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HOME AIR FRESHENERS: By Ken Miller A CATEGORY THAT'S ANYTHING BUT STALE

Scent is a powerful force. We use it to catalog experiences, people and environments, and we hold strong emotional associations with it that can transport us and change our mood. No sector is more aware of that transformational power than the air freshener category, where products work hard to leverage consumers' experience with scent.

I conducted in-home ethnographic research with a group of women who buy and use a range of air freshener products; New Jersey-based Fieldwork Research did a great job recruiting this for me. I audited the women's homes, explored their purchase rationale, assessed product performance and presented a range of category offerings for feedback.

I'd be the first to say that my research wasn't comprehensive. But spending time in consumers' homes was critical to assessing the underlying needs that drive their purchase behaviors and satisfaction, and it revealed key leverage points that could help jump-start innovation.

> THE SCENTED LANDSCAPE

The air freshener sector is characterized by an abundance of forms, features and formulas. Consider that the household section at Target is lined with perhaps 15 linear feet of air freshener offerings, top to bottom. From candles to crystals, the selection is overwhelming in its breadth. And while some products are simple and intuitive, others are almost appliance-like in their features and functionality.

Category offerings seem to be driven by what manufacturers view to be the next incremental idea: Motion-detection, intermittent spraying, dual scents, and dissolving crystals all vie for real estate in the home by attending to presumably under-met, device-driven needs.

But these air freshening products are rarely location or problem-specific. They represent a range of generic solutions. And, while this approach is sure to satisfy each isolated occasion, it may be stifling category growth.

Manufacturers are not setting up new usage occasions or pointing consumers to new scent-needy environments. And more importantly, they are not addressing the various underlying emotional connections people have with scent. As a result, consumers seem to be stuck in a buy-and-replace routine that holds little excitement.

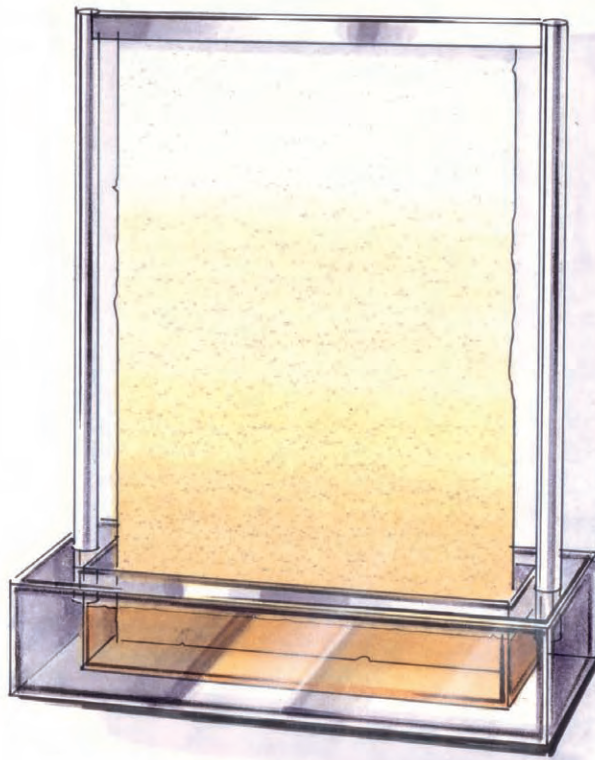
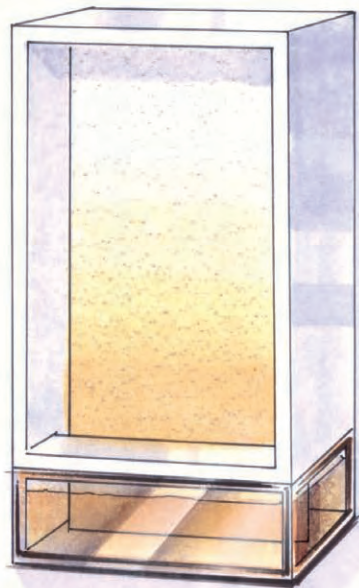
> CONSUMERS' TWO SCENTS

Let's review what consumers say they like and don't like about the current category offerings. While plug-in air freshening units are still out there in bathrooms and hallways, they make some consumers nervous. One said, "I got weirded out leaving them plugged in all day." The products' refill business model can also be frustrating for those who find their scent missing on the shelf—particularly because consumers are not likely to stock up on this type of product.

A category trend toward multiple scents in a single unit is something that confuses other consumers. It's easy to understand how research may have surfaced the idea of "nose boredom" with a single scent. But the concept of multiple scents doesn't play out intellectually. The consumer often misses the point of rotating or switching them. Even so, manufacturers seem to be playing the shaving category's "razor blade" game, by introducing two and, now, three scents per unit.

The category's adjustable air freshening cones seem to be "passable" for light duty where appearance isn't an issue, and localized scent is enough. Though consumers say these products look "institutional" or "like my mom's house in the '70s."

Consumers also have a hard time understanding the role of motion sensor units, and indicate that the intermittent spray feature seems like a waste. The functionality of appliance-like products such as these is difficult to understand without a



> Scent-Centrics might appreciate a kit designed for multiple locations. Here, elegant and natural fabric acts as a “diffuser” that works full-time in coordinated scents. Units are designed to be décor-enhancing and inviting throughout the home.

deep dive into label copy or heavy ad support. And, some say, they look too obvious in their purpose and too conspicuous in the home.

Attempts at nicer aesthetics are hit and miss. But there are two new products that have been well received by most consumers. First there is Renuzit’s Crystal Elements. Though some moms worry that the product can be easily mistaken for candy, they consider it a modern, attractive product they can swap with the “ugly” air freshening unit often hidden behind a photo frame.

Glade’s scented reed diffusers have also been well received. They are attractive, subtle and can be used anywhere. These reed-like sticks, housed in an oil-filled vial, are a fascinating exception to the bland perceptions consumers have of the air freshener category’s chief product types—and they are a product type that has the potential to move the category from “object” focused to “need state” focused.

That’s because these décor-enhancing diffuser products tap into deep-seated emotional needs surrounding scent that, for some consumers, help them define their idea of “home.”

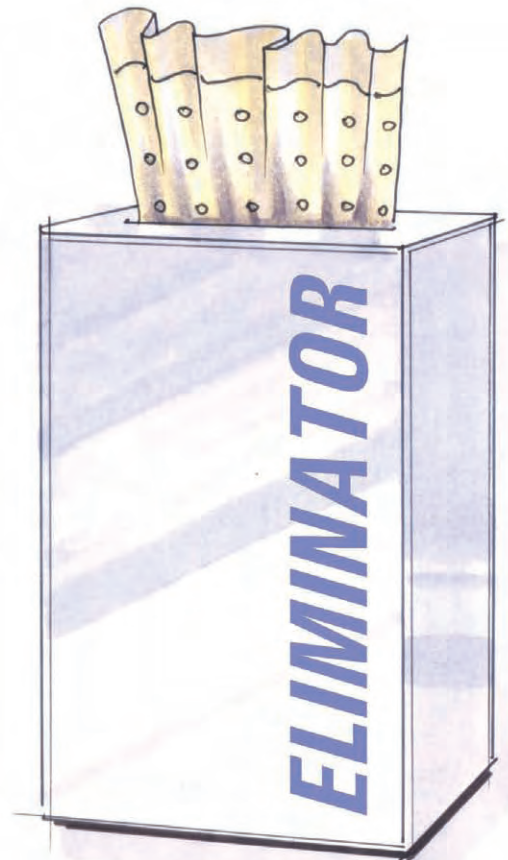
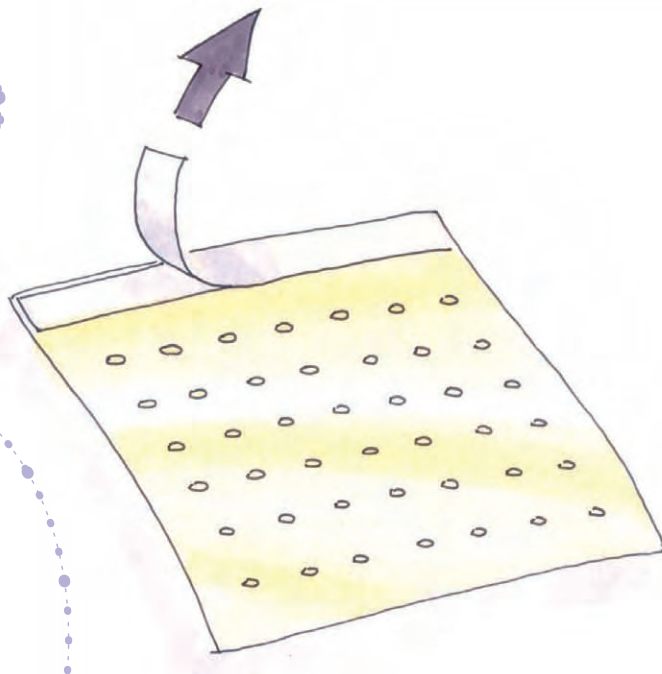
> UNDERLYING NEED STATES

Of course, every product can’t meet the needs of every consumer. But it is important to consider a few need states that seem to characterize discrete groups of air freshener users.

Scent-Centrics are consumers who want scent to play a role in their lives; it’s a critical element in creating a sense of place for them. After a long day, these consumers want to return home to a scent they associate with warmth, security and family. They are less concerned with location-specific odors (though they do take steps to combat them), and are more concerned with the emotional wellbeing they get from experiencing scent at home.

Practically speaking, this means that air fresheners are always present and functioning in their main rooms, and scents are often coordinated throughout these public spaces. Appearance in these settings is important, but Scent-Centrics will hide less attractive products to achieve the scent they want. In essence, they have adopted a scent strategy for their home, anchored by underlying emotional needs.

What products do they tend to buy? Diffusers and automatic units that freshen constantly in perceptible fashion, and candles >



> **Odor-Phobics** are treated to industrial strength “neutralizing” sheets for high-density odor sources. These sheets do the job in garbage cans, hampers, shoe storage bins and cat litter boxes. Lay them down or tack them up—they fit tight spaces and attack nasty odors.

that lend atmosphere. Products like plug-in or stand-alone units don’t have the desired impact beyond a few feet, so while they may find their way to bathrooms or other needy spots, they don’t help the Scent-Centric consumer enhance and enjoy her home.

Odor-Phobics are another segment of air freshener users. They work hard to rid their homes of any and all “distasteful” pollutants. They are not into scents, but are more concerned about eliminating odors. They talk about “sanitizing” and “neutralizing,” often quoting package claims, and worry about germs as well as unpleasant odors that crop up in the garbage can, during cooking and in the bathroom.

Like other air freshener user segments, they are concerned about spraying product around food in the kitchen. While the Scent-Centrics would light a candle during food preparation to suppress fish, garlic and vegetable odors, Odor-Phobics would wait until cooking is completed before spraying away.

They prefer to address the odor as it occurs rather than put an air freshener in place to treat it consistently. As such, the spray

can is their best friend, and scent is a secondary concern. In fact, they would expect that a product that could truly “cancel” an odor would leave no scent behind. Odor-Phobics are confused by claims that a product can eliminate an odor but leave another one in its place. “Isn’t that just masking?” they wonder. The only emotional connection Odor-Phobics have with scent is the one that drives them to abolish it in their homes.

Spot-Treaters are a third segment of air freshener users. They like to have their homes smell fresh and view specific odor sources as a challenge. Spot-Treaters enjoy scents and have no issue with “masking” that Odor-Phobics find fault with. And, unlike Odor-Phobics, who are more occasion-driven, Spot-Treaters prefer ongoing air freshening.

In fact, the air freshener category as we know it is tailor made for this need-state group, as it is comprised of a range of devices, each with specific utilities suitable for any and all household locations.

In the Spot-Treater home, we may find plug-in units in the bathroom, stick-up units in the shoe closet (hard to find these

days), cone-like units in the gym, office and laundry area, and maybe even a scented shelf liner or sachet in the drawers. They will have spray cans in the bathrooms, but also are fond of “layering,” where an ongoing scent is augmented by a quick spray blast to address an “emergency.”

Spot-Treaters believe there are scents that are right for the kitchen (cinnamon and vanilla) and the bathroom (citrus), but they are not coordinated as they are in Scent-Centric homes, and they aren’t valued for their ability to make a house a home. Candles may reside in the living areas of this group, but they are reserved for adult-related special occasions. After all, Spot-Treaters think these environments smell just fine as they are.

> SCENT STRATEGIES

In a full-blown research effort, much more work would be done to define these need-state groups in terms of attitudes and behavior, dissecting the buying and usage cycle and marrying them up to products, substitutes and workarounds.

But as a quick fix, I’ll consider a few opportunities that could re-energize category growth by focusing development on the emotional needs of these segments rather than “device” or “object” driven solutions that currently typify the category.

For instance, Scent-Centrics might appreciate a lifestyle solution that reinforces the emotional attachment they have to their home. One option could be a “kit,” anchored by a diffuser product and enhanced by units in related scents and complimentary designs. Such an approach might drive incremental use in new locations by delivering a cohesive solution.

Odor-Phobics may appreciate products in more convenient formats or those that are based on specific usage occasions. Perhaps there’s a solution to dealing with cooking odors without spraying food. Or addressing the kitchen garbage can and other receptacles without any spray residue. While Odor-Phobic have already identified many of the offending locations in their homes, they would appreciate a line of products geared toward these problem locations.

The growth opportunity for the Odor-Phobic segment is to formally recognize the potential applications rather than expect the consumer to find and treat them with generic offerings. For instance, a new “neutralizing” product could be positioned to perform in close-quarter receptacles such as trash cans, laundry hampers, cat litter bins, etc. Of course, these units should also offer aesthetics, usability and scents that meld with the locations and sensibilities of those who primarily use the space. For this segment, the complete absence of scent could also be a strong selling point.

Increasing consumption for Spot-Treaters might be achieved by designing products for specific, unrecognized occasions and locations—the linen closet, for instance. Or, consider a bathroom product that is attractive enough to display and is inviting to potential users to ensure “compliance.”

These are just a few attempts to address tangible business opportunities in the air freshener category. We can’t set out to solve for every situation here but, by way of example, I’ve asked Carson Ahlman, an independent industrial designer, to work with me to create a few packaging concepts that illustrate a couple of these opportunities. Think of these as “thought-starters” rather than refined solutions.

Successful innovation takes place when a strong methodology teams with fresh insight and technical know-how to focus, inspire and guide concept development. With a coherent design strategy, your team can reach consensus on what really motivates the consumer beyond evident product features, and where there are opportunities for growth.

This is how thoughtful insight for innovation can make perfect “scents” for new product and package success. **BP**

*Ken Miller works with consumer products companies to provide insight for innovation. His firm KMG uses proprietary tools in research and analysis to provide on-strategy and actionable design direction for new product and package development efforts. Contact Ken at ken@kenmillergroup.com or visit www.kenmillergroup.com. *Insight for Innovation*® is a registered trademark of Ken Miller Group.*



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