Trends to Watch in Personal Hygiene

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About Canadean

Unique, robust data

Trusted industry analysis and insight

Innovative integration and collaboration
Personal hygiene products are well placed to address key consumer concerns

Source: Canadean Global Consumer Survey 2014

<table>
<thead>
<tr>
<th>Issue</th>
<th>Concerned Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bad breath</td>
<td>38%</td>
</tr>
<tr>
<td>Maintaining hygiene outside the home</td>
<td>37%</td>
</tr>
<tr>
<td>Teeth discoloration</td>
<td>37%</td>
</tr>
<tr>
<td>Looking old</td>
<td>35%</td>
</tr>
<tr>
<td>Bad body odor/ excessive sweating</td>
<td>35%</td>
</tr>
<tr>
<td>Dry or flaky skin</td>
<td>33%</td>
</tr>
<tr>
<td>Dark circles under eyes</td>
<td>33%</td>
</tr>
<tr>
<td>Baldness/ hair loss</td>
<td>32%</td>
</tr>
<tr>
<td>Bags under eyes</td>
<td>31%</td>
</tr>
<tr>
<td>Dark spots/pigmentation/uneven skin tone</td>
<td>31%</td>
</tr>
<tr>
<td>Facial wrinkles</td>
<td>29%</td>
</tr>
<tr>
<td>Spots, pimples and blackheads</td>
<td>29%</td>
</tr>
<tr>
<td>Sun damage</td>
<td>29%</td>
</tr>
<tr>
<td>Foot odor</td>
<td>28%</td>
</tr>
<tr>
<td>Sensitive skin</td>
<td>26%</td>
</tr>
<tr>
<td>Oily skin</td>
<td>26%</td>
</tr>
<tr>
<td>Cellulite</td>
<td>26%</td>
</tr>
<tr>
<td>Spilt ends/ dry hair</td>
<td>24%</td>
</tr>
<tr>
<td>Excessive facial hair</td>
<td>23%</td>
</tr>
<tr>
<td>Lip wrinkles</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: Canadean Global Consumer Survey 2014
Bath/shower products and deodorants are most commonly used everyday products.

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath/Shower Products/Soap</td>
<td>59%</td>
</tr>
<tr>
<td>Deodorants</td>
<td>52%</td>
</tr>
<tr>
<td>Shampoo</td>
<td>41%</td>
</tr>
<tr>
<td>Facial Skincare Products</td>
<td>39%</td>
</tr>
<tr>
<td>Body Skincare Products</td>
<td>34%</td>
</tr>
<tr>
<td>Conditioner</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: Canadean Global Consumer Survey 2014
### Experimentation & Premiumization: 2 big challenges in ‘quiet’ categories

#### Shopping Behavior

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I often experiment with buying new products</td>
<td>17%</td>
</tr>
<tr>
<td>I occasionally buy something different</td>
<td>35%</td>
</tr>
<tr>
<td>I tend to buy the same products every time</td>
<td>44%</td>
</tr>
<tr>
<td>Someone else buys these products</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Canadean Global Consumer Survey 2014
Experimentation & Premiumization: 2 big challenges in ‘quiet’ categories

**Purchasing Priorities**

- 15% I don't notice how much I spend
- 28% I usually buy goods at the lower end of the price range
- 51% I usually buy goods in the middle of the price range
- 6% I usually buy goods at the premium or highest end of the price range
- 15% I usually buy goods at the lower end of the price range
- 26% I usually buy goods at the middle of the price range
- 52% I usually buy goods at the premium or highest end of the price range

Source: Canadean Global Consumer Survey 2014
Innovation Trends and Opportunities

Target consumer segments

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?  

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Understanding age group nuances can facilitate a more personalised offering.
Addressing gender-specific needs can differentiate products in a crowded market.
Speaking the language of social media can help brands target today’s tech-savvy teens.

Source: Canadean Product Launch Analytics
Innovation Trends and Opportunities

Target consumer segments

Visual culture

?
Brands can capitalise on today’s visual culture to broaden product appeal

“suitable for groomed armpits”

“powder soft, with brightening properties”

“includes hyaluronic acid and coconut oil for moisturization/anti-aging effect”

“vitamin-rich anti-perspirant and instant skin brightener”

Source: Canadean Product Launch Analytics
Positioned as a “visual solution” rather than just a body odor solution

Women are concerned about armpit sweat marks in various situations

TV promotions emphasize the freedom of having sweat-free armpits
Success story: Lion Ban Sweat Block

- Water-based roll-on antiperspirant applied to the armpit, aiming to prevent wet sweat marks by blocking sweat glands

- Launched in Feb 2014, sold 2.5 million bottles within five months of launch as it responds to a specific concern of female consumers

- Antiperspirants with "right-for-me" aspects have great opportunities where the market has been growing

- Promotions focus on sending a straight message, which resonates well with target consumers

Source: Canadean's Success Case Study– Lion Ban Sweat Block
Innovation Trends and Opportunities

Target consumer segments

Visual culture

Experience economy
Scents can elevate consumer perceptions from functional to experiential

- Calming, stress-fighting
- Cocktail-inspired
- Luxury scents (e.g. peony)
- Scent-changing sensors

Source: Canadean Product Launch Analytics
In-shower innovation need not be limited to conventional cleansing products

**In-shower after-sun lotion**

**In-shower whitening**

**Shower capsule system for a “spa-shower”**

Source: Canadean Product Launch Analytics
Today’s active lifestyles have expanded usage occasions for personal hygiene products

Around 2 in 3 consumers globally say they exercise at least once a week

64%

“anti-bacterial, soap-free wipes for pre- and post- workouts”
“saves time by eliminating the need for a post-workout shower”

Source: Canadean Global Consumer Survey 2015 Q4, Canadean Product Launch Analytics
Smart product design can drive engagement by combining novelty and efficacy

“responds directly to body movement, releasing extra protection during physical activity”

“dispenses deodorant at the click of a button; free mobile app calculates the right amount of deodorant needed”

Source: Canadean Product Launch Analytics
Innovation Trends and Opportunities

- Target consumer segments
- Visual culture
- Experience economy
- Usage motivations
- Niche, emerging innovation
Brands can expand reach with personalized, body-part-specific products

Source: Canadean Product Launch Analytics
Ingestible formats offer a combination of convenience and novelty

Source: Canadean Product Launch Analytics
Stress-monitoring devices can cater to hectic, stressful lifestyles

Source: Canadean Product Launch Analytics
Canadean’s TrendSights Framework

MEGA-TRENDS
- Social Responsibility
- Sustainability & Ethics
- Health & Wellness
- Sensory & Indulgence
- Easy & Affordable
- Smart & Connected
- Evolving Landscapes
- Individualism & Expression

Key:
- Trends
- Consumer Graphics available
Canadean’s TrendSights Framework
Summary & Key Take-Outs

Consumer Attitudes & Behavior

- Looking and feeling clean is an important facet in today’s visual culture
- However, the inherently functional nature of the personal hygiene sector struggles to excite and engage with consumers

Innovation Trends & Opportunities

- Successful personalization is in effectively understanding various needs and nuances of each age/gender cohort
- Personal hygiene brands can combine hygiene with cosmetic features to capitalize on societal pressures to look good, via clever marketing and added product features
- Making product usage an experience can boost consumer engagement
- Exploring underlying motivations for product usage can inspire innovation
- Body-part-specific products, ingestible formats and stress-monitoring are emerging as future innovation trends to watch
Thank you!

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