CASE STUDY | Reframing Value in the Toilet Paper Aisle

SITUATION

Scottex sought growth by better aligning its pack sizes and pricing with shopper needs across retail channels.

APPROACH

Use shopper insights to identify better pack and pricing options.

- **Understand value perceptions:** Identify what shoppers look for when judging value.
- **Compare competitor offers:** Benchmark pack sizes and pricing by channel.
- **Prioritize opportunities:** Identify gaps where different packs or price points could better meet shopper needs.

RESULTS

A clearer understanding of value and a concrete pack opportunity.

- **Sheet count mattered:** Determined that shoppers saw the brand as overpriced despite its lower pack price and strong quality perceptions.
- **A competitive pack option:** Identified an entry-level 4-pack of maxi rolls that could match the industry sheet-count benchmark while keeping pack price competitive.

CUSTOM SHOPPER SURVEY

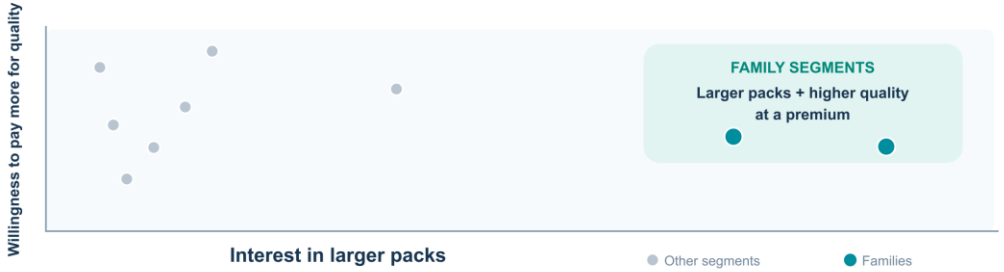
Families want larger packs and premium quality

Interest in larger packs coincided with willingness to pay more for quality

WHAT "LARGER" MEANS

More sheets in the pack

Pack capacity can increase without adding more rolls



Source: Custom shopper survey. Illustrative reconstruction; positions schematic and percentages omitted.

ILLUSTRATIVE PACK AND PRICING COMPARISON

A maxi 4-pack adds sheet capacity in an entry format

Mainline · Supermarkets, hypermarkets and drug stores

4 MAXI ROLLS × 500 SHEETS = 2,000 SHEETS PER PACK
More total sheets than the standard 4-pack (1,080) or 10-pack (1,450)

PACK ROLE	CURRENT BRAND OFFER	CURRENT CATEGORY OFFER
Primary entry pack	No equivalent pack WHITESPACE	4 maxi rolls · 500 sheets/roll 2,000 sheets per pack
Secondary entry pack	4 rolls · 270 sheets/roll Illustrative price index: 108	4 rolls · 270 sheets/roll 1,080 sheets per pack
Limited distribution	8 rolls · 270 sheets/roll Illustrative price index: 105	8 rolls · 270 sheets/roll 2,160 sheets per pack
Primary frequency pack	10 rolls · 145 sheets/roll Illustrative price index: 102	10 rolls · 145 sheets/roll 1,450 sheets per pack

Competitor price benchmark = 100 · All price indices illustrative

Illustrative comparison only. Roll and sheet counts retained from source; price indices invented. Sheets shown per roll.

"Adding the shopper perspective to our discussions helped identify promising growth opportunities and opened leadership to new manufacturing capabilities needed to unlock that growth."

— Category Sales Leader Kimberly-Clark

