

ATTITUDES TOWARDS HOME & PERSONAL HYGIENE - INDIAN CONSUMER - 2020

COVID-19 increases the interest in home & personal hygiene with hand hygiene taking the spotlight. Keeping consumers invested post-pandemic will be the challenge.



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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- Impact of COVID-19 on home & personal hygiene
- Sanitisers made hygiene more accessible for Indians
- Chasing the sanitiser boom will prove fruitless in the long-term

What consumers want and why

- Move consumers up the hygiene ladder
- Consumers want: hygiene products that work as a system
- Consumers want: emotionally relatable reasons
- Consumers want: household equality

Opportunities

- Communicate holistic hygiene
- Promote emotional satisfaction from cleaning
- Introduce male narratives in hygiene
 - Graph 1: males with household responsibility, May-Oct 2020

Competitive landscape

- Saturated market, but only a few will stay relevant

Mintel predicts

- Highlight the importance of hygiene to retain category growth

THE IMPACT OF COVID-19 ON HOME & PERSONAL HYGIENE

- The outlook for India's hygiene industry
- SWOT analysis
- RecheHow consumer behaviour will change and what can brands do: male household consumers
- Marketing mix
- In summary: adapting to the next normal

KEY TRENDS

- What you need to know
- Heightened demand is met by a spike in launches
 - Graph 2: % change Q3/Q4 2019 - Q1/Q2 2020; household care and personal care*
- The hand sanitiser glut halts brand aspirations
- Sanitisers: gold rush but also a fool's gold
- Mass penetration a critical strategy to address the virus
- Family safety messaging leads to diffused branding
- The emphasis remains on hand hygiene

KEY DRIVERS

- An age for social hygiene
- Long, sustained fear levels result in permanent mindset shifts
 - Graph 3: fear of contracting infection during the outbreak of COVID-19, March-August 2020
- Lack of infrastructure cripple hygiene priorities
- Waterless solutions are needed by some households
 - Graph 4: %age of households with no water at handwashing place
- Regional inequities compound a simple solution
- Hand hygiene is being widely promoted as a basic necessity
- Single households expected to grow; but for now, families are reunited

GLOBAL TRENDS AND THEIR IMPACT ON INDIA

- The fear of tomorrow is driving hygiene
- Consumers need education- and awareness-building campaigns
- The COVID-19 pandemic leads to a sudden spike in global hand sanitiser launches
 - Graph 5: hand sanitiser launches as a proportion of all soap and bath product launches, by quarter, July 2019-May 2020
- Refillable sanitisers promote on-the-go use
- Growing need for water-saving innovations
- Consumers have become more engaged in cleaning the home
- Fear will linger as virus occurs in waves

CONSUMER INSIGHTS

- What you need to know
- Disinfecting surfaces is a newfound interest
 - Graph 6: actions taken during the COVID-19 outbreak, Aug 2020

Attitudes towards home & personal hygiene - Indian consumer - 2020

- Household work is fear-based
- Sensitivity towards labels and alcohol content
- Trust in handwashing declines among 18-24 year olds
- Yet, consumers want to return to a normal hygiene routine
- Social hygiene is still deprioritised over personal
 - Graph 7: hygiene practices in the last six months, Aug 2020

Hygiene converts

- Rise of the champions of hygiene
- Sobering drop out rates mean these consumers don't intend to stay engaged
- Hygiene rituals are in place but temporary
- Short term gains with sanitisers

Addressing lower-tiers

- Use the lack of hand-washing infrastructure as a way to push hand sanitizers for the lower tiers
 - Graph 8: actions taken during the COVID-19 outbreak, lower tiers, Aug 2020
- Stay away from "natural" claims in hand sanitizers for the lower tiers to communicate efficacy

New COVID-19 cleaners: male consumers

- Men have come aboard the household wagon - in a dramatic fashion
 - Graph 9: male consumers, May-Oct 2020
- Who is the male COVID-19 Cleaner?
- Disengaged male consumers, too, are exhibiting fear-based hygiene behaviour
- Equally at risk of dropping out of the category

Risk factor: household size

- Single households have the highest risk to drop off
 - Graph 10: consumers worried about virus exposure, Aug 2020
- Singles are not overly engaged in household cleaning chores
 - Graph 11: hygiene practices in the last six months by household composition, Aug 2020
- But they are cleaning (and buying) more
 - Graph 12: household surface cleaners used during COVID-19 outbreak by household composition, Aug 2020

The disbelievers

- Unconvinced by not unchanged by the virus

MARKET APPLICATIONS

Opportunities

- What you need to know

Introduce male narratives

- Feature male figures in hygiene conversations
- Give #sharetheload stretch goals

Playing on the hygiene ladder

- Social hygiene is the beginning of a hygiene ladder
- Growing a brand in line with the hygiene ladder
- Next: transfer hand hygiene to home hygiene
- Introduce hand and surface hybrids
- Create associations with hand and surface products
- And build towards the ultimate clean life experience
- Address skin dryness issues to pump up protection
- Instil the need to incorporate hand hydration into the hand hygiene routine

Innovations for the bottom of the pyramid

- Innovate within the realities of amenities in India
- Sachets are the quick response to affordability
- Tap into the natural and chemical tension by finding a balance between the two
- Save time and stress with convenient packaging and formulas

Sell emotionally

- Make sophisticated emotional sells for hygiene
- Focus on the hand feel of products
- Create micro-cleaning moments
- Empower lifestyles for singles
- Tailor solutions to new lifestyle cleaning scenarios
- Provide immediacy through fast-acting assurance towards safety
- Provide longer-lasting "safety" between uses
- Premiumised sanitisers will work in the short term

GLOBAL INNOVATIONS

- Develop creative on-the-go packaging for hand hygiene and care
- Simplify ingredients to engage with the straightforward mind
- Sustainability: a tale of three refills
- The future towards sustainability and a waterless world

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