

# SHAMPOO AND CONDITIONERS – INDIAN CONSUMER – 2018

Decode Indian consumers' reasons for using and avoiding shampoo and conditioner to create the products they want.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know – Summary
- Focus future development efforts on natural and environment-friendly products
- Address rising levels of air pollution with protective products
- Natural is the new norm in beauty and personal care products
- Popular brands compelled to go the natural/Ayurveda way in India
- Take the naturals route to drive more frequent shampoo use
- Educate consumers about how conditioner protects hair while styling
- Focus on men with targeted men's shampoo
- What it means

## KEY TRENDS

- What you need to know

### Key drivers

- Booming beauty and wellness industry and availability of salon brands for at-home use supports growth in haircare
- Indian salon brands available for purchase and use at home

### Global trends and how they are playing out in India

- Differentiate in natural space with 'all natural', vegetarian, Ayurveda as most talk about botanical/herbal ingredients
- The Ayurveda soap opera compelled Hindustan Unilever to revive their Ayurvedic brand, Lever ayush
- Going beyond botanical/herbal claims
- Be prepared for the airpocalypse
- Take a leaf from other personal care products to equip consumers with anti-pollution arsenal
- Dove focuses on environmental 'defence' in India

## CONSUMER INSIGHTS

- What you need to know

### What haircare products consumers use

- Graph 1: Haircare products usage, April 2018
- What consumers say about conditioners

### The factors having the most impact on hair appearance

- Graph 2: Product usage frequency, by gender, April 2018

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- Take pollution head-on with a specific shampoo that either prevents or repairs pollution's impact on hair
  - Graph 3: Most important factors that impact hair appearance, April 2018
- Demographic profile of haircare user groups
  - Graph 4: Select important factors that impact hair appearance, by usership profile, April 2018
- Cast coconut as a hero in products to appeal to South India

### The haircare claims/benefits consumers seek

- Graph 5: Product features/claims sought while purchasing haircare products such as shampoo and conditioner, by gender, April 2018
- Shampoo and conditioner users are better aware of conditioner benefits and advanced
- Highlight 'extra' benefits/functions offered by a conditioner over shampoo
  - Graph 6: Besides price, benefits/claims sought while purchasing haircare products such as shampoo and/or conditioner, by user type, April 2018

### Men are important too, especially Millennial men

- Graph 7: Product usage frequency among men, by age, April 2018
- Get relevant and connect with Millennial men
  - Graph 8: Product usage frequency among Millennials aged 18-34, by gender, April 2018
  - Graph 9: Select factors that impact hair appearance, among shampoo and conditioner users, by gender, April 2018
- Target men with a functional shampoo and women with functional and cosmetic benefits
  - Graph 10: Besides price, benefits/claims sought while purchasing haircare products such as shampoo and/or conditioner, by gender, April 2018
  - Graph 11: Attitudes toward haircare products, by gender, April 2018
- Make it simple for men by offering a targeted shampoo that addresses their specific concerns
- Address male issues with multifunctional, masculine and problem-solving products

## MARKET APPLICATION

- Opportunity: key areas of focus

### Opportunities

- Dig deeper than 'natural' – use more specific, meaningful descriptors to attract 18-34 year olds
- Opportunity for products tailored toward expectant and new moms with a special all-natural range
- Re-engineer product use and manufacture in light of looming water scarcity

### Who's innovating

- Biotique leads the way for natural evolution through technology
- Biotique integrates Ayurvedic knowledge and technology to extract the future
- Match a latent need with a specific functional hero ingredient the L'Oréal 'extraordinary clay' way
- Look beyond general market segments into untapped cohorts – expectant mothers

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- BBLUNT – the celebrity salon chain brand comes to retail with products specially created for Indian hair

### Global innovators

- Specifically designed for humid Asian climate to tackle oily scalp and dry ends
- The world fights pollution with anti-pollution, dust shield or charcoal shampoo
- A shampoo for the winters in Germany has a potential for Northern India
- Beyond the bottle: think packaging innovation in terms of function, design aesthetic and sustainability
- Explore consumer segments who will benefit from quick rinse gentle foam shampoo specifically designed for seniors in Japan
- Draw inspiration from Japan's leading edge products – multifunctional foams, creams and 'water'

## APPENDIX

- Consumer survey methodology

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