NINJAMAS

PYJAMA PANTS

Case Study

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Agenda

Internal Analysis

Procter & Gamble France SNC is the leading player in 2022, with a retail value share of 44%, while the performance under Baby, Feminine & Family Care have a growth in net sales +2% from 2022

- Net Sales over 20.2 billions globally as a positive impact of higher price of 8%, despite the unfavorable foreign exchange of 4%
- The global market share of Baby, Feminine and Family care is unchanged

	Net Sales Change Drivers 2023 vs. 2022 [1]						
	Volume with Acquisitions & Divestitures	Volume Excluding Acquisitions & Divestitures	Foreign Exchange	Price	Mix	Other [2]	Net Sales Growth
Beauty	(1)%	(2)%	(5)%	8 %	(1)%	1 %	2 %
Grooming	(3)%	(3)%	(7)%	9 %	(2)%	— %	(3)%
Health Care	(1)%	(1)%	(4)%	5 %	4 %	— %	4 %
Fabric & Home Care	(4)%	(4)%	(5)%	11 %	1 %	— %	3 %
Baby, Feminine & Family Care	(3)%	(3)%	(4)%	8 %	1 %	— %	2 %
TOTAL COMPANY	(3)%	(3)%	(5)%	9 %	1 %	— %	2 %

[1] Net sales percentage changes are approximations based on quantitative formulas that are consistently applied.

[2] Other includes the sales mix impact from acquisitions and divestitures and rounding impacts necessary to reconcile volume to net sales.

BABY, FEMININE & FAMILY CARE

($ millions)	2023	2022	Change vs. 2022
Volume	N/A	N/A	(3)%
Net sales	$20,217	$19,736	2%
Net earnings	$3,545	$3,266	9%
% of net sales	17.5%	16.5%	100 bps

Market Analysis

Diapers Market in France is projected to grow annually by 3.18% (CAGR 2023-2027), and it's generating a revenue of €0.75 billions in 2023. By 2027, the volume in the Diapers market is anticipated to reach 128.20m kg units.
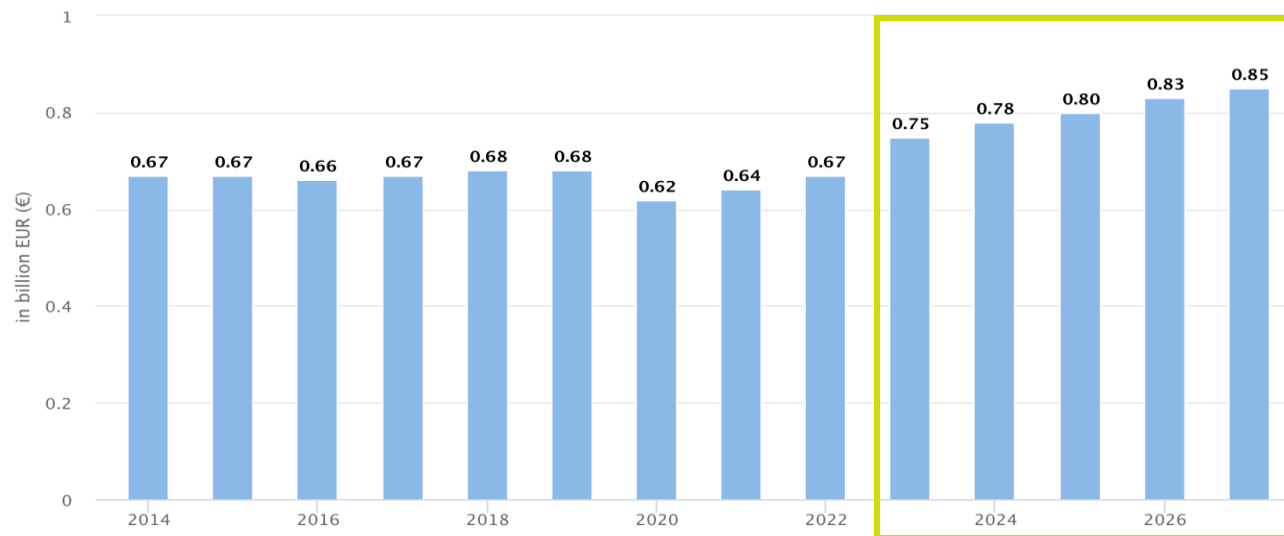
77% of parents seek out ways to prevent their child's bedwetting, while over 750,000 children in France affected with Enuresis
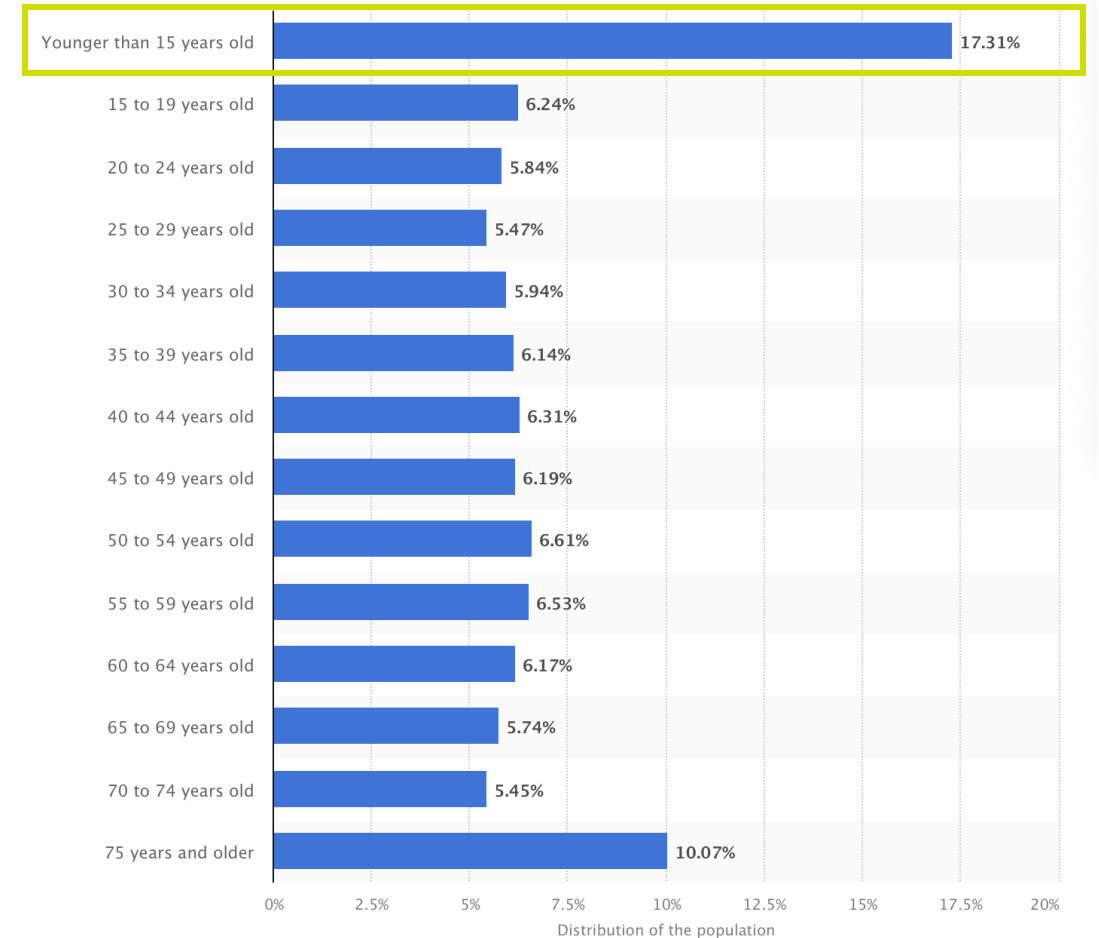
Targeted users of the product represents the biggest group of populations in 2023 (13.31%)

Competitor Analysis

	Strengths	Weaknesses
goodnites	• 22% market share (Kimberly-Clark 22% vs 35% P&G) • Most preferred brand • Significant ecological commitment (reusable packaging, Biodegradable material) • 88% of customers are fully satisfied with the purchase and its quality	• Higher price than Ninjamas • Cover kids aged 4-15 years old, while Ninjamas only cover 4-12 years old • Not good for sensitive skin
Andy Pandy	• 75% of customers are fully satisfied with the product • Environmentally-friendly, 86.5% biodegradable • Soft and plain design (no colors, patterns, etc.)	• Smells bad after use • Only available on online store
JOONE PARIS	• Eco-Friendly Focus, emphasizing natural materials and eco-friendly components in their diapers. • Well-known for their stylish and appealing designs, combine functionality with a fashionable element. • Hypoallergenic Properties for babies with sensitive skin or allergies	• Limited Availability • Higher Price Point compared to conventional diaper brands. • Limited Range of Sizes or Styles
Carrefour / baby	• Cost Advantage, frequently offer more affordable options through price competition. • Carrefour has loyal customers who prefer their product due to familiarity and trust.	• Some perceive private label diapers as lower in quality • Limited Brand Differentiation • Struggles to differentiate in terms of features and innovation

PESTLE

POLITICAL

Disposable diapers constitute around 4% of solid waste. In an average household with children who wear diapers, disposable diapers make up to 50% of the household waste. France aims to reduce its production of household waste by 15% (compared to the 2010 level) to reach 500kg per capita per year by 2030

TECHNOLOGICAL

Cutting-edge technologies such as wet tracking and leak locking consistently drive the Research and Development team to pursue innovative breakthroughs, maintaining an atmosphere of anticipation and excitement for new advancements.

ECONOMIC

The Diapers segment records €0.75 billion in revenue for 2023, with an anticipated annual growth rate of 3.18% (CAGR 2023-2027), indicating sustained expansion in the market.

ENVIRONMENTAL

The current group of parents, predominantly millennials, exhibits a heightened awareness of environmental concerns, influencing their decision-making processes as they prioritize for products that align with eco-friendly approach, underscoring their commitment to sustainable choices and contributes to shaping their consumer preferences

SOCIOCULTURAL

Enuresis taboos, rigid stereotypes, and gender roles intersect with health and wellness trends. Surprisingly, over 14% of parents remain unaware of this phenomenon, highlighting the need for increased awareness.

LEGAL

The surveillance and regulatory responsibilities pertaining to the presence of potentially harmful chemicals within the diapers product are carried out by both the European Chemicals Agency (ECHA) and the European Commission, joining efforts to ensure the thorough monitoring and enforcement of safety standards for the diapers product.

SWOT

STRENGTHS

- **Innovative Design** - The design focuses on a sleek and flexible fit
- **Convenience** - These have high absorbency and flexibility
- **Brand reputation** - P&G is one of the most well-known brands all around the world.

WEAKNESSES

- **Price** - Price-sensitive consumers might opt for more affordable alternatives.
- **Limited Sizes** – The products are not available in all sizes
- **Stigma around older children** - Social pressure regarding older children still using diapers, creating neglected issues

OPPORTUNITIES

- **Market Growth and Expansion** - Using Internet platforms may create new opportunities to connect with a larger audience
- **Sustainability** - The products can be more sustainable.

THREATS

- **Competition** - Strong competition from well-known diaper companies hinders the growth of Ninjamas
- **Economic Factors and Regulations** - Changes in regulations related to diaper manufacturing, safety standards, or environmental policies could affect their production process or increase costs.

Segmentation

What segments exist on the market?
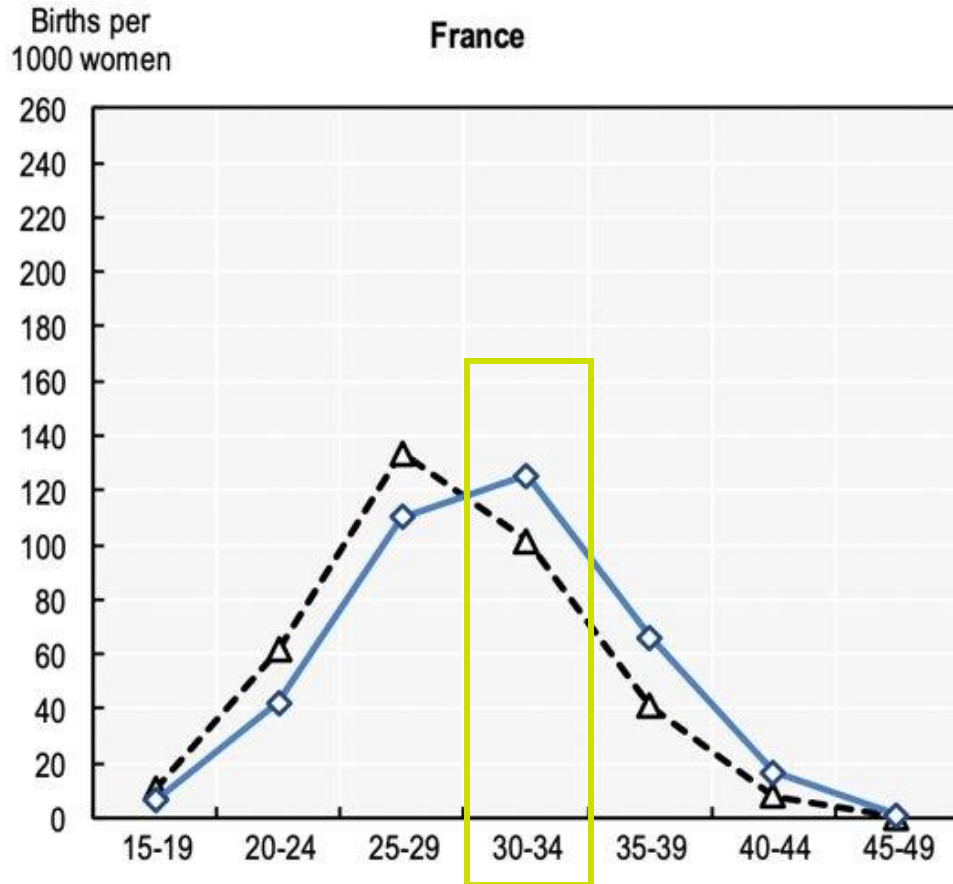
According to OECD, during the 2010s, the average age of maternity falls into the 30–34-year-old group.

The existing segments are products for:

Parents	Children
About to have a baby **Age 25 - 30**	Newborn babies **Age 1 - 3**
Have babies **Age 30 - 35**	Babies who are in training **Age 4 - 7**
Who have children older than 5 years **Age 35 - 40**	Children who are trained but still are to be trained for the night **Age 7 - 12**

This indicates that, by the time the children are in the target of *Ninjamas* (4-12 years old), the parents will be 34-46 years old

Births per 1000 women — France

TARGETING

Existing buyers in the market

Based on Income:

Parents with medium to high income couples with one or more children aged less than 14 are classified as:

- Lower class: income less than 2,350 euros per month,
- Middle class: income between 3,738 and 6,700 euros and
- Upper class: income above 9,400 euros.

	Personne seule	Famille monoparentale	Couple sans enfant	Couple avec un enfant de moins de 14 ans	Couple avec deux enfants de plus de 14 ans
Seuil de pauvreté	941	1 223	1 411	1 693	2 351
Classes populaires	Moins de 1 495	Moins de 1 944	Moins de 2 243	Moins de 2 691	Moins de 3 738
Classes moyennes	De 1 495 à 2 693	De 1 944 à 3 501	De 2 243 à 4 040	De 2 691 à 4 847	De 3 738 à 6 733
Classes aisées	Plus de 2 693	Plus de 3 501	Plus de 4 040	Plus de 4 847	Plus de 6 733
Seuil de richesse	3 762	4 891	5 643	6 772	9 405

Based on location:

Metropolitan cities and areas with accessibility to distribution channels in the initial stage.
Examples: Bordeaux (Nouvelle-Aquitaine), Toulouse (Occitanie), Lyon (Auvergne-Rhône-Alpes), Nantes (Pays de la Loire), Bayonne (Nouvelle-Aquitaine), Rennes (Brittany), Angers (Pays de la Loire), Strasbourg (Grand Est), Quimper (Brittany), Montpellier (Occitanie)

Instagram Topic in France	Average Yearly Growth
Finance & Economics	**29.7%**
Health & Medicine	22.6%
Adult content	21.7%
Water sports	17.9%
Kids & Toys	16.4%

Engagement Rate By Instagram Influencers In France

● 2020 ● 2021

	1K - 5K	5K - 20K	20K - 100K	100K - 1M	1M+	Average ER
2020	6.1	3.2	2.6	2.9	3.1	3.9
2021	5.8	2.9	2.3	2.2	2.2	3.6

INSG.CO

Source: HypeAuditor
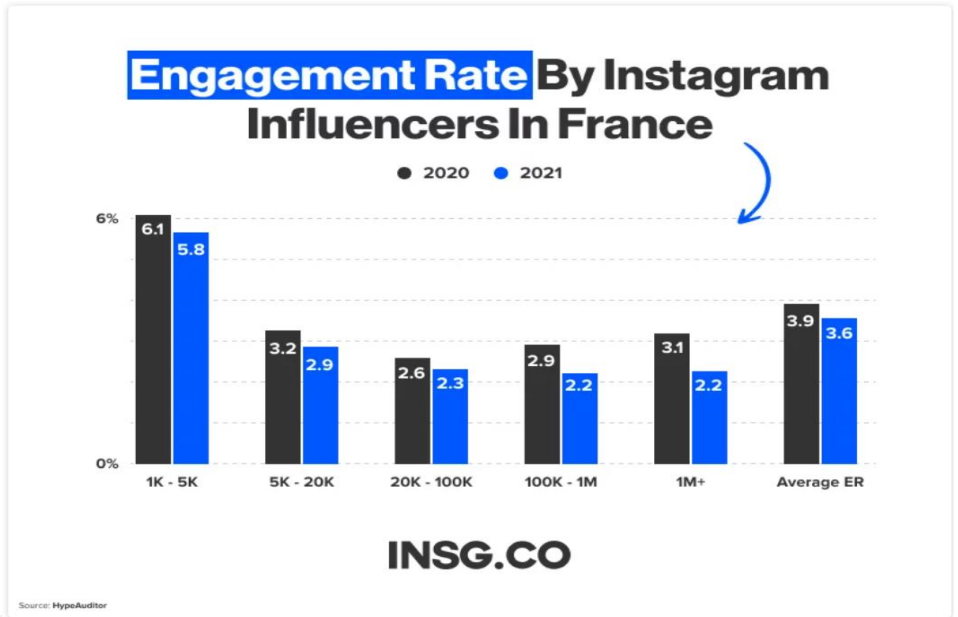
Based on professionals:

Healthcare professionals such as pediatricians, urologists, and child psychologists.

Based on Social media presence:

25-34: 45% of French Instagram users are middle-aged

French Nano-influencers are the most popular influencer tier on Instagram and have the strongest connections with their audience, dominating Instagram with 43% of them actively doing promotions on the platform.

The gender majority of Instagram users are females. But for the most popular age group, males are leading the number.

Source:
Influencer marketing in France in 2023 - Insights & Numbers (insg.co)

Target Profile

Marital Status: Married / Divorced single parent

Location: Urban or suburban areas Houshold

Household Income: Medium to high

**Age range:** 30-45 years , Parent of a 7-year-old child or older who experiences enuresis

Purchase driver: satisfaction of children, stress relief to parents

Deciding factors on brand: Performance, skin-friendliness, eco-friendliness

Main Social Media Choices: Youtube, Instagram, Tiktok

Other factors: Caring and conscious parents who care about hypoallergenic and free from harmful chemicals products

POSITIONING

High Efficiency

Low Price

High Price

Low Efficiency
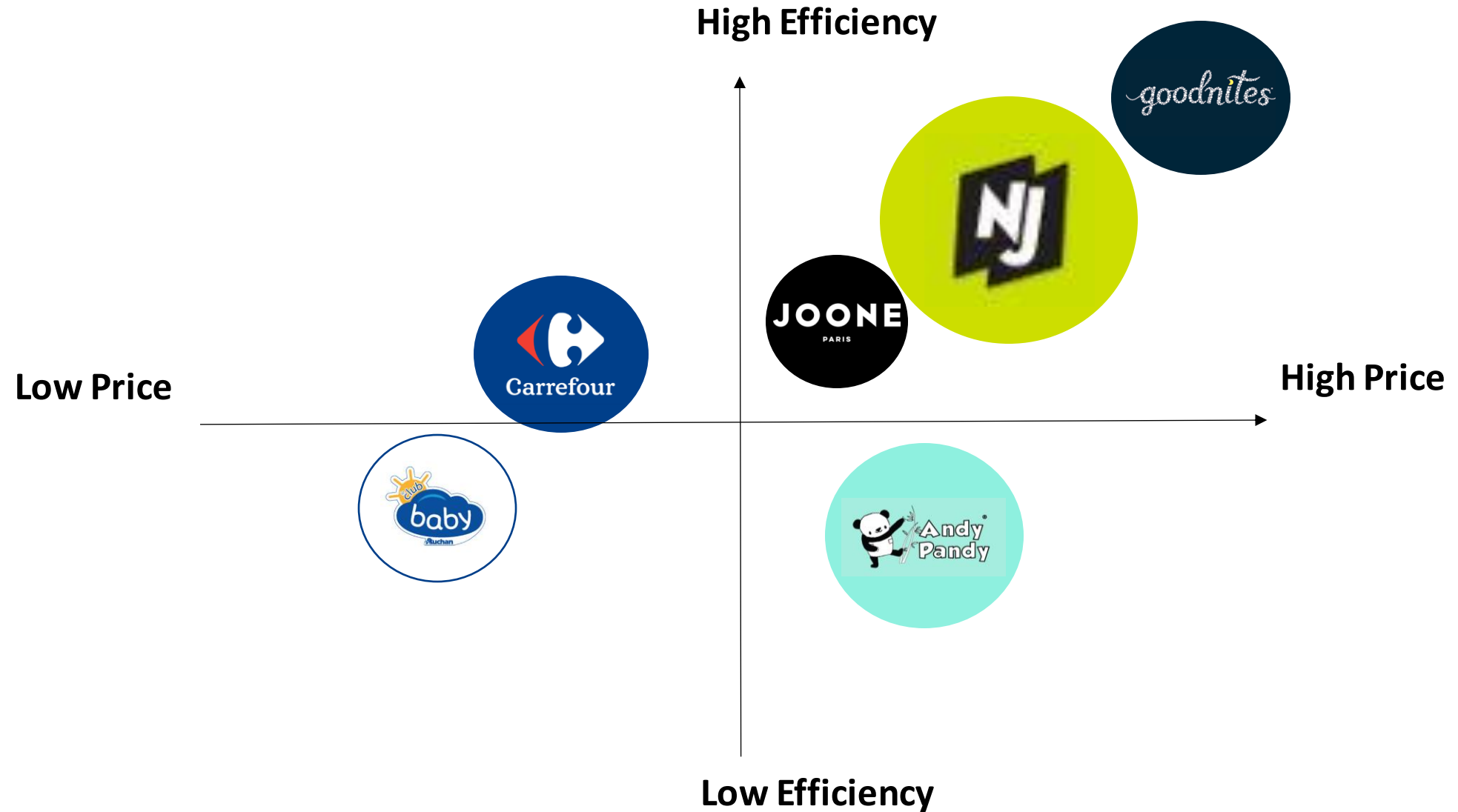
Positioning Statement

Older kids' needs for protection is just as important as their need for comfort and discretion. *Ninjamas* is the all-in-one solution for bedwetting, offering innovative and underwear-like design, thanks to its unique OdorMask™ technology that ensures the best experiences to children
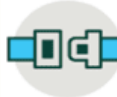
Customer Value Proposition

Emotional:

- **Reduces Anxiety :** Seamless sleep, worryless about the bedwetting.
- **Wellness :** No chemical used on the product that will cause irritation to sensitive skins
- **Design Aesthetics :** Cutting-edge designs that help boosting children's confidence.

Functional:

- **Reduces risk :** Risk from getting Enuresis and others that came from bedwetting.
- **Quality :** With innovative features on the product that help improving its efficiencies and user experiences.
- **Informs :** Ninjamas aims to introduce and inform the issue of Enuresis that parents are not aware of or neglect the effect on their child.

Product

Packaging

According to the reviews on Amazon, over **70%** of people who are satisfied with the product are satisfied with its qualities. While there are **11%** of the reviewers mentioned how the characters interest their children and make them feel good wearing them. While parents are the ones who make the purchasing decisions, children's preferences also contribute to the final purchase, The Ninja Characters can be the highlight on the packaging to be attractive to children.

Scent

While the OdorMask™ technology is a good selling point for the product, **31%** of the reviews didn't like the fragrance added. Some said that it smelled like a cheap perfume and some children didn't like the smell. Ninjamas can remove the unnecessary disadvantages from the product

Why? According to the customer insights...

Amazon FR

Commentaires client
★★★★½ 4,5 sur 5

399 évaluations

Pampers Ninjamas
par Pampers

Taille: Taille 7 (60 Unités) | Mod

5 étoiles	71%
4 étoiles	18%
3 étoiles	6%
2 étoiles	3%
1 étoile	2%

Écrire un commentaire

Amazon Global

Customer reviews
★★★★½ 4.5 out of 5

11,332 global ratings

Pampers Ninjamas
by Pampers

Size: L | Unit Count: 68 | Chang

5 star	76%
4 star	10%
3 star	5%
2 star	3%
1 star	5%

Write a review

29%
of the customers are not fully satisfied with the product
while Huggies' Drynites has only 15% of customers who are not fully satisfied.

27%
of the satisfied customers mentioned 'no leaks' and 'good absorbency' in the reviews

Most important factors for purchasing decision

- Leak Protection (51%)
- Fit Size (22%)
- Absorbency (21%)
- Comfortable (12%)

👍
- Good absorbency
- Good design, boosting children's confidences
- Perfectly fit and comfortable
- No irritation, good for sensitive skins

👎
- Not 100% leak proof
- Sizing wrong, cannot fit up to 95 lbs as advertised
- The perfume smell is too strong for some children
- A small percentage of reviewers think the price is too expensive

By feature

Stretch	★★★★☆	3.8
Comfort	★★★½☆	3.3
Leak proof	★★★☆☆	3.1
Absorbency	★★★☆☆	3.0
Leak protection	★★★☆☆	2.9

*The percentage of customers' satisfaction is relatively the same between the french market and the global market.

Eco-Friendly approach suggestions...

Waste management

Diaper packets should contain fresh diaper pants packed in a small pouch/wrapper so that whenever a fresh diaper is needed, the used diaper can be wrapped in the given pouch/wrapper to ensure proper disposal

Steps towards sustainability

Customers who are environmentally conscious can be attracted with a sustainability campaign, such as, One tree gets planted for the sale of every 10 packets of Ninjama pants. The statistics of this is to be shown on the website for transparency

Connected strategy approach

Automation can be implemented for the parents to subscribe and be carefree about running out of the product when required

Place

France exhibits a weekly online shopping prevalence of **32%** while its offline counterpart stands at **72%**

Suggested Position:

In-store : Middle level, where both parents and children can see.
Both can contribute to the decision-making

    Parents: Can easily see the product

    Children: Can be attracted by the ninja characters

Ex: Current position in Intermarche Croix
Drynites and Ninjamas are both placed together. The diaper pants are on the lowest shelf and not easily visible to parents.
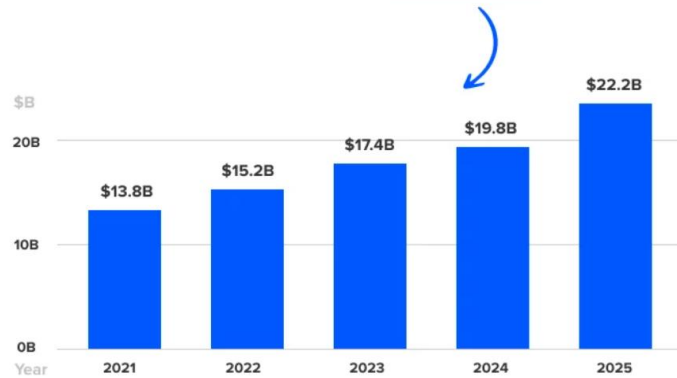*Moving Ninjamas to another shelf will make it more visible than its competitor.*

Promotion - Online

Influencer Marketing Growth In 2025

Source: HypeAuditor

Preferred Social Networks For Influencer Marketing In France

- Brands favourite
- Agency Favourite
- Influencers favourite

Source: Reech
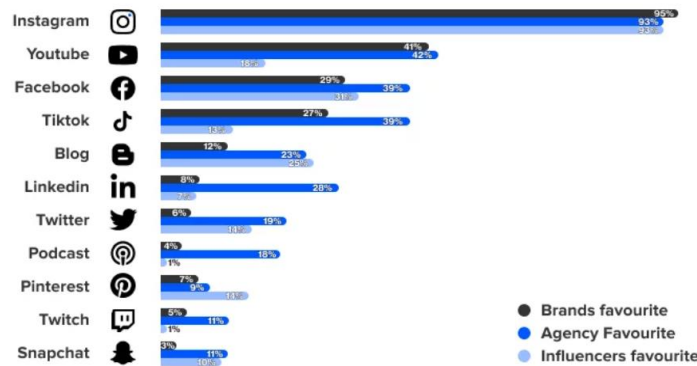
Content marketing

Valuable and informative content related to parenting, child-care, and related topics. This can include blog posts, articles, videos, and infographics. Sharing this content on Ninjamas' website, social media platforms, and guest posts on relevant parenting blogs can help establish the brand as a trusted resource.

- 76% of French influencer marketing agencies receive consistent marketing demands.
- 64% of French consumers make purchases after viewing influencer content.
- Instagram is the most popular social network for influencers and brands in France.
- French Nano-influencers are the most popular influencer tier on Instagram and have strong connections with their audience.
- TikTok Mega-influencers have the highest engagement rate in France.

This highlights the significance of influencer marketing in France, with a majority of agencies experiencing consistent demand and a significant portion of consumers making purchase decisions based on influencer content. **Instagram** remains the leading platform for influencer collaborations, and different tiers of influencers, such as Nano-influencers and **TikTok Mega-influencers**, have distinct advantages in terms of audience connections and engagement rates.

Influencer marketing in France in 2023 - Insights & Numbers (insg.co)

More than 50% of children aged from 11-18 years old, prefer watching videos and about 30% share the media they watch

- **Facebook** (main social media in France): Educational content about bedwetting, Enuresis, and how the product is good for all the kids including those with sensitive skins to raise awareness to parents.
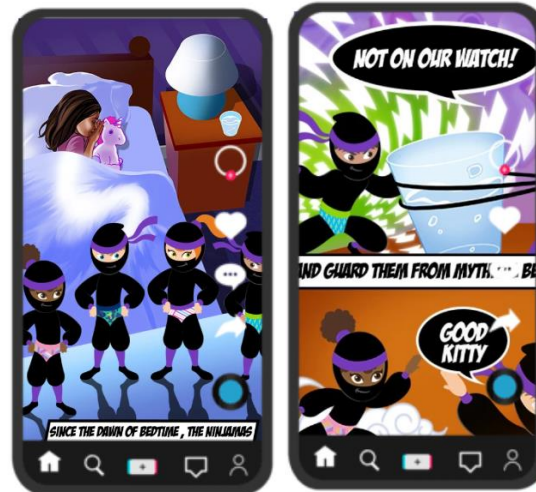
- **Youtube and Tiktok:** Fun and educational animated contents for children to build brand awareness and affection towards the ninja characters. Ninjamas filters on TikTok- QR code available on packets that directs the user to the website - edits the children's faces in the Ninjamas character.

Details: France; GWI; DataReportal; Q3 2022; 16-64 years; internet users

© Statista 2023
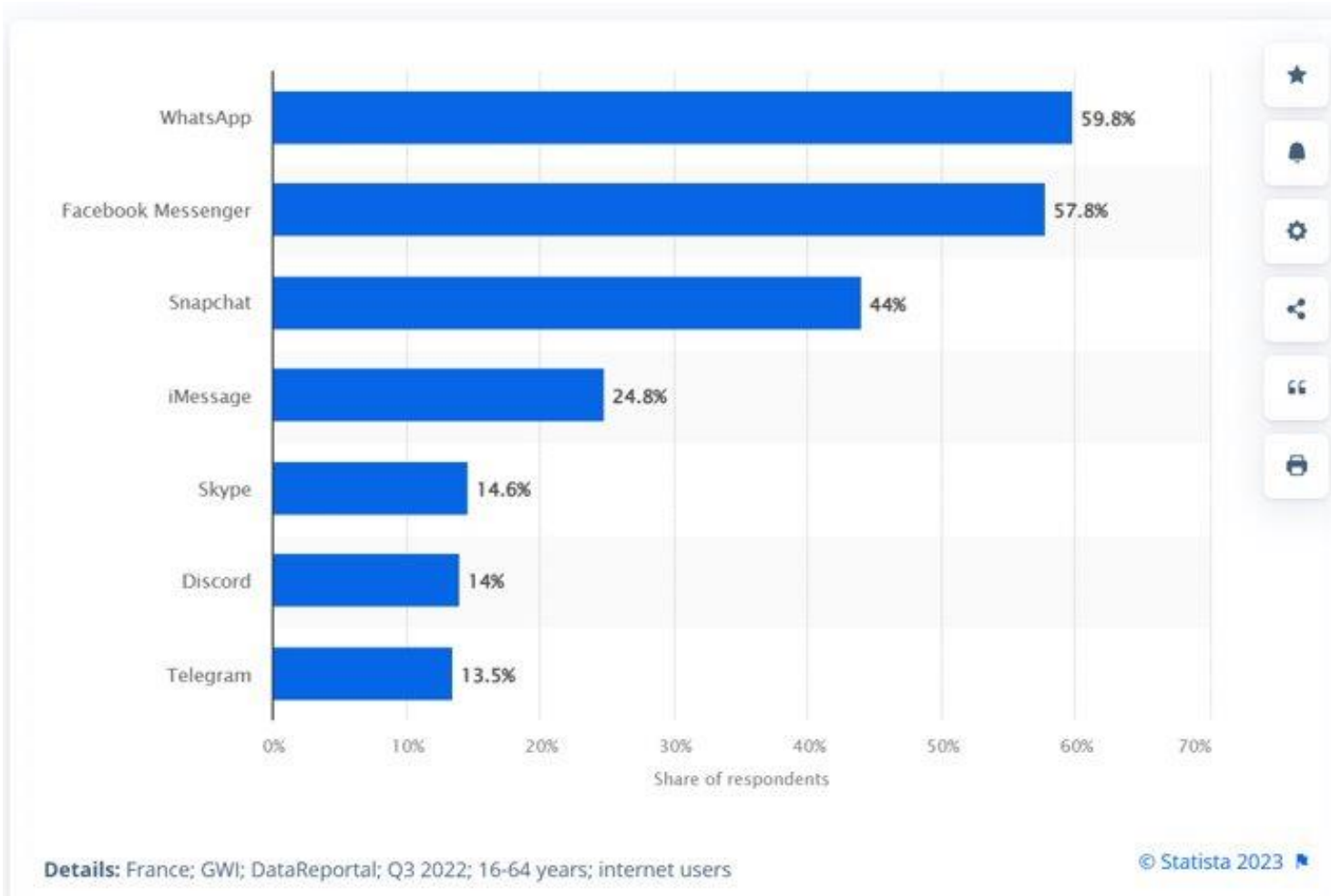
Other Media
- **WhatsApp:** after the increasing popularity and new updates WhatsApp allows companies to reach the customer directly and promote their product and attractive offers related to it. Customer service can also be managed from this channel which can help in building trust with Ninjamas

_____

- **Owned media channels:** Pampers website, Ninjamas website, Social media channels of Pampers and Ninjamas
- **Paid media channels:** amazon, carrefour website, collaboration with picnic, etc
- **Earned media channels:** Feedback from customers who were satisfied with the product, word of mouth, etc.
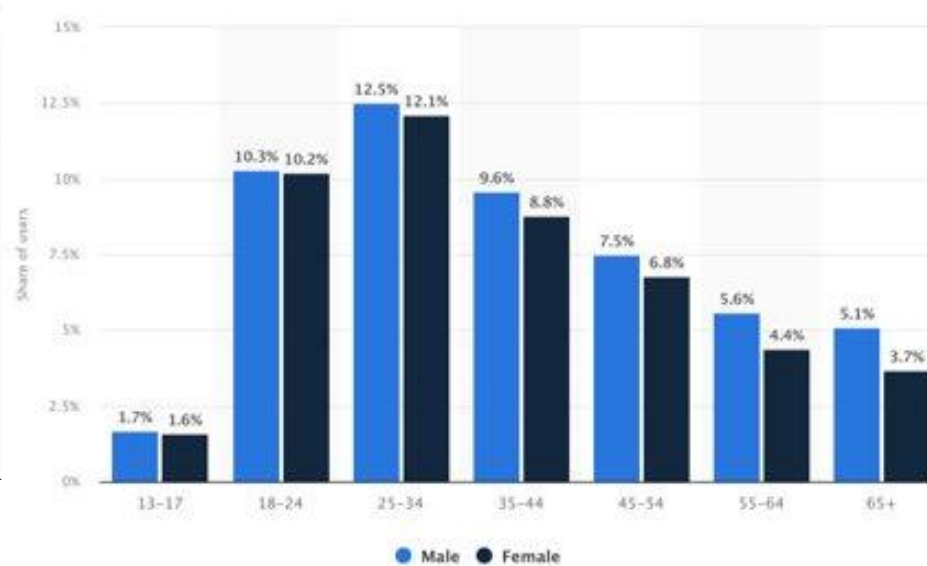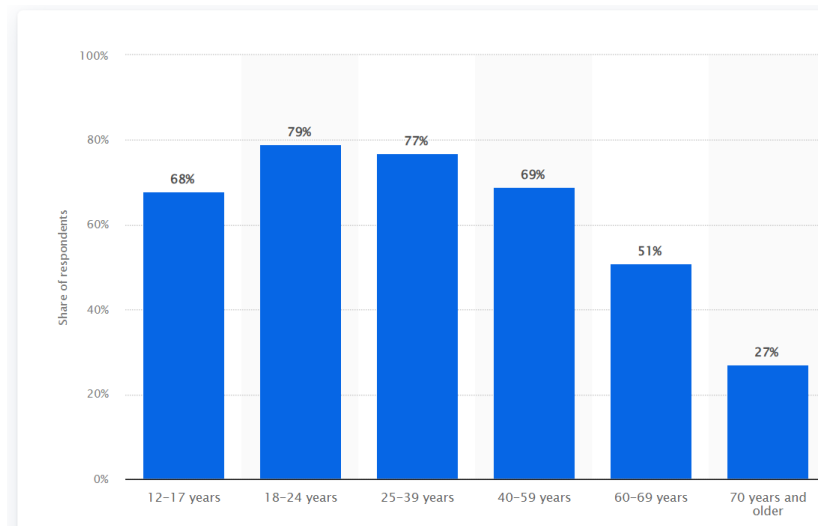
Why? According to the social media statistics...
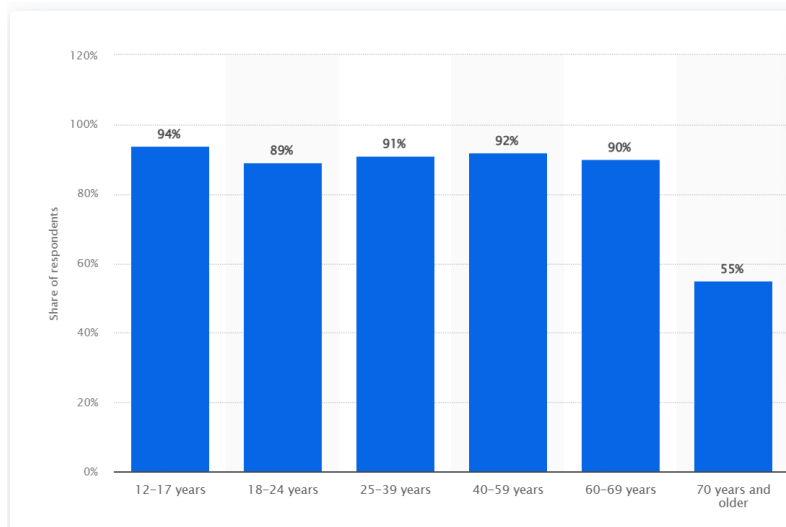
Internet usage in France for our target profile is about **91-92%**. And almost **70-75**% have a social media presence. Hence promotion on social media channels like Instagram, YouTube, etc, is essential in grabbing the attention of parents and children.

Average age at childbirth in France is 31 years old. With kids aged 4-12, parents will be under 35-44 years old group. The group is the 3rd most users of social media (18.4%). According to the statistics, Ninjamas can be promoted on social media channels such as Facebook, Instagram and YouTube with engaging ads, surveys and collaborative promotions

Promotion - Offline

Retail Channels | Historical | % breakdown			2020	2021	2022
Geography	**Category**	**Outlet Type**			
France	Nappies/Diapers/Pants	Retail Channels	100.0	100.0	100.0
France	Nappies/Diapers/Pants	Retail Offline	89.9	86.8	83.8
France	Nappies/Diapers/Pants	Grocery Retailers	87.0	83.9	80.8
France	Nappies/Diapers/Pants	Convenience Retail	0.8	0.8	0.8
France	Nappies/Diapers/Pants	Convenience Stores	0.7	0.7	0.7
France	Nappies/Diapers/Pants	Forecourt Retailers	0.1	0.1	0.1
France	Nappies/Diapers/Pants	Supermarkets	32.3	30.9	30.1
France	Nappies/Diapers/Pants	Hypermarkets	43.7	42.1	39.6
France	Nappies/Diapers/Pants	Discounters	10.0	10.0	10.1
France	Nappies/Diapers/Pants	Warehouse Clubs	-	-	-
France	Nappies/Diapers/Pants	Food/drink/tobacco specialists	-	-	-

57% of the French population prefer in-store shopping

Hence to target this audience, process-oriented promotion methods like:

Initial phase - to make the product well known and popular
- **Trial packs** provision in the stalls to build trust and prove the quality
- In-store banners
- Feedback
- **Promotions and discounts on bigger packages**
- **Sale of combo packs to parents buying normal diapers** combined with a small packet of ninjama pants
- **Ads on radio channels**, Interviews with parents, brand promoters, doctors, advisors etc etc
- **Pamphlets** talking about enuresis and its solution with Ninjamas
- **School campaigns** and seminars

Source :
https://www.industries-cosmetiques.fr/en/new-generations-of-shoppers-27-french-prefer-now-to-do-their-shopping-on-line/?noamp=available

Other suggestions:

Product demonstrations: Set up product demonstration booths or pop-up stores in high-traffic areas such as shopping malls, supermarkets, or family-oriented locations. Allow potential customers to experience the comfort and features of Ninjamas firsthand.

Direct mail campaigns: Create targeted direct mail campaigns by sending promotional materials, such as brochures, flyers, or product samples, to households within your target market. Personalize the content and offer exclusive discounts or incentives to encourage engagement and purchases.

Parenting workshops or seminars: Organize or sponsor educational workshops or seminars for parents. Focus on topics related to child development, sleep training, or parenting tips. Position Ninjamas as a solution to common sleep-related challenges and provide samples or discounts to attendees.

Word-of-mouth marketing: Encourage satisfied customers to share their positive experiences with Ninjamas through word-of-mouth. Offer referral incentives or discounts for customers who refer their friends or family members to try Ninjamas.

Community involvement: Engage with local parenting communities, support groups, or charitable organizations. Sponsor events or donate a portion of your sales to a cause related to child welfare or parenting support. This demonstrates your commitment to the community and can generate positive brand associations.
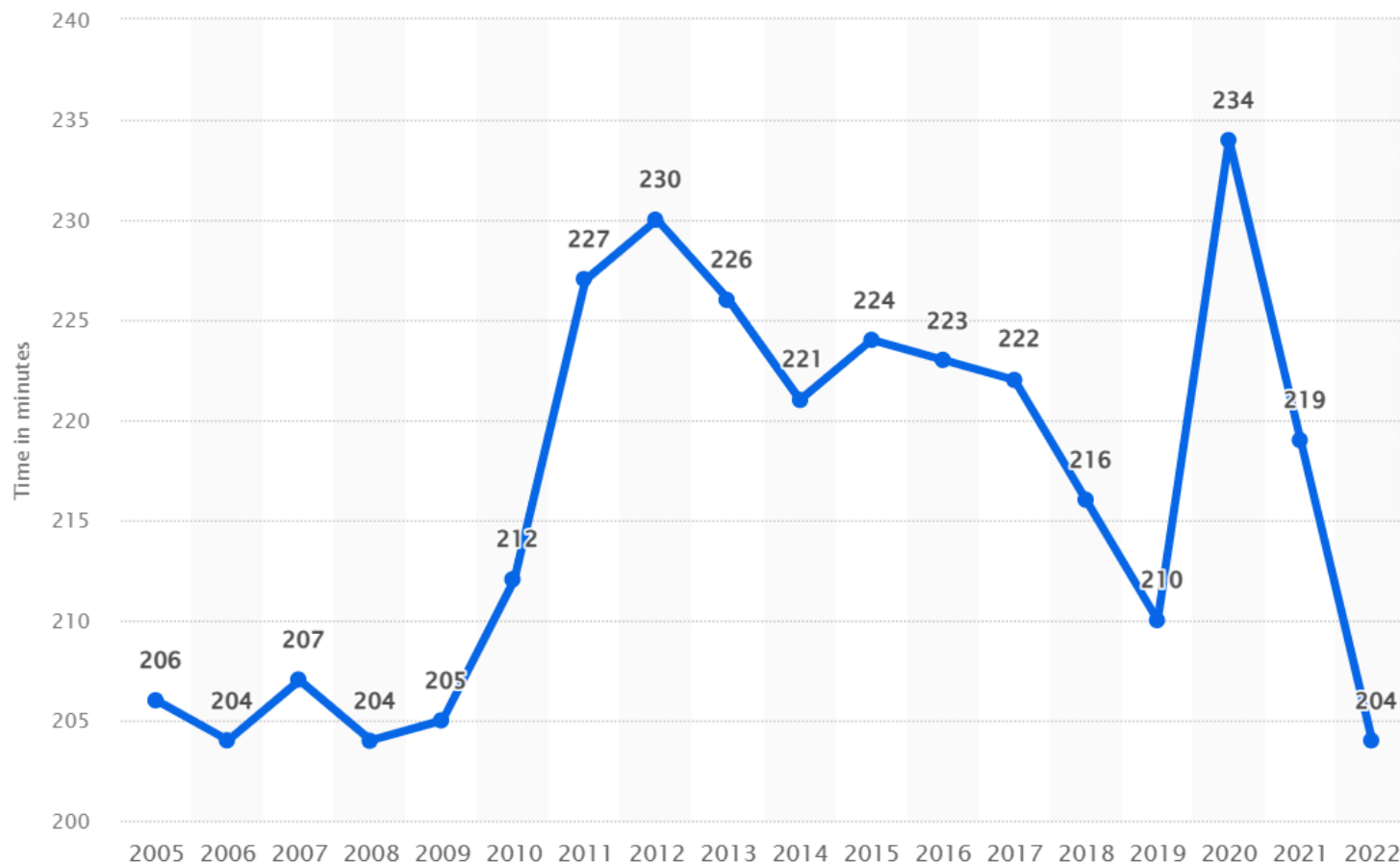
Details: France; Médiamétrie; 2005 to 2022; 4 years and older; television owners in metropolitan France; Panel survey

© Statista 2023

TV:

Average TV viewing time per day in France is about 3.5 hours Our target profile – Families in the medium to higher income category prefer watching TV during the day, particularly during lunch breaks i.e., **12 pm-2 pm** and at the end of the working day **6 pm-8 pm**, therefore promoting Ninjamas during this time would be the most beneficial

Ideas:

- **Informative TV ads** normalizing enurism and making children feel like they're the heroes. These ads can contain feedback of current users of the product and demonstration of the technology in practice

Price

Ninjamas Boys' Sizes	Price per pant	Goodnites Boys' Sizes	Price per pant
S/M (44 count)	$0.68	XS (44 count)	$0.70
L/XL (68 count)	$0.86	S/M (44 count)	$0.68
		L (75 count)	$0.89
		XL (63 count)	$1.09
Ninjamas Girls' Sizes	Price per pant	Goodnites Girls' Sizes	Price per pant
S/M (44 count)	$0.68	XS (44 count)	$0.70
L/XL (68 count)	$0.86	S/M (99 count)	$0.68
		L (75 count)	$0.89
		XL (63 count)	$1.09

Ninjamas has a slight advantage in price compared to GoodNites which is favorable. Over **62%** of the fully satisfied reviews on Amazon said that the product is worth the price, while only a small percentage of the critical reviews are not satisfied with the price. Ninjamas price positioning is in between Goodnites (higher) and Andy Sandy (lower), which is a good choice for the parents regarding the options and value propositions Although the pricing of Ninjamas w.r.t the biodegradable quality of competitor Andy Pandy pants is on the high side, competitive pricing here can be advantageous

Differentiation-Leadership Pricing Strategy approach

1. **Brand reputation:** Leveraging P&G's strong brand reputation and recognition, Ninjamas can be positioned as a premium, high-quality product. Customers who trust and associate P&G with quality and reliability may be willing to pay a higher price for Ninjamas, expecting superior performance and features.

2. **Product differentiation:** Sleek and flexible fit along with high absorbency and sustainability suggestion implementation will pose this product as a premium quality product.

3. **Perceived value:** Perceived value that P&G's association brings to Ninjamas can be capitalized. Customers may perceive the brand association as an assurance of quality, safety, and reliability, making them more willing to pay a premium price for the product.

4. **Target market:** As our target market ranges from medium to high income generating families, this strategy is viable.

5. **Long-term strategy:** Implementing a differentiation-leadership pricing strategy positions Ninjamas as a premium offering from P&G. This can support long-term profitability by allowing for higher profit margins and creating a perception of inclusivity and superior quality.

Conclusion

- **Market Growth Potential:** The Diapers Market in France is projected to grow, presenting an opportunity for P&G to capture a larger market share by targeting older children experiencing bedwetting with their product Ninjamas.
- **Competitive Advantage:** P&G has a significant market share and a strong brand reputation. Their ecological commitment and emphasis on eco-friendly components differentiate them from competitors and will help Ninjamas with its brand reputation.
- **Innovation and Differentiation:** P&G's focus on innovative design, convenience, and functionality of Ninjamas can help them stand out in the market and improve customer satisfaction.
- **Targeted Marketing and Positioning:** P&G's segmentation and targeting strategies allow them to effectively reach specific customer segments. Positioning Ninjamas as a solution that combines protection, comfort, and innovative design can resonate with customers' needs and preferences.
- **Sustainability and Regulatory Compliance:** Ninjamas commitment to environmental concerns and safety standards can position them favourably in the market, appealing to environmentally conscious consumers.

By capitalizing on market growth, leveraging competitive advantages, emphasizing innovation and differentiation, targeting specific customer segments, and addressing sustainability concerns, Ninjamas can enhance their market value and brand awareness.