

# 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

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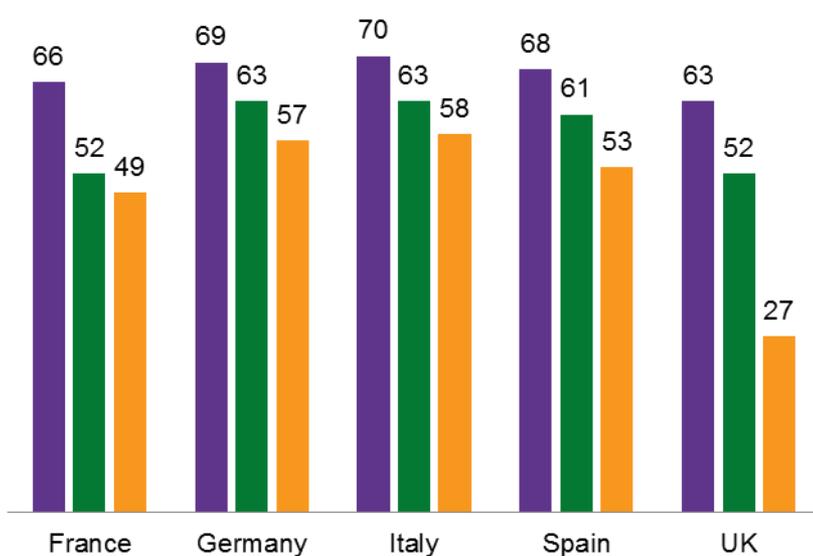
- **Scent is a primary purchase driver in personal care & household categories**

# 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

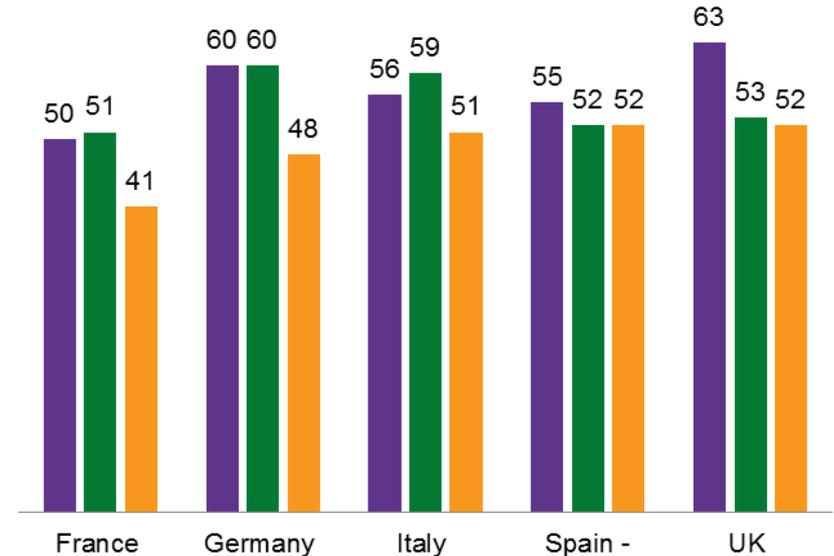
**Soap, bath & Shower**  
"Has a scent I like"

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



**Deodorant**  
Top 3 purchase drivers

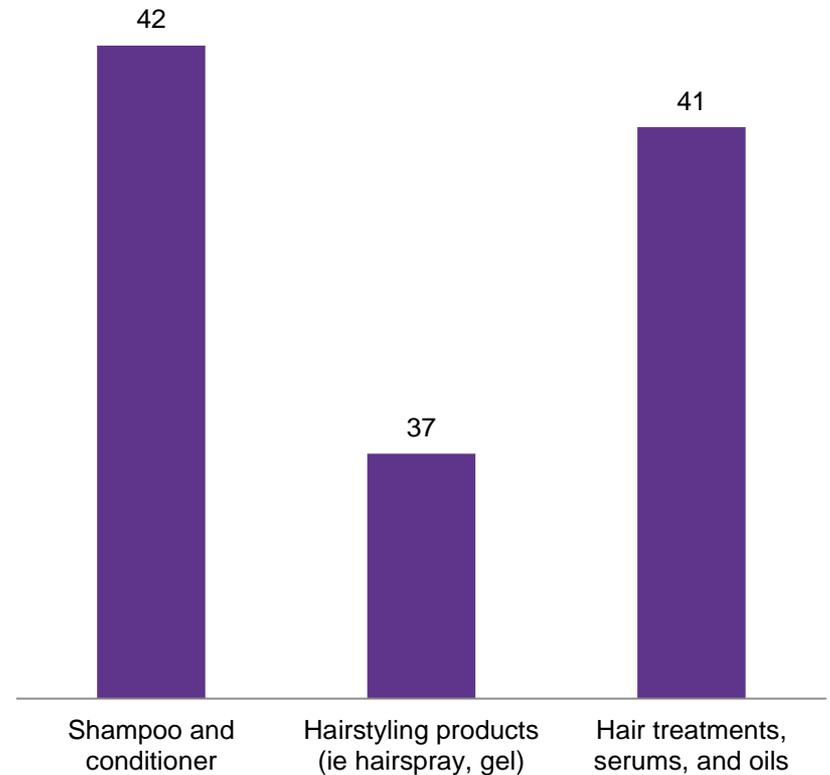
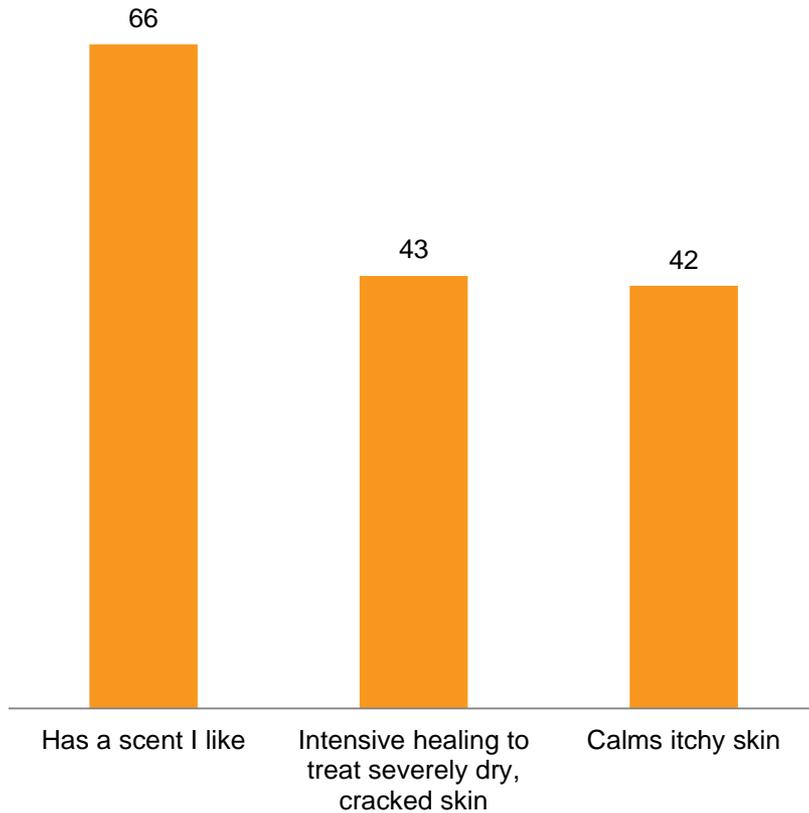
- Long-lasting effective protection
- A fragrance I like
- Leaves no stain on body or clothes



# Fragrance is a top purchase driver in personal care categories, USA, % consumers

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

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



# 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)

	France	Germany	Italy	Spain	UK
Scent/Fragrance	58	67	62	62	57
Makes clothes extra soft	55	50	53	49	54
Keeps clothes fresher for longer	39	50	38	52	56

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

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

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

	France	Germany	Italy	Spain	UK
Power to remove grease and dirt	53	67	60	60	61
Suitable for cleaning a range of different surfaces	48	47	32	41	53
Antibacterial (ie kills germs)	44	36	51	34	52
Scent/Fragrance	44	36	52	53	24

# Fragrance is a top purchase driver in household categories, USA, % consumers

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

Power to remove tough stains	55
Works well in cold water	43
Power to clean unseen body oil/sweat stains	38
Scent/Fragrance	37
Keeps clothes fresher longer	37

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

Power to remove baked-on food residues	55
A pleasant fragrance	40
Antibacterial formula	36
Skin friendly properties/dermatologically tested	35
Concentrated formula	29

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

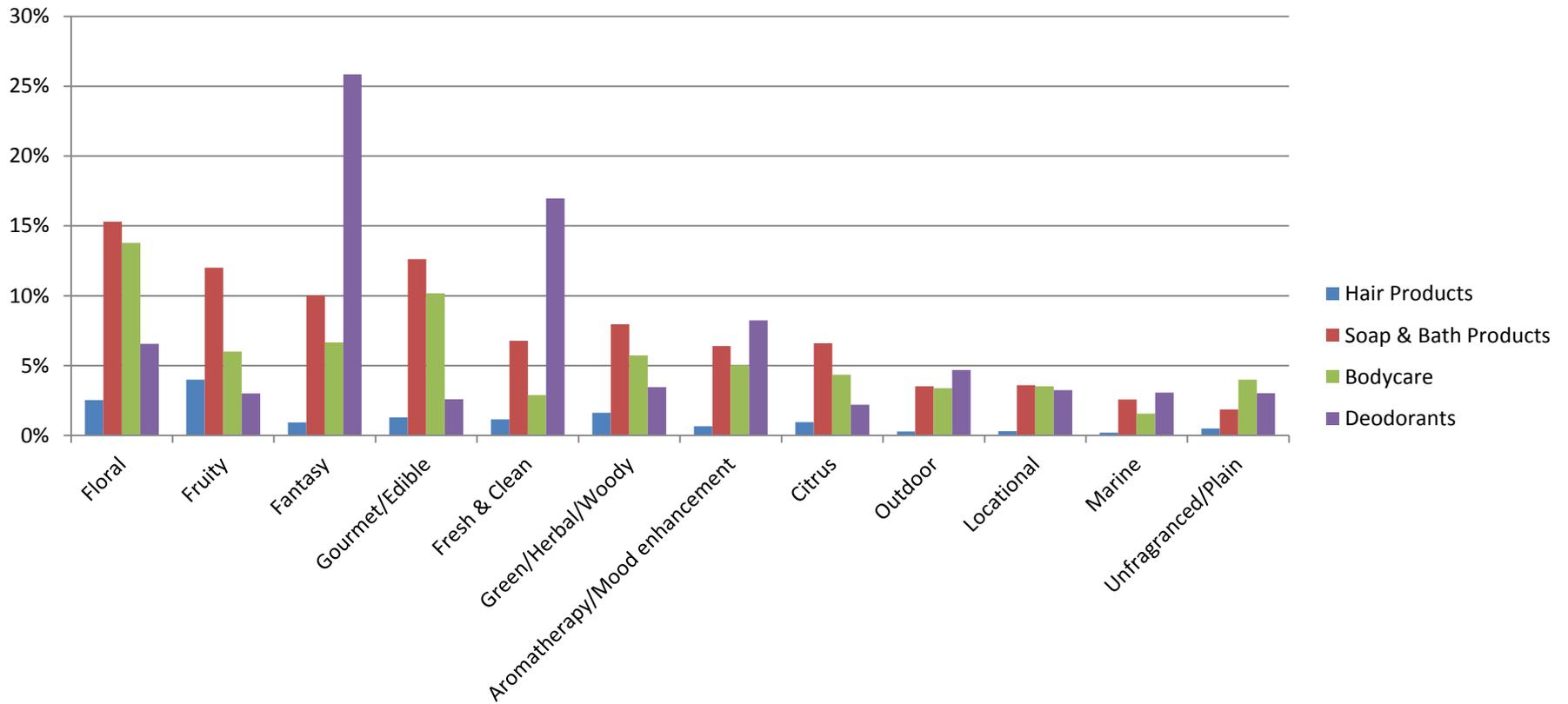
Static control	47
Makes clothes extra soft	47
Scent/Fragrance	45
Keeps clothes fresher for longer	41
Makes ironing easier	18

# Scent trends

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# Scent\* positioning 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

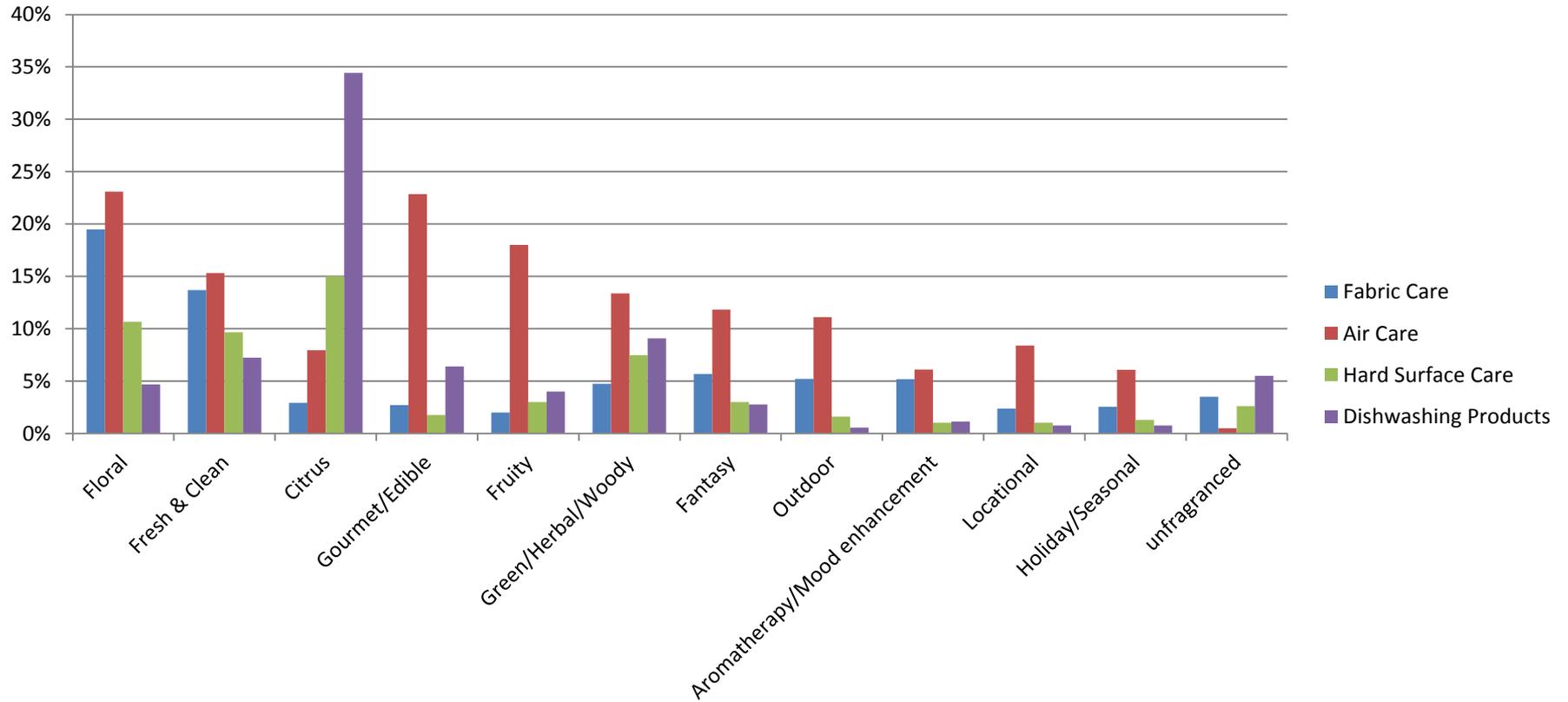


Source: Mintel GNPD: analysed as "fragrance component group"

\* As a marketing classification

# Scent\* positioning in household, 2014

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.



Source: Mintel GNPD: analysed as "fragrance component group"

\* As marketing classification

# 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 is suitable for a variety of surfaces

# 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.

# 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.

# 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

# Scented innovation

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- **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

# 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



For cashmere and delicate fabrics



For underwear



Fragrance enhancer  
for clothes



Air & Fabric Freshener

## 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**



## 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

## 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 floral Playing with the Devil white.
- \$155-\$450, available in May 2015

# 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 Ultime 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.

## 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-Rfresh Dry Shampoo features a refreshing lily scent said to awaken the senses

# Premiumisation of bar soaps

## Granado Pharmácias Therapeutics Benzoin Glycerin Bar Soap



## Marionnaud 49 Rose Sensual Rose Guest Soaps



# 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

Bom Ar Air Wick Britto Collection designed by Romero Britto



- 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

# 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.



Jo Loves  
Pink Vetiver Bath Cologne  
UK (£59, 200ml)

## 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**



# 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

## Fabric & Skin Care

## Skin Care



Method Honeycrisp Apple Limited Edition 8X Laundry Detergent



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.



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.

# Catering for different seasonal needs and demographics

## Autumn Renew



## Scent for Teens & Tweens



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

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

# 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

# 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.

## 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.

## 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).

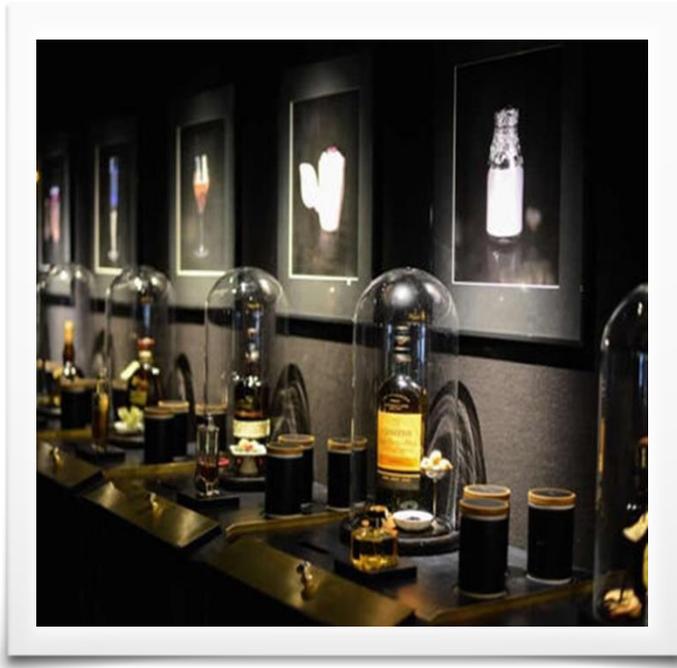


## Enhanced experimentation with scent: leveraging the link between food and scents

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.



# Longer lasting scent & Smart fragrances

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# 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

# 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.

# 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 Perfumes Collections

- **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



**PRESENTING  
THE NEW  
UNSTOPABLES  
COLLECTION**

WITH ULTRA  
LONG-LASTING  
SCENTS

SMELL LIKE THE *lifestyle* YOU DESERVE

**UNSTOPABLES**  
air • home • fabric

**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.

## 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



## 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



## 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

More cross-category products: household and skincare, fabric care and fragrance, fabric care and deodorant  
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)

**THANK YOU**

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