



Personal Care Buyers:  
2021 Brand Equity & Trends Research



## Background & Objectives

As the United States has approached year two of living through the pandemic, habits and routines have been unrooted. As people stay at home more, there is an accelerated rate of technology adoption. People are still shopping, but how and what they purchase is modified from wearing a mask to buying more online.

In this changing environment, companies now more than ever need to understand their brand equity, consumer purchasing habits, and trends that impact their industry.

Provoke Insights, a full-service market research firm specializing in branding, advertising, and content marketing initiatives, developed the brand equity report to answer these pressing questions.

The goal of the research is to gain a national perspective on the mindset of consumers. The study covers 19 industries, including personal care.



## Methodology

Provoke Insights conducted a 15-minute survey among 3,000 Americans between the ages of 21 and 70. The study was in-field from January 18th to February 3rd, 2021.

A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).<sup>1</sup>

Results based on this sample have a maximum margin of sampling error of  $\pm 1.78\%$  at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

# Overview



## **Purchasing Personal Care Items**

Almost two-thirds of Americans purchase personal care products. They also plan to continue to buy these items in the next year. Women and those between 40 to 65 years old are more likely to shop for personal care products. They find the category fitting to their needs and are more willing than other sectors to pay more for specific brands.



## **Awareness & Brand Equity**

Dove leads for top-of-mind awareness in the personal care industry. Non-traditional beauty companies gain some traction, but legacy brands like Dove and Olay remain the highest for aided awareness. Gillette followed by Crest win when it comes to brand equity scores.

# Top Personal Care Brands

	Brand	Unaided Awareness	Brand Equity Score
1		24%	7.71
2		5%	7.72
3	Olay	5%	7.96
4	<b>Gillette</b>	4%	8.54
5	Neutrogena®	4%	8.27
6	<i>Johnson &amp; Johnson</i>	4%	7.43
7	<b>NIVEA</b>	3%	8.18
8	Aveeno®	2%	7.77
9		2%	8.03
10	<i>Old Spice</i>	2%	7.58
11	<b>Crest</b>	2%	8.49
12	<b>Colgate®</b>	2%	8.19
13		2%	7.64
14	<b>AXE</b>	1%	7.96
15	<b>L'ORÉAL</b>	1%	7.14

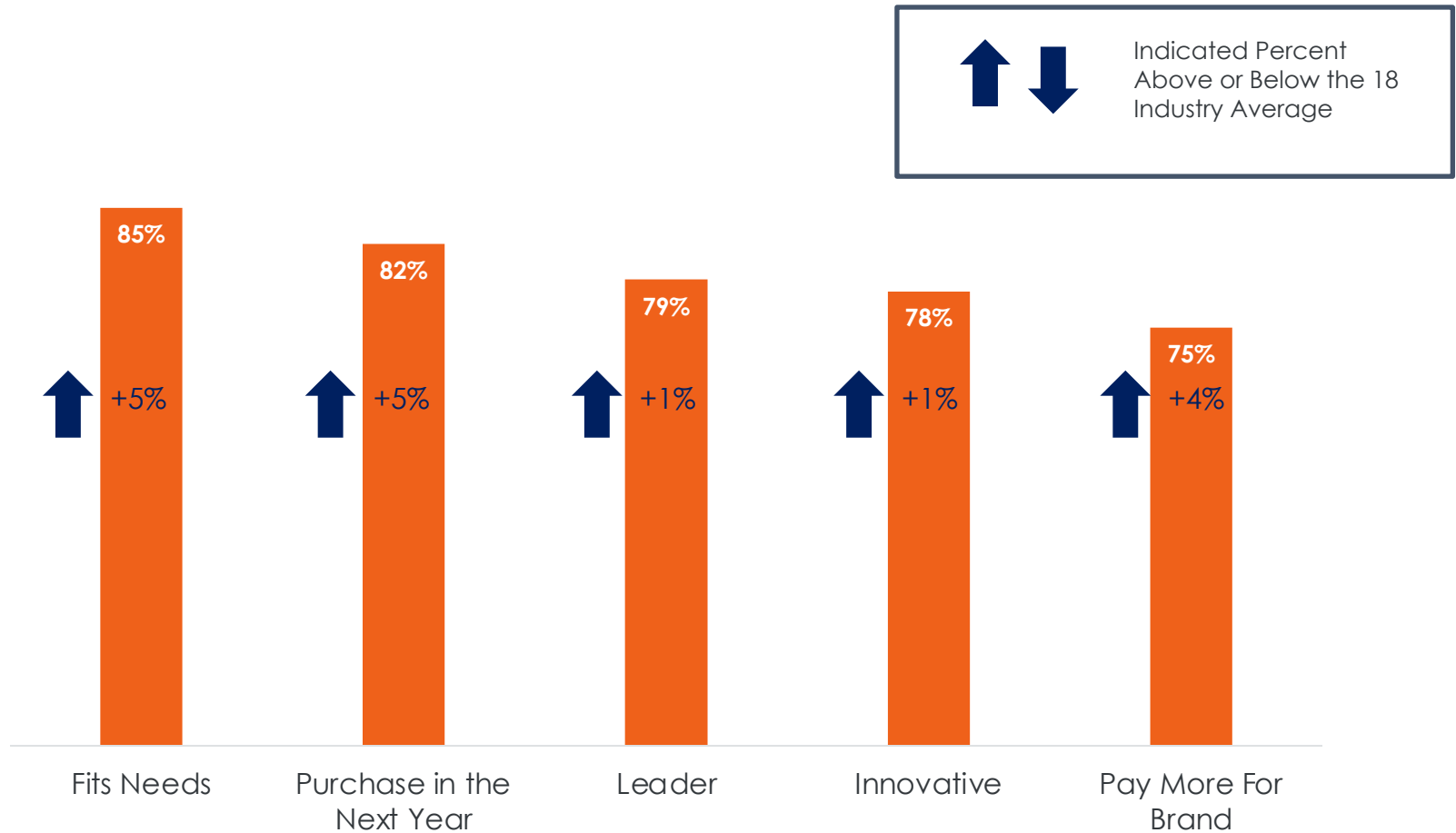
Consumers have the highest unaided awareness of Dove compared to other personal care brands. Gillette has the highest brand equity score.

## How to Read This Chart

There are two scores. The first score is unaided brand awareness.

The brand equity scores are calculated by averaging the ratings for leadership, innovation, fits needs, pay more, and likelihood to purchase in the next year. The attributes are rated on a ten point agree scale, where 1 is strongly disagree and 10 is strongly agree.

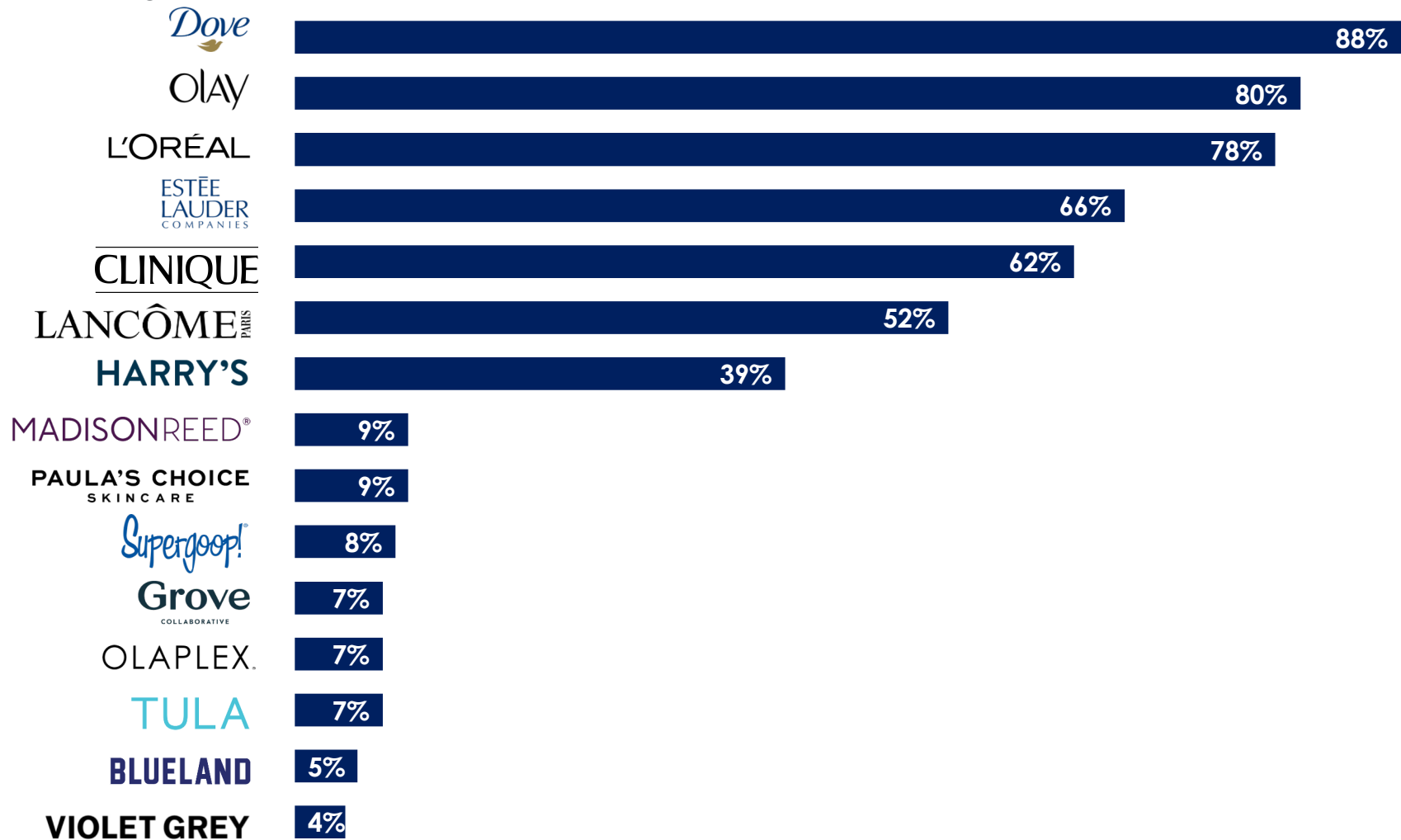
# Brand Equity Drivers: Personal Care



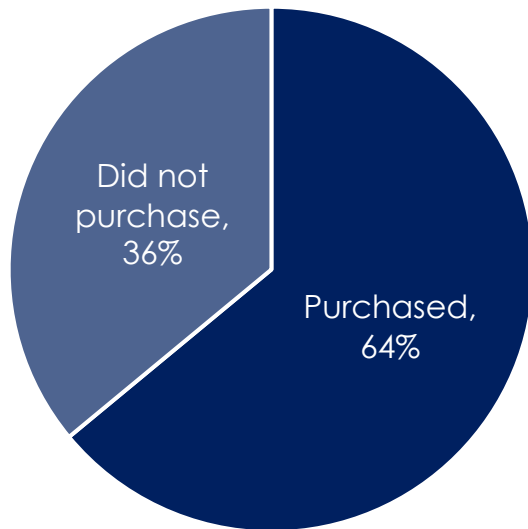
Base: Consumers who received the question (n=497)

# Awareness of Beauty & Personal Care Brands

Non-traditional beauty companies are gaining some traction, but legacy brands like Dove and Olay remain strong for aided awareness.



# Current Personal Care Purchasing:



## 64%

of U.S. Consumers  
have purchased  
personal care in the  
last three months

## More Likely to Purchase Personal Care

Those who have the  
following  
characteristics, % who  
purchase Personal  
Care



**Female: 72%**



**Baby Boomers: 68%**



**Gen X: 67%**



**Under \$50K: 66%**



**No children: 66%**





## Personal Care Buyer Profile vs. Non-buyers

**64%** of the Population  
211 million Americans

### Personality Traits

Although, they are still concerned about COVID-19 impacting:



**The economy (82%)** vs. 74%



**In-person social events (70%)** vs. 66%

*(Top 2 of 4: Moderately/Extremely concerned)*



**26% Good-hearted**  
vs. 18%



**15% Intelligent**  
vs. 14%



**11% Passionate**  
vs. 9%

Self described  
personality

### Shopping Habits

*Top 2 of 7: Strongly Agree/Agree*



**41%**

Enjoy spending time  
picking out items to  
purchase  
(37% Non-buyer)



**28%**

Prefer to shop online  
than in physical  
stores  
(32% Non-buyers)



**13%**

Spend money to  
stay on top of the  
latest trends  
(22% Non—buyers)



**22%**

Pay more for items  
that are sustainably  
sourced  
(31% Non-buyers)

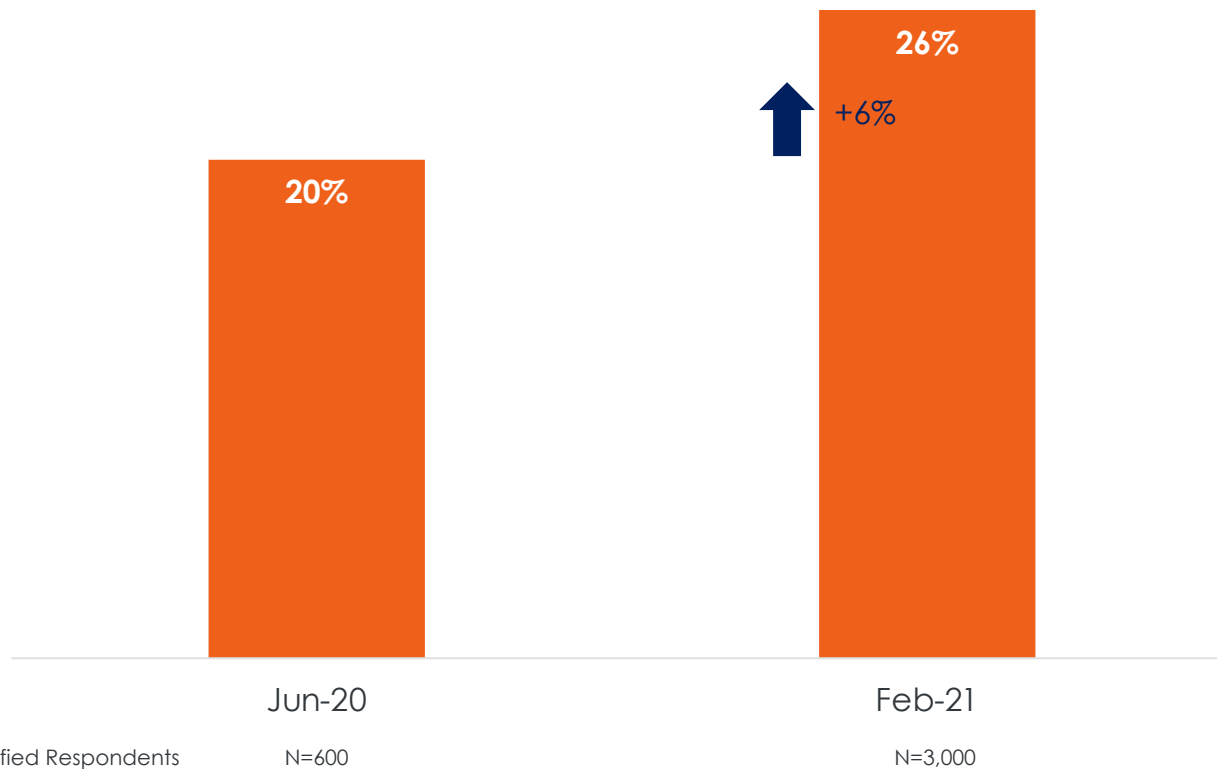


Quality is most important for  
personal care buyers when  
purchasing products/services

# Happiness

Americans optimism has improved since the summer of 2020.

Very Optimistic  
(Top Box of 4 Point Scale)



# Shopping In-Store

Over half of the U.S. population is still concerned about going in-store to shop.

Moderately/Extremely Concerned About Shopping In-Store

56%

of Americans are concerned  
about shopping  
in-store

(+2% from Summer 2020).

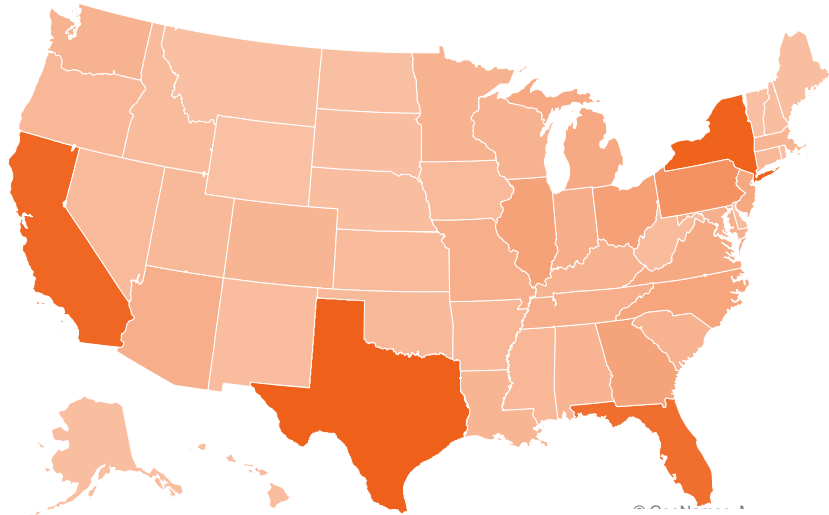
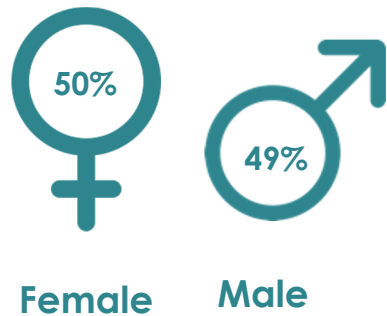


# Importance of Attributes When Selecting a Brand

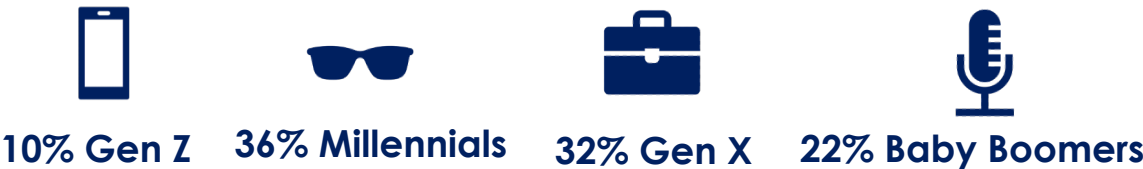
Quality is more important than price when selecting a brand. Trust also plays a critical role in the decision-making process.



# Demographics

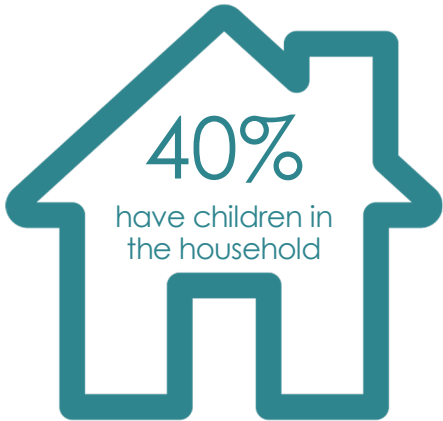


## Generations



## Employment Status

Employed full-time	53%	Unemployed	7%
Retired	12%	Business owner/Self-employed	5%
Employed part-time	10%	Full-time student	3%
Homemaker	9%	Freelancer	2%



# About Provoke Insights



Founded on the premise that research should better align with marketers' needs, Provoke Insights empowers brands to navigate through today's cluttered advertising space. This full-service market research firm solely focuses on research for **branding**, **advertising**, and **content marketing** initiatives.

What makes Provoke Insights unique from other research firms is that you work with a research expert who is also a seasoned brand strategist; this ensures that questions are deeply explored, and insights are cultivated and capitalized. We develop insights from the data to help guide growth for your company's vision.

For more information or press inquiries, reach out to [rachael.ryan@provokeinsights.com](mailto:rachael.ryan@provokeinsights.com).