

Top Advertisers in CPG:

Category Trends and Social Insights



Introduction

Still the top category in digital advertising, CPG takes on aspects of nearly every other vertical, with multiple sub-categories and products that span the entire digital landscape. We analyzed the top 5 CPG advertisers over the last 3 years, for seasonal, spend and creative trends, to explain what keeps it at the top of the (individually wrapped) food chain.

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Top advertisers and brands in the last 3 years, H1

Comparing H1 of the last three years, The Hershey Company was the top advertiser, investing a hair under \$200MM for candy, mints & gum brands combined. At first glance, that's double its nearest competitor, Mars Inc. However, looking closer at the data, Procter & Gamble actually controlled 4 of the top brands, slotting the CPG giant as the true #2 advertiser with more than \$193MM in total spend.

Top advertisers/brands in the last 3 years, H1



Confections:

Seasonal spend for the candy holidays

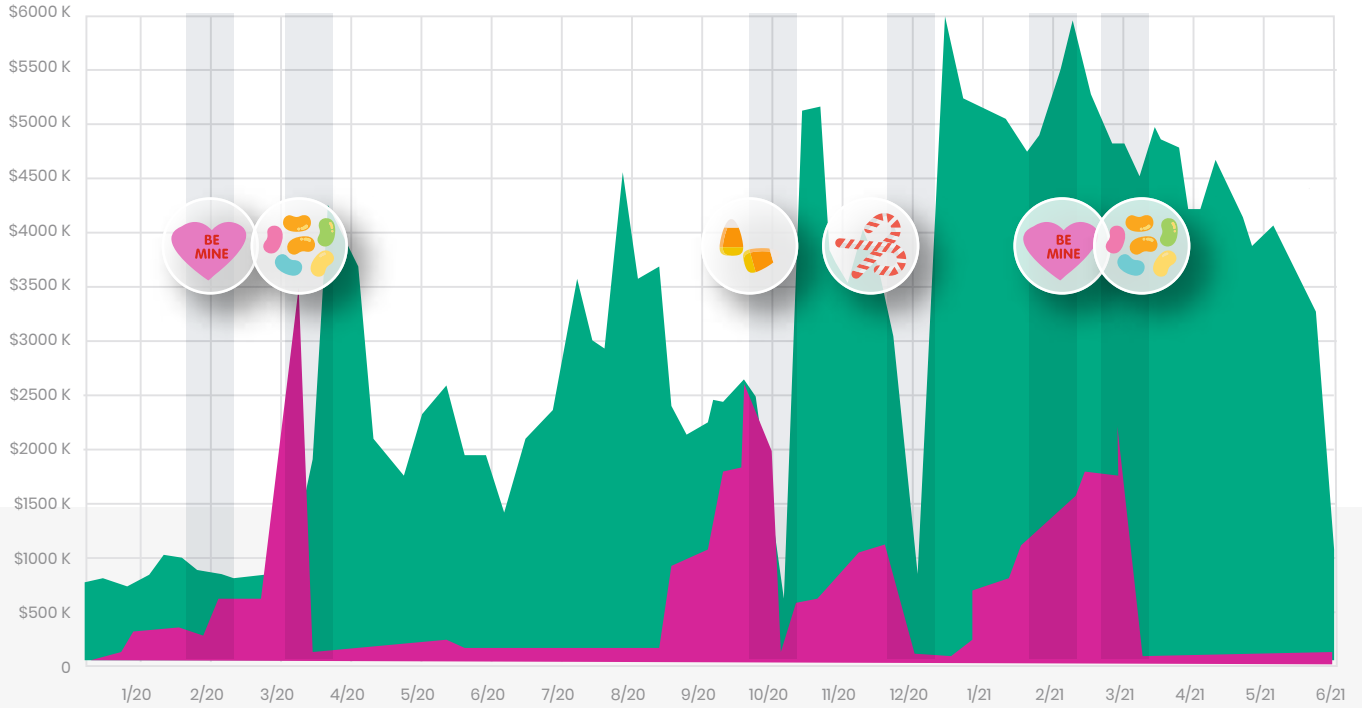
The sweet always tastes just a bit sweeter during the holidays. You know what we're talking about—from the bags of scary Halloween candy, to cadbury eggs, to a heart-shaped candy-coated representation of love, CPG brands, Hershey and Mars Inc. had us covered between 2020–2021. In fact, you barely have to look at a calendar to know when the sugar rush is upon us. Taking a look at seasonal v. non seasonal creatives, meaning any ad that mentioned a certain holiday vs. one that didn't, it doesn't take a rocket scientist to see the trends. Mmmmm...how can we get a chocolate covered rocket? Nevermind.

While Hershey definitely earned it's top advertiser status, nearly doubling Mars' spend in each of the holiday spikes, the trend lines are nearly identical.



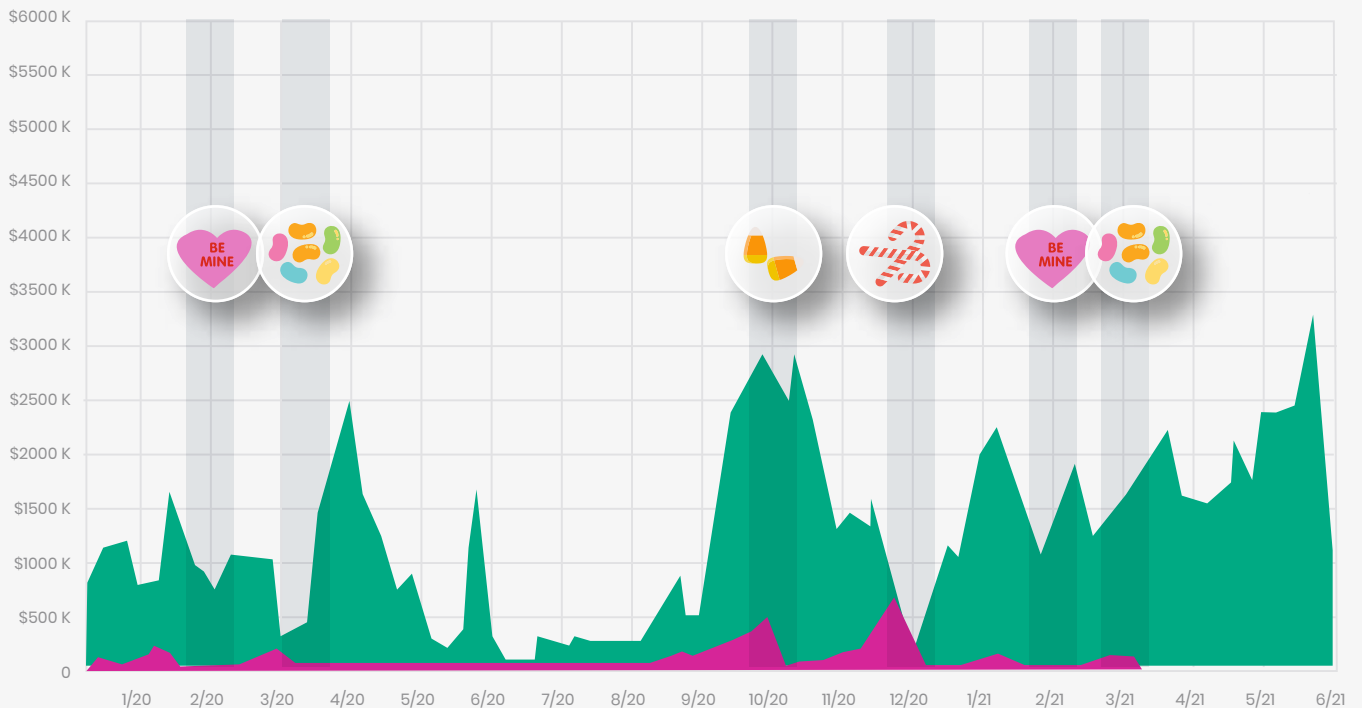
Top 1 Brand Hershey Candy, Mints & Gum

- Non-Seasonal Confections and Snacks
- Seasonal Confections and Snacks



Top 2 Brand Mars Wrigley Candy, Mints & Gum

- Non-Seasonal Confections and Snacks
- Seasonal Confections and Snacks



The covid effect:

Category trends during quarantine

CPG was at the forefront of consumer needs as Covid19 began shutting down the country in March, 2020, and none more so than cleaning and disinfecting products. Taking a look at the **Household Cleaning Supplies** sub-category, we see the significant uptick in spend beginning in March, 2020, as Desktop Video, Facebook and Instagram increased across the board, even leading into 2021.

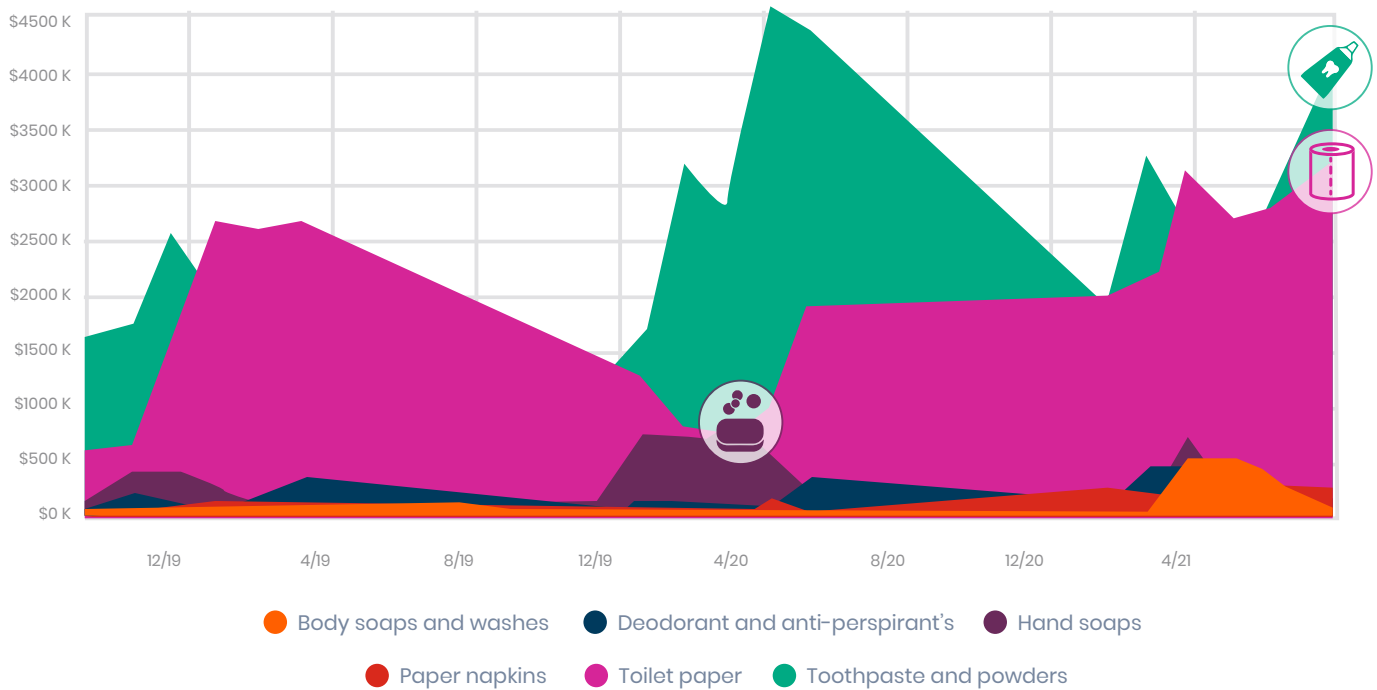
We can see the same pattern, even more pronounced, in both the **Hand Sanitizers**, and **Cleaners and Disinfectants** sub-categories—both hitting new highs in Desktop Video in late 2020, and June 2021 respectively.



However, the **Bathroom Supplies** sub-category had an unexpected surprise up it's sleeve as toothpastes and powders received a big boost in April, 2020. We can only speculate advertisers were doubling down on stay-at-home-orders producing an exorbitant amount of bad breath and rotting teeth, as consumers snacked away their days with confections.

But, perhaps less of a surprise was ad-spend for **toilet paper** brands, which actually declined significantly through the beginning of quarantine. A combination of news reporting and consumer behavior drove the scarcity of the essential product, offering brands the unique opportunity to pull ad spend in the wake of free publicity and high demand. Why advertise a product that's already flying off the shelves?

Bathroom Supplies



Possibly more than any other category of products, CPG is always adapting to trends and consumer behavior. A great example—**hand sanitizers**. In H1 of 2019 Only 3 brands were spending on digital for hand sanitizers with a total spend of \$47,700 (*Note Pathmatics did not track twitter or instagram during this time period). But, flash forward to H1, 2021, and hand sanitizers were all the rage, with major advertisers like GOJO Industries, Unilever, and SC Johnson jumping into the space with more than \$1.4MM in total spend.

Top Advertisers for Hand Sanitizers

Rank	Advertiser	Direct	Devices	Spend (USD)	Impressions
1	Gojo	✓		\$1,097,400	189,455,200
2	Unilever	✓		\$238,400	12,285,000
3	SC Johnson	✓		\$35,100	3,503,500
4	L'Oreal	✓		\$17,200	5,213,700
5	Everyone Soap	✓		\$13,000	1,361,900
6	Amyris	✓		\$2100	230,600
7	Every Man Jack	✓		\$600	74,000
8	Edgewell Personal Care			\$300	85,000
9	Sunshine Makers			<\$100	1,400

Top Categories Under Hand Sanitizers

Hand Sanitizers (General)		\$1,404,100	202,220,400
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Still waning on the covid-19 effect? We did a keyword analysis for the top 5 CPG brands in May of 2019, 2020 and 2021 to see what messaging was showing up in creatives.

2019 was no surprise as natural deodorants were coming of age and **“deodorant”** **“aluminum”** **“care”** and **“skin”** were top choices across digital channels. Although we might expect 2020 to have more covid-related keywords, brands hadn’t grasped the full specter of the pandemic quite yet. Add to that, Procter & Gamble’s Olay brand invested more than \$5.2MM in May, 2020, on face creams and skin care, skewing creative keywords in their favor with, **“Olay”** **“skin”** **“serum”** and **“proactive”** to name a few. But a year into the pandemic, May, 2021 seems to fit into the paradigm we’ve all come to understand, with keywords like, **“clorox”** **“wipe”** **“disinfect”** **“kill”** (we assume germs)” and **“virus”** saturating digital ads.

TOP 5 Brands in May of 2020



TOP 5 Brands in May of 2019



Top 5 Brands in May of 2021

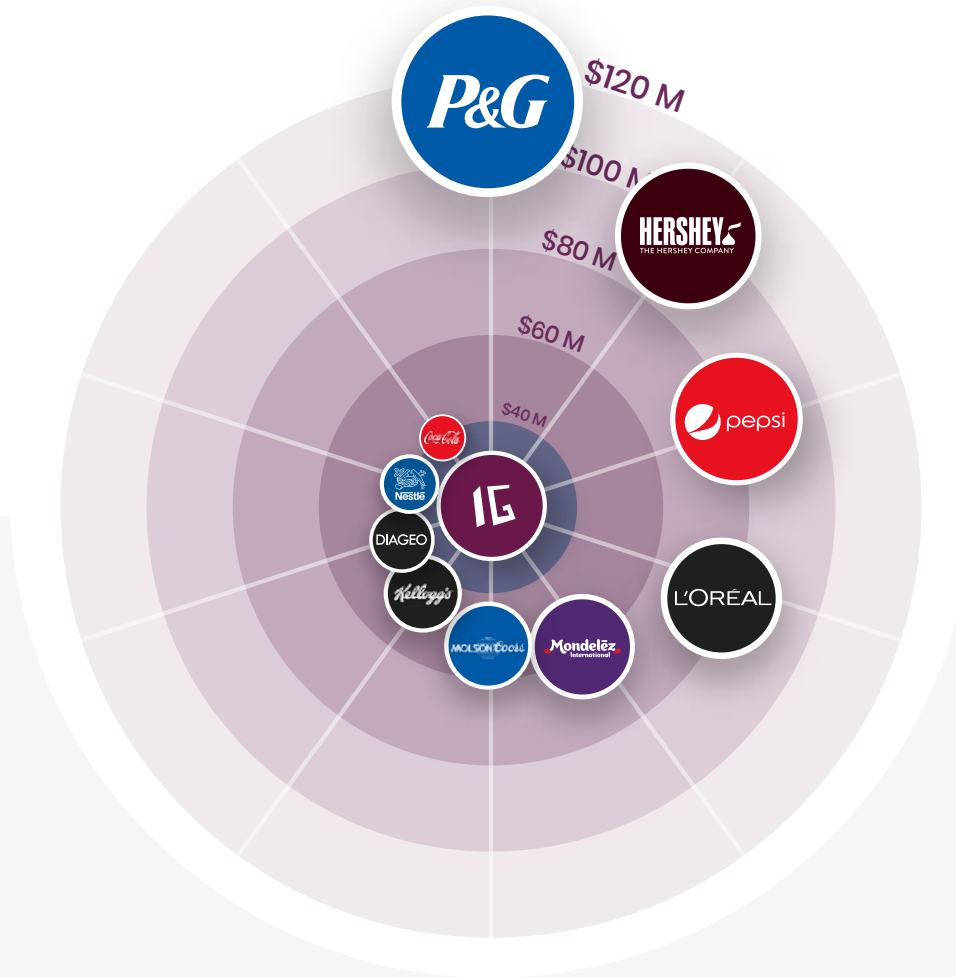


Spotlight on Instagram

There's no doubt that digital advertising has been moving investment into social channels over the last few years, and Instagram has become a boon for both smaller advertisers looking to make an impact, as well as established brands hoping to reach a younger audience. No surprise, the CPG category has several heavy-hitters on the platform.

P&G holds the top spot in both 2020 and 2021, though with only 4 months left in the year, it's possible that this year's spend falls below, or right on par, with 2020's 'Gram budget. Another change from 2020 is #2 Hershey, who trails P&G by only an estimated \$25 thousand, a gap that could easily be eradicated during the Halloween and holiday season. The spending difference between the two brands last year? Nearly \$100 Million.

Advertising Spend for Consumer Package Goods

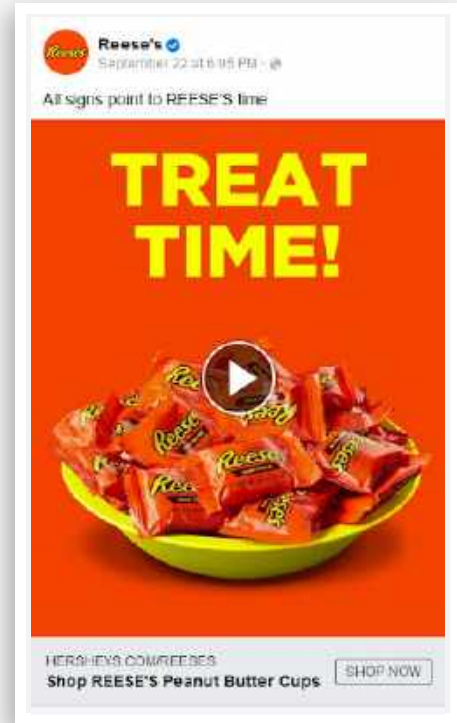


This top 10 list looks pretty similar to 2020, though some brands have seemingly placed more attention on Instagram, while others have pulled back. Both Pepsi and L'Oréal increased spend significantly, with the former already investing \$25k more than 2020, and L'Oréal tracking to more than double their spend on the platform by the end of 2021. Nestlé, on the other hand, has moved down the list into the #9 spot under top 10 newcomer Diageo, who has already doubled their FY 2020 Instagram budget, with 4 months to go.

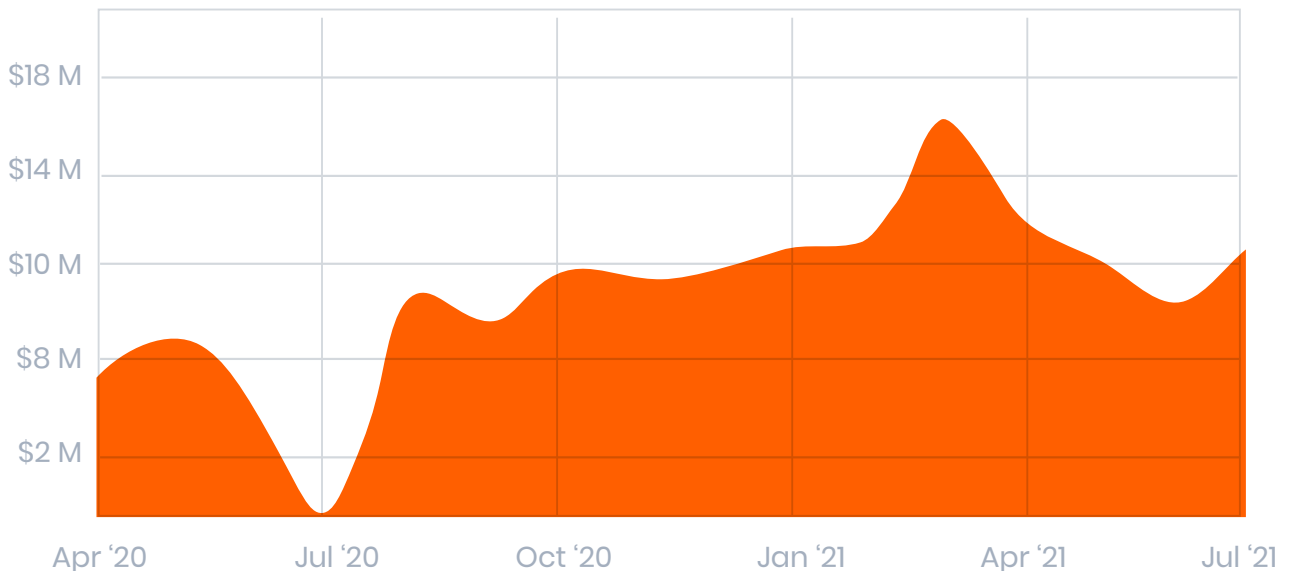
Candy'gram

Many of us associate Instagram with influencers, fashion and beauty, D2C brands, and lifestyle hacks. But food and drinks took center stage in the CPG category on Instagram this year, with names like Hersheys and Mondelez holding down top spots not just in the CPG vertical, but across all advertisers and categories YTD.

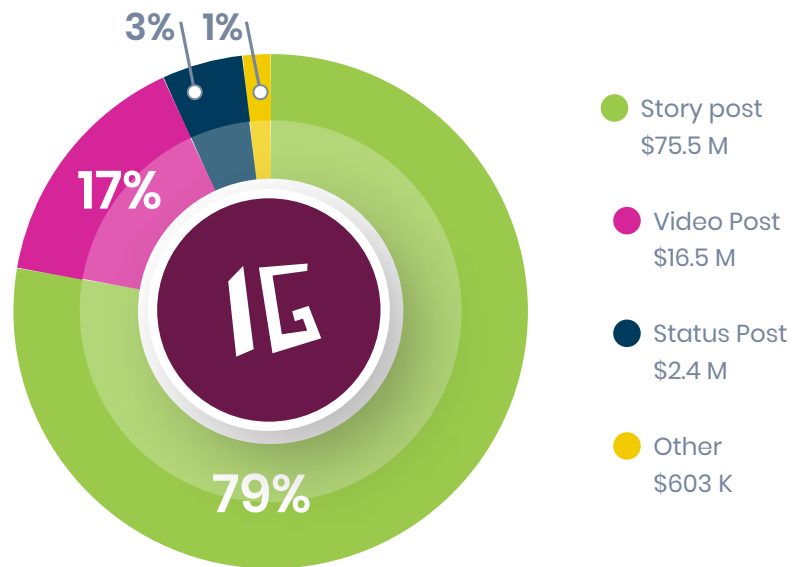
Utilizing Millennial and Gen-z-favored Instagram stories, The Hershey Company has spent an average of \$10 Million a month on the 'Gram since Halloween of 2020, with bright and vivid imagery that would make anyone consider a quick candy break. And with the pandemic keeping many in their homes and out of grocery and convenience stores, "shop now" CTAs enabled hungry scrollers to quickly get their hands on their favorite treats from the comfort of their homes.



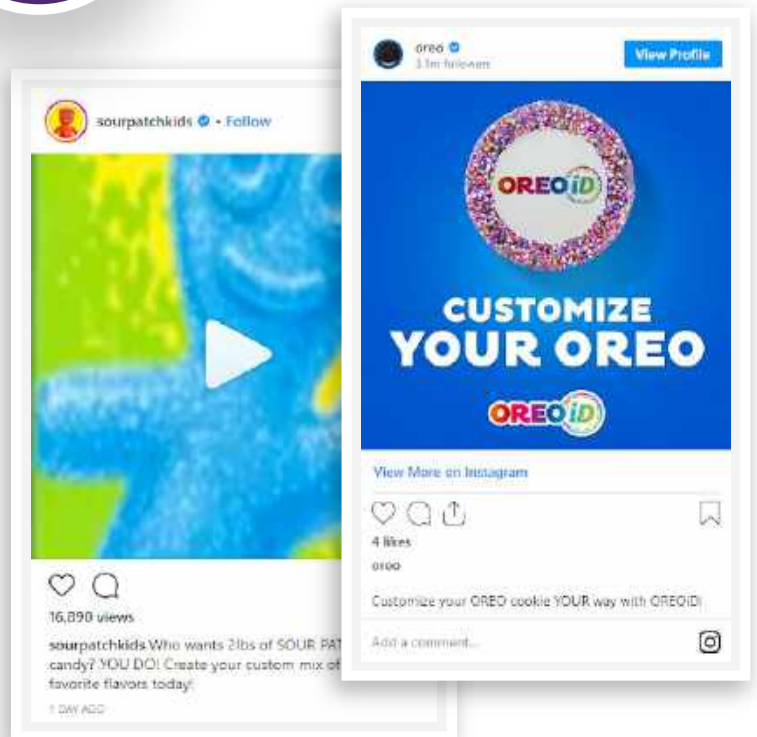
Monthly Spend Overview for Hershey Company



Creative Type Breakdown for Hershey Company



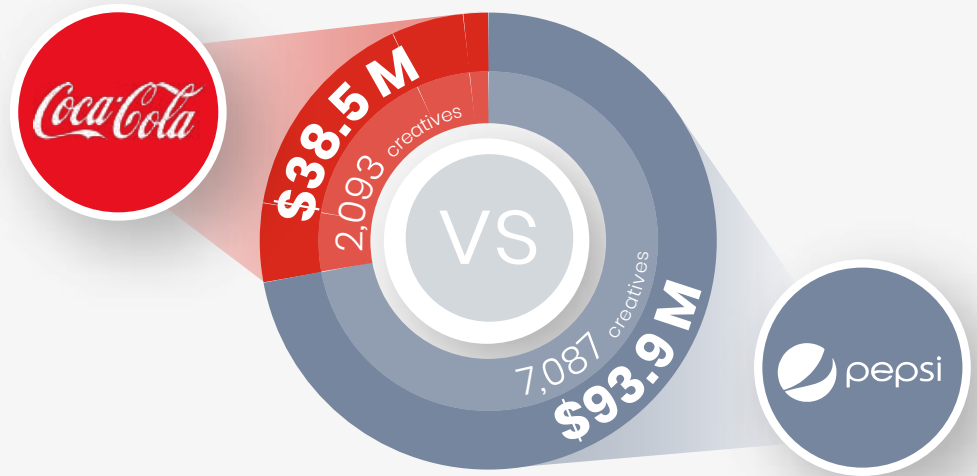
Mondalez, who has spent about half as much on Instagram as Hershey's so far this year, also prioritizes candy and sweet treats, with "candy, mints, and gum" as their highest spending category, followed closely by Oreo. Like Hershey's, the brand focuses heavily on stories and video posts. Top creatives for both Sour Patch Kids and Oreo feature options to customize flavors and colors, elevating the experience of ordering candy and snacks online for many stuck at home.



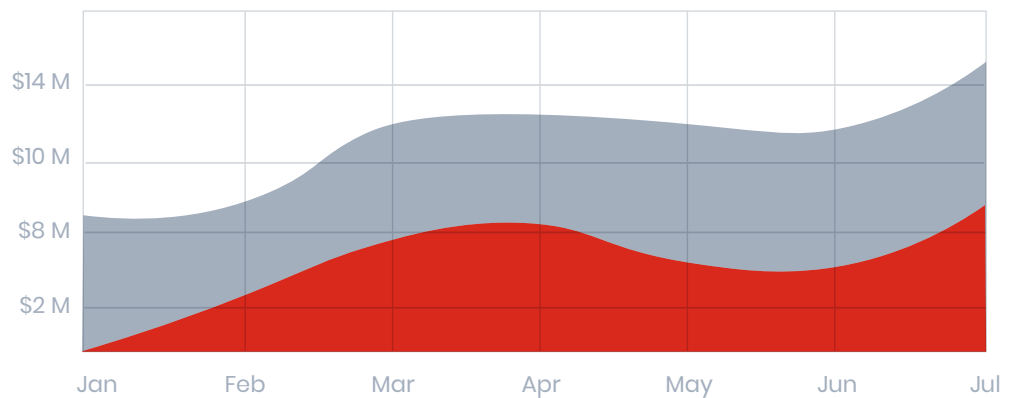
Beverages for Boomerangs

Thirsty for bubbles, caffeinated or alcoholic? Our top 10 list has it all, from the ongoing Coke vs. Pepsi battle to a new stand-off between Molson Coors and Diageo. PepsiCo is outspending The Coca Cola Company by a high margin YTD, and putting out more creatives too. But spend patterns have been eerily similar.

Spend Volume



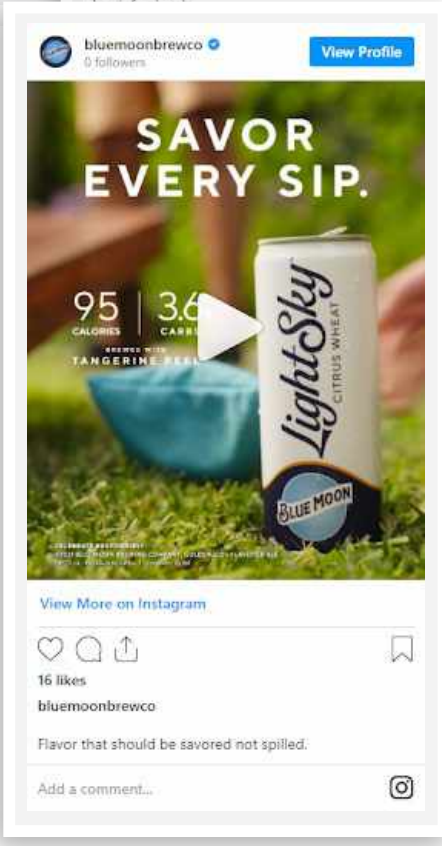
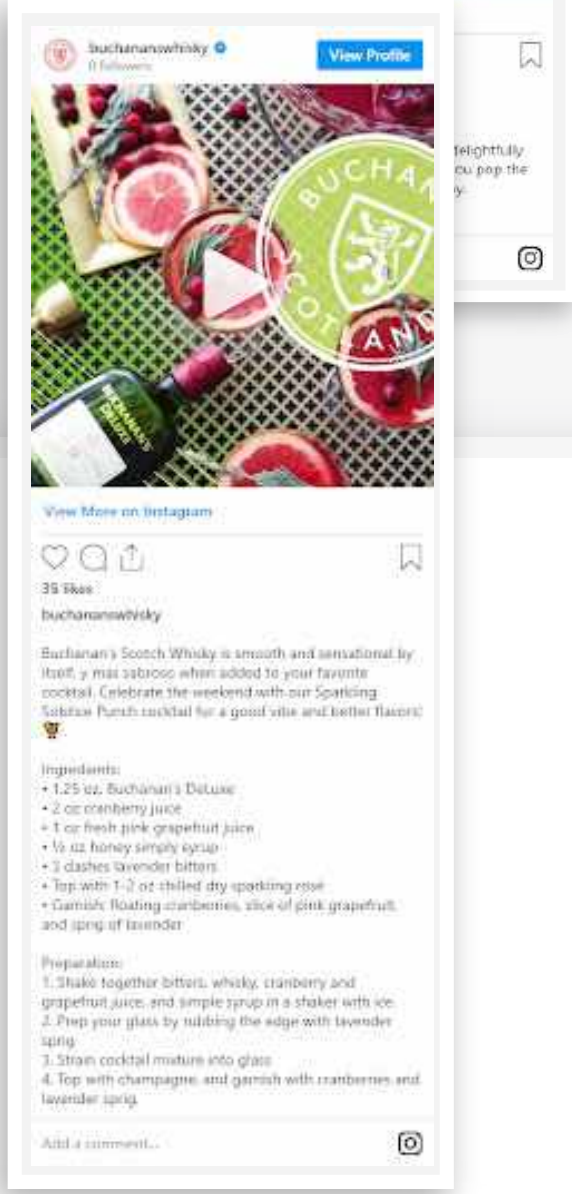
Monthly Spend



PepsiCo's top brand is interestingly not a soft drink—Frito Lay takes the top spot, with 24% of spend share, followed by Mountain Dew with 36% and Pepsi with only 13% of PepsiCo's total Instagram budget YTD. For Coca-Cola owned brands, classic Coke takes 23% of the brand's spend share, followed by Sprite with 14%. Anyone thirsty?

Over in adult beverage land, Molson Coors has taken to Instagram to promote their...healthy... alcoholic beverages, including a lower calorie Blue Moon Light Sky, and Vizzy, an antioxidant Vitamin C hard seltzer. Spending ramped up for Spring and Summer, perhaps in anticipation of warmer temperatures and newly vaccinated folks looking for reasons to celebrate.

Diageo brands had a similar idea, ramping up spend for the Summer months with creatives featuring cocktail recipes fit for a day at the pool. Jumping on the canned drink bandwagon, creatives for Tanqueray Crafted Gin Cocktails in a can and Smirnoff Ice Smash (also in a can) account for around \$1 Million of spend, mostly during the summer months.



Keep up with the latest trends in digital

CPG is no doubt a major player in the digital sphere, but Pathmatics Explorer has much more to offer, including our updated taxonomy with deeper brand and category insights.

[Request a free insights report](#)

About Pathmatics

Pathmatics turns the world's marketing data into actionable insights. As consumption rapidly shifts to digital, media decisions have become complex and opaque. Pathmatics Explorer, the Pathmatics marketing intelligence platform, creates trust and transparency, bringing visibility into the digital ad performance of brands, their competitors, and entire industries across display, social, video, mobile, and native advertising data. Brands and agencies get access to the creative used by all advertisers, spend and impression data, and path from publisher to viewer, empowering them to minimize waste from their budgets, better position their marketing, and predict the next moves of their competitors. Pathmatics data powers Kantar's Social Intelligence and Numerator's Ad Intel. Founded in 2011, Pathmatics is headquartered in Santa Monica, California, and backed by Upfront Ventures, BDMI, and Baroda Ventures.

