**PROJECT TITLE**

**BRAND HEALTHCARE TRACK**

**ORGANIZATION/ DEPARTMENT NAME & ADDRESS**

**KANTAR IMRB | QUANTITATIVE NORTH, GURGAON**

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**Executive Summary**

Kantar is the world’s leading data, insights and consulting company. For over 75 years, it has been pioneers in developing new technologies to better understand people. It is a data and evidence-based agency providing insights and actionable recommendations to clients, worldwide. By combining the expertise of the company’s people, the data resources and benchmarks, innovative analytics and technology, it helps the clients understand people and inspire growth. This time the brand that we are tracking is an Indian based startup that offers a wide range of cosmetic products to elevate its customers daily skin care routine. The range includes baby care, hair care and other skin care products. Here, the product that we are taking into consideration is Haircare- Shampoo.

The aim of the study is to understand consumers perceptions for client brand as well as competitors through a brand track study. For this Kantar proposed a mixed methodology offline and online track-

Offline: Face to Face Interviews: Interviewer assisted; the respondent is identified fitting the pre-decided criteria randomly

Online: Computer Aided Web Interviews: Self-filled; Panel based survey

A well-structured questionnaire was designed which included brand awareness, usage, consideration, brand equity, brand imagery, brand’s initiative & events and a long-term review. Data was collected on the same parameters mentioned earlier. After the analysis part, the results were 1. Meaningfully different is important to drive equity among Online users. While among offline users, Salience is key, followed by meaningful 2. The brand’s offline and online trialists are encouraged by it being a safe and toxin-free, natural brand. Good review and ratingsalso influence online users to try the brand shampoo. Being safe and toxin free is a reason for its continuous usage by online consumers. They have also witnessed effective results and find it a value for their money 3. Wanted to try something different is a main reason for the lapse. Found better ingredients in others and not having the right pack size are other laps age reasons 4. The brand’s aware non-trialists do not believe that its products are made of natural ingredients and are not finding relevant pack size 5. Over the year, the brand’s performance has remained stable. The recommendations given were 1. Strengthen awareness 2. Address Lapsers 3. Build trials 4. Be meaningfully different.

**Study Background**

This is a quarterly dipstick to track brand health of various shampoo brands. Every quarter this study is conducted to understand trends on the key performance indicators, brand equity and perceptions. Based on the results, recommendations are given to the client.

**Aims & Objectives**

Our aim is:

1. to identify the key drivers in the category and compare our brands versus key competitor’s performance
2. to identify potential barriers, triggers and lapsers to the purchase
3. to get the long-term review from last year (AMJ’23) till now (AMJ’24).

For the improvement of the product so that it’s sale increase.

**Methodology**

Questionnaire Formation:

A detailed questionnaire is created for primary research. It is well structured and designed for comprehensive surveys that capture the necessary information from the respondents. The questions are clear and concise for obtaining accurate data for analysis. Show cards are generated so that respondents can choose their opinion on that product at the time of interview. Once this is done, the link for the web interview goes live and offline interviews also start taking place.

Data Collection:

Offline: Face to Face Interviews

* Interviewer assisted
* The respondent is identified fitting the pre-decided criteria randomly:
  + - 1. The city is divided into different zones
      2. Starting points are selected in different locality within each zone and then interviews are done starting from the starting points
      3. The same starting points will be used later in the next phase from the point it was ended to maintain the consistency
      4. Continuous quality control checks are done to maintain the quality
* Whom we met:
  + - 1. Males and females, NCCS A and B1, Age -18-45 Years
      2. Userships: purchase personal care products from offline sources/platforms
      3. Decision makers (joint or sole) for purchase of brands/products
      4. Regularly use Shampoo (at least once a week)

Online: Computer Aided Web Interviews

* Self-filled
* Panel based survey
  + 1. Basis the requirements of the study, invites are sent to the panel members and the desired sample is achieved.
    2. Respondents meeting the research criteria fill the survey as per the understanding
    3. Quota is maintained as per the Research Design
    4. Quality checks incorporated in the script itself to filter out the junk/irrelevant responses along-with manual checks
* Whom we met:
  + - 1. Males and females, NCCS A and B1, Age -18-45 Years
      2. Userships: purchase personal care products from **online** sources/platforms
      3. Decision makers (joint or sole) for purchase of brands/products
      4. Regularly use Shampoo (at least once a week)

Data Collation:

Once the data is collected, the data collation process starts. Last quarter’s data and the recent data is collated in one excel sheet for further analysis.

Data Analysis:

1. Category Usage: Bottle users and hair related issue respondents
2. Brand Performance (Competitive context): Brand Awareness, current standing, brand funnel, future predisposition, variant’s performance, source of gain, net promoter score
3. Source of Awareness: Advertisement
4. Brand Equity: Brand Power: Meaningful, Different, Salient (MDS)  
    Drivers of Power, Meaningful and Different
5. Brand Imagery, Strength and weakness
6. Triggers and Barriers
7. Brand’s Initiative and Events
8. A long-term review: Comparison between AMJ’23 and AMJ’24

Significance tests at 95% CI are performed on the data of the above-mentioned parameters and conclusions are drawn.

**Results**

1. Category Usage:

Both offline and online users are more likely to purchase medium bottles of shampoo and belong to the 33-40 years age group.

Offline respondents are facing increased thinning of hair while greying hair, frizzy hair, hair breakage, and pre-mature greying are increasingly reported by online respondents.

The use of hair conditioner and hair wash soaps has increased significantly among offline and online respondents, respectively.

1. Brand Performance (Competitive context):

Awareness of the brand is consistent among both sets. While A, B, and C gain on spont recall, D and E decline among offline audience.

The brand has a strong standing among its online audience. Need to build awareness across and trials among offline respondents.

Both offline and online usage is stable for the brand. D declines on usage among offline users while A gains.

Even B gains significantly on L1Y and L3M usage among offline users.

Conversions are stable for the brand among both offline and online audience. A and B gain on consideration while D and E are losing on consideration among offline audience.

MOUB usage for the brand’s variants hasn’t changed much.

The brand’s major source of gain is from F and B users among its online users.

There is a significant increase in awareness of the brand’s products like sunscreen, conditioner, face serum, body wash, face mask, body lotions, hair mask, makeup, and hair oil among offline audience. Awareness and usage for products is stable among online respondents.

The brand has a good Net Promoter Score with 89% among its current online users being likely to recommend the brand to their friends and family.

The brand has strong trials however, consolidating repeats & arresting lap sage key task for the brand.

1. Source of Awareness:

While the major source of awareness for the brand’s offline audience is TV, ads on social media websites also play a major role in creating awareness offline (as compared to the category average).

Social media and e-commerce ads, followed by TV ads, lead the source of awareness platforms among online audience.

Ads on TV and social media are an important source of awareness for all brands, including the brand itself.

1. Brand-Equity:   
    Brand Power is majorly driven by meaningfulness among the brand’s online audience and by salience & meaningfulness among offline respondents.

A brand that makes hair shine and is a premium brand are the top drivers within offline and online categories respectively. Besides, brand that makes hair shine is the leading key driver in the online category as well.

Over the year, the brand has not only gained on its demand power but also on all the three pillars, meaningful, different, salient, both among offline and online respondents.

Even F and B witness gains on Brand Power over time, while G and E observe a decline.

Meaningful different have similar drivers in offline but in Online meaningful is being driven by functional benefits along with Natural x toxin free while different id driven by premium x packaging x designed by expert

Among top meaningful drivers the brand can drive Trust among offline audience and natural ingredients x repair damaged hair among online audience.

And is also able to drive top drivers of different - trust x gentle x hair fall reduction among offline audience.  
But not able to drive any of the top drivers of different among online audience (probably leading to softening on difference vs PAGO)

Offline: There is a need for the brand to cover gap on all three pillars to compete with F and D at the top.

Online: Even though the brand is at the top online, it still has scope to improve on its salience.

Despite strong KPIs among Online segment, the brand is perceived to be expensive among both set of consumers.

The brand’s shampoo triers continue to be the affluent, younger audience who have a high usage frequency and purchase big bottles of shampoo.

Lapsers too are affluent and young with medium usage frequency and suffer from hair fall, dull hair, split ends, and pre-mature greying.

And, lapsing out to premium brands A, B along with F and C.

1. Brand Imagery:

The brand continues to stand out as a brand whose products are made of natural ingredients. Additionally, it is perceived as a brand that cares for the society/ environment. Only H is positioned as a brand that makes hair smooth/soft (category driver). Other top drivers are a whitespace which the brand can tap onto. Among its online audience too, the brand is positioned as a natural brand that cares for the society and has toxin/chemical free products.

A, B, and H can tap the online key driver of being a premium brand. Besides, A and B are also standing out as brand designed by expert professionals. There is scope for the brand to position itself along online category drivers.

The brand is positioned as a natural brand among offline and online audience both. There is opportunity for it to position itself on the category key drivers of makes hair shine and premium brand.

A and B are standing out on category drivers amongst their online audiences.

Positioning not a challenge among lapsers, necessary to drive specific benefits to build repeats.  
No clear positioning among ANTs, need to drive codes of Natural x toxin free along with goodness/shiny hair to build trials.

1. Triggers:

It is a natural brand, safe and toxin-free, and good reviews and ratings are a popular trigger for both offline and online audience. Friends and family recommendation is an additional trigger for the brand’s offline triers.

Value for money is a popular re-purchase reason for brands across and so it is for the brand’s online users. Besides, being safe and toxin free and showing effective results also encourage re-purchases.

1. Barriers:

Online users are mostly lapsing because of product inability to fulfill requirements and other promises. They are also lapsing because they can find better discounts on other brands.

The brand lapsers also witnessed unfulfilled requirements, itchiness/irritation, better ingredients in others, and not the pack sizes they want.

Not believing that the product is made of natural ingredients, under Brand Promise, is the leading barrier among offline and online audience both. This is followed by pack size issues among offline respondents and price-related issues among online respondents.

Like for other brands, The brand’s audience does not believe it is made of natural ingredients and it doesn’t have the pack sizes that they were looking for. Online audience don’t believe the claims from the brand as well.

1. Brand’s Initiative and Events:

The initiatives have remained stable among offline audience with 61% of the respondents associating them with the brand.

Among online respondents as well, awareness for the events hasn’t changed much with 56% of the respondents associating them with the brand.

1. A long-term review: Comparison between AMJ’23 and AMJ’24:

While The brand’s awareness has remained stable among its offline audience, it has significantly improved salience among the online respondents over the year.

In terms of usage too, the brand has significant improvements among its online audience, while that of offline audience is stable. D, on the other hand, witnessed a decline in its online usage, as compared to the previous year.

The brand has also increased its conversions significantly among its online audience. This has increased a little directionally for its offline respondents.

The brand witness’s significant improvement on power and salience among offline respondents.  
Even F and B witness gains on Brand Power over time, while G and E observe a decline.

Among online audience, the brand gains significantly on power and all 3 metrics as compared to the year ago (AMJ’23).  
I and C decline on power while B gains.

Improvement in absolute endorsements with consistent positioning of natural x cares for the society/environment. Loses out on key positioning of toxin free products

Even among online respondents, improvement noticed on endorsements. Perceptions for the brand are also stable.

Being a natural brand that is safe and toxin free and its good reviews and ratings continue to be the main triggers for the brand’s buyers.

People continue to buy the brand online because it is safe and toxin free and provides value for money. They also report the products showing effective results for their hair as another reason for their re-purchase.

While not fulfilling product promises continues to be the leading reason for online, there is a decline in VFM as a reason for lapsing.

Reasons like wanted to try something different and not fulfilling requirements continue to be lapse reasons among online audience. Found better ingredients in other brand, developed redness/irritation, and not have the right pack size are also affecting lapse online now.

Over the year, contribution of brand promise, pack size, and price-related issues to barriers for not using the brand shampoo has increased among offline respondents.

On the other hand, price-related issues have decreased among online non-trialists. Brand promise, however, sees an increase among online respondents as well.

The brand barriers have not changed over a period of one year. Don’t believe it is made of natural ingredients and doesn’t have the pack size hat I am looking for are still a barrier both offline and online. Additionally, online audience doesn’t believe the product claims from the brand.

**Discussion and Conclusion**

Brand Equity:

Meaningfully different is important to drive equity among Online users. While among offline users, Salience is key, followed by meaningful.

Offline: Gained on power and being salient over the year. There is a lot of scope for the brand to build on all three pillars of equity to improve its brand positioning vs competition.

Online: The brand has gained significantly on all three metrics as well as brand equity among the online audience over a period of one year. Even though it’s at the top in terms of brand positioning, there is still space for the brand to increase on its salience.

Trials and Re-purchase:

The brand’s offline and online trialists are encouraged by it being a safe and toxin-free, natural brand.

Good review and ratings also influence online users to try the brand shampoo.

Being safe and toxin free is a reason for its continuous usage by online consumers. They have also witnessed effective results and find it a value for their money.

Reasons for Lapsers (Online):

Lap-sage is witnessed mostly for online users of the brand shampoo.

Wanted to try something different is a main reason for the lapse.

Found better ingredients in others and not having the right pack size are other lapsage reasons.

Not meeting product promise (not fulfilling requirements and developing itchiness/irritation) is common too.

Reasons for Non-trials:

The brand’s aware non-trialists do not believe that its products are made of natural ingredients and are not finding relevant pack size. Price is also a barrier among offline respondents.

Additionally, online non-trialists do not believe the claims from the brand as well.

Long Term Review:

**KPIs:** Over the year, the brand’s performance has remained stable offline across all KPIs. Online performance, on the other hand, has improved significantly on all KPIs, awareness, usage, and consideration.

**Equity:** While brand equity has improved significantly for the brand among online respondents, there is a significant increase in its power and salience among offline respondents.

**Brand Perception:** Absolute endorsements improve, while the brand continues to own perceptions on natural brand that cares for the society and has toxin-free products

**Triggers & Barriers:** Offline and online triers are encouraged by the brand being a safe, natural brand and its good reviews and ratings. Being safe and toxin-free is another reason for both first usage and continuous usage. While not fulfilling product promise continues to be popular lap-sage reason, The brand shampoo has been facing same barriers as its competitors in the market.

**Recommendation**

1. Strengthen awareness:

Improvement in Salience for online – still need to strengthen awareness in both segments.

TV ads are important to build awareness along with ads on social media/ e-comm sites, through celebrities and influencers.

OTT platforms also important to build awareness in Online segment.

1. Address lap-sage (Online):

Lapsers are facing issues like hair fall, dull hair, split ends and premature greying and are not satisfied with the Product experience

Though clear positioning, Product experience a key issue and thus there is a concern vs benefit gap

Address hair issues by providing functional benefits to drive repeats

1. Build trials (Offline):

Target: Youth x affluent x frequent users

ANTs are small bottle users facing multiple hair problems and don’t believe product promise of natural x other claims; don’t get right pack size neither value from the product

Drive positioning codes of Natural x toxin free along with goodness and shiny hair to build trials

1. Be meaningfully different:

Improvement in being meaningful and different over past year (vs AMJ’23) in online segment

Leverage key image codes that drive meaningful for category as well for the brand – repair damaged hair x natural

Build on codes that drive differentiation to stand out among competition in online segment

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