



Intermediary Report Marketing Management

The Launch of Fairy in France

Objective: Develop a marketing action plan to allow Fairy to recruit a maximum of new French user by June 2022.



MARKET ANALYSIS & CONSUMER INSIGHTS

Market Analysis & Evolution

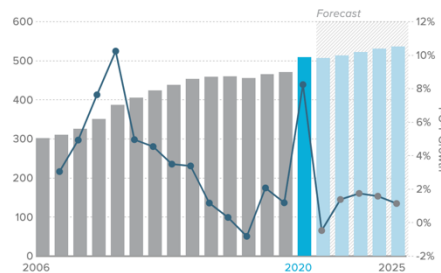
Size of the market: 500-million-euro market for automatic dishwashing.

Growth: significant growth over the last 15 years. From 2019 to 2020, there was a jump of 9.1%. This majorly happened because of the covid 19 pandemic, since more people preferred in home meals, increasing the consumption of dishwashing.

Evolution: Retail volume sales are set to remain higher in 2025.

- ⇒ Consumers are shifting from traditional powders and gels for automatic dishwashing to the tablet-based system, hence paving the way for innovative and better products, such as Fairy. Consumers are preferring an eco-friendlier option for dishwashing; hence hand dishwashing is seen in decline, boosting automatic dishwashing.

Sales of Automatic Dishwashing
Retail Value RSP - EUR million - Current - 2006-2025



"The best capsule against Tough stains."

The launch of Fairy so far 2-dimension strategy

Offering an outstanding product

Generating a high-scale trial

The brand showed great results so far:

- A total of 19MM€ of value sell-out in France
- 18% of Value Shares in April & May 2021
- 12% of relative market penetration at the end of June 2021

The sell-out value share total in France was constantly growing from January 2021 to May 2021 (up to 14,4%) then slowed down in June (11,3%).

P France is a politically stable country.

E The economy of France is developed and market-oriented. According to the highest penetration group using dishwasher in France is group Families with kids. The second biggest group is Seniors without kids. Young adults without kids use dishwasher the least.

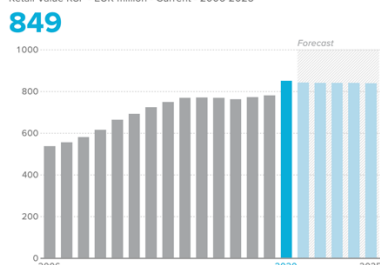
S More than 60% of people have a dishwasher at home in France. Approximately 60% of French people pre-rinse the dishes before using the dishwasher. Which is almost 2X more than in England.

T New technologies, social media can help to promote the Fairy product better. It can help to make the promotion easier.

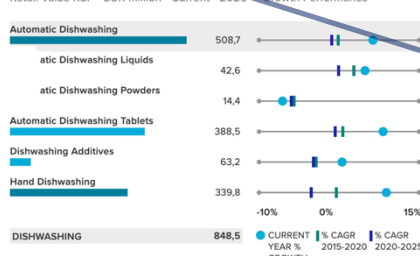
E Eco-friendly products are important part of today's world. Also in France growing concern with sustainability and eco-friendly products are important for customers.

L Directive 94/62/EC on packaging and packaging waste.

Sales of Dishwashing
Retail Value RSP - EUR million - Current - 2006-2025



Sales of Dishwashing by Category
Retail Value RSP - EUR million - Current - 2020 - Growth Performance



Strenghts

P&G brand image support
Products with innovative technologies
Positive experiences in foreign markets

Weaknesses

Many active competitors
Constant market forecast (Euromonitor)

SWOT

Opportunities

The pandemic boosted dishwashing sales, and automatic dishwashing (especially automatic dishwashing tablets) is expected to take some market share of hand dishwashing

Threats

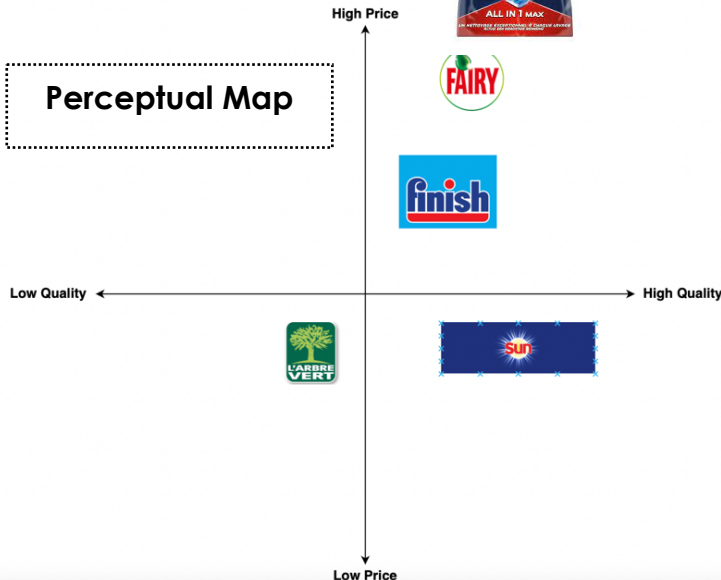
Rise of "green" products that are more respectful of the environment
Eco-friendly brands taking more and more market share
Leader with more than 30% market share (Unilever)

KEY COMPETITORS

Unilever's Sun	Reckitt's Finish	Colgate's Paic	Novame's L'Arbre Vert	Henkel's Mir
Leader in France	13.8 % market share in 2020	11.5% market share in 2020	One of the leading eco-friendly brands in France	6.4% market share in 2020
Created in 1965	Founded in 1953		Market share went from 3.7% in 2015 to 6.8% in 2020	Their objective is to "Offer pleasure without compromise and not at any price"
30.3% retail value share in 2020	World leader in automatic dishwashing		Combine performance and respect for the environment (products without phosphates or phosphonates)	From 2019, they are producing environmentally friendly products
Focuses on innovation and regularly improves its products with a better respect to the environment	Promises a product that will save you energy and time thanks to their innovation			
Aims to make all its packaging eco-responsible by 2025	#Ensemblepourleau: Finish products will allow you to reduce your consumption of water			
	Finish enjoys being recommended by the leading dishwasher manufacturers			



Perceptual Map



Customer Behavior

Covid-19 pandemic has increased the demand for automatic dishwashing detergent since people prefer to stay and cook at home to avoid the risk of infection.

Consumers are shifting from powders and gels to tablet based dishwashing detergents.

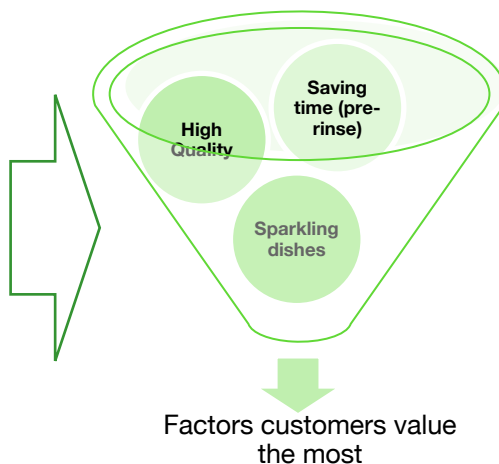
The target group, women, prefer detergents which are time saving, energy efficient, and offer better cleaning of the dishes.

Eco friendly products are in demand.

Consumers stick to the products they have been purchasing, since this has become a low involvement decision making. Hence, they need the extra push to switch to Fairy and try it out.

SURVEY RESULTS

Instead of just performing a quantitative survey to get insights, we decided to go a step further and directly speak with the end users making the purchases. We surveyed around **35 people for quantitative results** using Qualtrics and **spoke to 12 people** around the city to understand their decision-making process using more specific questions.



People think they have to pre-rinse their dishes.

50%

70%

People willing to try out more eco-friendly option.

People willing to buy detergent in a "sans-emballage" format.

80%

MARKETING STRATEGY PLANNING

Thanks to the results of our **survey** and **interviews** combined with data from **Statistica** and **Euromonitor**, we identified **3 main segments in the dishwashing market**. We followed the **STP** method to determine the best UPS solution for Fairy.

Clara, The Planet Savior

Clara is a young adult who tries to save the environment with her every action, being it taking a metro to go to the market or buying an eco-friendly dishwashing detergent. She chooses a dishwasher detergent which takes an eco-friendly and sustainable stand, right from the product development to how the waste is disposed off.

TARGET

Rachel, The Cleanliness Warrior

Rachel, a mother of two and a hardworking woman is someone who tries to optimize the time she spends on every activity, right from making breakfast to going back to bed at the end of the day. Quality and cleanliness are important factors to her while buying a detergent, and something that removes the requirement of a pre-rinse

TARGET

Marc, The Indifferent Knight

Marc, who is a happily married man in 50s doesn't put much thought while making low involvement purchase decisions. He prefers sticking to the products he has been using for years and does not feel bothered by any environmental issues. Cleanliness albeit is a factor for him but his existing detergent is satisfying enough for him.

Since Fairy has a standard and a premium product line, it only makes sense to choose a different target segment for each of the lines. Since a segment who always buys standard product will not go for a premium option in detergents.

PLANET SAVIORS

TARGET

This segment largely consists of young adults, between the age of **18 and 30**, and are people who have **recently gotten married and have already purchased dishwashers**.

Positioning Statement

For the **planet saviors**, Fairy **"Tout en 1"** is the only brand among the mass dishwasher detergents that provides a faster and an eco-friendlier way to clean the dishes, because it reduces the cycle duration and amount of water used while providing excellent cleaning.



We believe this to be the main segment for the **standard product**, **"Tout en 1"** line also overlapping in the premium section. Since Fairy **takes an eco-friendly stand** with reduction of cycles and saving water and electricity, we believe this to be a good segment for the **standard line**.

GROWTH OPPORTUNITIES

This segment consists of people between the **ages of 26 and 39**, who are **married with kids** and are **busy with the jobs** and daily activities. They prefer options which reduce the time taken for cleaning (pre-rinse) and provides a good cleaning compared to other options in the market.

We want to offer the following value propositions to our two targeted customer segments since we believe they portray what Fairy stands for:

Value Proposition

Saves time
Reduces Effort
Higher Quality
Provides Hope

CLEANLINESS WARRIORS

TARGET

This segment is perfect for the **premium line**. People in this segment have a strong purchasing power and are looking for ways to optimize the cleaning process. **"Fairy Platinum +"** has a unique value claim of brighter shine, anti-dull and shorter cleaning cycles. This segment would prefer such a product.

Positioning Statement

For the **cleanliness warriors**, **Fairy Platinum +** is the only brand among the premium dishwasher detergents that provides a faster and an efficient way to clean your dishes because it reduces the cycle duration and provides a super powerful stain removal using an anti-dull technology.



Overall Strategy

If the brand Fairy focuses on its unique selling proposition which is stated above, it will be able to reach more consumers, especially the ones in the 2 categories we defined. However, our overall strategy to reach Fairy's goal is to advise the brand to be more flexible with the product, it's brand image and the way the tablets are distributed and advertised. Women and children's image have been highly used by the brand at the beginning of their campaign, but they shouldn't only focus on this type of customers.

MARKETING MIX CONCEPT

How will we get French households to have at least 1 opportunity to try and test Fairy?
How should Fairy ensure sustained growth?

The idea behind “Sans-emballage” is to sell the dishwasher tablets without the packaging. This helps reduce the quantity of plastic waste that is created by dishwashing detergent brands. They will be stored in a few boxes where customers will be able to purchase as many quantities as they like, and they pay per tablet depending on the price. Also, heavy discounters such as **ALDI and LIDL** (which makes 6% of the delivery channel), focus on selling products with minimum packaging, most often in the original containers.

As consumer behavior is shifting towards eco-friendlier options with all the things they purchase, we firmly believe that with good in store promotions in supermarkets such as ALDI will be a good way to let the consumers know Fairy is striving to be the most eco-friendly detergent in the French Market. They could also try to sell their product in automatic laundry stores in distributors.

PLACE. The Distribution Channels: how do we get the product to customers?

P&G uses an indirect distribution channel for their Fairy’s products. The tablets are sold through brick-and-mortar stores. The buyers of fairy want to buy/are more inclined to buy in store or online from a retailer’s online shop.

We think P&G should continue to sell its product through big retailers, but we would like to bring an idea which would help them implement in many more places and become more available to people and therefore more tested: the **SANS-EMBALLAGE** format.



PROMOTION. Advertising: how do we promote the product in store and at home?

In-store

Since Fairy has a premium and a standard offering, it is important to place them separately in the store. The first thing would be to **stop offering the 2 lines at the same place**. This confuses the customer as to which option to choose. Moreover, it is important that the premium lines should be sold at premium supermarkets and offer the standard lines in the normal markets to not dilute the premium image of the brand.

Secondly, since we are focusing on an eco-friendly approach, Fairy should be offered to be kept in supermarkets selling sustainable products.

For **online promotion**, we suggest a mix of advertisements on YouTube, Facebook, and Instagram. Since dishwasher detergent is a low effort, involuntary purchase, we need to instill the brand image of Fairy in the minds of the consumers in every way possible, so when they see the product in the shopping centers, they are automatically inclined to purchase it.

To promote the eco-friendly standpoint, Fairy can promote the product with the help of **some eco-friendly influencers**, who try to find and promote eco-friendly products in the market.

Recommendations for the future: **Mid to eye level display.**

In some stores such as Leclerc Roubaix, Fairy had a separate stand of its own. While it is good to have an individual stand, the placement was not good. The stand was hidden behind other stands because of which you cannot spot it easily. Also, access to the stand was difficult since there were other product stands blocking it. Moving forward, individual stands should be kept in a good, easily accessible area.

Shelf talkers should be used which portray the supreme cleaning power of Fairy while highlighting the environmental benefits. Promo zones should be continued in supermarkets like they are being used now.

Head-aisle displays : big carts that explains the functions of the tablets and it’s benefits

IN-STORE ACTIVATION PLAN Show the product in action

Two dishwashers, one using Fairy and one random detergent will wash equally dirty dishes in front of the consumers.

At the end of the cycle, the consumer can see for himself the difference in the quality between these two and hence make a wise choice.

Create awareness and trial for the product

1. Educate French consumers to the benefits of using tablets
2. Educate French consumers to the non-usefulness of pre-rinsing

- ➔ Contact websites such as Futura-science to be included in their online comparison tests which are read by a good number of people.
- ➔ Contact and work with “testing” websites: they have big customer data base which we can use. The strategy is to offer tablets to their range of testers with hope they will give positive feedbacks and will buy Fairy tablets in the future.