SCENT TRENDS IN PERSONAL CARE & HOUSEHOLD
In Cosmetics Barcelona 2015
AGENDA

• Consumers: Scent is a primary purchase driver in personal care and household
• Market: Scent trends
• Innovation: Bringing new formats and added benefits
CONSUMERS

• Scent is a primary purchase driver in personal care & household categories
Fragrance is a top purchase driver in personal care categories, Europe Big 5, % consumers

Fragrance is the top purchase driver for SBS products ahead of moisturising functions

Scent is nearly as important as protection when buying deodorant

Soap, bath & Shower
"Has a scent I like"

- Liquid body wash/bath products
- Bar soaps
- Liquid hand soap/hand sanitisers

Deodorant
Top 3 purchase drivers

- Long-lasting effective protection
- A fragrance I like
- Leaves no stain on body or clothes

<table>
<thead>
<tr>
<th>Country</th>
<th>Liquid body wash/bath products</th>
<th>Bar soaps</th>
<th>Liquid hand soap/hand sanitisers</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>66</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>Germany</td>
<td>63</td>
<td>63</td>
<td>57</td>
</tr>
<tr>
<td>Italy</td>
<td>70</td>
<td>58</td>
<td>57</td>
</tr>
<tr>
<td>Spain</td>
<td>68</td>
<td>61</td>
<td>53</td>
</tr>
<tr>
<td>UK</td>
<td>63</td>
<td>52</td>
<td>27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Long-lasting effective protection</th>
<th>A fragrance I like</th>
<th>Leaves no stain on body or clothes</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>50</td>
<td>51</td>
<td>41</td>
</tr>
<tr>
<td>Germany</td>
<td>60</td>
<td>60</td>
<td>48</td>
</tr>
<tr>
<td>Italy</td>
<td>56</td>
<td>59</td>
<td>56</td>
</tr>
<tr>
<td>Spain</td>
<td>55</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td>UK</td>
<td>63</td>
<td>53</td>
<td>52</td>
</tr>
</tbody>
</table>

Source: Lightspeed GMI/ Mintel
Fragrance is a top purchase driver in personal care categories, USA, % consumers

**Bodycare products:** Scent is the most important claim that consumers look for

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has a scent I like</td>
<td>66</td>
</tr>
<tr>
<td>Intensive healing to treat severely dry, cracked skin</td>
<td>43</td>
</tr>
<tr>
<td>Calms itchy skin</td>
<td>42</td>
</tr>
</tbody>
</table>

**Haircare:** “Has a fragrance I like” is a top priority for consumers

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shampoo and conditioner</td>
<td>42</td>
</tr>
<tr>
<td>Hairstyling products (ie hairspray, gel)</td>
<td>37</td>
</tr>
<tr>
<td>Hair treatments, serums, and oils</td>
<td>41</td>
</tr>
</tbody>
</table>
Fragrance is a top purchase driver in household categories, Europe Big 5, % consumers

Europe Big 5, Top 3 Important factors when purchasing fabric softeners (2014)

<table>
<thead>
<tr>
<th>Factor</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scent/Fragrance</td>
<td>58</td>
<td>67</td>
<td>62</td>
<td>62</td>
<td>57</td>
</tr>
<tr>
<td>Makes clothes extra soft</td>
<td>55</td>
<td>50</td>
<td>53</td>
<td>49</td>
<td>54</td>
</tr>
<tr>
<td>Keeps clothes fresher for longer</td>
<td>39</td>
<td>50</td>
<td>38</td>
<td>52</td>
<td>56</td>
</tr>
</tbody>
</table>

Europe Big 5, Top 3 Important factors when purchasing laundry detergents (2014)

<table>
<thead>
<tr>
<th>Factor</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power to remove tough stains</td>
<td>53</td>
<td>51</td>
<td>54</td>
<td>54</td>
<td>56</td>
</tr>
<tr>
<td>Works well at low temperatures (ie 30 degrees or less)</td>
<td>49</td>
<td>57</td>
<td>49</td>
<td>41</td>
<td>46</td>
</tr>
<tr>
<td>Scent/Fragrance</td>
<td>37</td>
<td>42</td>
<td>45</td>
<td>42</td>
<td>36</td>
</tr>
</tbody>
</table>

Europe Big 5, Top 4 factors influencing choice of hard surface cleaners (2013)

<table>
<thead>
<tr>
<th>Factor</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power to remove grease and dirt</td>
<td>53</td>
<td>67</td>
<td>60</td>
<td>60</td>
<td>61</td>
</tr>
<tr>
<td>Suitable for cleaning a range of different surfaces</td>
<td>48</td>
<td>47</td>
<td>32</td>
<td>41</td>
<td>53</td>
</tr>
<tr>
<td>Antibacterial (ie kills germs)</td>
<td>44</td>
<td>36</td>
<td>51</td>
<td>34</td>
<td>52</td>
</tr>
<tr>
<td>Scent/Fragrance</td>
<td>44</td>
<td>36</td>
<td>52</td>
<td>53</td>
<td>24</td>
</tr>
</tbody>
</table>
**Fragrance is a top purchase driver in household categories, USA, % consumers**

**US, Top 5 important attributes in laundry detergent, 2014**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power to remove tough stains</td>
<td>55</td>
</tr>
<tr>
<td>Works well in cold water</td>
<td>43</td>
</tr>
<tr>
<td>Power to clean unseen body oil/sweat stains</td>
<td>38</td>
</tr>
<tr>
<td>Scent/Fragrance</td>
<td>37</td>
</tr>
<tr>
<td>Keeps clothes fresher longer</td>
<td>37</td>
</tr>
</tbody>
</table>

**US, Top 5 important attributes in dishwashing liquid, 2014**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Power to remove baked-on food residues</td>
<td>55</td>
</tr>
<tr>
<td>A pleasant fragrance</td>
<td>40</td>
</tr>
<tr>
<td>Antibacterial formula</td>
<td>36</td>
</tr>
<tr>
<td>Skin friendly properties/dermatologically tested</td>
<td>35</td>
</tr>
<tr>
<td>Concentrated formula</td>
<td>29</td>
</tr>
</tbody>
</table>

**US, Top 5 important attributes in fabric softener, 2014**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Static control</td>
<td>47</td>
</tr>
<tr>
<td>Makes clothes extra soft</td>
<td>47</td>
</tr>
<tr>
<td>Scent/Fragrance</td>
<td>45</td>
</tr>
<tr>
<td>Keeps clothes fresher for longer</td>
<td>41</td>
</tr>
<tr>
<td>Makes ironing easier</td>
<td>18</td>
</tr>
</tbody>
</table>

*Source: Lightspeed GMI/ Mintel*
Scent trends
Scent* positionning in personal care, 2014

Floral, Fruity, Fantasy, Gourmand and Fresh & Clean are the most common fragrance families across personal care categories. In SBS and Bodycare, floral is the most represented family while in deodorant, fantasy fragrances are more common.

Source: Mintel GNPD: analysed as “fragrance component group”
* As a marketing classification
Floral, Fresh & Clean and Citrus are the most represented olfactory families in household. Floral is the most important family in fabric care; gourmand and floral in aircare; and citrus in dishwashing products and hard surface cleaners.
Fantasy fragrance on the rise across all categories

**Shower Gel**
- Fa Glamorous Moments Shower Cream features Black Orchid fragrance that is said to captivate the senses and transport the user to an irresistible universe of glamour.

**Laundry Detergent**
- Fab Fragrance Temptations Spice Allure Laundry Detergent Powder

**All Purpose Cleaner**
- SC Johnson Mr Musculo Blackberry Temptation Multi-Purpose Concentrated Liquid Cleaner is a limited edition product suitable for a variety of surfaces.

*Source: Mintel GNPD*
Functional products can be seen as more sophisticated thanks to fragrance

Iris Flower & Violet

Cif Iris Flowers & Violet Petals Cream Cleaner, with micro particles, is designed to remove 100% of dirt.

Rose Oasis

Joy Compact Moist Care Rose Oasis Dishwashing Liquid is formulated with rose extract, and is said to minimise dehydrating hands whilst washing dishes.

Apple Orchard

Method Apple Orchard Scented Stainless Steel Polish is designed to clean and polish.

Source: Mintel GNPD
Fine fragrance in functional categories

**Lavender & Magnolia**
Ajax Aroma Sensations Lavender & Magnolia Surface Cleaner is made with natural essential oils and is suitable for all types of surfaces. It is said to provide 24h freshness and shiny cleanliness.

**Oud**
Frida Aqua Sensations Oud Air Freshener features a long lasting aroma, and with its aqua feel, brings freshness to the air.

**Snapdragon & Patchouli**
Comfort Creations Snapdragon & Patchouli Fabric Conditioner is a premium fabric conditioner blended by perfume experts.

Source: Mintel GNPD
Gourmand scents are getting closer to food

**Marshmallow**
Cottage The Marshmallow Ultra Gentle Shower Cream is enriched with natural marshmallow extracts and biolipids and features a soft and sweet marshmallow scent.

**Coca Cola**
Dop Douceurs d’Enfance Shower Cream with Candy Cola Scent evokes the delicious and unforgettable fragrances from childhood.

**Vanilla Latte**
Febreze Winter Collection Vanilla Latte Scented Room Fragrance Spray destroys even the most stubborn odours.

*Source: Mintel GNPD*
Scented innovation

• Creating hybrid categories & new scented forms
• Premiumisation of functional categories
• Added benefits & segmentation
• Technical innovations: smart fragrances and encapsulation
Space for innovation through scent

**Hybrid fragrances**

- 60% of US fragrance wearers are interested in fragrance that can be worn at night to help them sleep or to refresh bed linen.
- 17% of French and 33% of Italians are interested and would pay more for detergent that eliminates sweat odours from clothing.

**Driving Experimentation**

- 36% of US consumers always check what a deodorant product smells like before buying it.
- 51% of French and 50% of Spanish product users like to try washing-up liquids in new fragrances.

**Longer lasting scents**

- 23% of US women fragrance wearers think that fragrances don’t last long enough.
- 67% of US fragrance wearers are interested in encapsulated fragrance that releases gradually throughout the day.

*Source: Lightspeed GMI/ Mintel*
Hybrid fragrances
Fine fabric fragrances: Trickle up and Trickle down

27% of French female fragrance wearers are interested in fragrances for clothes

17% of French and 33% of Italians are interested and would pay more for detergent that eliminates sweat odours from clothing

63% of US fragrance users are interested in fragrances for spraying on clothing/fabric with added fabric care benefits 20% would pay more for this

Source: Lightspeed GMI/ Mintel
Hair perfumes: from ancillaries to added haircare benefits

25% of Spanish fragrance users are interested in perfume for hair
60% of US female fragrance wearers are interested in hair perfume that provides haircare benefits, 21% would pay more for it

Chanel Chance Hair Mist is designed to envelop the hair and leave it fragranced

L’Occitane en Provence Arlésienne Hair Mist keeps hair moisturised and makes styling easier

Source: Lightspeed GMI/ Mintel
New scented rituals for men

42% of UK men aged 25-34 have a beard/stubble
64% of French men have not shaved in the last 12 months
37% of German men prefer to use toiletries with male-specific fragrances

Tom Ford for Men Conditioning Beard Oil has been designed to condition, soften and nourish the beard for daily grooming.

The formula features almond, jojoba and grapeseed oils, as well as vitamin E

It is available in three of Tom Ford’s fragrances: Oud Wood, Neroli Portofino, Tobacco Vanille

Source: Lightspeed GMI/ Mintel
Scented jewels can counter concerns over allergens

In France, 10% of fragrance wearers express interest in jewellery that contains their favourite fragrance, rising to 21% of 16-24 year-olds.
16% of UK fragrance users are concerned about the use of chemicals in fragrances, while 9% worry they will have an allergic reaction to new fragrances.

- By Kilian Attache Moi scented jewels collection
- earrings, cuffs, bracelets, and necklaces incorporate a tiny pair of handcuffs to cheeky effect.
- Each of the five colors corresponds to a different fragrance so you can go with citrusy Love Don’t Be Shy orange, woody Straight to Heaven black, spicy Intoxicated blue, floral Rose Oud pink, and floriental Playing with the Devil white.
- $155-$450, available in May 2015

Source: Lightspeed GMI/ Mintel
Premiumisation of functional products
More space for scent in haircare

Chocolate Shampoo

Axe Dark Temptation Shampoo features a masculine chocolate fragrance.

Top fruity notes, floral heart and sensual base

Schwarzkopf Essence Ultîme conditioner features a fragrance with fruity top notes of apple, pear and red berries; feminine floral heart notes of jasmine, rose, ylang ylang and violet; and sensual base notes of musk, sandalwood and vanilla.

Strawberry Hair Mousse

DM Balea Trend It Up Lovely Berries Hair Mousse features UV protection, provitamin B5 and a strawberry scent.

Source: Mintel GNPD
Dry shampoo bridges the gap with hair fragrance

Mango Coconut Refreshing Dry Shampoo is designed to offer tousled texture and a clean, summer-fresh scent, which makes it suitable to be carried into a beach bag for on-the-go styling.

Clairol Herbal Essences Party Re-Rresh Dry Shampoo features a refreshing lily scent said to awaken the senses.

Source: Mintel GNPD
Premiumisation of bar soaps

Granado Pharmácia Terapeutics
Benzoin Glycerin Bar Soap

Marionnaud 49 Rose Sensual Rose
Guest Soaps

Source: Mintel GNPD
Home Collection: revisiting ancillaries & creating new scented rituals

Hermès “Le Bain”

- Hermès has introduced “Le Bain” a new art of living through perfume.
- Bubble bath, shampoo, balms, body milk and bar soap are available in the Cologne collection scent and Garden Perfume collection.
- Priced between €46-50
Air fresheners become decorative objects

Hermès Luxury range of candles was created by perfumer Céline Ellena and presented objets d’art designed by Guillaume Bardet

- For US scented candle buyers, visual appeal (45%) and odor elimination (48%) are equally important
- For spray and aerosol fresheners, visual appeal is important to only 9% of US consumers vs 64% for odour elimination

Bom Ar Air Wick Britto Collection designed by Romero Britto
Bath Cologne: a new way to experience fragrance in the bathroom

Jo Loves
Bath Cologne

• Created to look and feel "the same as pouring cologne into the bath", the product is claimed to scent the skin without leaving a sticky, heavy or oily feel.

• It is available in Pink Vetiver, Pomelo and Green Orange & Cardamom variants.
Fine fragrance deodorants: space to be more than simple ancillaries and need to target the young audience

62% of UK consumers are interested in deodorants that feature fine fragrance, 20% would be willing to pay more

57% are interested in deodorants with fragrances designed to complement their perfume/ eau de toilette

Axe White Label Bodyspray

Ralph Lauren Polo Red Bodyspray

Source: Lightspeed GMI/ Mintel
Added benefits & segmentation
Seasonal scents offer entry points into added benefits

33% of UK consumers look for skin friendly benefits when buying dishwashing liquid
63% of US fragrance users are interested in fragrance for spraying on clothing/fabric with added fabric care benefits (e.g. protects fabric, reduces wrinkles), 20% would pay more for it

Seasonal Scent

Method Honeycrisp Apple Limited Edition 8X Laundry Detergent

Fabric & Skin Care

Tesco Ambience Snowdrop and Almond Milk Fabric Conditioner has opening creamy notes of snowdrop and almond milk and said to descend into a white floral heart of delicate blossoms, and light fruity accords.

Skin Care

Palmolive Limited Edition Winter Frost Balsam Washing Up Liquid features a snow white formula with aloe vera extracts, degreasing power and a creamy formulation that protects hands.

Source: Lightspeed GMI/ Mintel
Catering for different seasonal needs and demographics

Autumn Renew

Olay Ultra Moisture Autumn Renew Body Wash features an Autumn Renew scent to indulge the senses

Scent for Teens & Tweens

Bebe Young Care Bamboo Cream Shower gently cleanses and softens skin, and comes with an invigorating Bamboo Water and Green Tea fragrance

*Source: Mintel GNPD*
Linking scent to functionality

Skincare dishwashing liquid

Kao Kyukyutto Peach & Tea Scented Hand Beauty
Dishwashing is a new limited edition variety. It is
developed based on skincare concepts, and is claimed
to achieve gentleness to the skin and effective
cleansing.

Moisturising fragrance

DKNY Be Delicious Fragrance with Benefits is
formulated with Apple Fusion Complex, a blend of skin-
loving ingredients clinically proven to moisturise,
smooth and brighten the skin.

Source: Mintel GNPD
Co-branding legitimises cross-category benefits

Detergent fabric softener

Tide Plus a Touch of Downy April Fresh Liquid Detergent features a 3-in-1 formula that cleans, freshens, softens, whitens and brightens.

Skincare dishwashing liquid

Fairy Clean & Care Chamomile & Vanilla Dishwashing Liquid with a Touch of Olay Softness.

Freshener detergent

Febreze Island Fresh Fabric Refresher with Gain Scent eliminates odors and freshens fabrics, sofa, bedding, carpets, air, and pet areas.

Source: Mintel GNPD
Bedtime fragrances

60% of US fragrance wearers are interested in fragrance that can be worn at night, 20% would pay more for this.

- P&G Sweet Dream collection

- The line of products is formulated with ingredients to clean, soften and freshen all your bedtime fabrics, from your linens to your pajamas, helping to create an ideal sleep environment so that consumers can relax in order to fall asleep.

- The regimen, all of which are endorsed by the National Sleep Foundation, includes: Tide plus A touch of Downy Sweet Dreams, Downy Unstopables Sweet Dreams, Downy Infusions Sweet Dreams and Bounce Sweet Dreams.

Source: Lightspeed GMI/ Mintel
Focusing on scent for its added benefits

67% of US fragrance wearers are interested in mood/stress relief fragrances; 23% would pay more for it

- Fifty Shades of Surf with Scentsual Oils Alluring Rose & Jasmine Concentrated Bio Liquid Detergent is described as a new fragrance guaranteed to awaken the senses.

- L’Occitane en Provence Aromachologie 5 Essential Oils Repairing Conditioner features an anti-breakage complex with five essential oils (ylang-ylang, sweet orange, lavender, geranium and angelica).

Source: Lightspeed GMI/ Mintel
Enhanced experimentation with scent: leveraging the link between food and scents

Linking food and scent will drive more experimentation
Can also relate to new textures and added benefits, using ingredients like tea, yogurt or honey

Fragrance Bar at Berlin’s Ritz-Carlton hotel

Givenchy has partnered with cocktail mixologist Tiziano Tasso of Hotel Café Royal in London to create seven cocktails.

Source: Mintel Beauty & Personal Care
Longer lasting scent & Smart fragrances
Longer-lasting freshness with after wash & scent booster

After Wash

Comfort Morning Morning Fresh Scented After Wash
Fabric Conditioner

Scent Booster

Bounce Bursts Outdoor Fresh In-Wash Scent Booster
is said to provide time released outdoor freshness and
static control

Source: Mintel GNPD
Longer-lasting freshness & functional benefits

Motion Sense

Rexona Antiperspirant Deodorant Spray has an alcohol-free formula with MotionSense System technology that is claimed to activate additional deodorising micro capsules when the body is in motion and the skin temperature rises.

Capsule of active ingredients

Right Guard Women Total Defence 5 Sport 48H Anti-Perspirant Deodorant Spray features a heat-response formula and is enriched with micro-encapsulated active ingredients that will release protection when needed most.

Source: Mintel GNPD
Helping women experience fine fragrance for a few dollars

**Changing scent**

| Downy Perfumes Collections Sage & Jasmine Concentrated Fabric Conditioner is said to be a surprising combination of two perfumes that activate with motion and change throughout the day. |

**Capsules of fragrance**

| Surf Lava Perfume Capsules Cherry Blossom & Lavender Laundry Detergent has been reformulated with perfume capsules. |
Smart fragrances

- **Downy perfume collection, Mystique, Passion, Attraction and Innocence**

- Formulated with two micro encapsulated perfumes. Both scent capsules attach to fabrics and the luxurious fine fragrances are released by friction, thus change throughout the day as a result of natural movements of clothes while wearing them.
Countering olfactory fatigue with multi-dimensional fragrance

Most people stop noticing a fragrance after about 30 minutes, the amount of time that it takes the brain to become acclimatised to a scent.

Reckitt Benckiser has launched Air Wick Life Scents, the first air freshener that delivers changing aromas within a single fragrance.

The company has created a formulation where multiple scents actually compete with each other for dominance, yet from the user’s perspective, remain distinct and separate.

Mystical Garden contains the fragrance of raspberries, roses and marshmallow, while Turquoise Oasis contains the scent of sea spray, warm breeze and driftwood.
Building a scented wardrobe

P&G Unstopables will be marketed as a home décor product

P&G Unstopables collection becomes a high-end, cross-category, home décor brand

It gives consumers the opportunity to use a signature scent across their homes and fabrics

The brand will still include laundry fresheners, but has expanded to comprise scented candles, oils, aerosols and fabric sprays.

There are six scents with names evoking a highly sensory experience like Lush and Shimmer.
Clean-smelling house for longer with encapsulated fragrance in detergent

More Cleaning Power

Flash with Febreze Limited Edition Rainforest All-Purpose Cleaner has been reformulated to provide more cleaning power with Febreze freshness than the previous formula.

Encapsulated Fruit Scent

Alen Pinol Liquid Detergent Cleaner features an encapsulated Fruit scent and it is made with scented micro-capsules for a long-lasting and better aroma.

Source: Mintel GNPD
Long-lasting moisture & potential for long-lasting scent

88% of Spanish shower product users are interested in long-lasting moisture; 37% would pay more for this.

84% of Spanish users are interested in long lasting fragrance in shower products; 30% would pay more for it.

Garnier Body
In-Shower Body Lotion

Nivea Men
In-Shower Body Lotion

Source: Lightspeed GMI/ Mintel
Moving into longer-lasting fragrance

54% of French fragrance users are interested in encapsulated fragrance
57% of US fragrance users are interested in a product that is applied prior to fragrance application that helps the scent to last longer, 19% would pay more for it

Canvas & Concrete Fragrance Primer

Old Spice Fresh Collection Fiji Re-Fresh Body Spray

Source: Lightspeed GMI/ Mintel
What’s Next

More experimentation

More scent varieties and inspiration from fine fragrance will help to drive interest and experimentation, add value and drive purchase.

Scent provides an easy way to upgrade functional categories.

Scent helps to segment categories by occasion (season, mood), room (kitchen, bathroom), demographic (men, teens) and time of the day (day, night, aromatherapy).

Crossing categories


Establishing new fragrance rituals with new scented formats (not ancillaries).

Scent plays a central role in added benefits (aromatherapy, aromachology).

Multi-layered scent

Encapsulation of fragrances moves beyond fabric care and deodorant for longer-lasting scents and fragrances that refresh on their own.

Air freshener and house cleaning products with micro-capsules release a burst of fragrance while walking on floors or touching surfaces.

Customisation with smart fragrances that change throughout the day or depending on the consumer’s mood or need (multi-capsules).

Source: Mintel Beauty & Personal Care
THANK YOU

Emnmanuelle Moeglin
Global Fragrance & Personal Care Analyst
emoeglin@mintel.com