

DEODORANTS – INDIAN CONSUMER – 2018

Relatively low usage provides opportunities to attract non-users to grow the category through pack size and shape, as well as format.



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Report Content

EXECUTIVE SUMMARY

- What you need to know – Summary
- Opportunity to increase penetration, particularly in the South and Tier 1 cities
- Tropical, humid climate drives need for deodorising, sweat protection
- Innovate odour control for regional variations in diet
- Introduce APDO to older consumers through younger adults in the household
- Target women, particularly 18–34s and metro women
- Create the products that APDO users want; shift perceptions to open consumers up to non-spray possibilities
- Go natural
- What it means

KEY TRENDS

- What you need to know

Key drivers

- Awareness, access, aspiration and affordability drive the category
- Opportunity to target India's large and relatively youthful population
 - Graph 1: Population share, by gender and by age, 2021 (projection)
- One quarter of Indians are projected to fall in the 20–34 age range in 2021
- Innovation slows in India over the past five years
 - Graph 2: Deodorant launch activity, distribution 2013–17
- India enters top 10 in 2015, growth forecast to push India into 6th spot by 2021
 - Graph 3: Top 10 countries, deodorant retail market value, 2017 (estimate)
- Challenge fragrances, introduce more variations for ladies

Global trends and how they are playing out in India

- Target active women, those who like to feel they are active
- Small size, single-use and fun formats
- Communicate strength along with femininity to resonate with active women

CONSUMER INSIGHTS

- What you need to know

APDO use and fragrance interaction

- Communicate the need for APDO to persuade non-users
- Convince consumers that fragrance isn't enough
- Overcome negative perceptions of deodorants vs fragrances
- Communicate APDO effectiveness to prevent body odour, particularly to women and South Indians
 - Graph 4: Uses fragrances to cover up body odour* and any APDO use, by gender and region, April 2018
- Message to men how body scent is an aspect of 'appearance' and overall image
- Gain entry into older consumers' personal care routines through young adults in the same household
 - Graph 5: Any APDO usage, by gender and age, April 2018

Preferred APDO format

- Differentiate APDO from fragrances/body sprays to encourage consumers to explore different formats
- Go South with alternative formats, spray has yet to dominate
 - Graph 6: APDO format preference, by region, April 2018
- Prickly heat powder and body talc may be used in place of typical APDO products in the South
- Develop convincing RTBs (reasons to believe) for sticks – room for innovation
- Sprays dominate, increased activity in roll-ons, sticks and other formats lag
- Communicate 'premium' for non-spray formats in metro areas
 - Graph 7: APDO format preference, by metro/city tier, April 2018

APDO purchase influencers

- Promote attribute combination of scent, brand, natural ingredients, invisibility and long-lasting formula to appeal to 95% of APDO users
 - Graph 8: APDO purchase influencers, April 2018
- TURF methodology
- TURF analysis reveals the mix of attributes that will attract the largest number of unique respondents
- Communicate 'natural' and 'quantity' along with fragrance/scent and brand in messaging to women
 - Graph 9: APDO most important purchase influencers – % point difference female vs male, April 2018
- Product claims are more influential among women than men, particularly for natural ingredients and number of sprays/uses
- Note regional fragrance preferences, explore new combinations
- Lead with claims that align with purchase reasons: indicate a proven personal benefit to entice APDO users
 - Graph 10: Top 10 APDO claims*, 2013-17
- Appeal to younger women APDO users' sense of value
 - Graph 11: APDO purchase influencers – Uses and pack size, by gender and 18-34, April 2018
- Call out the qualities that matter to 'natural' ingredient seekers
- Tailor regional messaging to highlight purchase influencers with the greatest impact
 - Graph 12: APDO purchase influencers, by region, April 2018

MARKET APPLICATION

- Opportunities: Key areas of focus

Opportunities

- Offer smaller pack sizes to get into purses, work/gym bags alongside other everyday personal care staples
 - Graph 13: APDO launches by pack size, 2013-17
- 150 g/ml pack size dominates, room for growth in smaller sizes
- Develop deodorant for active, on-the-go women
 - Graph 14: Deo launches with a male vs female claim, 2013-17
- Introduce on-the-go odour and sweat prevention for women
- Go 'natural', and if you can't beat 'em...buy 'em
 - Graph 15: Select attitudes toward 'natural', by APDO usage, April 2018

Who's innovating

- Get personal, get social, get online
- Tap into the power of celebrity and online influencers to build engagement and connect with youth
- Take inspiration from Nivea, look beyond the obvious 'hot and sweaty' months in India to address body odour during cooler months

Global innovators

- Create interest through unexpected formats with added benefits
- Switch Fresh offers customised design in an eco-friendly, reusable container with subscription home-delivery service
- Investigate latest 'hero' natural ingredient gaining traction globally for men's deodorant – charcoal
- Create safe deodorants for moms-to-be, new moms and other life stages

APPENDIX

- Consumer survey methodology
- Definitions and terms

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03

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