



# homecare

— 2021 —

OUR SELECTED TRENDS,  
INSIGHTS & OBSERVATIONS

ftb.  
CROWSNEST  
*trend horizons*



# WELCOME

As specialists in Health, Wellness & Homecare over the past 23 years, we have always been obsessed with ‘what comes next’. One area of high interest is the Homecare market which was already seeing fantastic growth pre-pandemic and looks set to continue to deliver record breaking sales as this new way of life continues.

Our 2020 WFH lives has given us the opportunity to see our homes in a whole new light. From setting up the spare room as the office or sharing the kitchen table with the kids for home schooling to noticing what jobs need doing. And as we are at home much more, we are cleaning more than ever, not just a quick once over but a Covid standard clean. Our homes have become a sanctuary, a fortress to keep us all safe, in this world where hygiene is the new currency.

We have explored how this thriving sector of Homecare is evolving across 3 macro trends, we have been charting the new needs and concerns of Homecare consumers and the innovations altering the type of products available for purchase.

We hope that our perspective on Homecare is inspiring food for thought and would love to hear what you think of it.

We look forward to discussing our findings with you.

## KILLER STATS

# 86%

Globally, 86% of consumers have changed the way they clean their homes due to the pandemic, while 66% have changed the way they wash their clothes [unilever.com]

# \$600m

Unilever reportedly spent a minimum of \$600m (£465m) on its acquisition of US eco-cleaning brand Seventh Generation which is telling of how the eco category is being viewed by big business. [The Grocer, 2020]

# \$19.3bn

P&G reported a 9% jump in sales to \$19.3bn in the three months to the end of September. Meanwhile, Reckitt Benckiser with Dettol and Lysol, reported a 19% jump in third-quarter numbers. Unilever with Domestos and Comfort saw a 6.7% sales increase. [The Grocer, 2020]

## OUR AREAS

**ONE**

**HOME DEFENCE**

HYGIENE IS HAPPINESS  
HELP TO SLEEP  
FEEL GOOD

**TWO**

**ONE HOME**

ECO  
WATERLESS  
REFILLABLES

**THREE**

**BEAUTY OF  
HOUSEHOLD**

TOUCH OF LUX  
THE MINIMALS  
OWN LABEL



# HOME DEFENCE

HYGIENE IS HAPPINESS | HELP TO SLEEP | FEEL GOOD

We've ignored Trump's advice to inject bleach, but our cupboards are full of the stuff as we fight Covid-19 with our cleaning regimes. It's no surprise that sales for the big players such as *P&G*, *Unilever* and *RB* are soaring.

Not only have we been protecting our homes from Covid, but we're also trying to protect our mental health – most notably addressing concerns around **sleep** and our **emotional health** which is influencing the brands we choose.

26%

Sales of Unilever's hygiene arm – including cleaning sprays, hand soaps and sanitiser – jumped by 26% in the second quarter of 2020

tesj.com

No.1

Mental health is the top health benefit of interest among supplement users aged 18-34 in the US and UK.

Glanbia, 2020

\$205.2

The global laundry detergent market value is expected to reach USD 205.2 billion by 2025.

Grand View Research, Inc.



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HOME DEFENCE

## Hygiene is Happiness

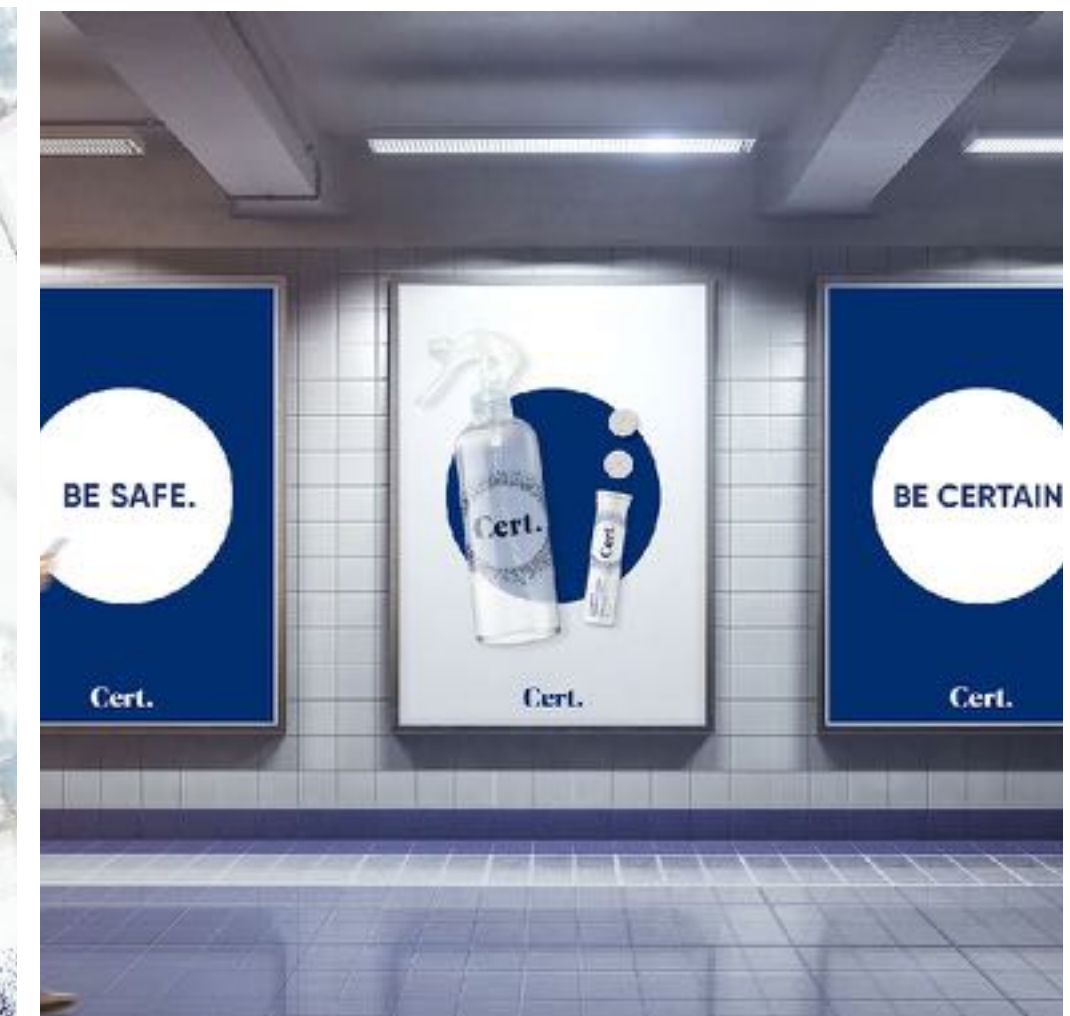
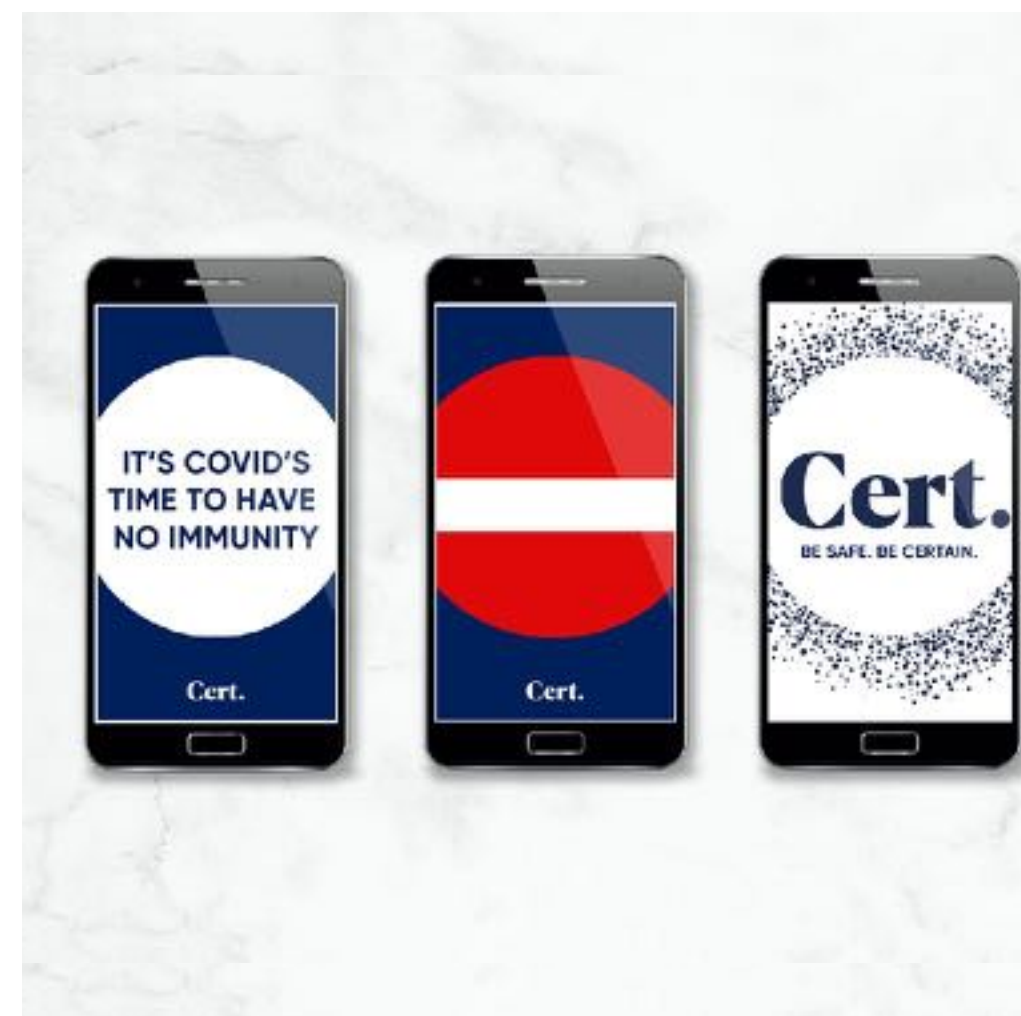
*Home hygiene brings peace of mind. Household cleaning brands can help and reassure people to feel happy and secure in their homes again by boosting the healthiness of their home.*

**Cert.**

***Created by Free The Birds***

A new DTC disinfectant and detergent product, Cert., has launched in response to the Covid pandemic. Believed to be the first domestically available cleaner of its kind, Cert. is simple to use: fill the clear Cert. branded bottle with 500ml of water and a dissolvable tablet, spray and destroy the SARS-CoV-2 virus, which causes COVID-19 in just 60 seconds.

Cert. is the first direct-to-consumer launch from Hydrachem – the leading suppliers of hospital standard cleaning and disinfecting products for the NHS – to provide a dissolvable tablet which provides effective surface cleaning against the Covid virus, by using detergent and disinfectant. initially Cert. launched online as a DTC starter pack.



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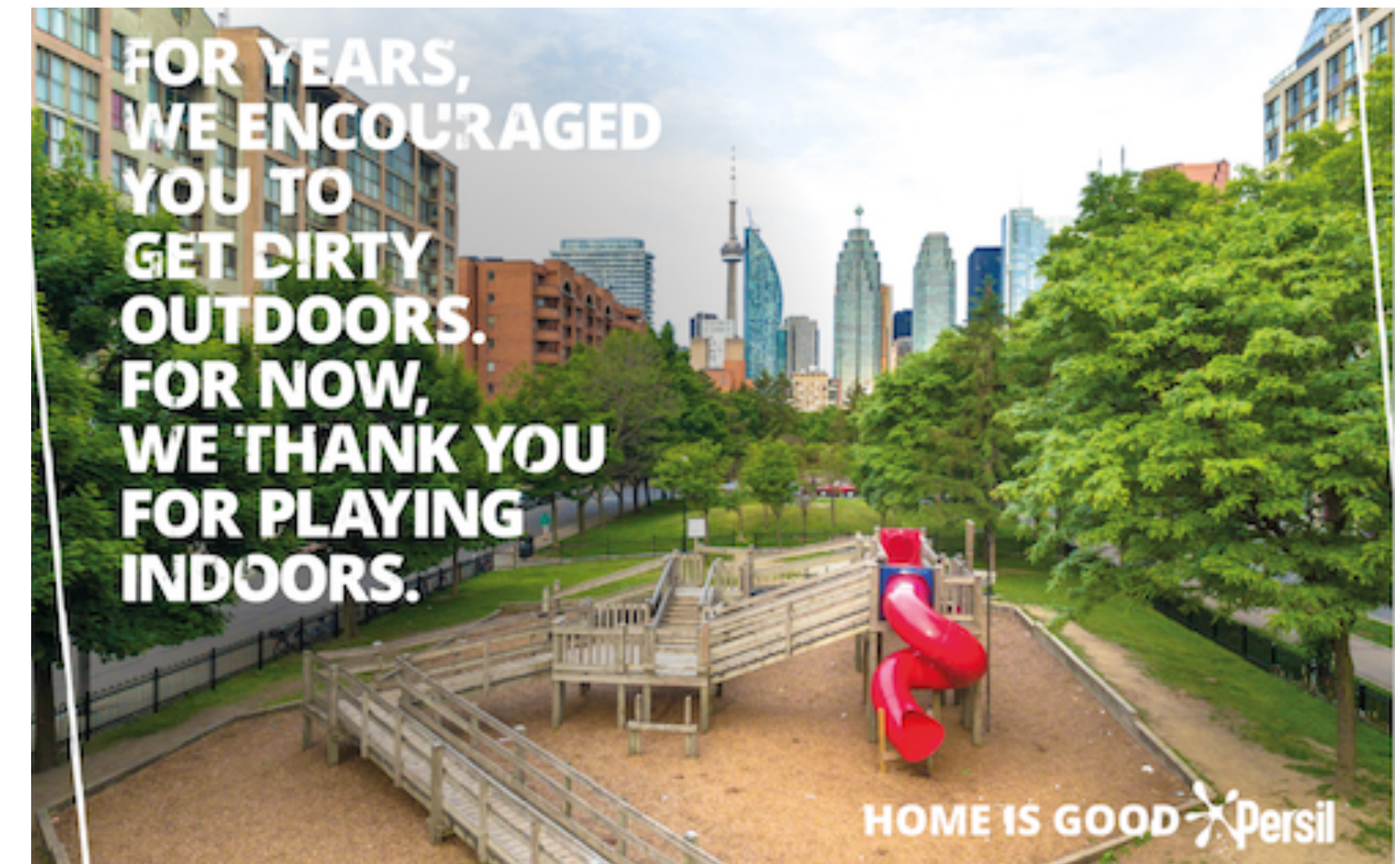


HOME DEFENCE

## Hygiene is Happiness *(cont)*

### **Persil Antibacterial Laundry Sanitiser**

In light of Covid, Dirt is no longer good and Home is Good instead. Persil has launched an Anti-bacterial laundry sanitiser claiming it kills 99.9% of viruses and bacteria.



### **Zoono microbe shield surface sanitiser spray**

Zoono is billed as both gentle (this spray is completely free from any fragrance, alcohol or preservatives) and effective (it claims to protect against 99.99 per cent of germs for up to 30 days). Rather than replacing your usual cleaner, it's recommended you apply this sanitiser weekly or monthly after cleaning all your surfaces (and even cleaning between doesn't prevent it from doing its job).





## Hygiene is Happiness (*cont*)

### OMO & Domestos

Responding to consumer demands in Turkey, Unilever shifted gear and combined Domestos Bleach into their Omo Laundry brand in just 40 days.



### We are Probiotic Cleaning

We've seen Probiotics gaining popularity in food and beauty, but how about cleaning? Probiotics survive for as long as the environment is sufficient, meaning that the solution works far longer than conventional formulas.

UK start-up *We Are Probiotic* uses them to break down dirt, grime and pollen, as well as the biofilm that bad bacteria feed and live off.





## HOME DEFENCE

# Help to Sleep

*We are experiencing a newfound obsession with essential oils set against a backdrop of Coronavirus anxiety, bringing soothing blends into our home to help prevent a sleepless night... it's no wonder that sales of pillow mists are booming.*

## Love Home and Planet

On the back of beauty brand Love. Beauty and Planet comes Love, Home and Planet - entering into the 'natural-ish' Household space. This variant, formulated to support sleep is mostly plant-based and contains natural & ethically sourced lavender, which as we all know is the king of all sleep ingredients, promoting a sense of calmness and relaxation.

## Fabric Pillow Sprays

Alongside a good book and a decent lamp (no phone!), pillow sprays have quickly become a bedside must-have. The route to entry typically comes from Skincare, Bath & Body and Fragrance brands. *This Works*, *REN* and *Mauli* are the brands leading the way to a satisfying nights' sleep.





## Feel good

*Remember the hysteria over toilet paper during the lead-up to the first lockdown? The shift to online has given us numerous choices of high-end DTC bathroom tissue brands, many of which are seeing huge sales growth.*

### Who Gives A Crap

Simon, Jehan and Danny started this brand when they learnt that 2.4 billion or 40% of the global population do not have access to a toilet, this means that around 289,000 children under five die each year from diarrhoea or other diseases caused by poor water and lack of sanitation. That's almost 800 children per day, or one child every two minutes. A shocking and simple to resolve fact. The brand donates 50% of profits to help build toilets and improve sanitation in the developing world.

### No.2

The paper is made from bamboo instead of trees. Bamboo forests reach maturity in 4-6 years – compared to 20-50 years with trees – and once mature can be harvested yearly. No.2 has evolving custom prints to match consumers' style and décor and a cheeky name to match.





DOING  
GOOD

USER  
GENERATED  
CONTENT

COVID

CONCLUSION *from*  
FREE THE BIRDS

## HOME DEFENCE

What does this mean for your brand?

## Pay it forward

Our brand choices reflect who we are or who we aspire to be. Brands that engage with the wider community to support and enrich livelihoods will always be highly regarded by consumers and in turn build deeper loyalty. DTC delivers that opportunity, independent organisations are masters of their own universe and are flexible enough to donate services, profits and products to make lives better for those less fortunate. How close are you to your community? Are there ways you can help without getting tied up in corporate red tape? Are there initiatives you can launch that are true to your brand purpose?

***We can help you identify those opportunities and communicate those messages.***

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***What can you do to ensure your brand is talked about?***

## Living with Covid-19

Catering to Future Demand. With the ongoing impact of the pandemic, we know it's a marathon we are dealing with. How can brands ensure they are being as empathetic and supportive as possible? By anticipating what consumers are wanting and needing from homecare, brands not only build loyalty but can use the insights gathered to fuel the innovation pipeline as well as adapting and adjusting their messaging accordingly.

***Do you need help viewing consumer behaviour from a different perspective? Let's discuss how to approach this.***



# ONE HOME

ECO | WATERLESS | REFILLABLES

There's often a myth that natural products aren't as tough on stains and dirt as the regular kind, but that's really not the case. 'Natural' doesn't have to mean 'ineffective'.

While the focus on sustainability has been paused – people are really starting to understand that the way we treat the environment impacts directly back on humans. Going forward, household products will need to sit at the intersection of wellbeing, sustainability and digital communication to succeed and grow.

578

On average, UK households produce enough non-food plastic waste each year to reach around the world 578 times

*Bower Collective*

82%

82% of respondents in the survey said they value sustainable packaging (less plastic) and would prefer to choose responsibly when shopping.

*countryliving.com*

90%

A typical bottle of cleaner is 90% water

*vox.com*

ftb.





ONE HOME

## Eco

*Eco-friendly or green cleaning is seeing a huge rise in interest as more of us are challenging the old traditional mainstream brands that relied on single use plastic and man-made chemicals.*

### Ecoegg laundry Egg

The laundry egg aims to replace your usual laundry detergent. The egg is designed to take the place of single-use plastic since it can be used repeatedly, and instead of regular laundry liquid or tabs, you use natural mineral pellets. The pellets – which last for about 70 washes can be purchased separately.



### Norfolk Natural Living collection

Unfortunately the majority of our household cleaning brands use plastic and are garish in terms of their semiotic power and efficacy codes. This dish-washing collection consists of natural materials and botanical ingredients, made by hand in Norfolk, using 100% natural ingredients.





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ONE HOME

## Eco

### Clothes Doctor

A new UK natural detergent brand that not only cares for your clothes with natural formulations but repairs them too, and even has an online tutorial with the motto of *Care, Wash, Wear & Repair*. ‘We believe that every new garment should be a friend for life, not a one hit wonder. With our wonderful team of skilled seamstresses, and our range of natural, plastic-free and gorgeously fragranced clothing care products, we give you the tools you need to join the revolution and embrace a more sustainable wardrobe.’

### Squeak

The average household contains dozens of toxic chemicals, many of which we bring in ourselves through the products we are using to keep our homes clean. The idea that we're spraying ingredients linked to aggravating asthma, allergies and even causing cancer onto our countertops made no sense to Jayna Crittenden, a North Carolina-based mother of three who launched Squeak as a safer alternative.



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ONE HOME

## Eco

### Smol

Much as Graze and Freddie's Flowers pioneered letter-box friendly snacks and flowers, Smol hopes to do the same with Homecare. A DTC subscription brand set up by an ex-Unilever executive, Smol delivers ultra-concentrated laundry and dishwasher tabs in post-consumer recycled childproof and waterproof packaging, small enough to go through the letter box delivering great convenience as well as huge plastic and carbon savings.

### Dropps

According to US DTC brand Dropps 'All living things are inextricably interconnected, and it is every human's responsibility to leave the planet a better place for future generations. You can help by making small, easy changes that, in the aggregate, can have a big impact on our environment.' Dropps are powerful, convenient and good to the planet, what more could you ask for?





ONE HOME

## Waterless

*The impact of our consumption on our personal health and wider environment is increasingly understood by consumers. Last year was a tipping point in terms of plastic pollution and the environment following TV programmes like Plastic Planet and campaigns led by Greta Thurnberg.*

### Blueland

To provide an affordable, eco-friendly alternative to household cleaners in new plastic bottles, direct-to-consumer (DTC) innovators such as Blueland are offering consumers tablet-based products through the refill business model.

### Truman's

Recently purchased by Henkel, Truman's Starter Kit comes with four bottles that can tackle virtually all of the home's hard surfaces with just four non-toxic, biodegradable spray cleaners. The refill cartridges are colour coded so you can't get them confused. Simply add water and go.





ONE HOME

# Waterless

## OceanSaver

Homecare generates more than 29 billion plastic containers each year. OceanSaver, have taken a stand and created a solution. Their plant-based, non-toxic EcoDrops transform in water, creating a safe and powerful product to clean your home spotlessly, while you play your part in something vital. Small change. Big impact.



## Jeremiah Brent x Grove Collaborative

A true collaboration between renowned US interior designer and Grove Collaborative, the ground breaking business bringing healthier home essentials to like minded consumers. This Limited Edition range blends beauty, function and sustainability with an all purpose cleaning concentrate featuring a natural signature fragrance and reusable spray.





ONE HOME

## Waterless (*cont.*)

### Neat

Neat believe they make beautiful cleaning products that perform brilliantly and cut down on waste. They use no single use plastic and have a drastically reduced carbon footprint as they don't ship water around the world.



### Homethings

Homethings state; “Whilst we can appreciate most of the world is bonkers, there's some things that just don't make sense. That's why we're waging a war against single-use plastic underneath our kitchen sinks and inside our homes. The circular economy is the future, so we might as well have fun whilst we are getting there.” A DTC tablet format cleaning sprays from founders Tim, Lo & Matt.





ONE HOME

## Waterless (*cont.*)

### **EC30**

Procter & Gamble innovation, where detergent is spun into a cloth-like material that dissolves in water. EC30 reduces the CO2 emission impact from manufacturing, chemistry, and shipping by 50% vs traditional liquids.



### **Wipe That**

Similarly creating dry sheets of laundry detergent that consumers can cut to size to suit the wash load. Wipe That was launched with one thing in mind, to provide consumers with environmentally friendly products.



**WIPE  
THAT.**



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ONE HOME

## Refill

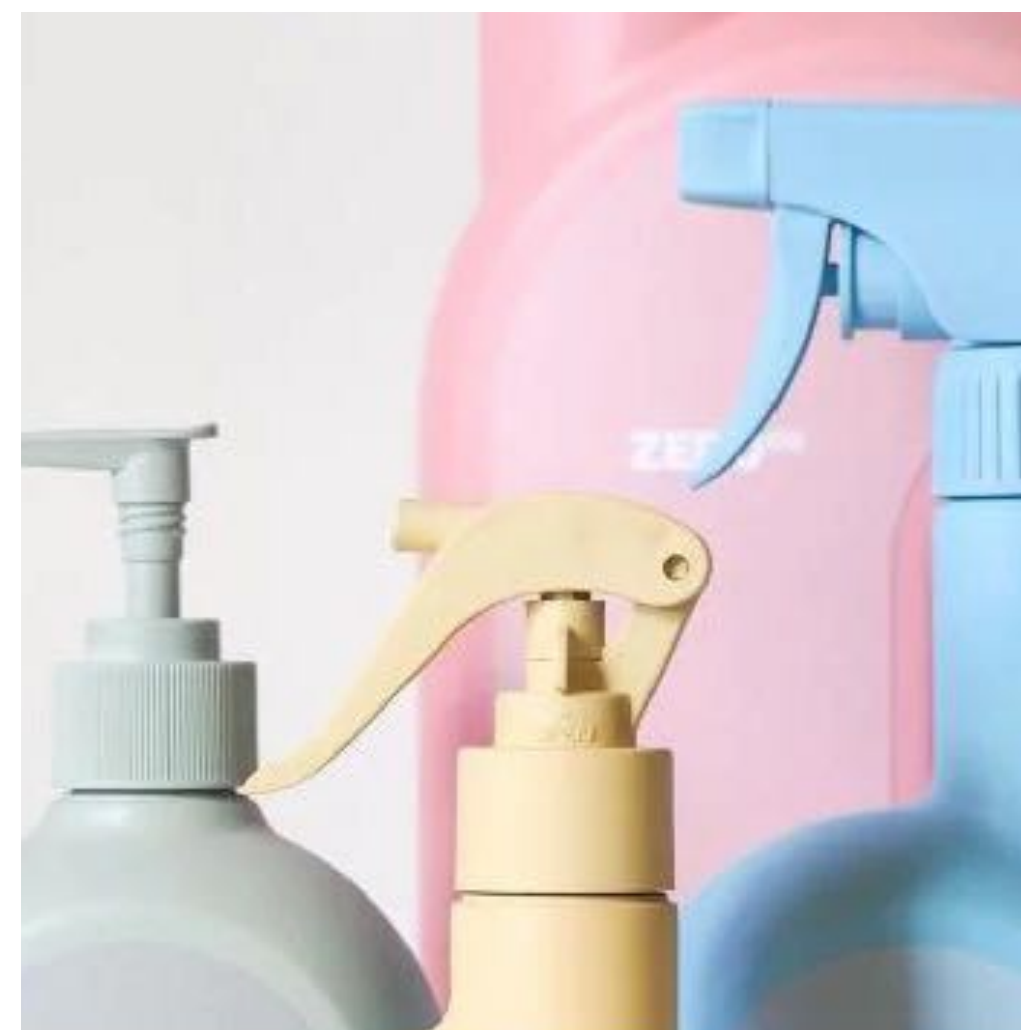
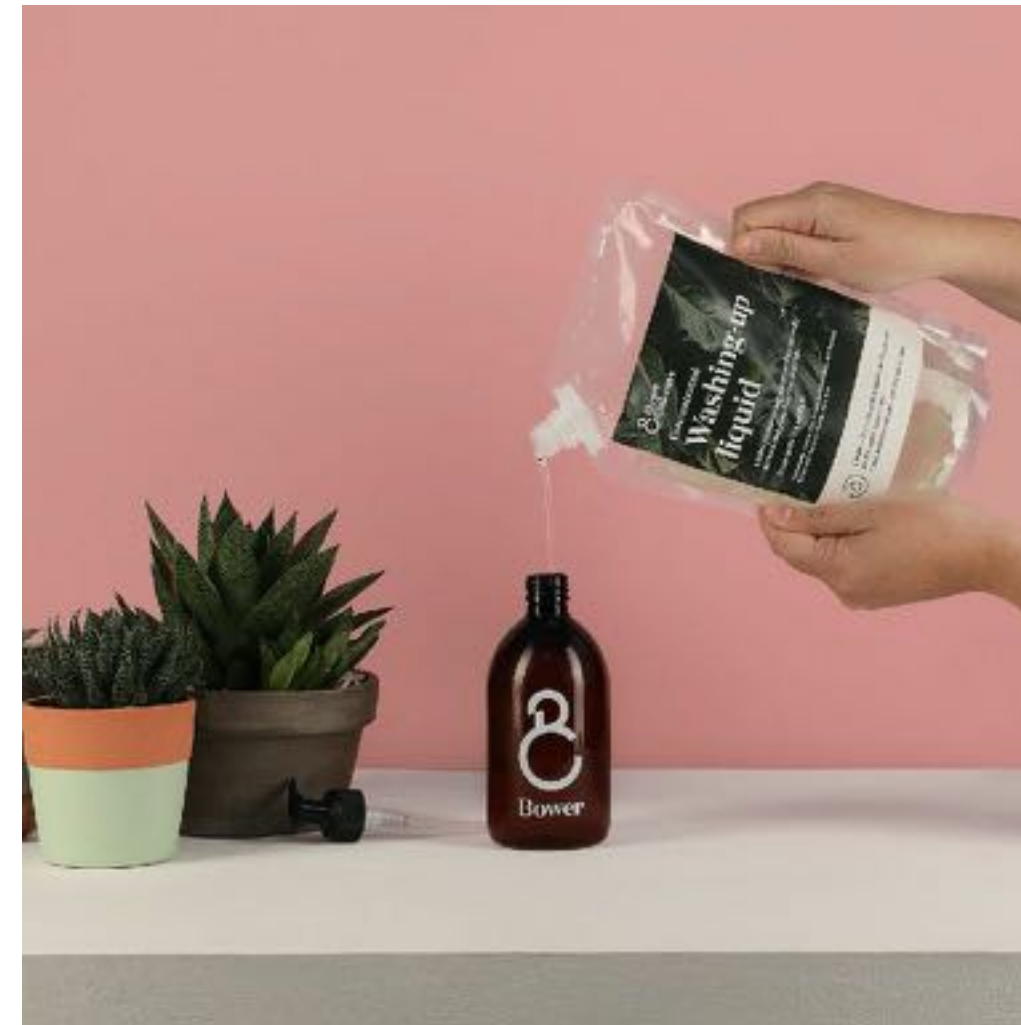
*Reuse, Refill and Recycle are key to the future of Household brands. Optimising and reducing packaging, ensuring that it is recycled – perhaps by take-back schemes or refills like Terracycle’s Loop - and having transparency on what the bottle contains will become standard operating procedure.*

### **Bower Collective.**

With its reuse and refill collection, you buy reusable glass or PET plastic (the most widely recycled plastic) dispensers from the brand and then stock up regularly on its 11 refills online. The refills use Bio-D, meaning it’s also hypoallergenic and natural, and once you’re done, you can pop the pouch in the post so it can be washed and reused, meaning you’re never buying single-use packaging.

### **ZeroCo**

Australian subscription service ZeroCo delivers soap and household cleaning products in reusable pouches made from ocean plastic. Empty sachets can be returned to the brand for sanitising and refilling.





ONE HOME

## Refill *(cont.)*

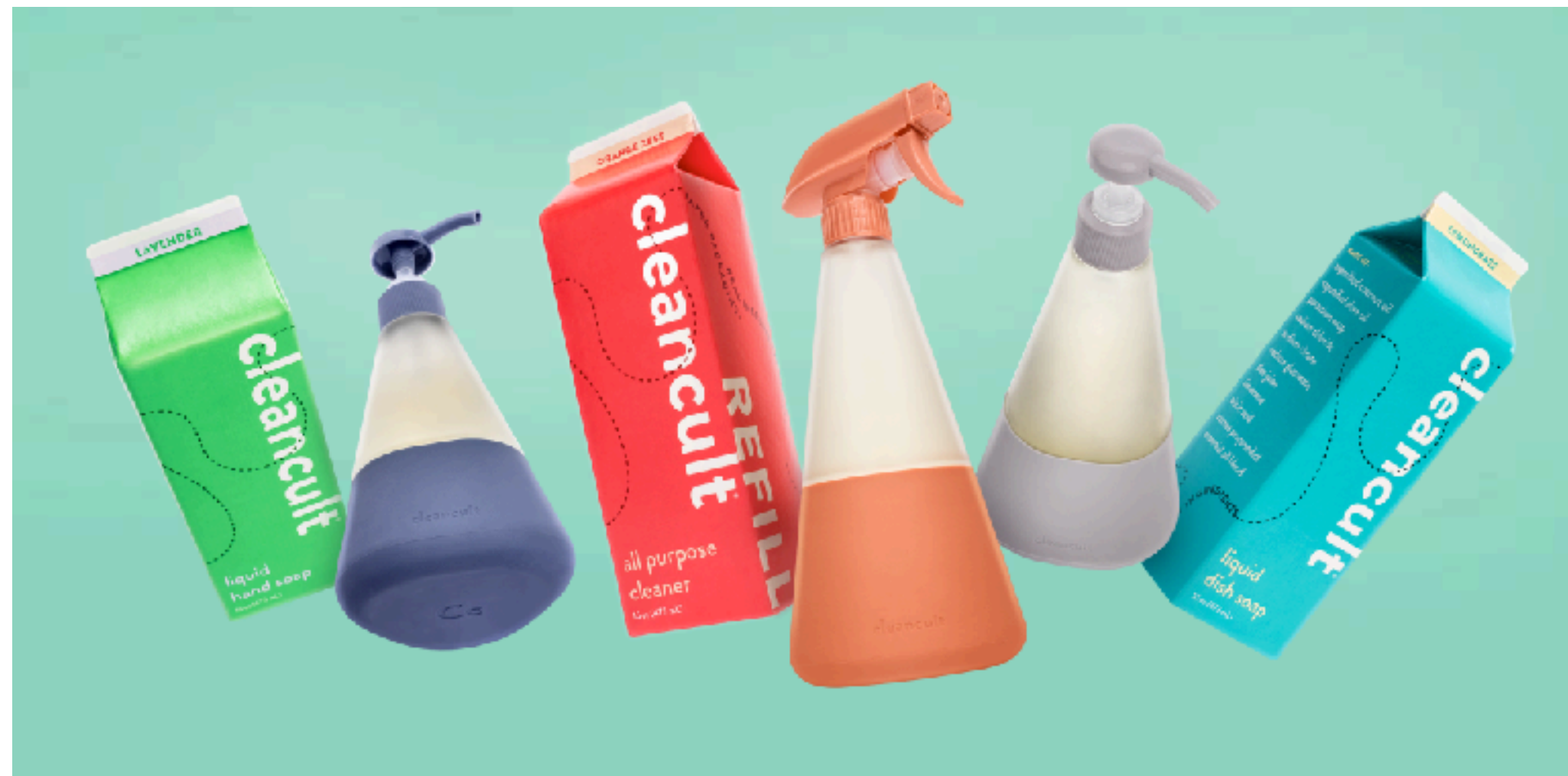
### Supermarket Refilleries: Ecover

UK supermarket chain Sainsbury's new in-store refill machines enable customers to refill laundry detergent and washing-up liquid bottles from Belgian cleaning brand Ecover – marking a first for major UK supermarkets. The recyclable bottles can be refilled 50 times.



### Cleancult

Cleancult believe ‘The cleaning industry has a dirty little secret: it’s not so clean after all. In order to fix tomorrow’s problems, we have to fix today’s cleaning model. So that’s what we did. We built a better cleaning system, one that’s easy, sustainable, and cost-effective. One that rethinks everything, from ingredients to packaging to performance to shipping. Because a brighter tomorrow starts with a smarter today.’





FUTURE  
THINKING

KNOWLEDGE  
IS POWER

BRAND TRUTH

CONCLUSION *from*  
FREE THE BIRDS

## ONE HOME

What does this mean for your brand?

## Are you the best you can be?

Household brands come with a lot of baggage from formulations containing toxins to heavy use of plastic. The ship is sailing with brands that do good, causing less harm to people and planet. Are you onboard? Even if you're not yet, be honest and let consumers know about your intentions. Stating that you're moving towards a more sustainable future by '2025' is ok too. Just have a plan, a voice and an opinion. ***No excuses for keeping your head stuck in the sand, you will be found out and it'll harm your bottom line.***

## If not, seek help!

The world of sustainability is complex and multi-faceted. New innovations in both packaging and product formats are launched all the time plus regulations are constantly evolving. Staying ahead can be challenging. We attend a huge amount of talks and are regularly invited to participate in debates on this ever growing and crucial subject. ***Get in touch and we'll inform you too, not just in the dos and don'ts but also in how you can communicate your perspective to your audience.***

## But do it your way

Whilst sustainability is finally gaining the momentum it deserves make sure you stand out from the crowd. Many claims i.e. '100% recyclable' 'fragrance-free' and 'plant-based' are soon becoming the hygiene factors for many household brands. What else are you doing to differentiate your position and more importantly, what's right for your brand proposition? ***Do you need to take more fundamental steps and join the 21st century consumer demand for increased sustainability in the household market?***



# BEAUTY OF HOUSEHOLD

TOUCH OF LUX | SCENTS & SENSIBILITY | OWN LABEL

We've created a new name for this new hybrid, Beauty Household, focusing on both the emerging aesthetic and considering how the category fits into the way consumers live their lives and shop brands.

Legacy brands and retailers must stop and reassess how they can transition away from their traditional commodity category approach in order to protect their hard won consumer loyalty and to enable future growth. The race has started through acquisitions by the global businesses but it isn't won yet.

40%

Of younger consumers are more likely to associate premium with superior customer experience (40% vs. 31% for older consumers), than the generation before them.

*Nielsen Premiumisation Study*

2020

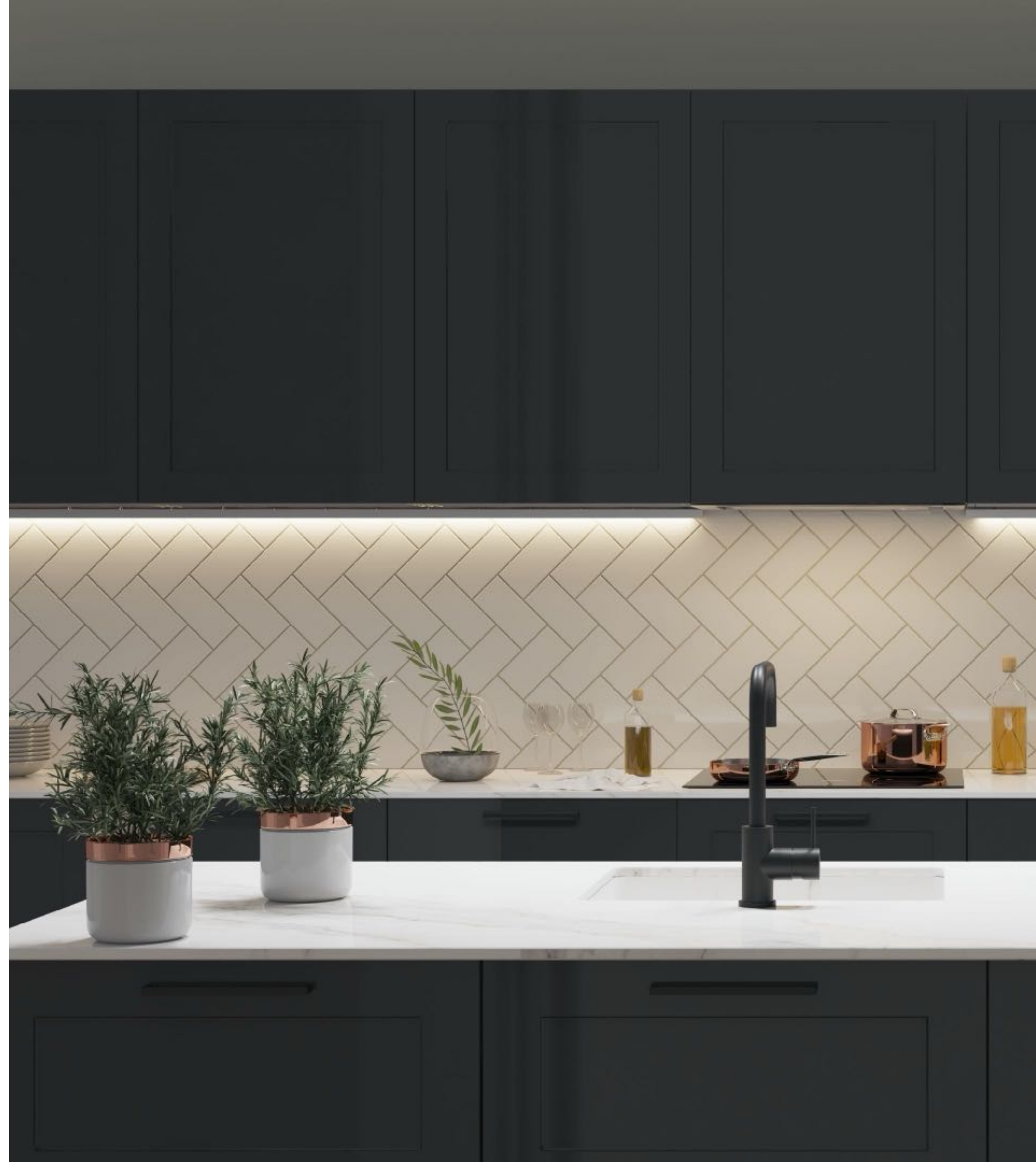
Is the third consecutive year that own-label growth has outpaced that of brands, which are suffering from "a decreasing share of spend"

*The Grocer Focus on Household 1st Feb 2020*

41%

In the United States, in dollar terms, sales of private labels rose **41%** from 2013-18, compared to **7.4%** for national brands

*Private Label Manufacturers Association*





## Touch of Lux

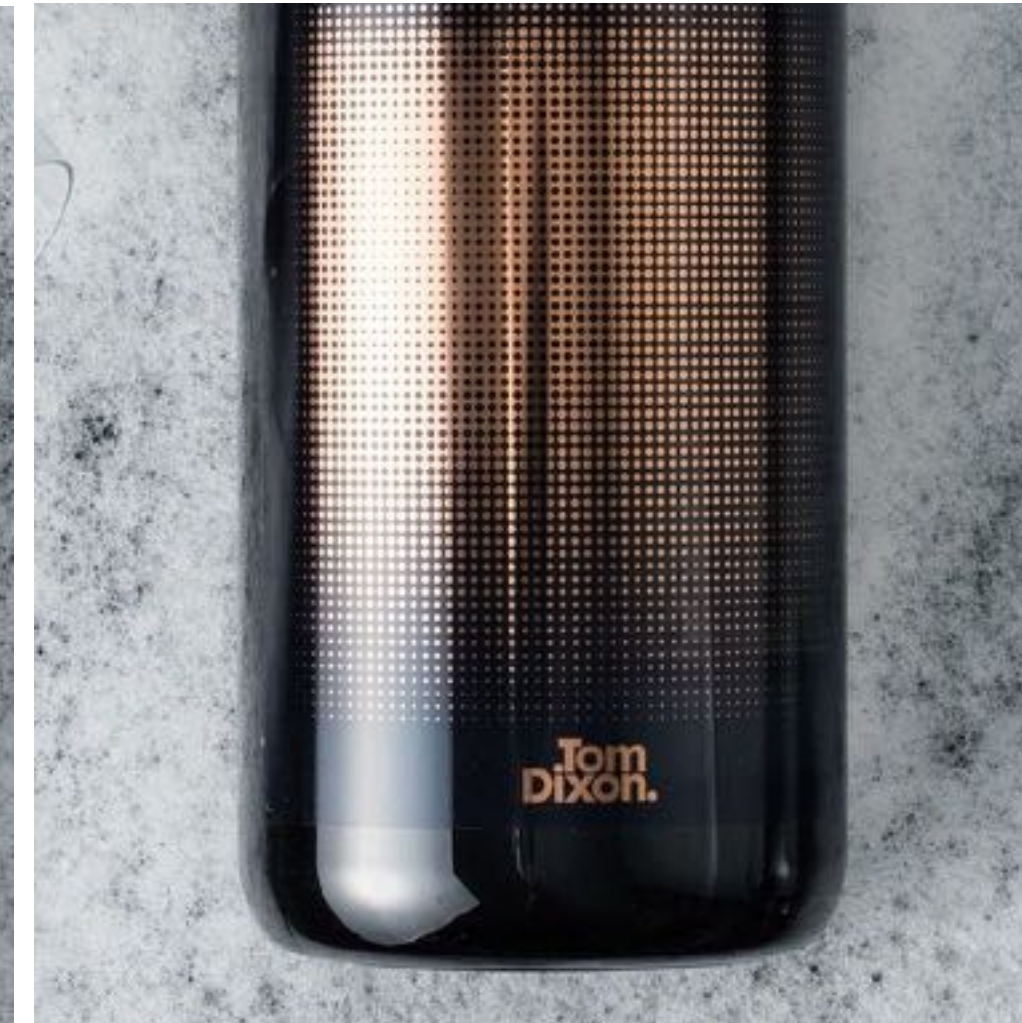
*Displaying Homecare brands isn't something consumers have traditionally done, until now. The impact of a stunning design aesthetic has finally been given the recognition it deserves. Branding and packaging with lux design credentials is a way of saying something about the owner, proud to display in their kitchen or bathroom, to be seen in real life or on a Zoom call!*

### **Tom Dixon**

Aggressively branded, artificially perfumed doesn't make dishwashing endearing. Tom Dixon has done something about it, creating an alternative which is destined to command pride of place in any self-respecting kitchen. The gel is antibacterial and contains aloe vera. Its delicious London scent won't linger on your plate. Free from Parabens and SLS.

### **Lenor - Parfum Des Secrets / Created by Free The Birds**

Lenor's most premium variant in its broad portfolio. A superior and sophisticated perfume inspired fabric conditioner scents delivered within a faceted bottle and elegant brand design.





# Scents & Sensibility

*In this crowded and busy world, one way or the other, brand design and packaging must stand out against others in order to catch our attention. But it doesn't necessarily mean louder colours, more claims, more words - quite the opposite in fact.*

## L'Eaundry

An indulgent washing detergent to treat the clothes you love with a hint of luxury. Taking on board perfume semiotics and moving away from the usual functional type of bottles usually associated with detergent. L'EAUNDRY not only cleans but cares for special items such as negligees, cashmere jumpers and silk pillowcases delivering beautiful scent too.

## The Laundress

New York brand The Laundress are masters of the perfect fragrance colab. Whether it's partnering with Le Labo, delivering their signature scents in a new format or Aromatherapy Associates, clearing the senses with their 100% pure essential oils, the formulations are effective in all temperatures and systems, using the finest natural ingredients without testing on animals.





# Own Label

*With consumers more than willing to try private label, legacy brands now have to deliver far more than just stylish packaging to get consumers to pay higher prices because private label has the gorgeous packaging covered.*

## EverSpring: Target

US retailer Target’s attractive eco cleaning range is pitched as ‘down-to-earth solutions that are up to Earth’s standard’. From all-purpose cleaners with 100% recyclable bottles + sprayers to compostable multi-surface wipes and 100% recycled paper.

## Uniquely J

An own-brand range of grocery and household products with hundreds of different every day items. All of them with a disruptive look representative of each of their different categories. Their bold and eye-catching designs are unexpected - from tattoo-inspired to geometric shapes - products are designed for millennial urban dwellers, with high expectations, lower incomes and limited storage space.





TAKE A  
STEP BACK

UNDERSTANDING  
TODAY

GEN ME

## BEAUTY OF HOUSEHOLD

What does this mean for your brand?

### Less is more

A recent academic study from Montpellier Business School in the leading academic journal Retailing and Consumer Services entitled ‘Is less more or a bore?’ examined packaging design simplicity and brand perception. The research studied three different champagne labels of simple, mid and complex design with over 300 consumers. Over half (52%) strongly preferred the simplest label, with it being associated with modernity, reliability, authenticity, success and sobriety. Extremely pertinent when we consider some of the main purchase drivers for household cleaning. **Does your brand have too much baggage and need some help in working through what is important in today’s world?**

## The New Landscape

With the changing and challenging world, what does this mean for Homecare? What we already know is that mass legacy brands are falling behind. Most Homecare brands remain static, without their own e-commerce sites, let alone plugged into subscription models, automatic reordering or personalised fragrance offerings. And realistically, apart from the most fanatic of cleaning fanatic, no-one is going to share a selfie with their box of laundry pods in the background!

**Does your brand need to evolve its USPs or its brand proposition in this New Landscape? We can help.**

### Get Personal

Gen Z consumers are even more demanding. Nearly half (48%) wanted tools in-store and online to let them personalise their own products and 42% wanted tools to be able to design their own products entirely and 3D print them, according to joint research from IBM and the US National Retail Federation. There is a huge opportunity in the household space for personalisation from packaging to fragrance to formats.

***We run Brand Innovation workshops to unlock ideas within Personalisation. Need to unlock some creative thinking?***



## CONCLUSION

# AT A GLANCE

## HOME DEFENCE

### Pay it forward

Our brand choices reflect who we are or who we aspire to be. Brands that engage with the wider community to support and enrich livelihoods will always be highly regarded by consumers and in turn build deeper loyalty. DTC delivers that opportunity, independent organisations are masters of their own universe and are flexible enough to donate services, profits and products to make lives better for those less fortunate. How close are you to your community? Are there ways you can help without getting tied up in corporate red tape? Are there initiatives you can launch that are true to your brand purpose? ***We can help you identify those opportunities and communicate those messages.***

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## ONE HOME

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# Here to help

We hope you found our gathering of insights and opportunities helpful. Please get in touch with us to arrange a time to discuss how we can elevate your brand.

NICK VAUS | +44(0)774 815 2343 | [nick@freethebirds.com](mailto:nick@freethebirds.com)

**ftb.**  
FREE THE BIRDS