

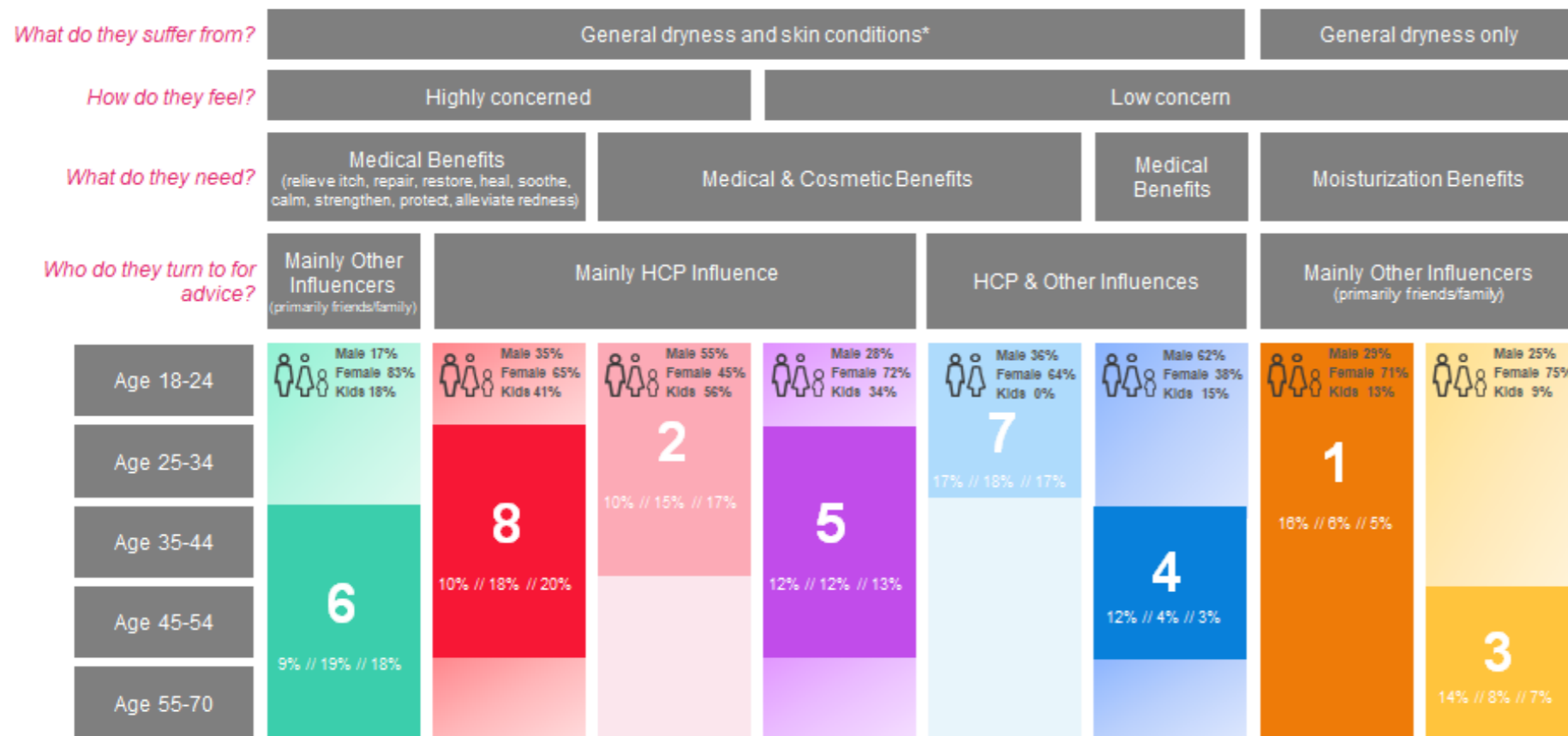
Bepanthen®

CONSUMER SHOPPER JOURNEY ECZEMA FRANCE



The CSJ is built on the design target

Dry & Irritated Skin Segmentation Frame



Source: Kantar, Dry and Irritated Skin Segmentation, 2017

Segment 8 is the strategic focus for the brand

- Suffer from general dryness and other skin conditions
- Highly concerned
- Prepared to spend on health
- Pharmacy the channel of choice
- High HCP influence
- High % kids with skin condition

This is a very specific segment, with 10% of category users globally, so further drill down to personas is not recommended, as these sub-segments would be very niche and difficult to reach

Segment 8 – Global figures (France not available)

% people	10%
% attainable volume by pharma brands	18%
% attainable revenue by pharma brands	20%



Juliette, 30 years old
Young female with eczema,
looking for a brand that can
help her maintain control over
the condition

WHO ARE WE:

- Female, most between 25-44
- Suffer from eczema and skin dryness

WHAT DOES SHE FEEL

- She is concerned about her condition
- Has been living with it for years but still feels anxious, thrown off balance when a flare up occurs
- Eczema impacts how she lives her life; when she experiences flare ups she's frustrated as she can't enjoy the simple things in life like going for a swim or wearing the clothes she wants
- Mums with kids with the condition are very emotionally engaged & also have guilt for having passed it on to their children, as they blame themselves

WHAT DOES SHE THINK

- Knows steroids work but doesn't want to use them every time as worried of the long term effects
- Knows that there is no miracle cure, it's a chronic condition that needs to be managed

75%

Having healthy skin is important to me

78%

Even if I don't have a specific problem, I consciously monitor my health

71%

I consider skin health an important part of my overall health

WHAT DOES SHE DO

- Has an established skincare routine with 6+ brands that include medicated & mass market brands
- She is constantly online searching for information on how to manage eczema (even when she is not experiencing flare ups)
- Is fairly confident of treating herself when flare ups occur as she sees herself as an expert, after having lived with the condition for so many years. However trusts her dermatologist / pharmacist & seeks advice from time to time
- Believes in reducing stress, exercising, avoiding exposure to foods, allergens which might trigger a flare up

WHAT ARE HER CONCERNS

- I am very / extremely concerned about my eczema (44%)
- Fears negative impact of use of corticosteroids especially if it's for her kids

WHAT ARE HER NEEDS

- Relieve the itch
- Prevent the skin from bleeding
- Get her life back to normal
- Space out the next flare up for as long as possible

WHAT DOES SHE SAY

- Internet is a good resource for information
- Branded websites don't have the information she needs in terms of triggers, how to manage eczema, latest science on eczema management. Medical websites are the best
- High dissatisfaction with at least one brand used
- Pharmacy brands perform better
- I am willing to pay for the right product

WHO INFLUENCES HER

- 77% HCP
- 44% Digital
- 38% Friends/Family

WHERE DOES SHE SHOP

All shop at the pharmacy. High cross over with mass market channels as well

WHAT BRANDS DOES SHE USE (P12M)

- 37% LRP
- 37% Avene
- 31% Bepanthen
- 29% Bioderma
- 27% Cicabiate

Profile of consumers who take this journey:

JULIETTE, 30 YEARS OLD



I NEED TO GAIN BACK THE CONTROL!

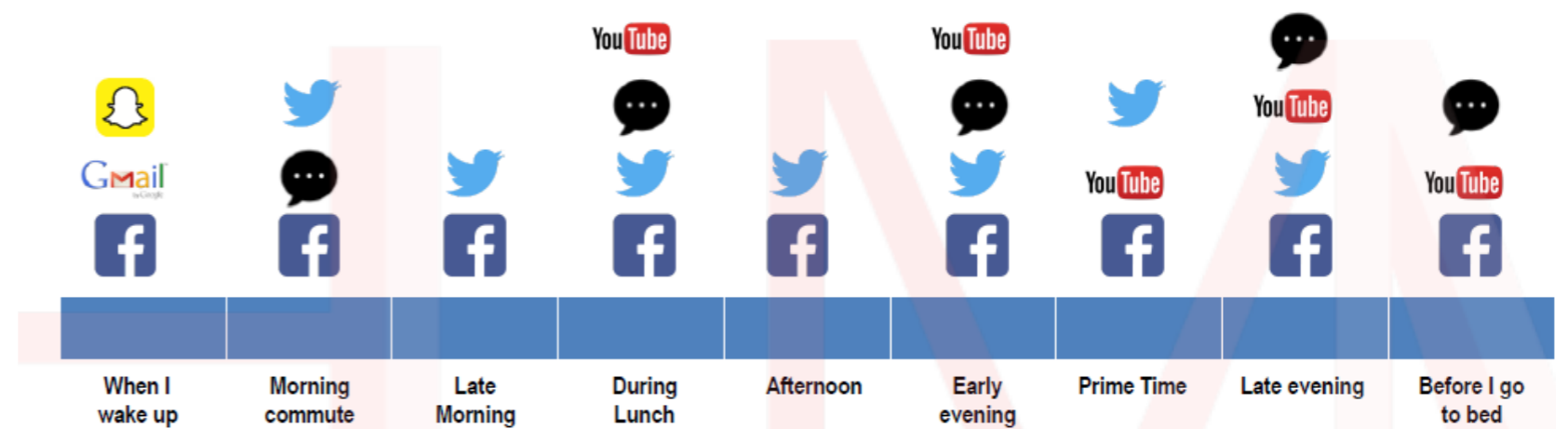
STRESS MANAGEMENT

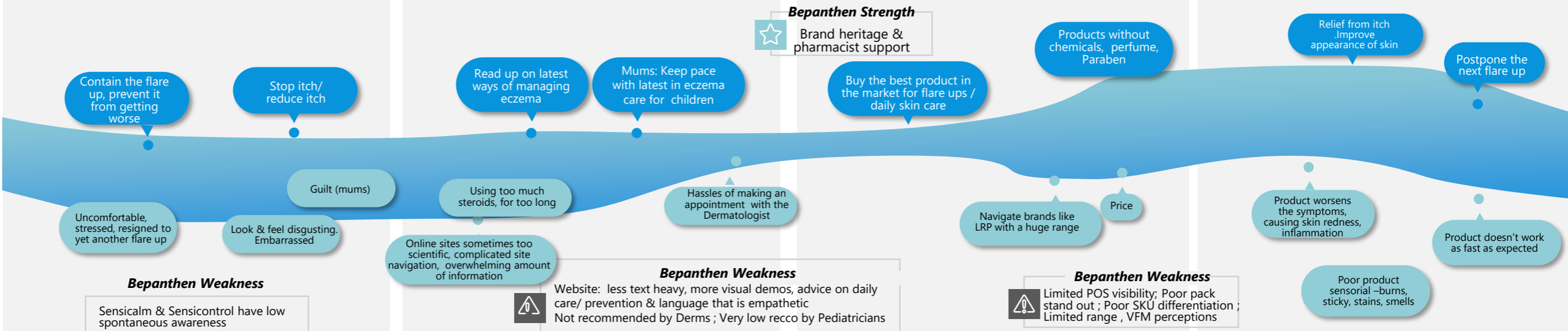
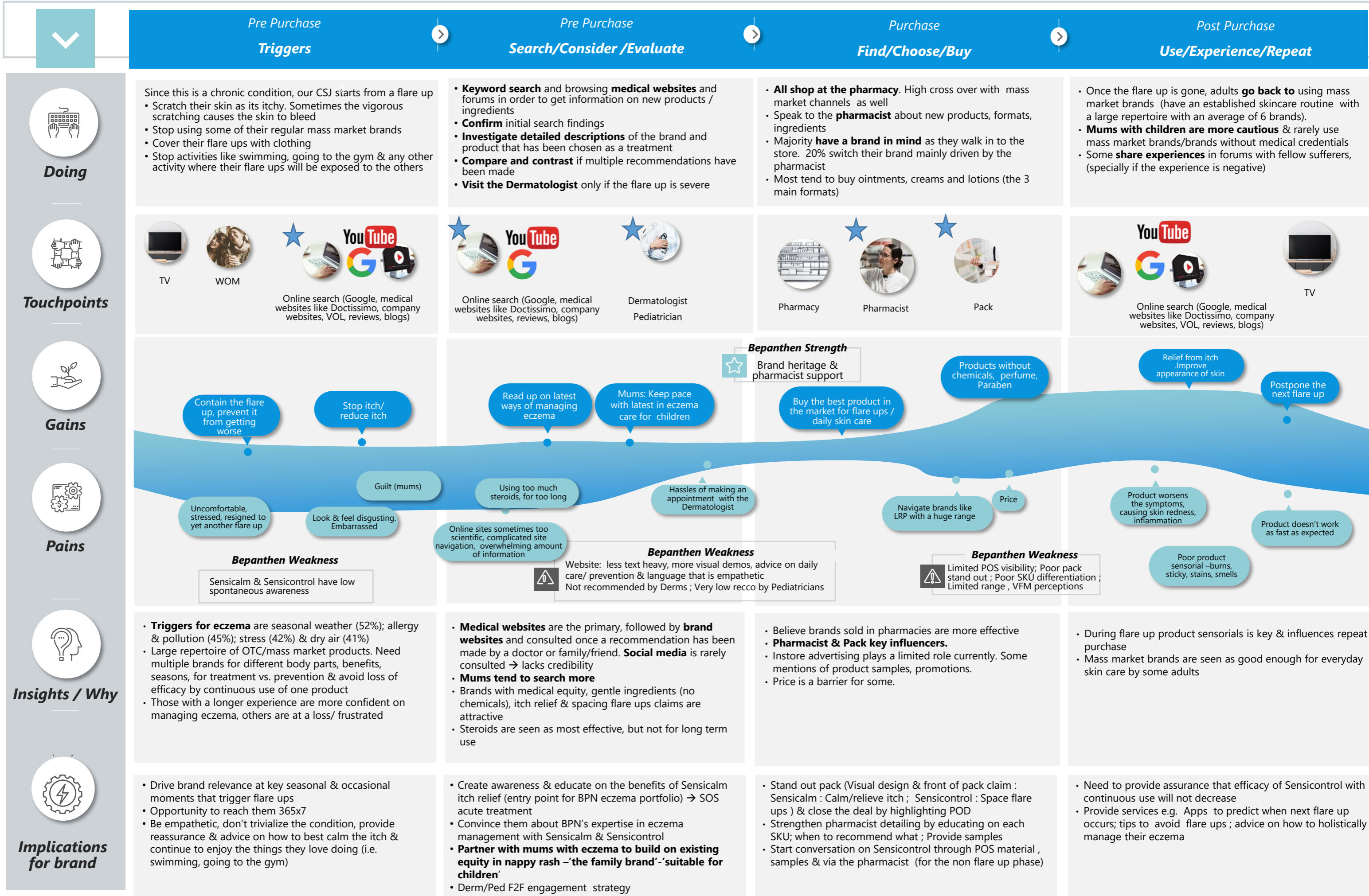
- Desire for empowerment & control
- Stress management at work



HIGHER USE OF "TARGETABLE" MEDIA

- **FACEBOOK** and **YOUTUBE** is key to target women
- Amazon is key touchpoint when shopping





ADULT ECZEMA SUFFERERS - FRANCE

