

Air Care - Canada - 2023

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This report looks at the following areas:

- Market factors influencing the air care market
- Air care market participation
- Change in air care usage frequency over the past year
- Motivating factors impacting a change in air care usage frequency
- Purchase factors influencing air care buying decisions
- Air care shopping behaviours
- Air care attitudes.

The air care category has been supported by the rise of remote work. Among Canadians exclusively working from home, 35% claim to have increased their usage of air care since last year, marking a considerable difference from the 18% of Canadians overall who are using more air care compared to last year. The extended periods of time spent at home allow for more air care usage opportunities and brands can promote these occasions by providing remote workers with fragrances that support productivity, alertness and stress management.

The rising cost of living is making consumers take pause before indulging in air care purchases. Cost is a significant barrier and is cited by 55% of those who have cut back on air care usage this year. This is particularly notable considering it was only mentioned by a quarter (27%) of consumers when asked in 2019, highlighting the significant impact of the economy on consumer purchase decisions.

Three in 10 air care users who have reduced their air care usage cite concerns with chemicals as a motivator for their declined usage. Health and safety concerns pose a challenge for the market and must be addressed with transparent ingredient claims and mindful formulation choices.

Improving and expanding scent options will garner additional category attention since consumers recognize the need for premium fragrances. Over



“As consumers cut back on spending, discretionary categories like air care will be tasked with reminding shoppers what value they bring to the table.

Highlighting the added advantages associated with air care beyond straightforward odour control, like ambiance and wellness benefits, will help defend against budget cutbacks.”

- Meghan Ross, Senior Analyst – Home & BPC

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half (56%) of consumers are willing to pay more for premium brands, so bringing these elevated scents mainstream will help satisfy shoppers (particularly since 58% of consumers wish mass brands offered more premium scents).

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