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Birdseye Report | Industry Deep Dive
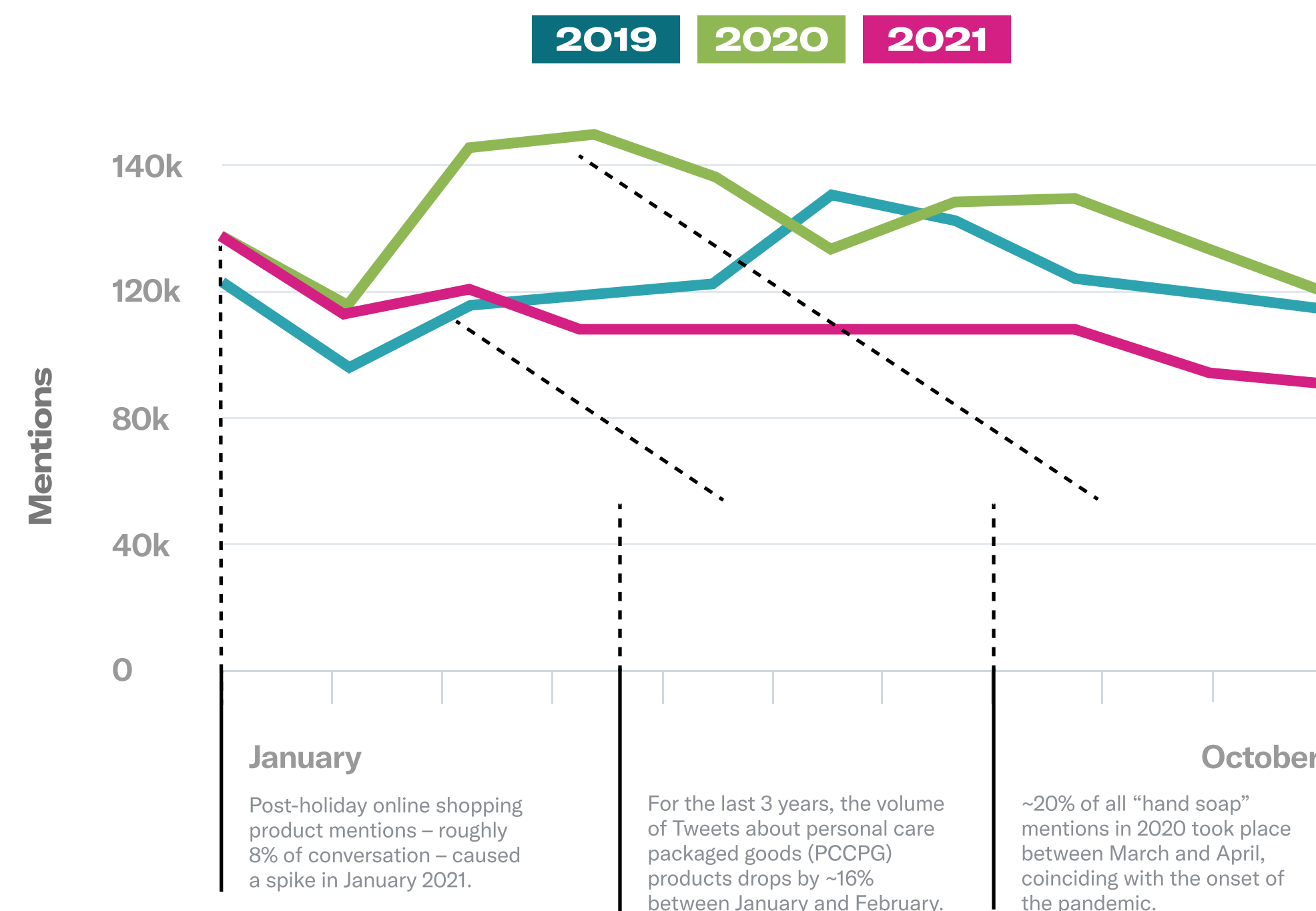
Personal Care

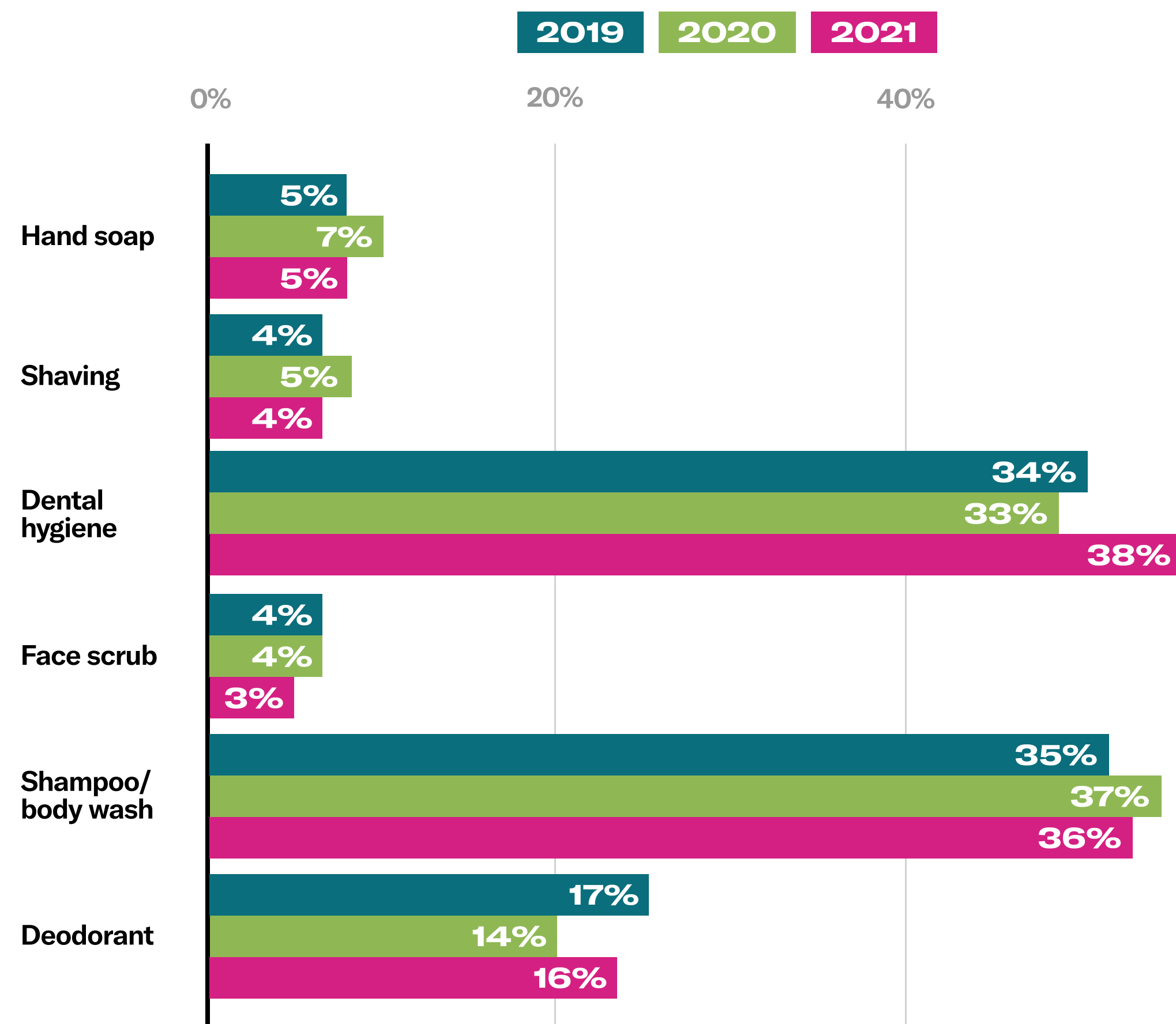Presented by NetBase Quid

Getting up close and personal

Twitter conversation about personal care products decreased in 2021 compared to the swell of quarantine-induced conversation of 2020. Despite the YoY decline, analysis of 2021 Twitter conversations reveals several distinct shifts in shopper behaviors and preferences. These shifts portray a category facing significant change as people begin to gather again with family, friends, and coworkers.

Twitter mentions of personal care products YoY

-21%

This data is based on global Twitter mentions from Jan - Oct in 2020 and 2021. See Methodology for details.

The YoY period references Nov 2020 vs. Jan-Nov 2021. See Methodology for details.

Personal care product conversation on Twitter (Jan - Oct, 2019 - 2021)

2019 **2020** **2021**

Mentions

140k
120k
80k
40k
0

January
Post-holiday online shopping product mentions – roughly 8% of conversation – caused a spike in January 2021.

For the last 3 years, the volume of Tweets about personal care packaged goods (PCCPG) products drops by ~16% between January and February.

October
~20% of all "hand soap" mentions in 2020 took place between March and April, coinciding with the onset of the pandemic.

This chart is based on global Twitter mentions from Jan - Oct in 2019, 2020, and 2021. See Methodology for details.

Category relative share of voice on Twitter by year

2019 **2020** **2021**

0%   20%   40%

Hand soap
- 2019: 5%
- 2020: 7%
- 2021: 5%

Shaving
- 2019: 4%
- 2020: 5%
- 2021: 4%

Dental hygiene
- 2019: 34%
- 2020: 33%
- 2021: 38%

Face scrub
- 2019: 4%
- 2020: 4%
- 2021: 3%

Shampoo/ body wash
- 2019: 35%
- 2020: 37%
- 2021: 36%

Deodorant
- 2019: 17%
- 2020: 14%
- 2021: 16%

This chart was generated by NetBase Quid and is based on global Twitter mentions from Jan - Oct in 2019, 2020, and 2021. Share of voice is defined as the % share of all evaluated category mentions. See Methodology for details.

Post-quarantine shoppers are more critical and they're questioning the value, effectiveness, and composition of their personal care products. Fortunately, conversation on Twitter helps to understand the consumer mindset and navigate their changing needs. Keep reading to explore how marketing, product innovation, and brand values will all play a major role in retaining personal care shoppers into 2022.

Discussion drivers

+147%

Increase in "trimming beards" mentioned in 2020 vs. 2019. While mentions dropped in 2021, YtD they are 18% higher than 2019 levels

+15%

Largest MoM increase of "deodorant" conversation occured in August 2021 as temperatures climbed. "Antiperspirants" also peaked, making up 5% of deodorant conversation.

-74%

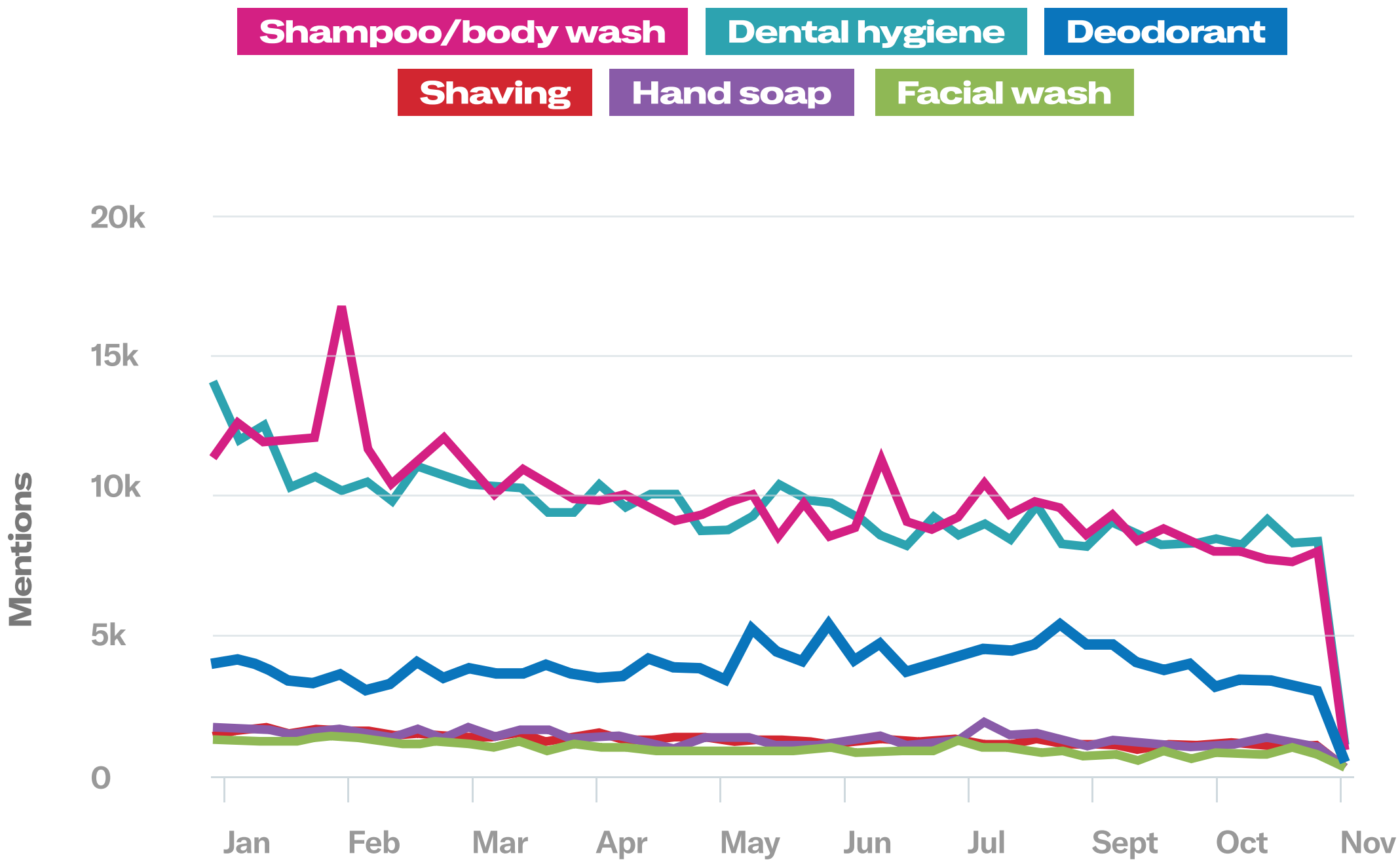Personal care + COVID-related Twitter mentions YoY from 2020 to 2021

-12% vs. 2019
-26% vs. 2020

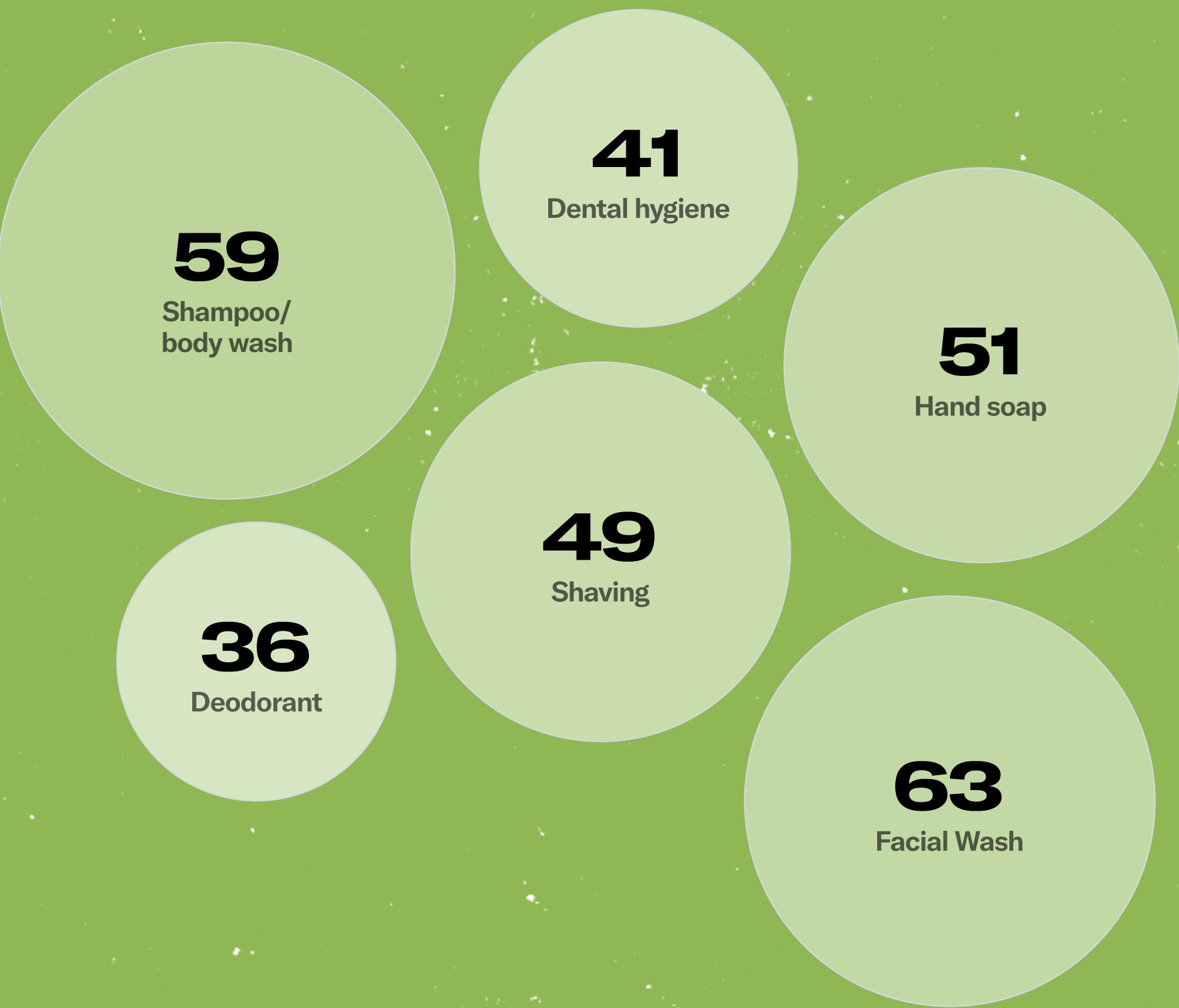Product consideration conversation[1] on Twitter in 2021

[1] Product consideration conversation is qualified as Tweets that mention keywords related to "need", "want", "looking for".

MoM is defined as month over month.

Twitter mentions by product category (2021)

Shampoo/body wash **Dental hygiene** **Deodorant**
Shaving **Hand soap** **Facial wash**

Net sentiment of Tweets related to each evaluated hygiene product

59 Shampoo/body wash

41 Dental hygiene

51 Hand soap

49 Shaving

36 Deodorant

63 Facial Wash

This data was generated by NetBase Quid and is based on global Twitter mentions from Jan - Oct 2021. Sentiment is defined as the ratio of positive to negative mentions. See Methodology for details.

Net sentiment refers to the ratio of positive to negative mentions.

Trends to watch

Given that the volume of Tweets referencing personal care products are trending down following the 2020 surge in Twitter activity, it is more vital than ever to understand what is driving conversation on Twitter in 2021. Exploring these trends will provide valuable insight for brands and marketers to reconnect with shoppers in the post-quarantine world.

01 Product detox

People were willing to try out new personal care products during quarantines, had the time to read reviews, and write reviews of their own. After restrictions were lifted, some shoppers cut shampoo and deodorant of their hygiene routine entirely, resulting in a "product detox."

02 Odor anxiety

Counter-intuitively, while product detoxing trended, so did the desire to minimize social anxiety about body odor and bad breath. People want to optimize oral care and deodorizing products to boost confidence as they reacquaint themselves with friends, family, and coworkers.

03 Ingredients obsessed

More flexible schedules and alone time gave people the opportunity to break out of their old habits and experiment with new products in a judgment-free environment. This freedom allowed consumers to explore values-based buying habits.

01
Product detox

Cleaning up the clean routine.

Dramatically different or limited social interactions during the pandemic may have left many people feeling liberated to forego the primarily aesthetic elements of their personal hygiene routines, with some shoppers questioning why they use certain products at all. As we analyzed the Twitter conversation surrounding personal care products, we found that much discussion centered around the effectiveness of deodorant and shampoos.

Within these discussions there is a distinct "no-poo" subcommunity, which promotes the belief that natural scalp and hair oils can maintain hygiene and appearance without shampoo. These shampoo-free, and in some cases, deodorant-free, success stories inspire other consumers to experiment with eliminating products from their personal care routine.

+18%

Twitter mentions of personal care products and keywords related to effectiveness[2] (2021 vs. 2020)

2021

2020

+8%

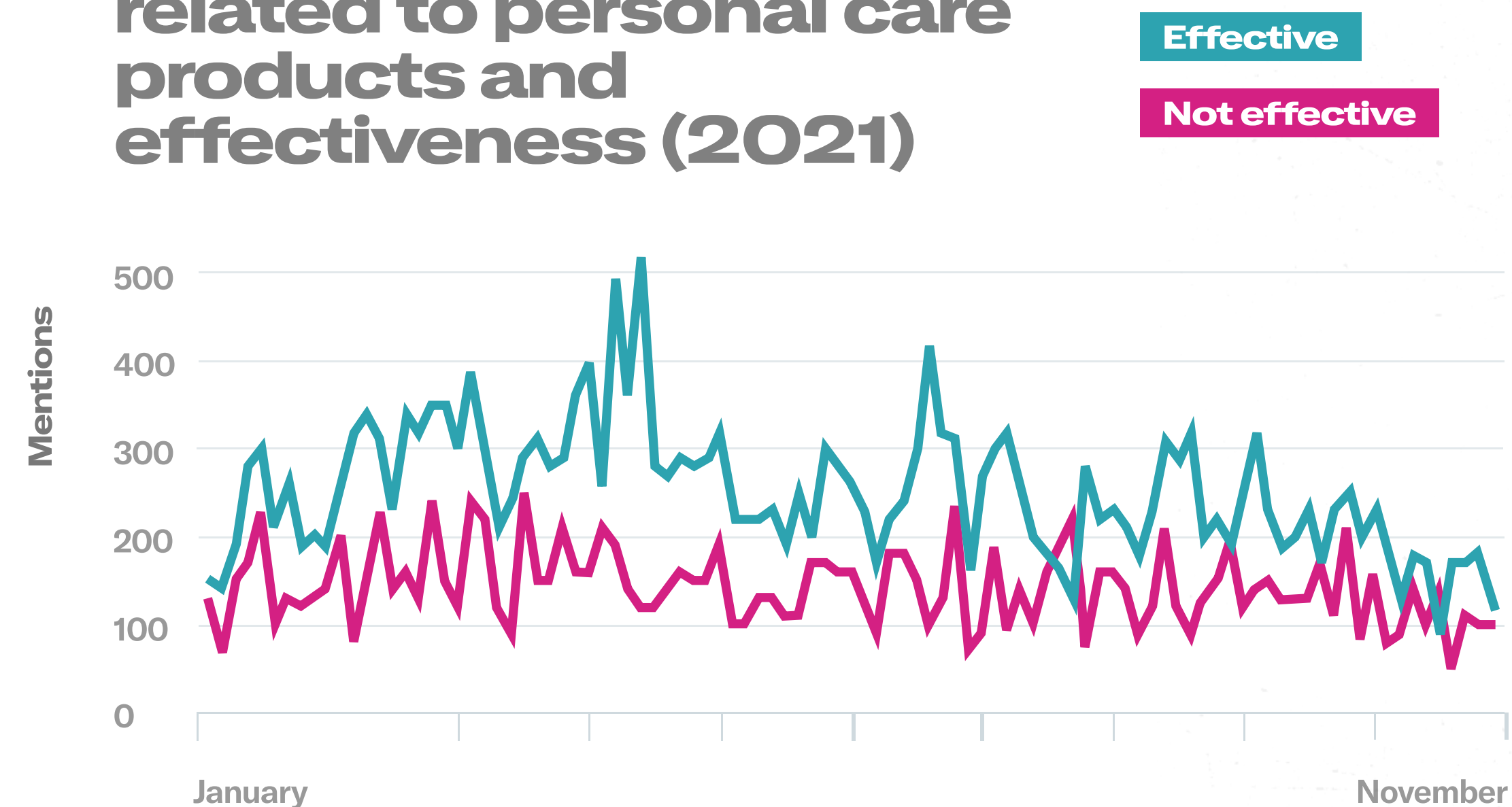Increase in "product detox" mentions (2021 vs. 2020)

+19%

Increase in "product detox" mentions (2021 vs. 2019, pre-pandemic)

[2] Keywords related to effectiveness include "effective," "results," "doesn't work," etc. See Methodology for details.

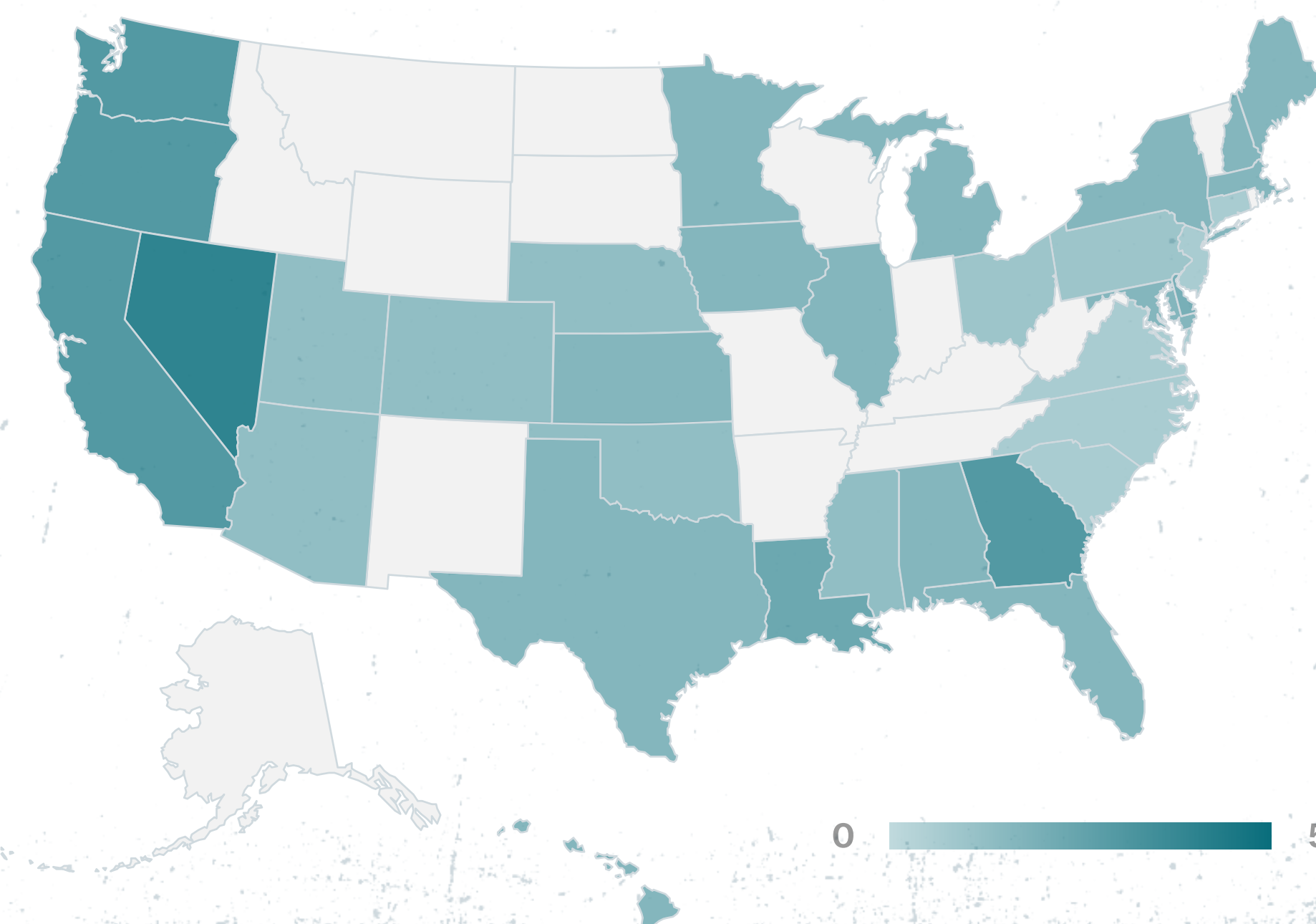This data is based on global Twitter mentions from Jan - Oct in 2019, 2020, and 2021. See Methodology for details.

Within all personal care products conversation, the gap between "effective" and "not effective" mentions is narrowing, particularly in the later months, e.g. "not effective" overtook "effective" in October 2021.

Twitter conversation related to personal care products and effectiveness (2021)

Effective

Not effective

Mentions

500
400
300
200
100
0

January   November

This chart was created by NetBase Quid and represents the volume of Tweets mentioning personal care products + "effective" or "not effective" from Jan 2021 - Oct 2021. See Methodology for details.

Mentions per capita (mpc) of "product detox" by state

Nevada (2.2 mpc), Louisiana (1.3 mpc), and New York (1.2 mpc) are the states with the highest per capita "**product detox**" mentions.

0 ▬▬▬▬▬ 5

This chart was created by NetBase Quid and is based on global Twitter mentions from Jan - Oct 2021. See Methodology for details.
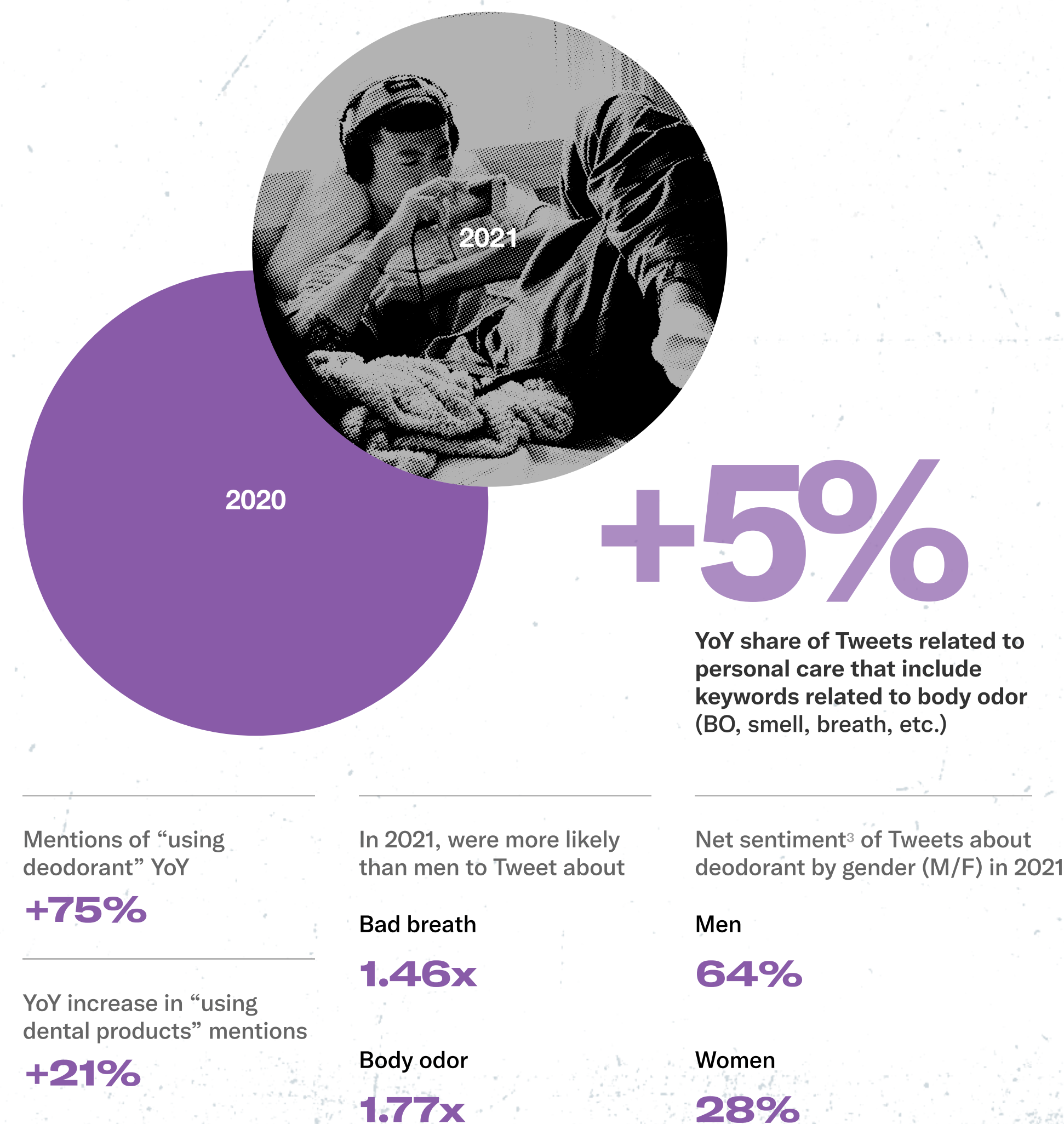
Turn insights into action

01 Leverage branded iterations of #30daychallenge to replicate and gamify the experience of no-poo shampoo detox on Twitter. Lean in to the idea that any new routine, with or without a personal care product, takes time and consistency to achieve results.

02 As some shoppers are leaving behind ineffective personal care products, they are discovering new methods for managing their aesthetic concerns. Continue to monitor skincare, no-poo, and DIY hygiene Twitter communities to inspire future product innovation.

Elliott 📖 | 🚀
@elliottaleksndr

This no shampoo thing keeps coming up.

Going to experiment; let's see how long it takes my wife to notice.

If at all.

#nopoo

10:19 AM · Oct 19,   iPhone
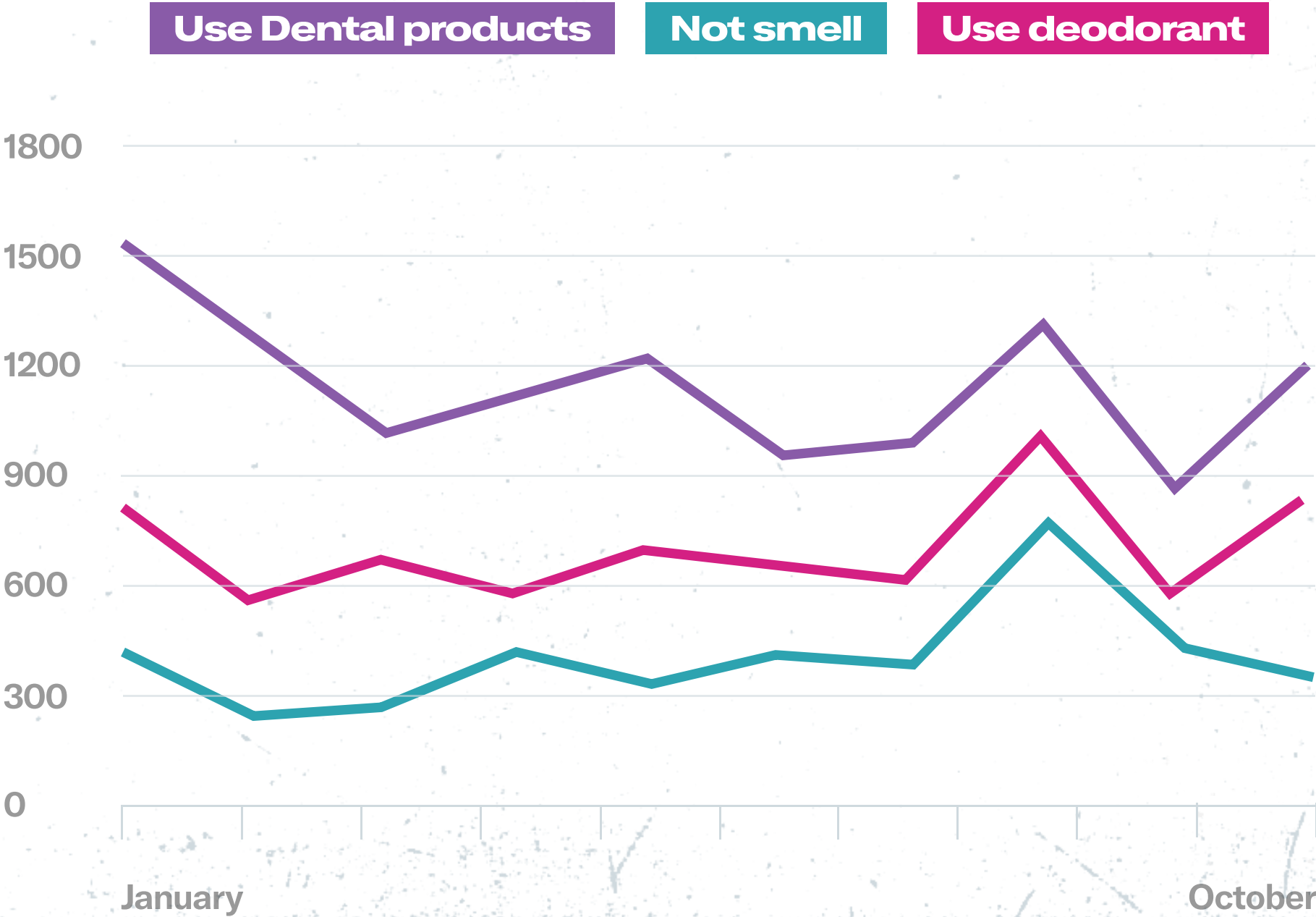
2
Odor anxiety

Embracing the freedom of social distancing.

The reintroduction of indoor dining, the end of virtual classes, and the prospect of a return to the workplace signal the final stage of quarantine and a reintroduction into social spaces. As people venture out of their homes and find themselves spending time in close quarters with friends and strangers alike, the pressure to present well is paramount. Given that smell is one of the strongest senses, the aromas people give off can often make or break a first impression.

2021

2020

+5%

YoY share of Tweets related to personal care that include keywords related to body odor (BO, smell, breath, etc.)

Mentions of "using deodorant" YoY

+75%

YoY increase in "using dental products" mentions

+21%

In 2021, were more likely than men to Tweet about

Bad breath

1.46x

Body odor

1.77x

Net sentiment[3] of Tweets about deodorant by gender (M/F) in 2021

Men

64%

Women

28%

These data points are based on Tweets mentioning "using" [personal care products] from Jan-Oct 2020 and Jan-Oct 2021. See Methodology for details.

[3] Net sentiment: -100% to 100% scale representing the difference between positive and negative mentions compared to sum of all mentions with sentiment.

In 2021, people discussed fear of bad breath or unpleasant body odor much more frequently than during quarantine of 2020. As a result, oral care and deodorant are top of mind for the odor anxious. Odor fighting strength and longevity are the product attributes most important to these consumers.

Global mentions of keywords related to dental care and deodorant products vs. odor concerns (Jan - Oct, 2021)

Use Dental products   **Not smell**   **Use deodorant**

1800	
1500	
1200	
900	
600	
300	
0	

January   October

reelykathleen
@reelykathleen

Mask wearing full-time at work means I really gotta bring a toothbrush and keep it in my desk. I ordered a lox & horseradish bagel for lunch and it was delicious but omg the mask breath. 😂😂😂😂

1:12 PM · Oct 1, 2021 · Twitter for Android

Likes

Turn insights into action

01 Incorporate moments of confronting and overcoming the anxieties that come with increasing socialization post-quarantine into marketing initiatives. Help consumers remember that they aren't alone in adjusting to the new normal, and everyone, no matter their circumstances, is leaving quarantine a better version of themselves.

02 Personal care products are inherently gender neutral, as evidenced by some women's preference for male-marketed deodorants. Rather than becoming overly concerned with distinctly "gender neutral" branding, focus on emphasizing formula, longevity, and quality.

03
Ingredients obsessed

Less is more.

Many people spent early quarantine trying to find the most effective sanitizers or exploring options for minimizing exposure to contaminants. This behavior has carried into personal care considerations, indicated by a +55% YoY increase of personal care Tweets mentioning "natural" and "organic."

Concerns about additives, irritants, and synthetic substitutes in personal care products drive consumers to seek out natural and organic alternatives, which are considered to have lower risk of adverse effects. Even the active ingredients, such as the aluminum in some deodorants, can be considered non-essential or undesirable.

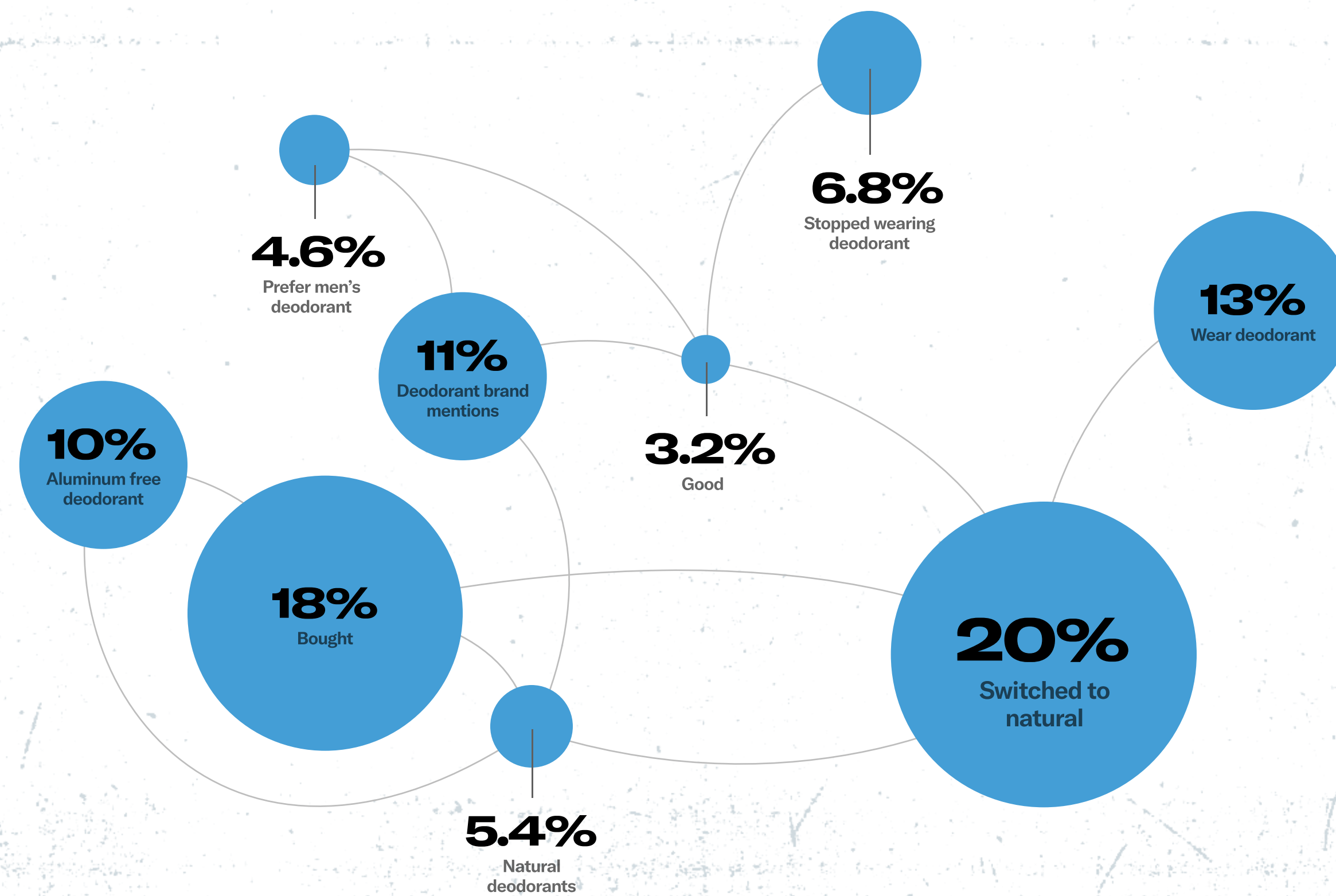**Share of Tweets mentioning natural or organic products[4]**

4.4%
2021

3.7%
2020
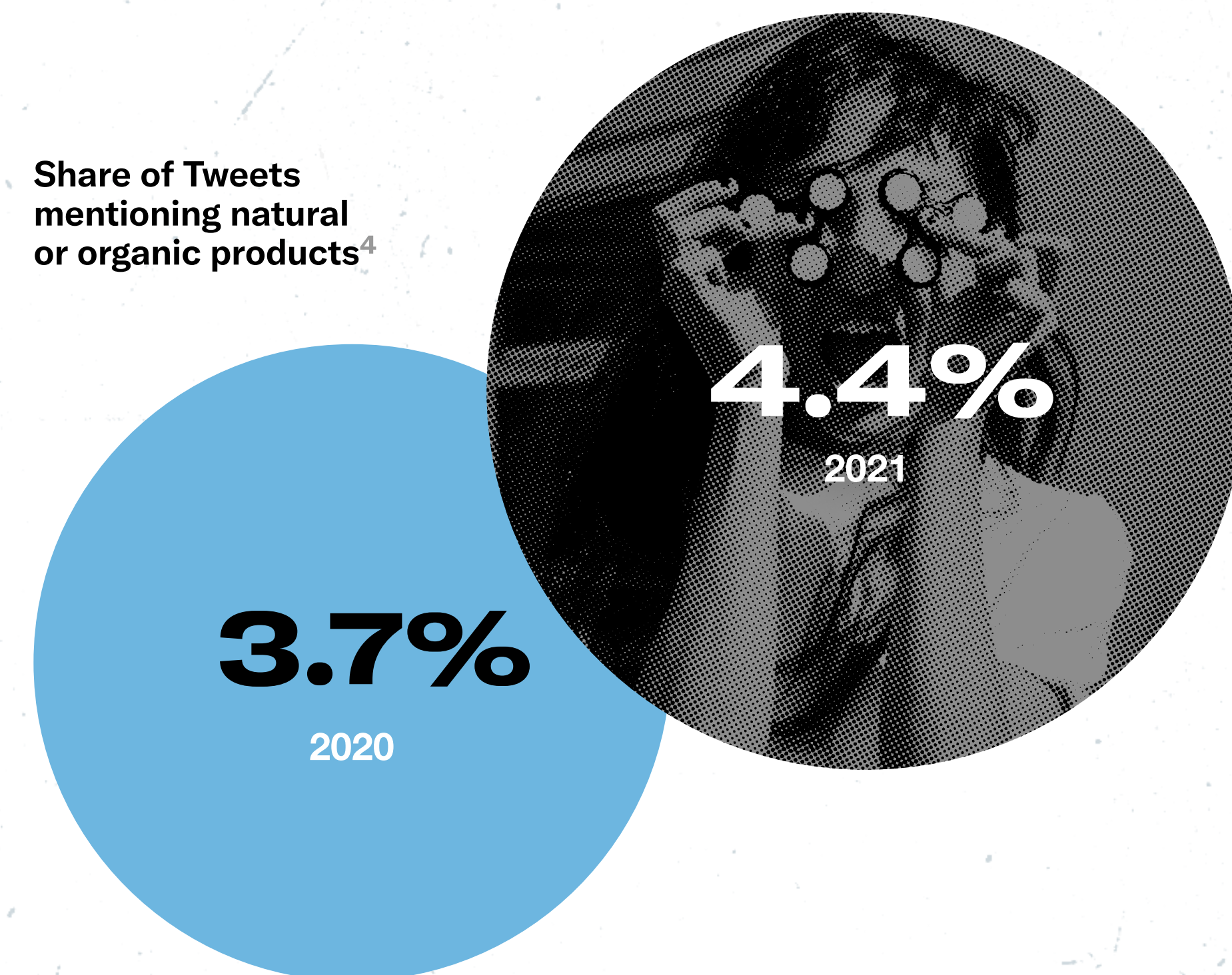
+10%

Increase in Tweets that mention natural/organic deodorant increased by (2021 vs. 2020)

+65%

Increase in Tweets about deodorant that also relate to social responsibility, including sustainability and the environment (2021 vs. 2020). Increased in net sentiment by 9 percentage points YoY (56% vs. 65%)

[4] These data points are based on personal care related Tweets that also mention "social good", "ecofriendly", "sustainability" from Jan - Oct 2020 and Jan - Oct 2021. See Methodology for details.

Turn insights into action

01   Share as much information as possible about ingredients and why they are included in a product. Don't take the risk of a customer misinterpreting product labels. Train Twitter community managers to respond to ingredient questions with an emphasis on the R&D (research & development) that leads to formulation of products, including historical experience and ongoing refinement.

02   Help attract new customers by demonstrating investment in the development of natural/organic products. Earn these values-based shoppers' trust by engaging with relevant topics on Twitter even if there's no direct brand connection or marketing angle.

What this means for personal care brands

Looking forward to 2022, anticipate consumers getting closer to the "new normal" and personal care CPG having an important role to play in getting them there. 2021 brought about significant changes for daily life, personal hygiene choices, and by extension, the products they buy. Consider the following opportunities for personal care CPG businesses to reconnect with consumers during the post-quarantine transition.

01 30 day challenge

Explore opportunities to leverage a "30 day challenge" to replicate and gamify the experience of a no-poo shampoo detox.

02 Acknowledge the anxiety

Incorporate moments of confronting and overcoming the anxieties that come with increasing socialization post-quarantine into marketing initiatives.

03 Category expertise

Emphasize the deep subject matter expertise that informs the formulation of products, including historical experience and ongoing refinement.

04 Clean retail

Demonstrate investment in the development of natural/organic products to attract new customers.

05 Product innovation

Monitor skincare, no-poo communities, and DIY hygiene to inspire future product innovation.

06 Go gender neutral

Rather than becoming overly concerned with gendered branding, focus on emphasizing formula, longevity, and quality.

07 Ingredient transparency

Share as much information as possible about ingredients and why they are included in a product.

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Methodology

Netbase Quid conducted this research via the creation of key term queries that defined a global sample of matching English-language Tweets from Twitter. The personal care CPG query included the following key terms and variations: deodorant, shampoo, hand soap, toothbrush, toothpaste, dental floss, dental pick, shaving kit, shave, razor, facial scrub, etc.

Leveraging this sample of Tweets referencing PCCPG, custom filters were created for product categories (hand soap, shaving, dental hygiene, facial wash, shampoo/body wash, deodorant), attributes (effective, non-effective, natural/organic), and behavioral (use dental products, use deodorant, not smell, product detox). All filters involve the use of additional keywords to further segment the overall PHCPG data set.

The date ranges Jan-Nov 2020 and Jan-Nov 2021 were compared to determine all YoY metrics. Additionally, the NetBase Quid platform includes NLP algorithms that identify top used terms, sentiment drivers, attributes, and brands – which informs the identification and analysis of trends.

The charts included for the ingredients obsessed trend are networks created using a sample of Tweets that mention deodorant clustered into distinct subtopics by similar language.

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