

# 1010DATA™

June 2021

## ECOMMERCE HEALTH & WELLNESS Spotlight

### 75%

Increase in Online  
Over-The-Counter (OTC)  
Health Product Sales



2020 witnessed a radical redefinition of “self-care” as consumers put a greater priority on health and well-being both to prevent contracting coronavirus and to reduce its harmful effects, should they contract it. This Health & Wellness Spotlight provides further insight to the online growth trends in over-the-counter product sales in 2020.

#### eCommerce Data

Although 1010data utilizes multiple panels that track millions of panelists, 1010data is projecting up to the total U.S. population. Panel-based projections are not intended to perfectly correlate to actual sales on an absolute dollar sales basis. The strength of 1010data's ecommerce data lies in share performance and trends over time.

Source: 1010data Market Intelligence eCommerce Panel Year-Over-Year Growth from 2019 to 2020

# A TALE OF TWO CHANNELS

## Online Growth Sees an Explosion in Over-The-Counter (OTC) Pharmaceutical Sales

There has been a dramatic shift in buying habits for OTC pharmaceuticals given the pandemic's impact - showcasing the importance of having channel specific marketing strategies tailored to both the online and offline shopper. Total year-over-year OTC sales decreased 3%\*, while online sales grew 75%\*\*. Cough & Cold is the largest OTC category with 45% share\* of total 2020 sales; however, online only, vitamins & Supplements account for 73% of OTC sales, growing 68% year-over-year.

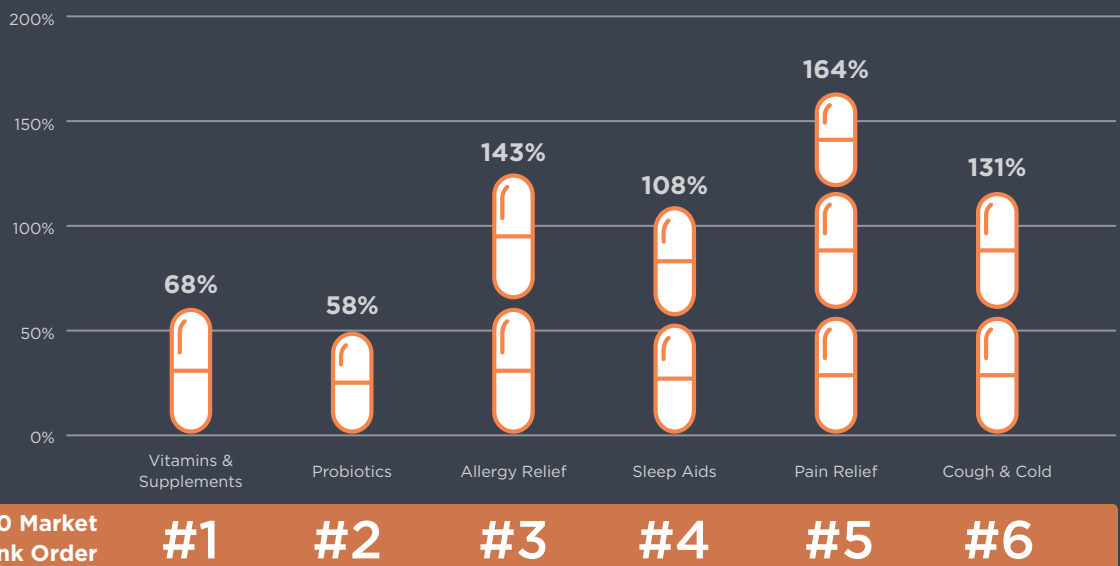
### 2020 OTC Top Performing Categories



### What is the OTC eCommerce Customer Buying?

Vitamins have one of the highest online purchase adoption rates, but this level of growth indicates new online shoppers have joined this trend given the pandemic's impact. While demand for Cough and Cold also increased significantly within our panel, online buying limitations impact its total performance giving it a rank of only #6 in total online category share.

### 2020 OTC Online Category Year-Over-Year Growth



1010data eCommerce Suite - YoY Growth From 2019 to 2020 for Health-Centric Products

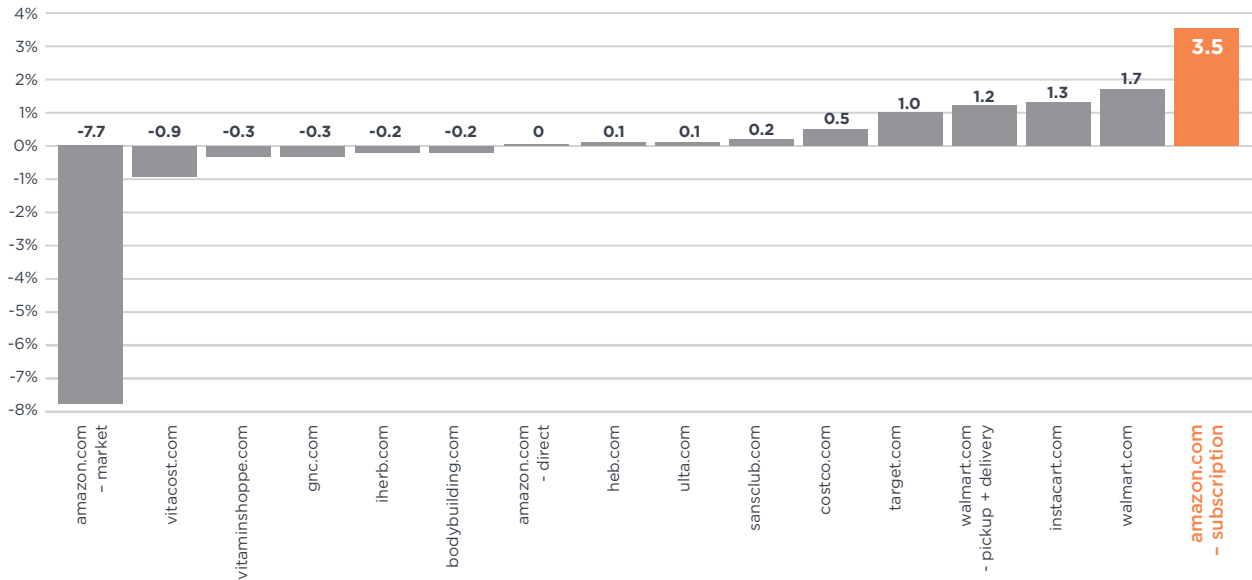


# AND THE WINNERS ARE...

## The Amazon Effect

Amazon even managed to take some of its own market share in 2020 shifting buyers from purchasing items via their 3rd party vendors to re-ordering automatically through their subscription-based service. Amazon Subscribe and Save achieved 133% year-over-year OTC growth and gained 3.5 share points, creating higher long-term value for Amazon given the stickiness of subscribers.

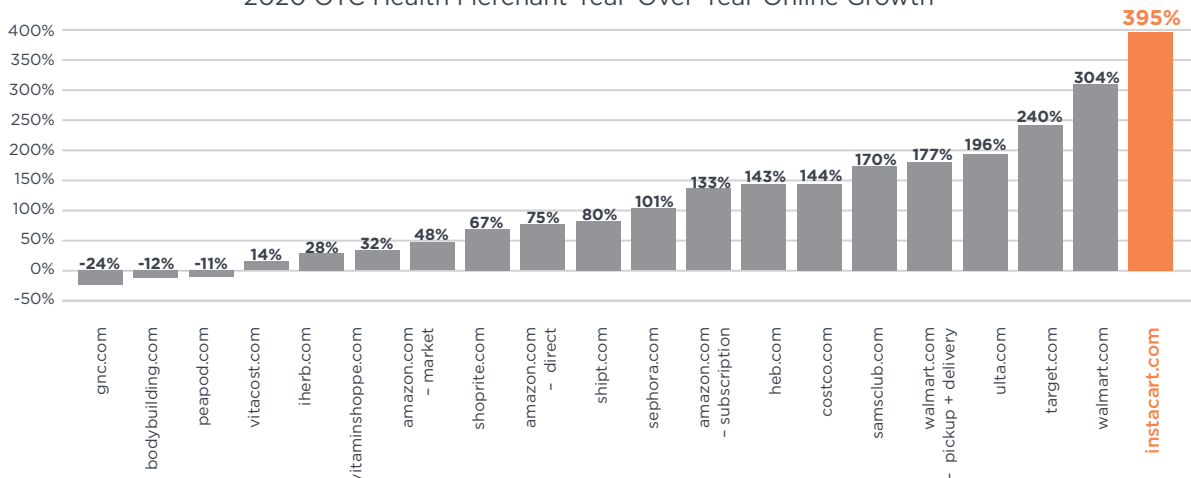
2020 Share Point Change by Merchant for Online OTC Health Spend



## The Convenience of Instacart

Instacart's OTC sales grew 395%, the highest of any merchant we track. These merchant's OTC efforts were boosted by consumers including OTC purchases alongside their grocery orders.

2020 OTC Health Merchant Year-Over-Year Online Growth



Source:1010data eCommerce Suite - YoY Growth From 2019 to 2020 for Health-Centric Products

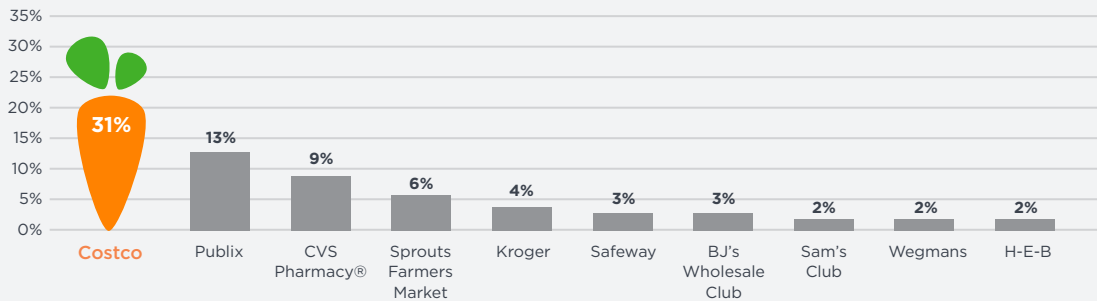
# THE POWER COUPLE:



## About That Curbside Delivery...

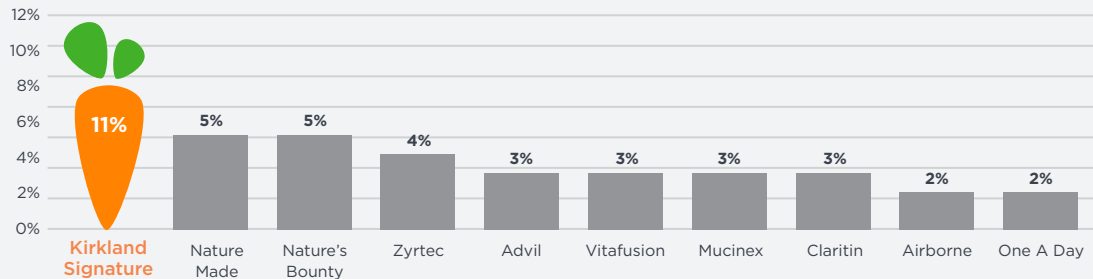
As we noted in our [State of Grocery Report](#), Costco's partnership with Instacart paid off in a big way in 2020, earning them the spot for top performer within our Instacart OTC health sellers data panel as well, owning 31% of seller share.

2020 Top 10 Instacart OTC Health Sellers - eCommerce Panel Data Market Share



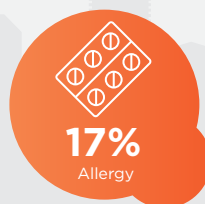
Taking a closer look at OTC health brands sold via Instacart in 2020, Costco's private label Kirkland Signature is the top brand sold by Instacart.

2020 Top 10 Instacart OTC Health Brands - eCommerce Panel Data Market Share



Source: 1010data eCommerce Suite - YoY Growth From 2019 to 2020 for Health-Centric Products

By offering a more diversified product portfolio and same-day delivery alongside grocery, Costco's Kirkland brand share is more than double that of its next closest competitor.



Source: 1010data eCommerce Suite -  
2020 Share of Kirkland Signature OTC Health Product Types Sold Via Instacart



# THE SEARCH CONTINUES

## Consumers Expand Their View of Wellness

During the pandemic, consumers took a much more proactive approach to their health. This led them to rely on media (news and social), friends and family, and product descriptions and reviews to proper preventative self-remedies, many of which can be indicated below based on the top populated search terms by category.

### Growth for Health Category Items That Call Out Specific Terms Via Consumer Online Searches

SEARCH TERMS	
Item descriptions that contain:	
Elderberry	231%
Probiotic	62%
Melatonin	102%
Zinc	172%
Tylenol	333%
Mucinex	194%
Ibuprofen	115%
Women	67%

SPECIFIC LETTER VITAMINS	
Item descriptions that calls out:	
Vitamin A	72%
Vitamin B	104%
Vitamin C	147%
Vitamin D	110%
Vitamin E	88%

HOLISTIC MEDICINE	
All items that reference:	
Mushrooms	49%
Chaga	116%
Lion's Mane	71%
CBD	118%
Turmeric	16%
Charcoal	24%
Apple Cider Vinegar	265%
Nootropics (Brain Supplements)	57%
Ashwagandha	54%

PRODUCT BENEFIT	
Item descriptions that contain:	
Sleep	78%
Immunity	216%
Energy	45%
Vegan	86%
Calming	79%
Gummy/Gummies	166%

## What Did They Buy?

As loyal as many consumers became to their retailer of choice for OTC products, the majority were not as loyal when it came to seeking out specific product brands they wanted to purchase. In fact, Tylenol and Mucinex were the only brands that populated within the top 10 search terms that lead to OTC items being added to a shopper's cart.

### Top Search Terms Leading to Add to Cart

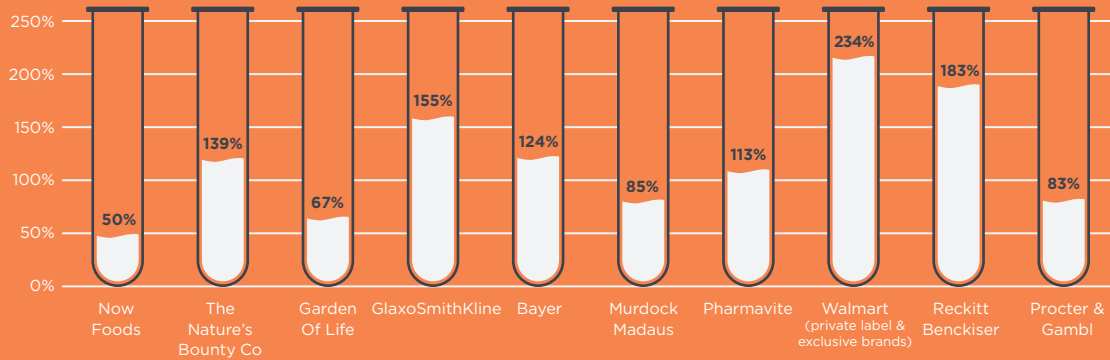
Probiotics  
Vitamin C  
Vitamin D  
Melatonin  
Zinc  
Tylenol  
Mucinex  
Elderberry Gummies  
Ibuprofen  
Probiotics for Women

# WHICH MANUFACTURERS WERE IN THE RIGHT PLACE AT THE RIGHT TIME?

## Exclusive & Private Label Brands Are On The Rise

Walmart's private label and exclusive brands performed exceptionally well during this period, achieving the 234% year-over-year sales growth thanks in particular to the success of in-house brands Equate, Spring Valley and Parent's Choice.

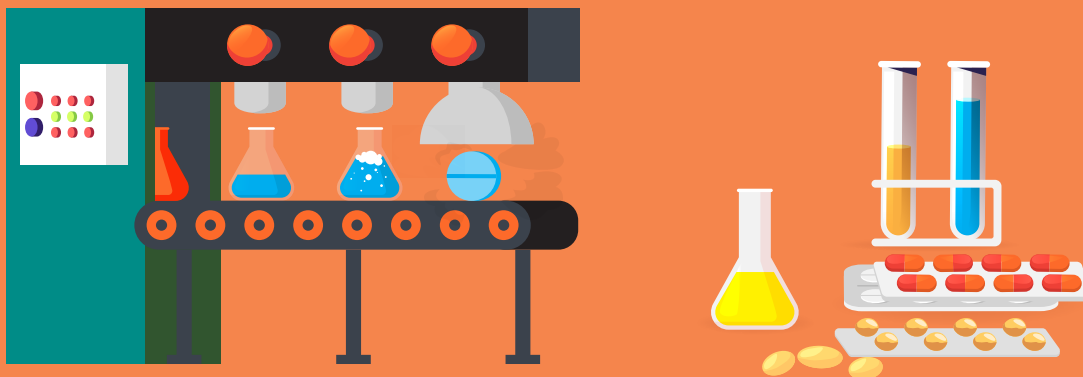
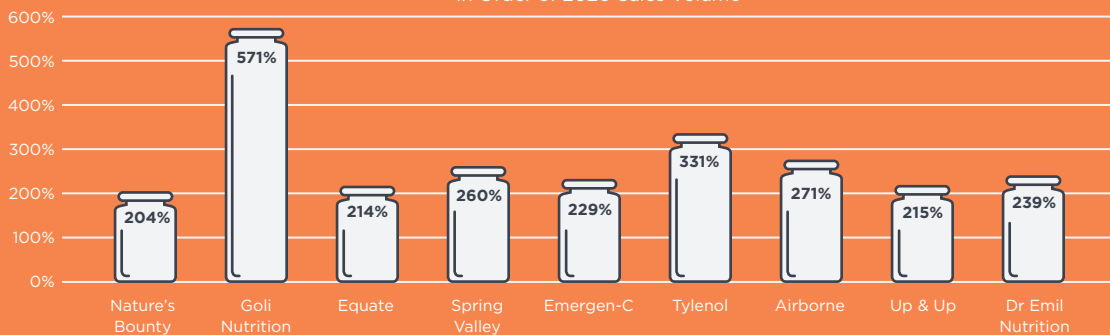
2020 Top OTC Health Manufacturer Year-Over-Year Online Growth



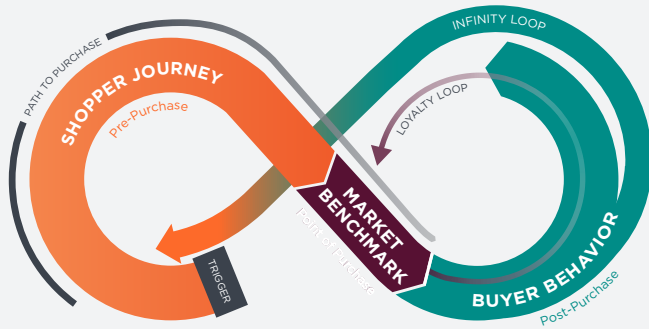
## Breakout Success From Goli Nutrition

Many brands achieved major sales growth in 2020, such as Goli Nutrition which launched the 'world's first' apple cider vinegar gummy a few months prior to the pandemic and successfully maintained sales momentum throughout the year.

2020 Top Brands with Notable Year-Over-Year Online Growth  
In Order of 2020 Sales Volume



Source: 1010data eCommerce Suite - YoY Growth From 2019 to 2020 for Health-Centric Products



# 1010DATA'S ECOMMERCE SUITE

Consumers' Online Decision Journey

## 2020 Apple Cider Vinegar (ACV) Gummies Industry Analysis

Diving deeper into the 2020 growth for Goli Nutrition we saw which retailers are capitalizing on this growth, by what means, and how this new brand's emergence has impacted the OTC industry. Below are top highlights we found:



### 2020 TOP SEARCH TERMS RELATED TO ACV GUMMIES

### 2020 TOP NEW ACV CUSTOMERS - MERCHANTS SHOPPED

### 2020 ACV LESSON'S LEARNED

1	Goli apple cider vinegar gummies	Target.com - 45.6%	82% of Goli customers are new
2	Goli	Vitacost.com - 39.3%	Top Item Switched From: Natrol 5-HTP
3	Apple cider vinegar gummies	Walmart.com - 13.6%	Top Supplements Switched From: Elderberry & Magnesium
4	Goli gummies	Vitaminshoppe.com - 1.4%	At Target.com there is a positive affinity for Premier Protein and Goli gummies

Goli's marketing efforts have been extremely effective in generating brand awareness and mindshare.

Target.com grew from 25% market share for ACV gummies in 2019 to 60% in 2020.

Bragg liquid ACV lost 14% of its customer-base with 32% of those customers switching to Goli gummies

Source: 1010data eCommerce Suite - YoY Growth From 2019 to 2020 for Health-Centric Products

## HOW CAN WE HELP YOU STAY AHEAD OF SHIFTING, ONLINE CONSUMER TRENDS?

The statistics in this Health & Wellness Spotlight were generated by the 1010data [eCommerce Suite](#), which offers access to our timely data updates across the broadest category coverage in the marketplace. Companies leverage our data intelligence solutions to better understand digital shopping behaviors and monitor brand performance within today's online consumer journey from the path-to-purchase and beyond.

Contact [info@1010data.com](mailto:info@1010data.com) for more information.

### eCommerce Data

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