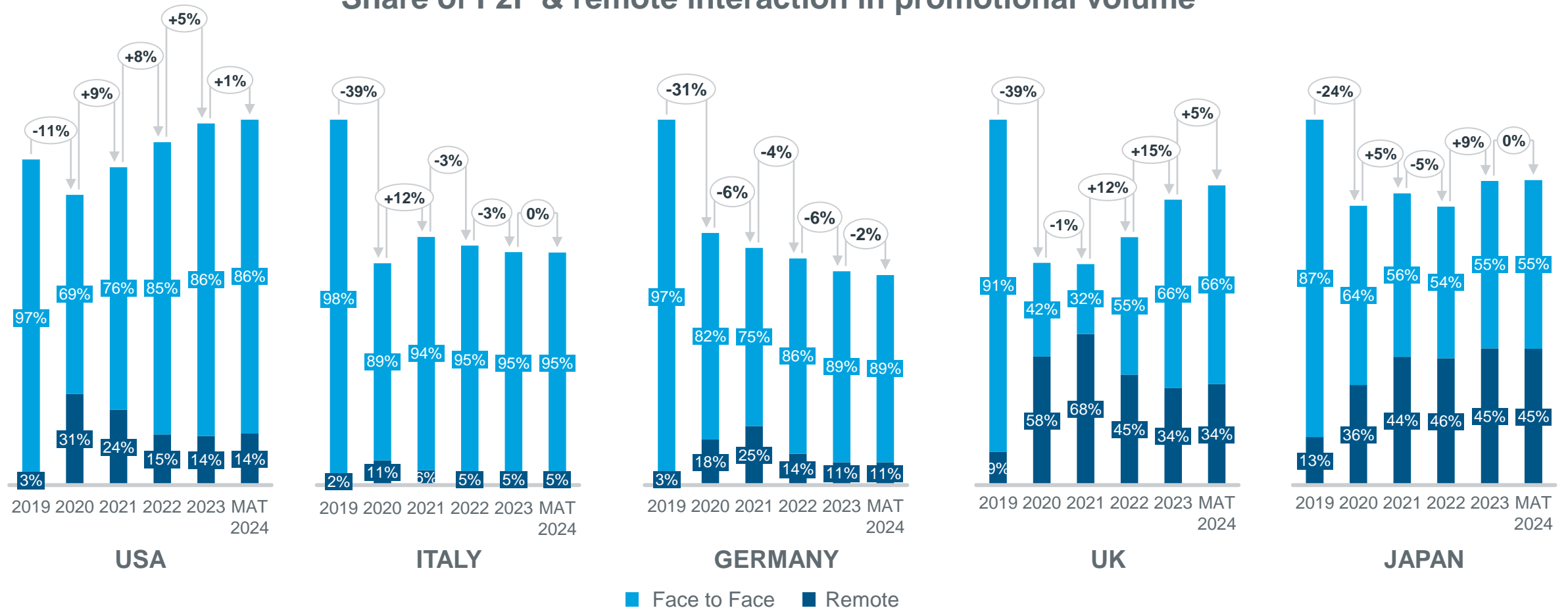
- Limitations on in-person interactions
- Promotional necessity
- Schedule around clinic time

Source: IQVIA EMEA Thought Leadership; IQVIA ChannelDynamics™ Data (EU4+UK, all specialties, all therapy areas)
The Consumer Health Brand Strategy Evolution – IQVIA Consumer Health – May 2024

Countries behave differently in line with its culture, size, access and ability to orchestrate channels

ChannelDynamics Major markets: FY 2019 vs 2020 vs 2021 vs 2022 vs 2023 and MAT Feb 24

Share of F2F & remote interaction in promotional volume



HCPs are becoming increasingly digital savvy and they are expecting the same from the industry

Constraints on physician & pharmacist time

- Continuing evolving role of pharmacists beyond dispensing in management of patients
- Limited time for HCPs to interact with 'non-patients'
- Challenges associated with patient backlogs and/or staff shortages
- Digital channel offers improved efficiency and more time optimisation

Consumer and patient behaviour are forcing physicians to embrace change

- Consumers have more choice, and demand more access to information about their treatment
- HCPs are subsequently recognising that digital presence and engagement is important
- The patient journey is becoming a holistic experience where more interaction, from initial contact to post-treatment care is happening digitally and contributes to overall perception of care quality
- Patients desire more than basic digital engagement, thus more HCPs are embracing this

Drivers for digital engagement

57% of patients research their condition online

Delivery of launch excellence post pandemic

- Reduced and altered interactive engagement between life science companies and HCPs
- Tightened budgets with raised access barriers
- Fragile health systems and more complex, leakier patient journeys to diagnosis and launch products

The next generation of physicians will be even more digitally led

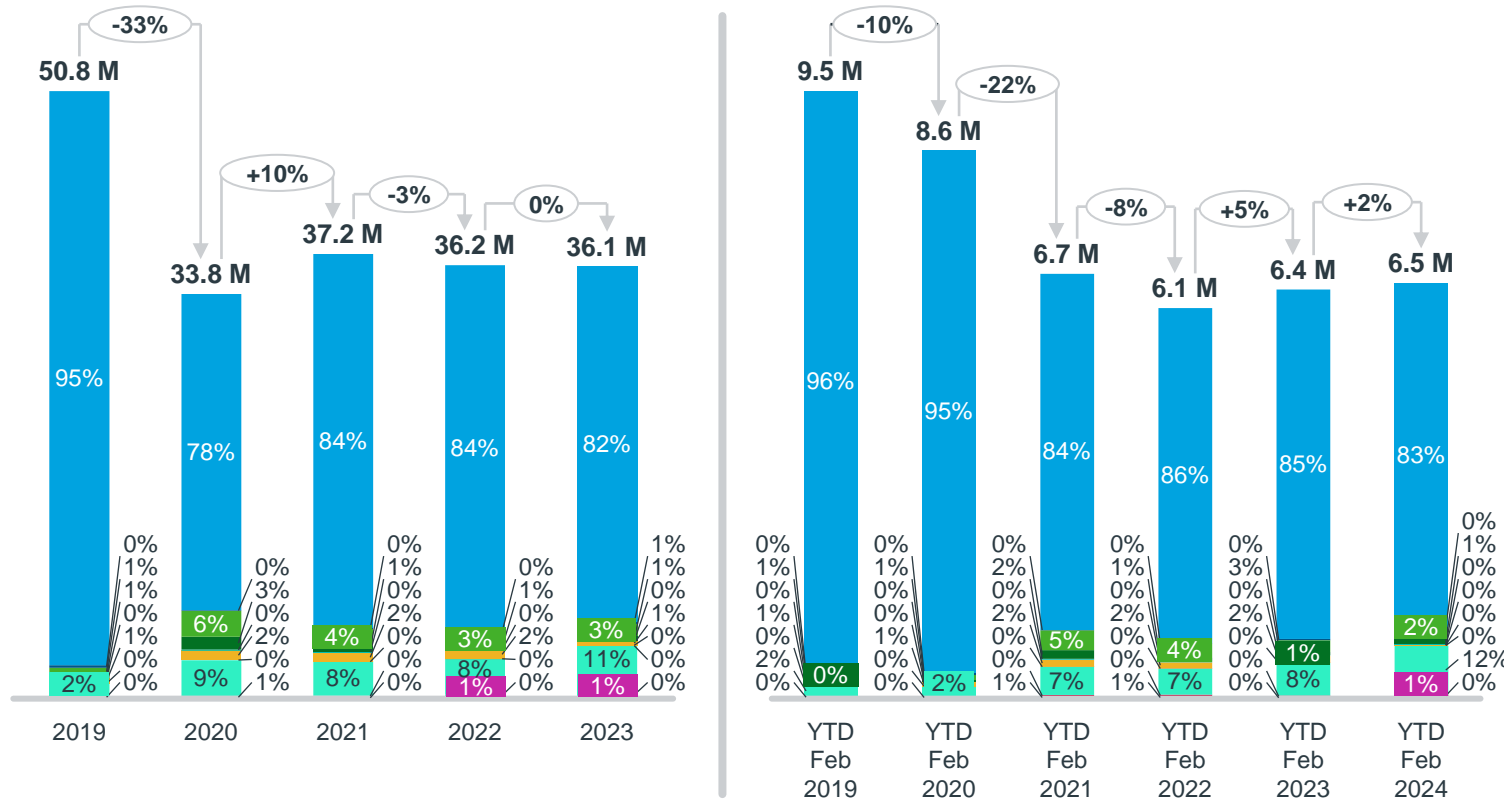
- In 2022 almost 60% of registered Dr's were under 45 years of age
- In 2022 over 11k new doctors entered the system for training post education
- HCPs in the future are expected to be even more digitally reliant and focused and will increasingly form part of their education and daily life



ChannelDynamics: Channel volume and performance trends

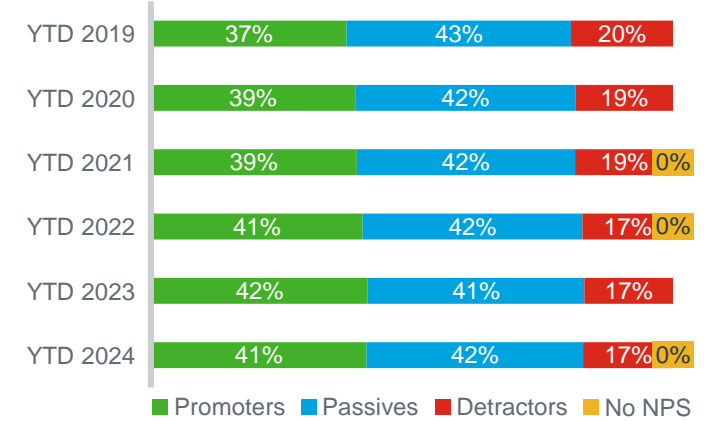
Italy: Full year 2019 vs 2020 vs 2021 vs 2022 vs 2023 and year-to-date trends over 6 years

Share of projected promotional volume

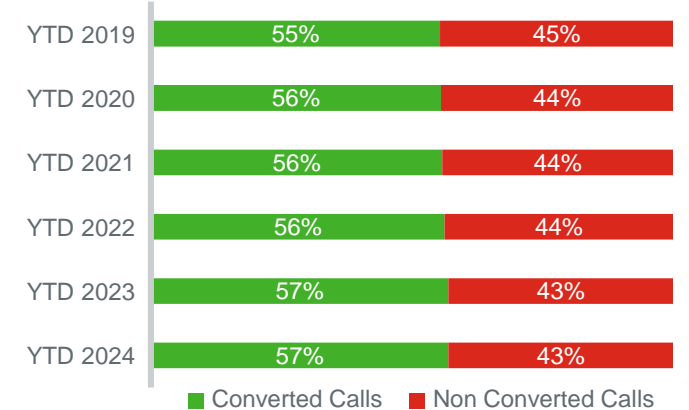


■ F2F - Detailing with rep ■ F2F - Meetings/Events ■ Remote - Detailing with rep (telephone, voice only) ■ Remote - Detailing with rep (online)
■ Remote - Meetings/Events (live, streaming) ■ Digital - Detailing (automated, self guided) ■ Digital - Meetings/Events (prerecorded, streaming)
■ Digital - Podcast ■ Digital - E-Mailing ■ Digital - Instant messaging / texting ■ Mailing (postal)

NPS Category share



Converted Calls

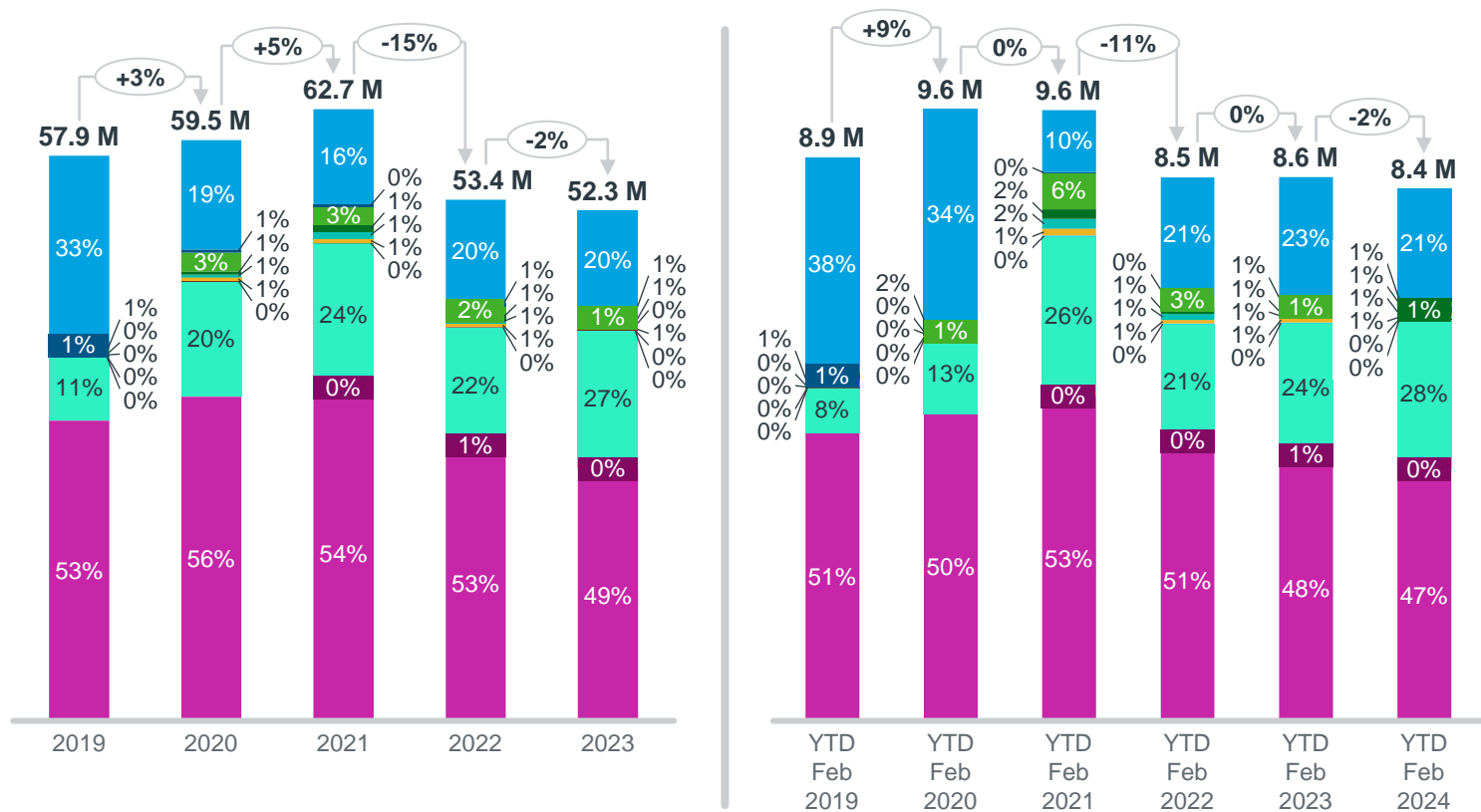




ChannelDynamics: Channel volume and performance trends

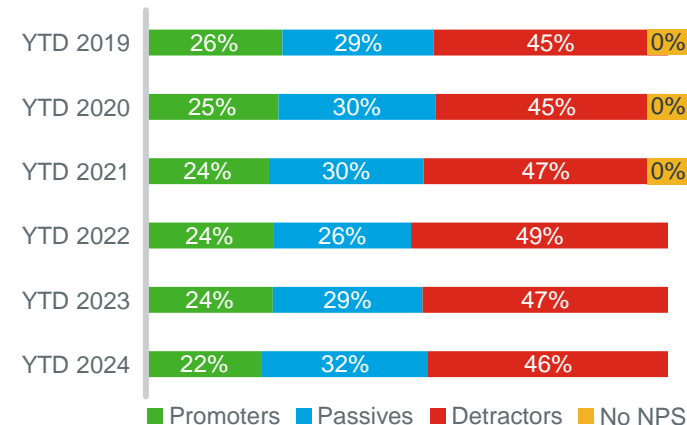
Germany: Full year 2019 vs 2020 vs 2021 vs 2022 vs 2023 and year-to-date trends over 6 years

Share of projected promotional volume

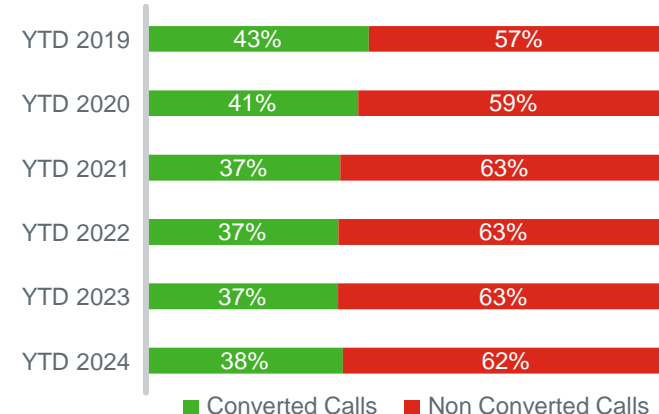


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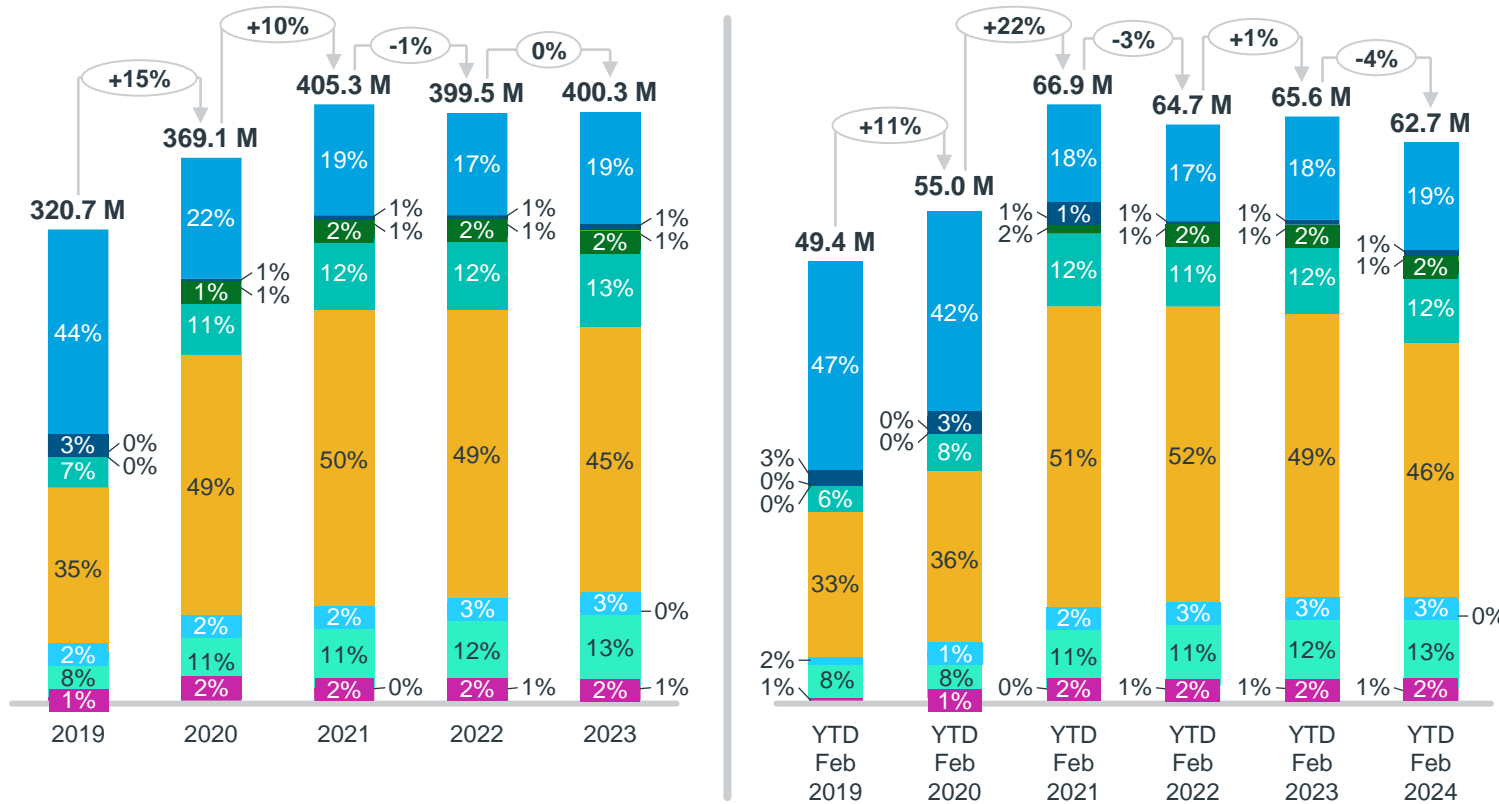




ChannelDynamics: Channel volume and performance trends

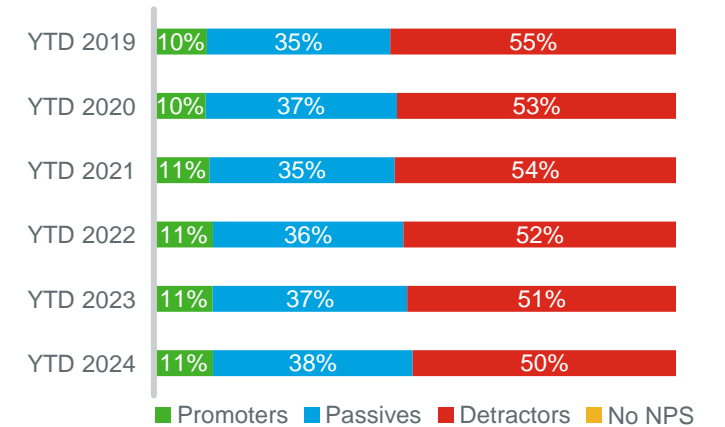
Japan: Full year 2019 vs 2020 vs 2021 vs 2022 vs 2023 and year-to-date trends over 6 years

Share of projected promotional volume

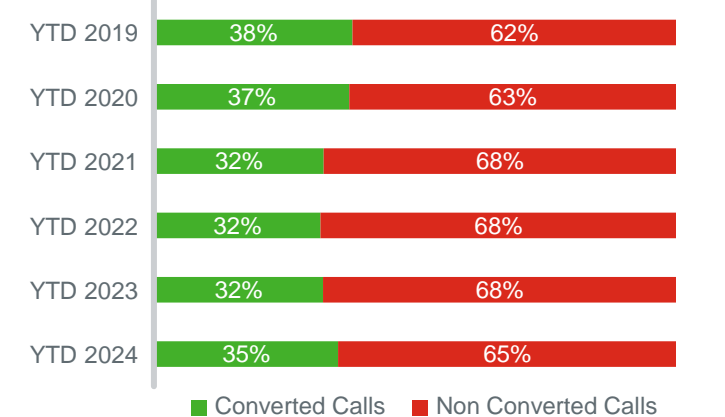


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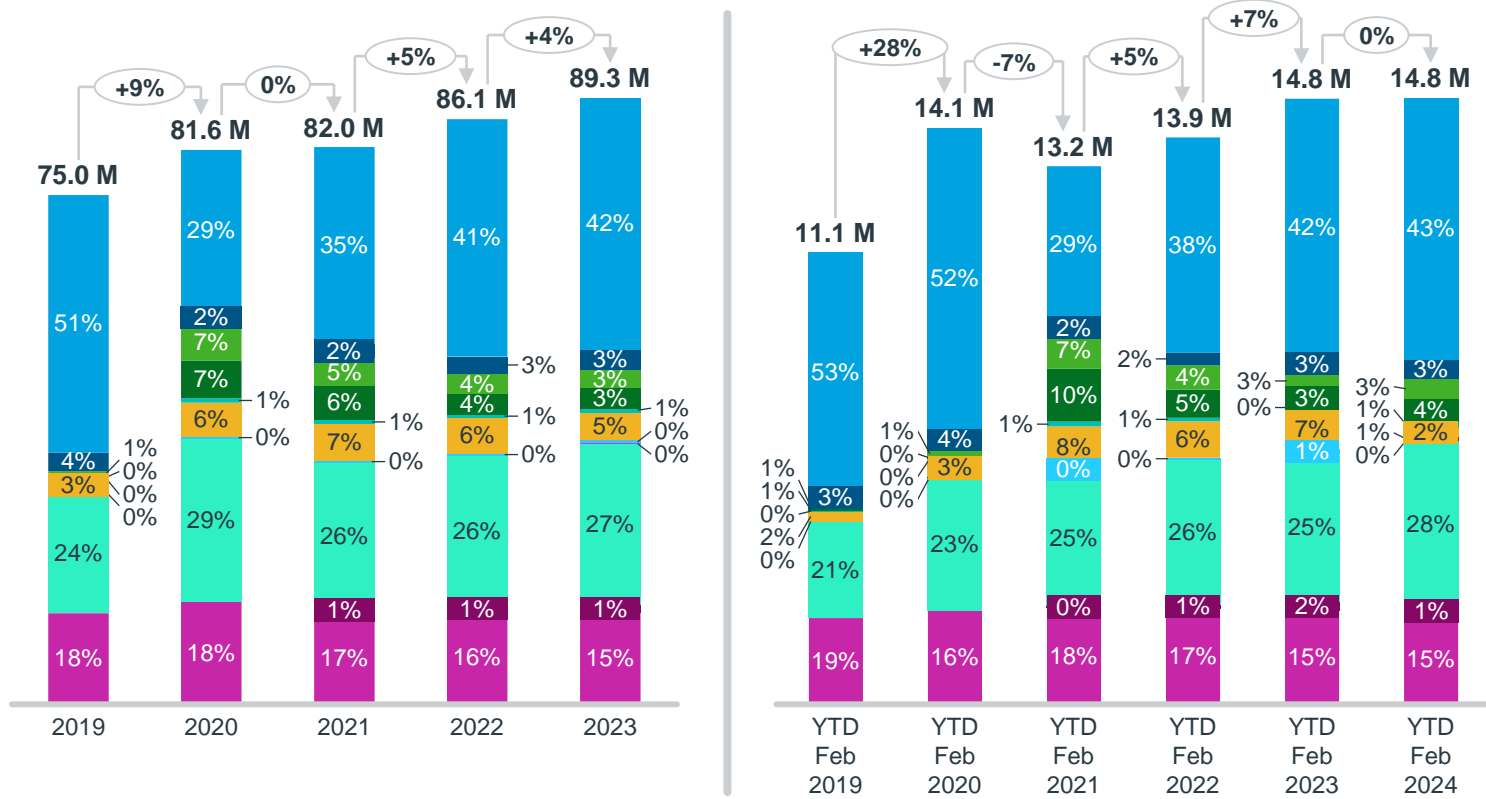




ChannelDynamics: Channel volume and performance trends

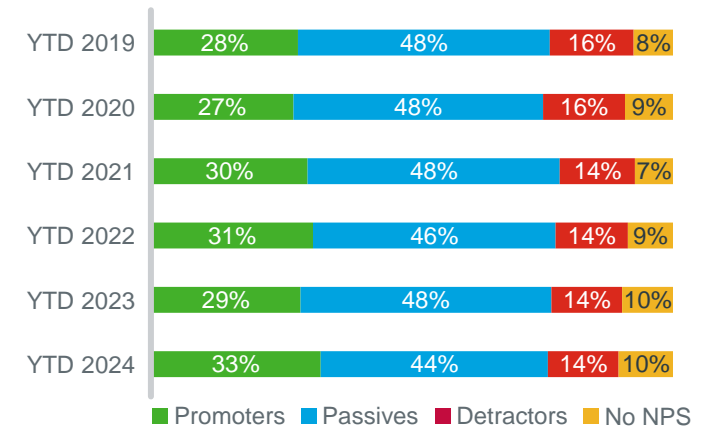
USA: Full year 2019 vs 2020 vs 2021 vs 2022 vs 2023 and year-to-date trends over 6 years

Share of projected promotional volume

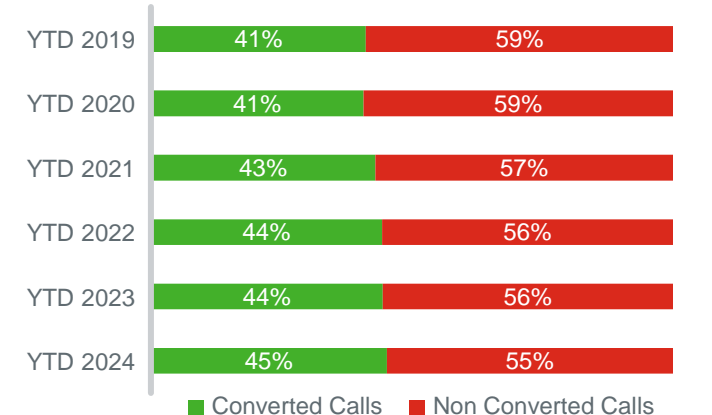


■ F2F - Detailing with rep ■ F2F - Meetings/Events ■ Remote - Detailing with rep (telephone, voice only) ■ Remote - Detailing with rep (online)
■ Remote - Meetings/Events (live, streaming) ■ Digital - Detailing (automated, self guided) ■ Digital - Meetings/Events (prerecorded, streaming)
■ Digital - Podcast ■ Digital - E-Mailing ■ Digital - Instant messaging / texting ■ Mailing (postal)

NPS Category share



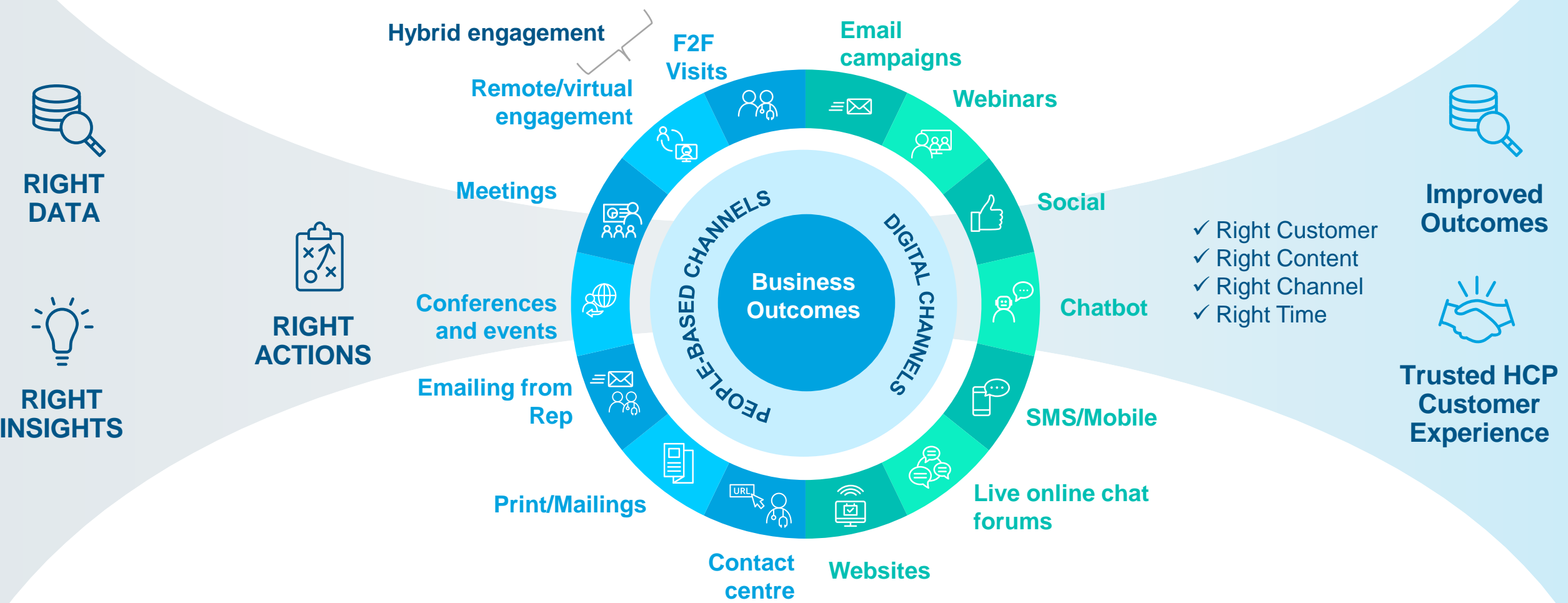
Converted Calls



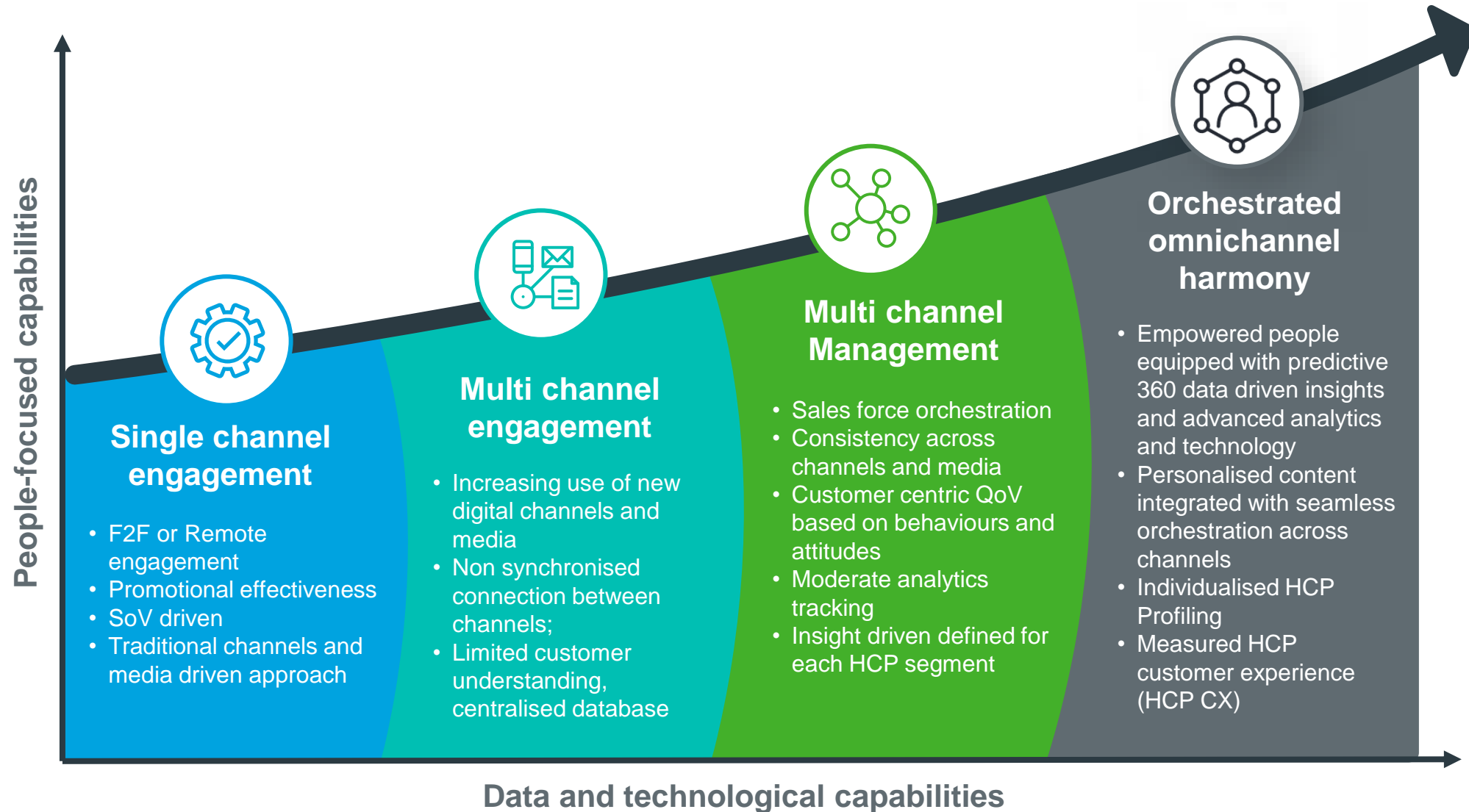


Omnichannel harmony - a seamless customer-centric journey

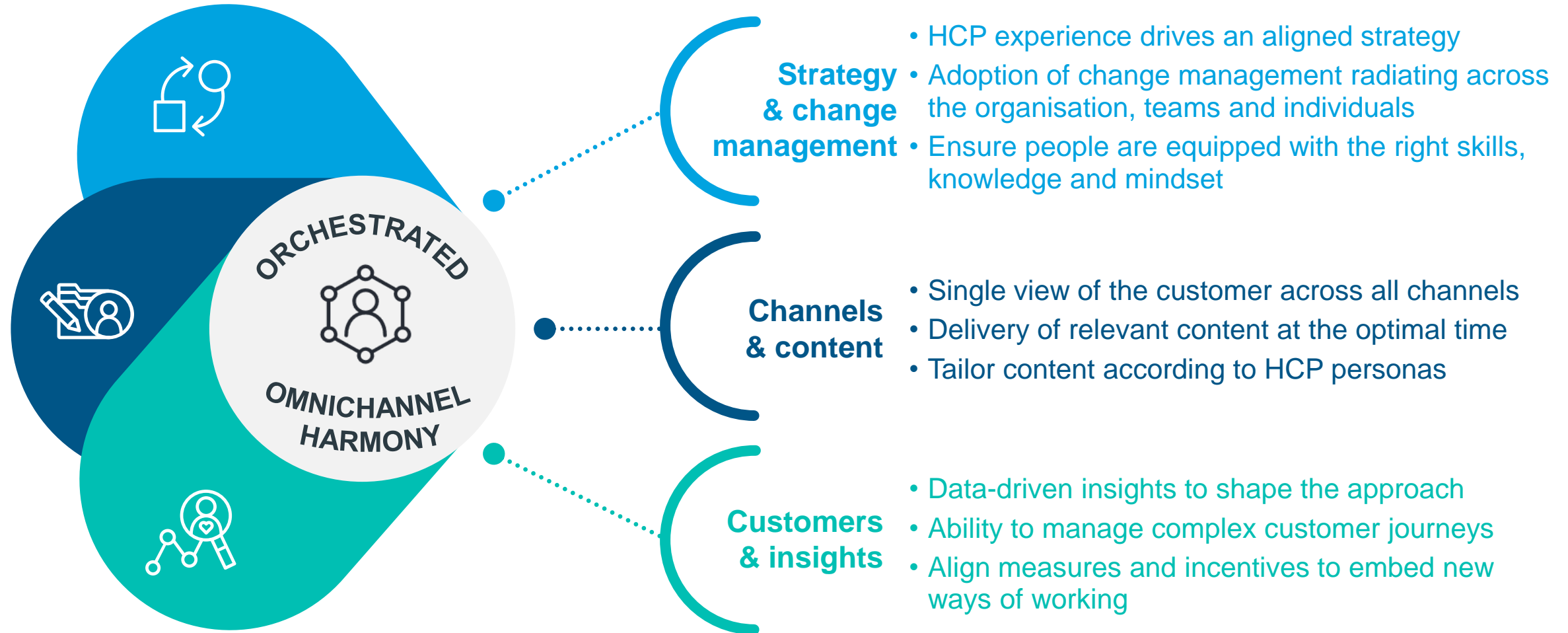
Orchestrating a seamless customer-centric journey through the harmonization of people-based and digital channels to meet HCP communication preferences and 'get it right' across all personas



Omnichannel adoption ladder



How to orchestrate omnichannel harmony for brand growth





Future HCP Engagement...

Channel harmony

The future of customer engagement is through an orchestrated hybrid omnichannel approach harmonizing digital and people-based channels to meet the evolving preferences of HCPs and consumers

People + digital solutions

Combining people and digital/technology is the key to delivering excellence with HCP engagement

Customer experience

Ensuring personalized interactions with tailored content are increasingly important in developing a trusted customer experience.

Touchpoints to journey

There is more to be done across all markets in matching channel preference with promotional reality to realize this vision and ensure seamless integration across all channels

Contact our experts: Consumer.Health@iqvia.com



Amit Shukla

*Vice President, Global
Consulting Services,
IQVIA Consumer
Health*



Dr Volker Spitzer

*Vice President, Global
R&D/RWE Services
and Thought
Leadership, IQVIA
Consumer Health*



Carrie Evans

*Director of GTM
Strategy & Offering
Development, IQVIA*



David Gray

*Head of Healthcare
Brand Strategy; Ceuta
Group, an IQVIA
business*

Thank You!

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