

AIR CARE – INDIAN CONSUMER – 2019

Rise above the function of odour-masking and cater to emotional wellbeing. Design eco-friendly products in the wake of changing living conditions.



Rimpie Tulsiani, Sr. Beauty
& Personal Care Analyst,
India



Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Overcome limited usage and safety concerns with eco-friendly products that also help with emotional wellbeing
- Global retail market overview: Aircare, 2019
- Air care growth markets and per capita spend
- The limiting equation: There is odour = use air freshener
- Be alert to growing concerns around household products contributing to indoor air pollution
- Counter barriers associated with air fresheners using natural fragrances and eco-friendly products
- Feature in consumers' daily life through emotional benefits to tackle lifestyle woes
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Small is beautiful
- Emotional wellbeing over functional must drive the air care sector
- Godrej aer pocket kills two birds with one stone by using a value format (sachet) and communicating mood over odour

Global trends and how they are playing out in India

- Go beyond physical products in development of mood enhancers
- Botanical/herbal and environmentally friendly product claims feature in top five across regions
- Provide moments of reflection and relaxation with modern aromatics
- Relieving commuter stress on-the-go

CONSUMER INSIGHTS

- What you need to know

Chapter 1: Air care usage and attitudes

- Propagate a mind shift to elevate air care products as mood managers
 - Graph 1: Air care products used (any use) in last 12 months, August 2018
- Think value format innovations to reach a wider consumer base
 - Graph 2: Select air care product usage frequency, August 2018
- Address safety and chemical concerns of air care products especially among parents

- Graph 3: Select air care products not used in last 12 months, by parent status, August 2018
- Go natural to combat occasional usage and safety concerns associated with the category
 - Graph 4: Select attitudes towards air care, August 2018
 - Graph 5: Select attitude towards air care, August 2018
- Think different with the East region as it is averse to air care products
 - Graph 6: Select attitudes towards air care products, August 2018
- Car fresheners to refresh mind, body and car
- Three Indian metros feature in the top 10 cities world-wide with long one-way commute times

Chapter 2: Ideal air care innovations

- Combine functional benefits with emotional wellbeing to offer a holistic solution
 - Graph 7: Select functions of an ideal air care product, August 2018
- TURF methodology
- Address the most common menace – mosquitoes – through product innovations
 - Graph 8: [no title]
- Climb the air care product benefits ladder with a product portfolio
- Air care product benefits ladder

MARKET APPLICATION

- Opportunity: Key areas of focus

Opportunities

- Explore nature-inspired fragrances and ingredients
- Look beyond floral group of fragrances
 - Graph 9: Flavour component group, by region, 2018
- Render aromatherapy benefits to elevate air care products
- India's diverse regional fragrance preferences and abundance of natural ingredients

Who's innovating

- Ripple Fragrances elevates air care with fragrance boutique experience...
- ...and talks higher ground with 'Endangered' in a mundane product
- Go fruity...mix and match fragrances and formats
- Talk multi-space use to expand product usage across spaces
- Natural, vegan, Ayurvedic air care products that go beyond plain odour-masking

Global innovators

- Natural charcoal air freshener sticks
- Reinvent the spray with a natural image offering mood-management benefits
- Pure recovery wellness candle

- Products to deal with emotional and psychological situations
- Small formats: Portable scent pods and scent cubes for the home
- Plug-in scent pad diffuser – how it works

APPENDIX

- Consumer survey methodology
- Terms and abbreviations

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