MARKET RESEARCH

Dabur Amla Hair Oil

"Asli Amla Dabur Amla"

AGENDA

Background & Objectives — Research Design — Incidence Of Hair Oil — Usage & Buying Behaviour — Brand Health Report — Conclusion

BACKGROUND & OBJECTIVES

Background :

- The Indian hair oil market is valued at USD 1,536.6 million in 2023 and is expected to witness a CAGR of 5.80% over the next five years
- Dabur Amla is very old brand of amla oil sub category trusted by mothers for their family's haircare
- It used to be one of largest brands during 2010's but now, it's just a shadow of its former self

Product life cycle for hair oil has reached late growth stage

Objectives

- To study the incidence of hair oil as a product category
- To understand its usage and buying behavior
- Analyze the brand health of Dabur Amla hair oil

RESEARCH DESIGN

Research Type -
- Quantitative Research
- Cross-sectional Research

Target Group -
- Youth & middle aged men and women (15-55 Yrs)

Sampling Technique-
- Convinience Sampling
- Snowball Sampling

Sample Size - 391

- Standard error : 5% , at 95% confidence level

SE = Z × √[{p × (1 - p)} / n

SE = 1.96 × √{(0.5 × 0.5) / 391}

SE = 0.05 or 5%]

AUTHENTIC INDIAN GOOSEBERRY

Dabur has been in the Ayurveda business for over 100 years

INCIDENCE

Entire Sample : 85.93%

Gender

Male : 81.31%

Female : 91.09%

Age

15-25yr : 85.02%

25-35yr : 88.64%

35-45yr : 95.45%
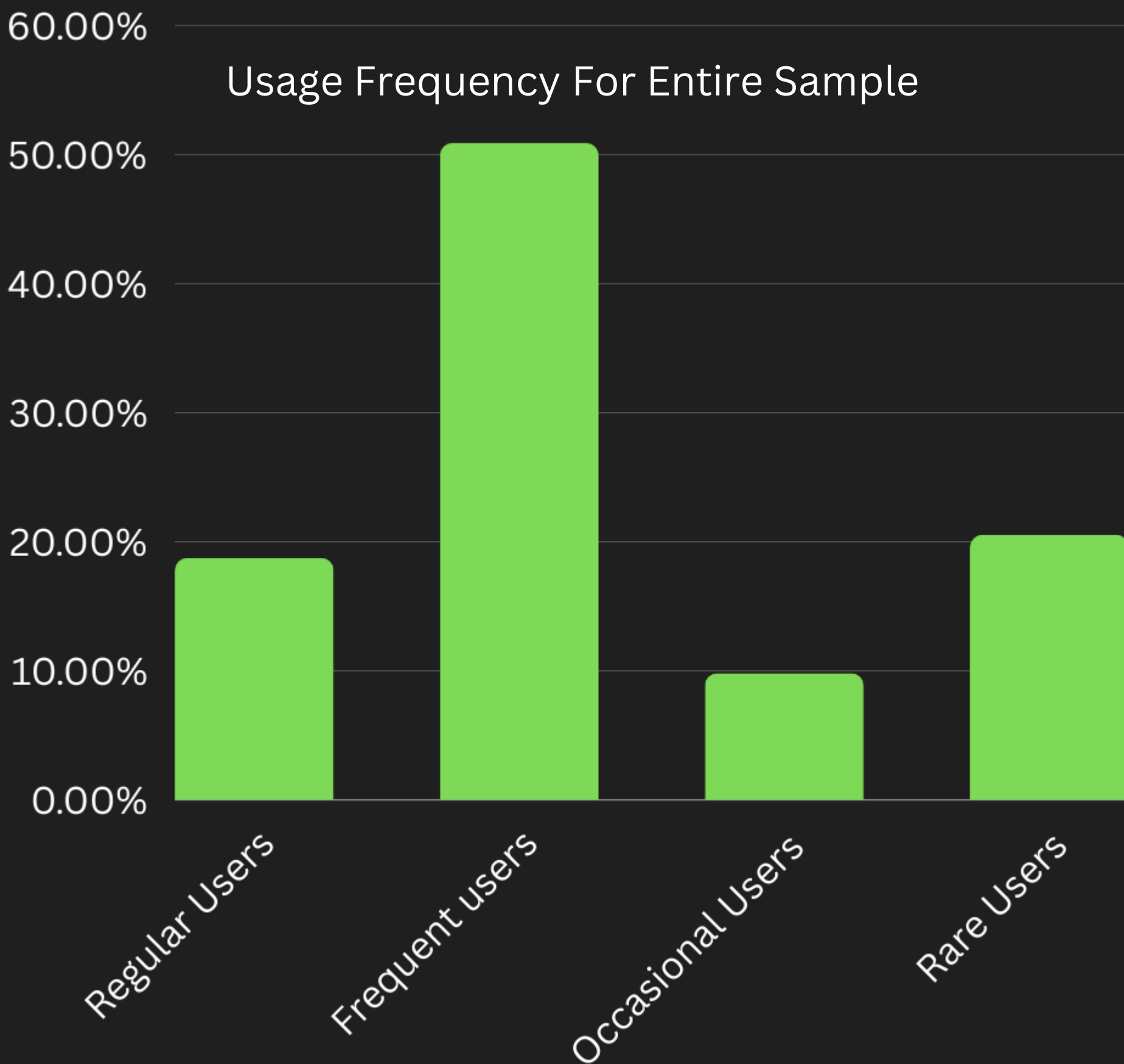
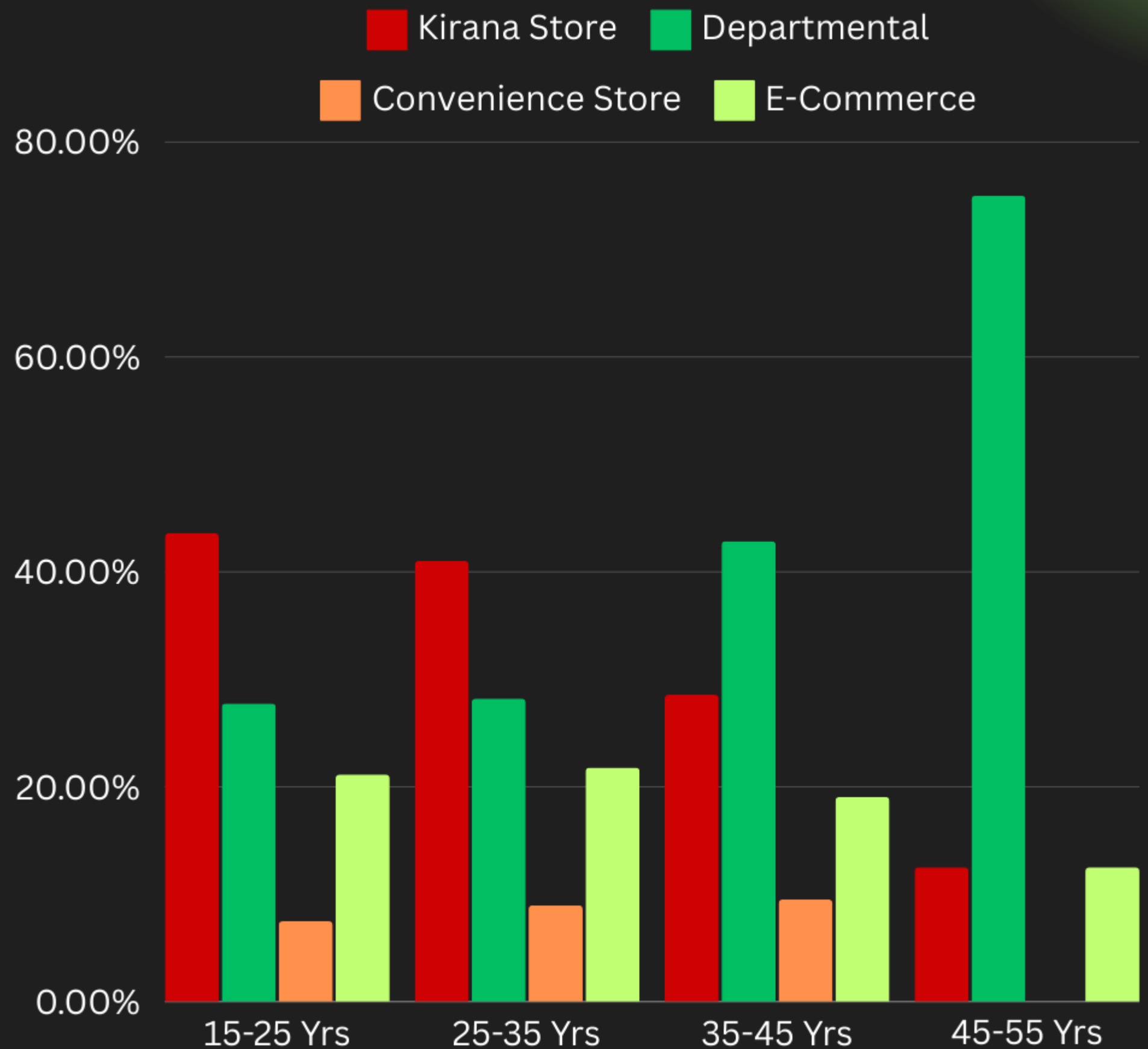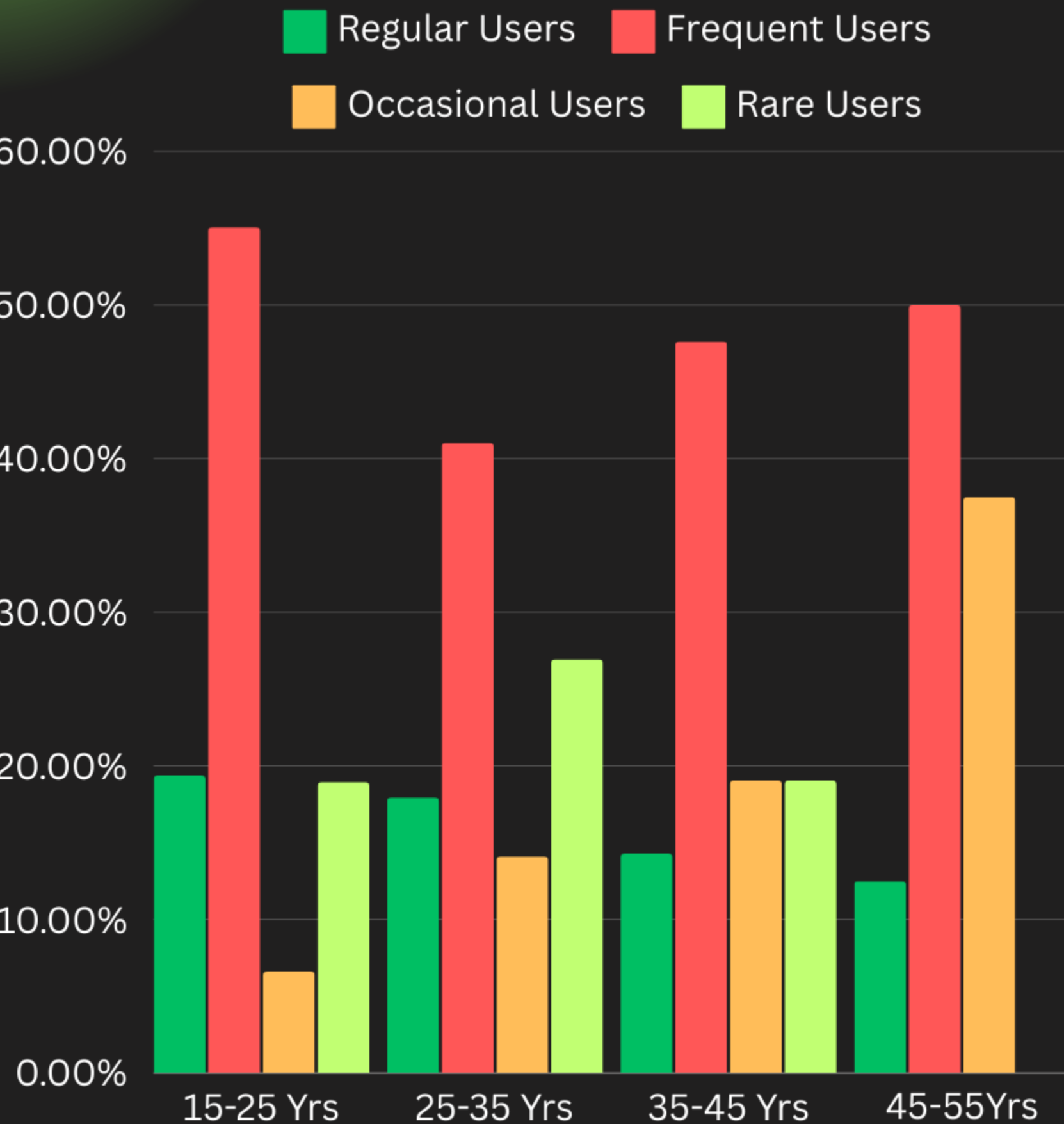45-55yr : 71.43%

55+yr : 50%

Location

Kolkata : 83.98%
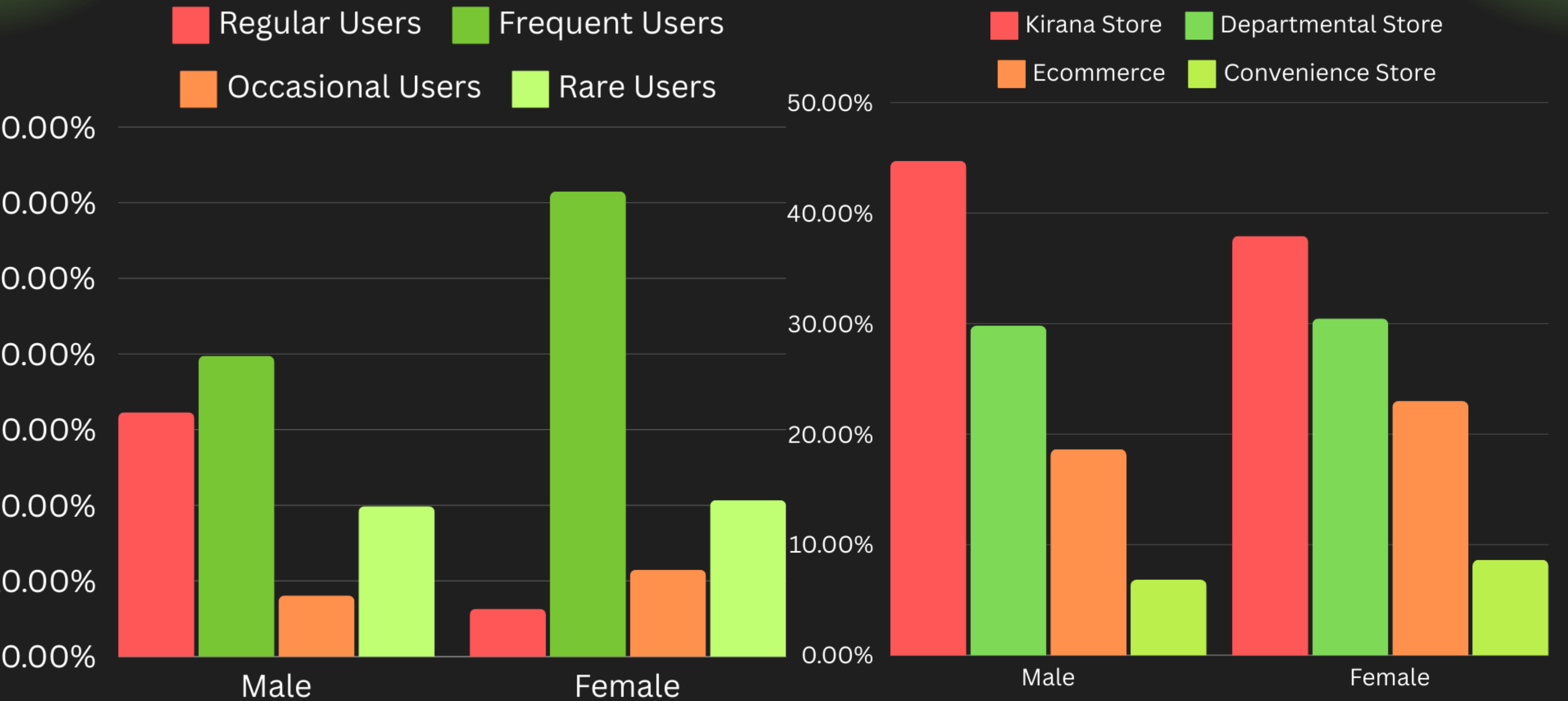
Rest of WB : 85.98%

Rest of India : 91.03%

Usage & Purchase Behavior Statistics

Usage Frequency For Entire Sample

(Bar chart)
- Regular Users: ~18%
- Frequent Users: ~51%
- Occasional Users: ~9.5%
- Rare Users: ~20.5%

Y-axis: 0.00% to 60.00%

Purchase Behavior For Entire Sample

(Bar chart)
- Departmental Store: ~30%
- Kirana Store: ~41%
- Convenience Store: ~8.5%
- E-Commerce Website: ~21.5%

Y-axis: 0.00% to 50.00%

Age Group Wise Usage & Purchase Behavior

Left chart legend: Regular Users, Frequent Users, Occasional Users, Rare Users

Left chart Y-axis: 0.00%, 10.00%, 20.00%, 30.00%, 40.00%, 50.00%, 60.00%

Left chart X-axis: 15-25 Yrs, 25-35 Yrs, 35-45 Yrs, 45-55Yrs

Right chart legend: Kirana Store, Departmental, Convenience Store, E-Commerce

Right chart Y-axis: 0.00%, 20.00%, 40.00%, 60.00%, 80.00%

Right chart X-axis: 15-25 Yrs, 25-35 Yrs, 35-45 Yrs, 45-55 Yrs

Gender Wise Usage & Purchase Behavior

Legend (left chart): Regular Users, Frequent Users, Occasional Users, Rare Users

Legend (right chart): Kirana Store, Departmental Store, Ecommerce, Convenience Store

LOCATION WISE USAGE & PURCHASE BEHAVIOR

Left chart legend: Regular Users, Frequent Users, Occasional Users, Rare Users

Right chart legend: Kirana, Departmental, Convenience, E-Commerce
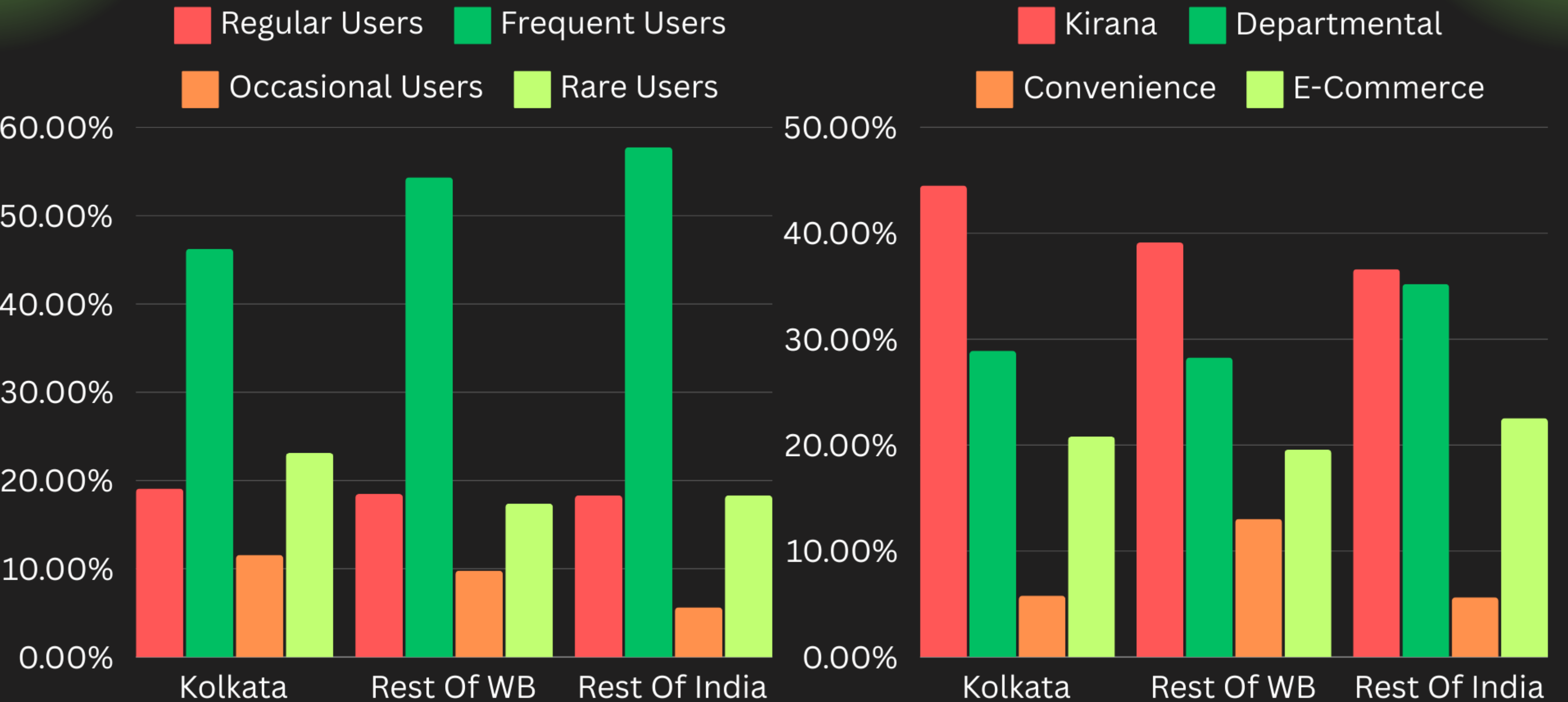
BRAND HEALTH

Dabur Amla

TOM - 8.33%

Total Awareness- 66.07%

0.54 | Trial- 35.71%

0.41 | Repeat-14.58%

0.59 | MOUB- 8.63%

Parachute

TOM - 25%

Total Awareness- 73%

0.79 | Trial- 57.40%

0.65 | Repeat-37.20%

0.84 | MOUB- 31.10%

Bajaj Almonds

TOM - 14.29%

Total Awareness- 72.92%

0.79 | Trial- 58.33%

0.51 | Repeat-29.46%

0.68 | MOUB- 19.94%
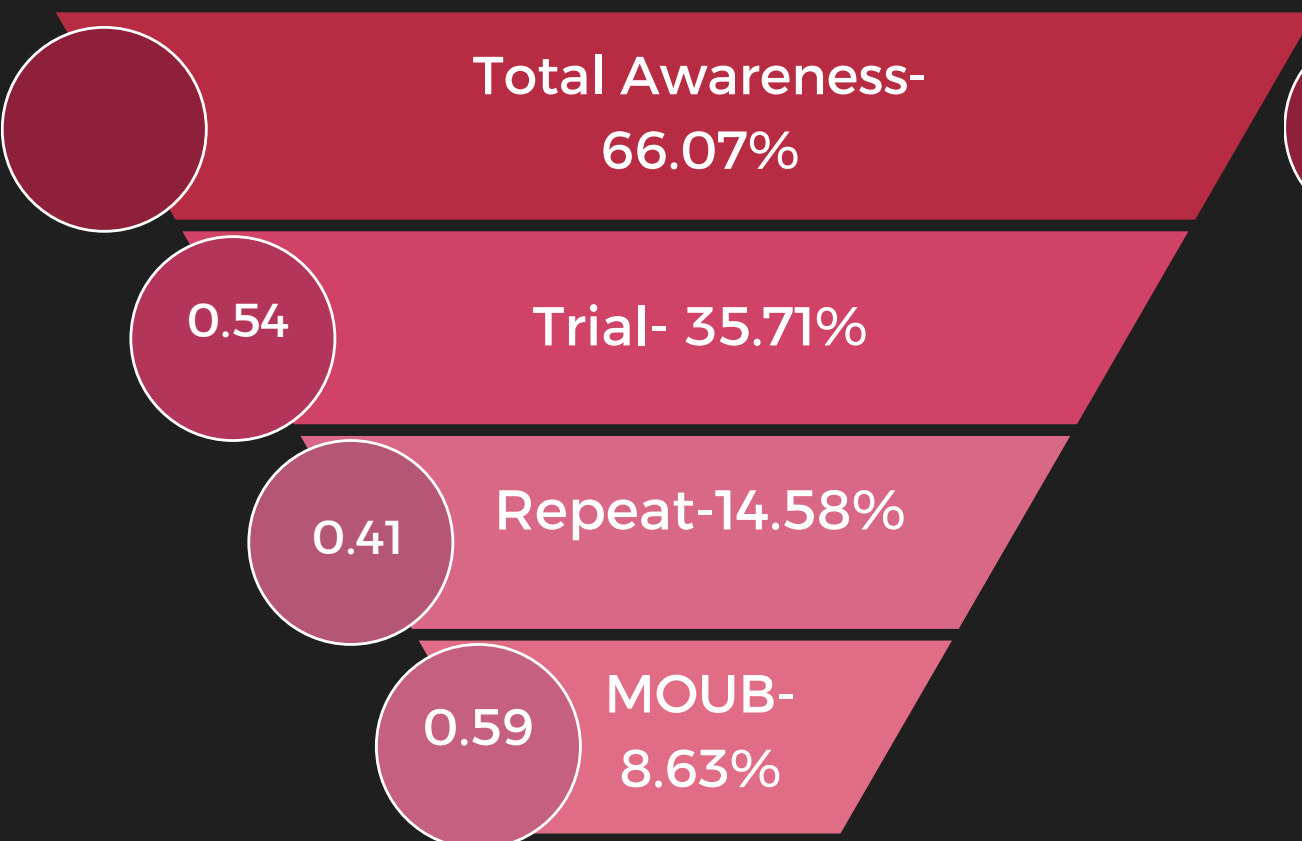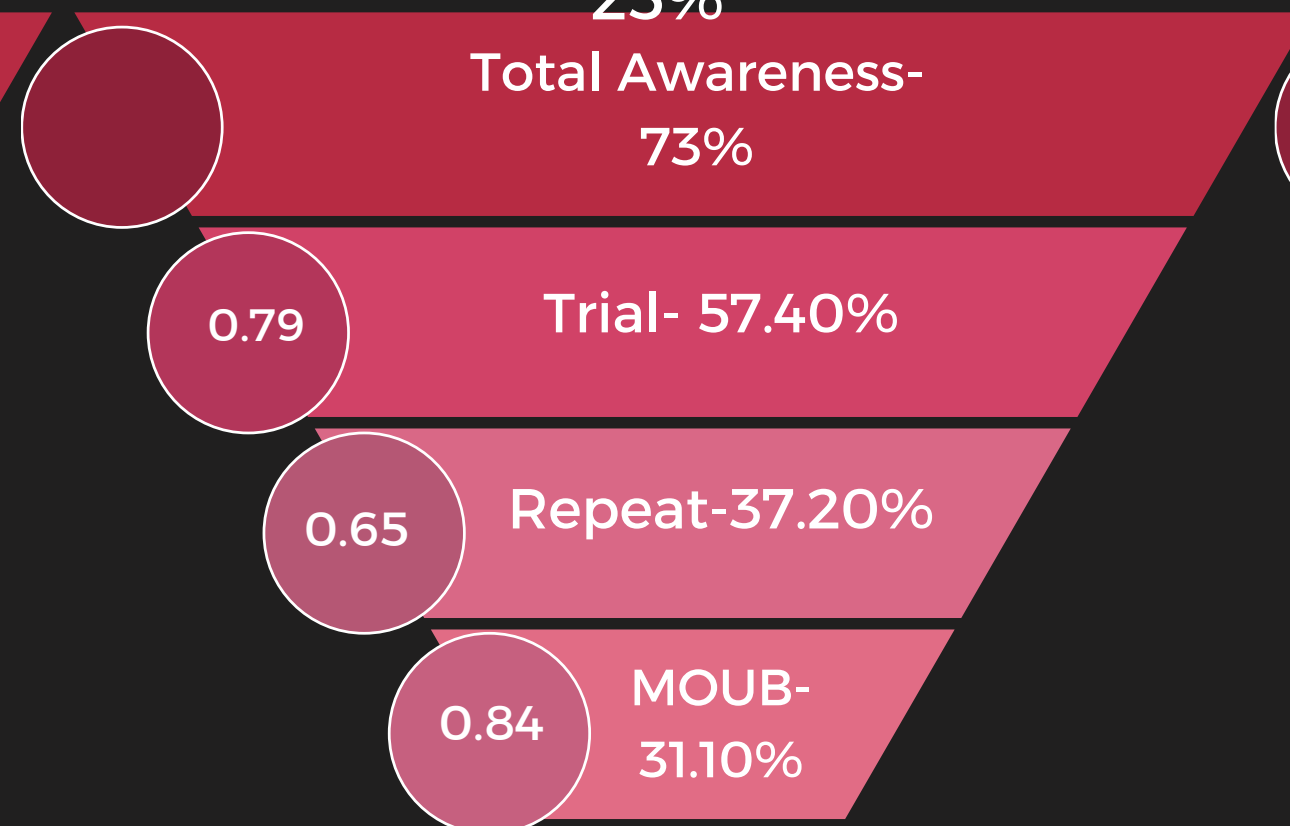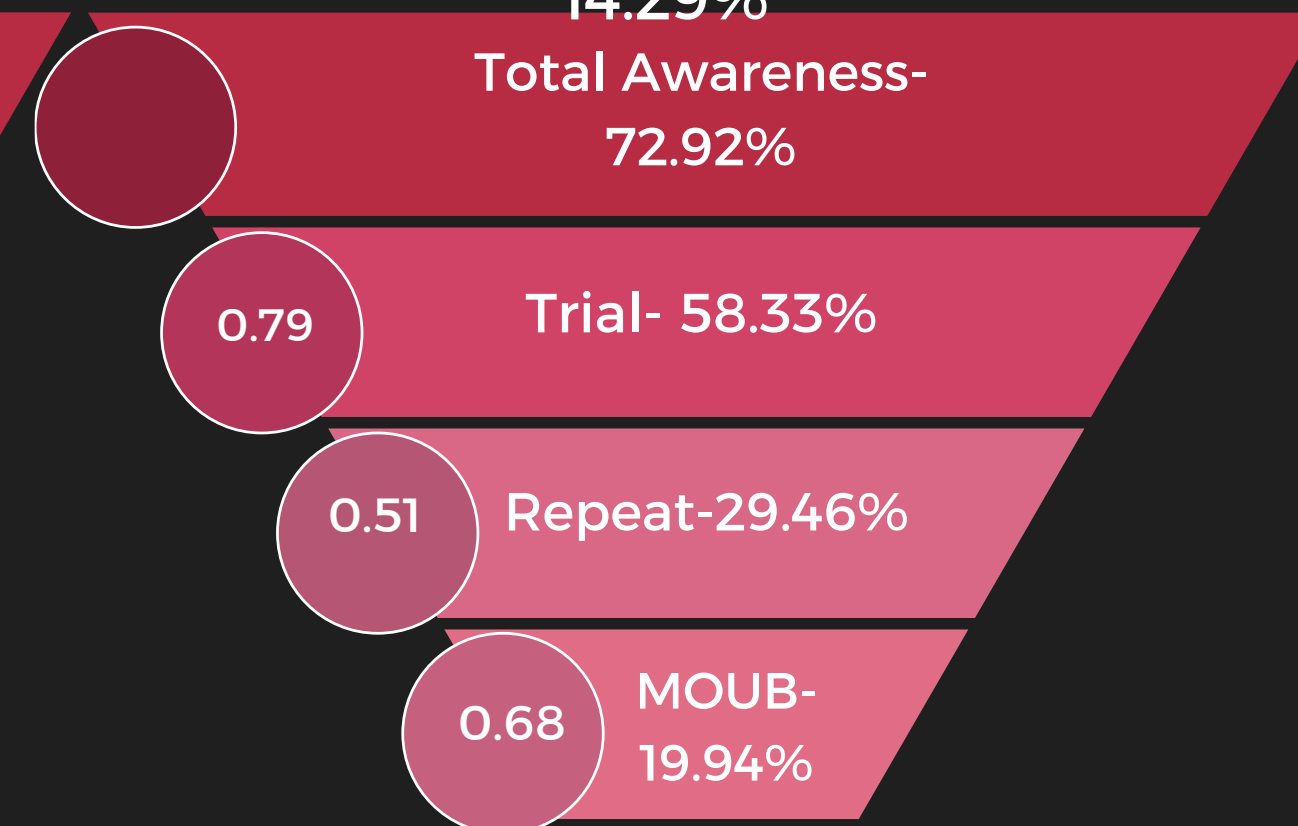
BRAND LOYALTY
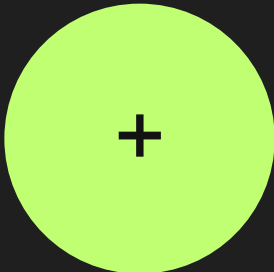
AVERAGE USER / CUSTOMER SATISFACTION SCORE IS 4.1

	Buy Different Brand	Buy From Different Shop	Wait Out	Can't Say
Parachute	-	-	+	+
Bajaj Almonds	(yellow)	-	(yellow)	++
Dabur Amla	+	++	-	--
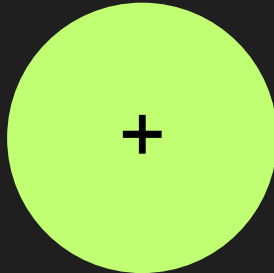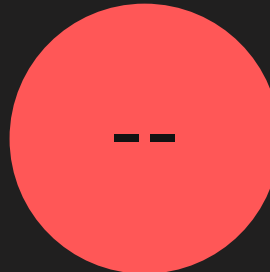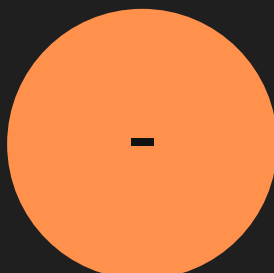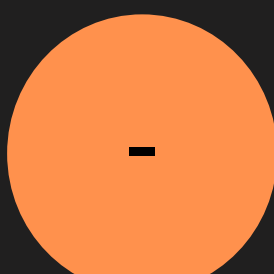
Reasons to switch :	Better Price	Better Quality	Better Availability	Better Packaging	Better Scent
	13.79%	62.07%	10.34%	6.90%	6.90%

- Most of the Dabur Amla customers are brand loyal and will buy from another shop if Dabur Amla is not available at the store they usually buy from

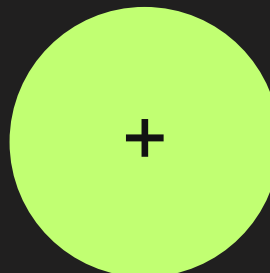- There are comparatively less people who will buy another brand if Dabur Amla is unavailable at the store they usually buy from

- The main reason to switch to a new brand is product quality

- There are few people who will wait for Dabur Amla to get restocked at the store they usually buy from and very few who are undecided

BRAND IMAGE ANALYSIS

INTENDED BRAND IMAGE: TRUSTED NATURAL HAIR OIL BRAND

	Dabur	Parachute	Bajaj
Affordability		+	
Natural	+	++	--
Trustworthy		-	+
Premiumness		-	++

- People perceive Dabur Amla Hair Oil to be natural due to its ingredients but Parachute is leading in this parameter

- Dabur is doing fairly well in terms of trustworthiness though Bajaj rates slightly higher in this parameter

- Dabur is doing slightly worse in terms of affordability and premiumness

BRAND POSITIONING

INTENDED BRAND POSITIONING: "ZYADA LAMBE, ZYADA MAZBOOT, ZYADA KHUBSOORAT BAAL"

	Dabu	Parachut	Baja
Strengthens Hair	+		
Gives Volumnous Hair	-		+
Makes Hair Silky & Shiny		++	--
Reduces Hair Fall		--	++
Stimulates Hair Growth			
Pleasant Scent			

- People perceive Dabur Amla Hair Oil strengthens their hair and is leading in this parameter

- People don't think Dabur Amla adds volume to their hair, while Bajaj Almonds is leading in this parameter

- Dabur Amla is doing average or slightly worse in all other parameters

Brand Metrics

Brand Share among age groups

Legend: Dabur, Parachute, Bajaj

Y-axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%
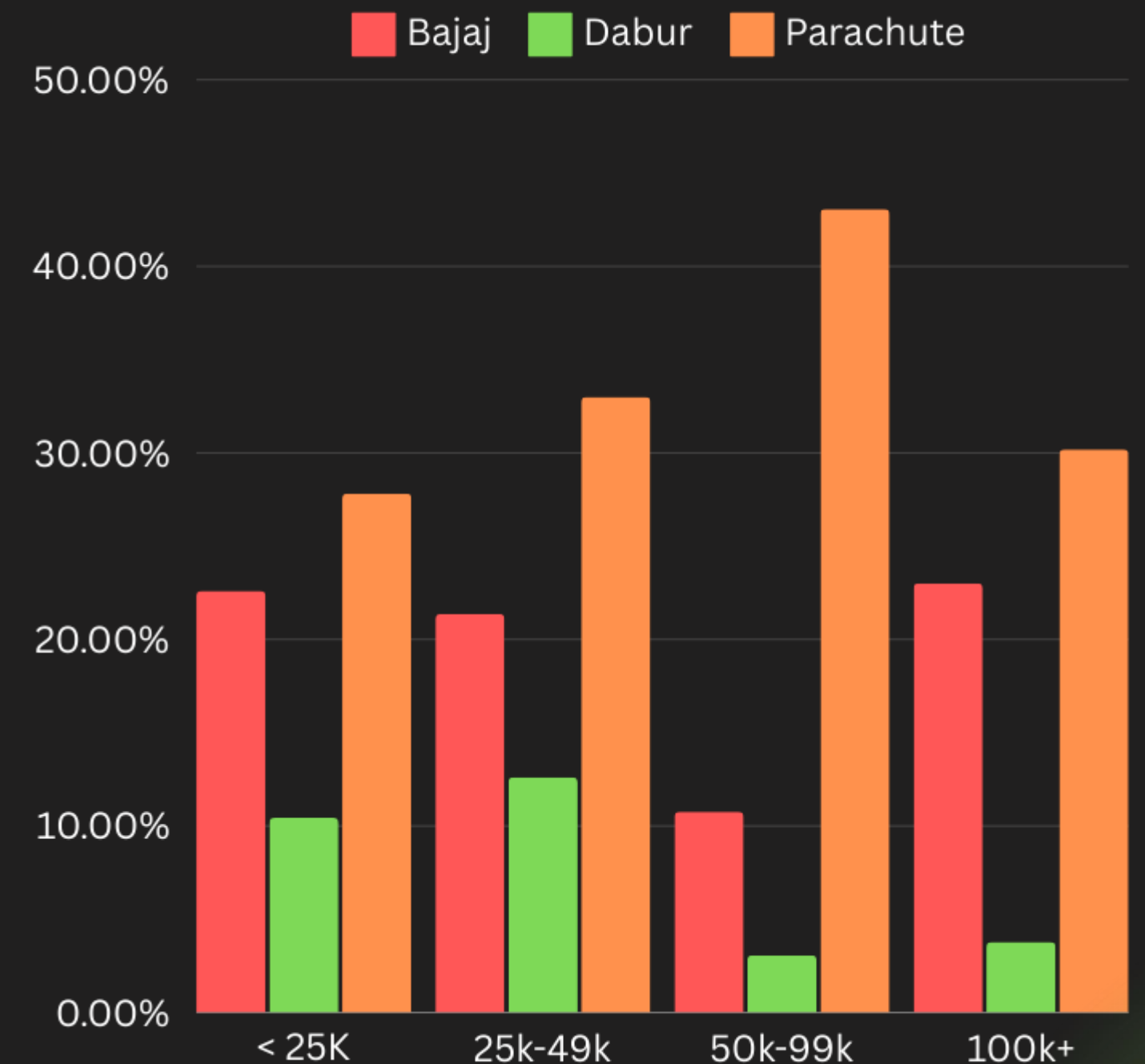X-axis: 15 to 25, 25+ to 35, 35+ to 45, 45+ to 55
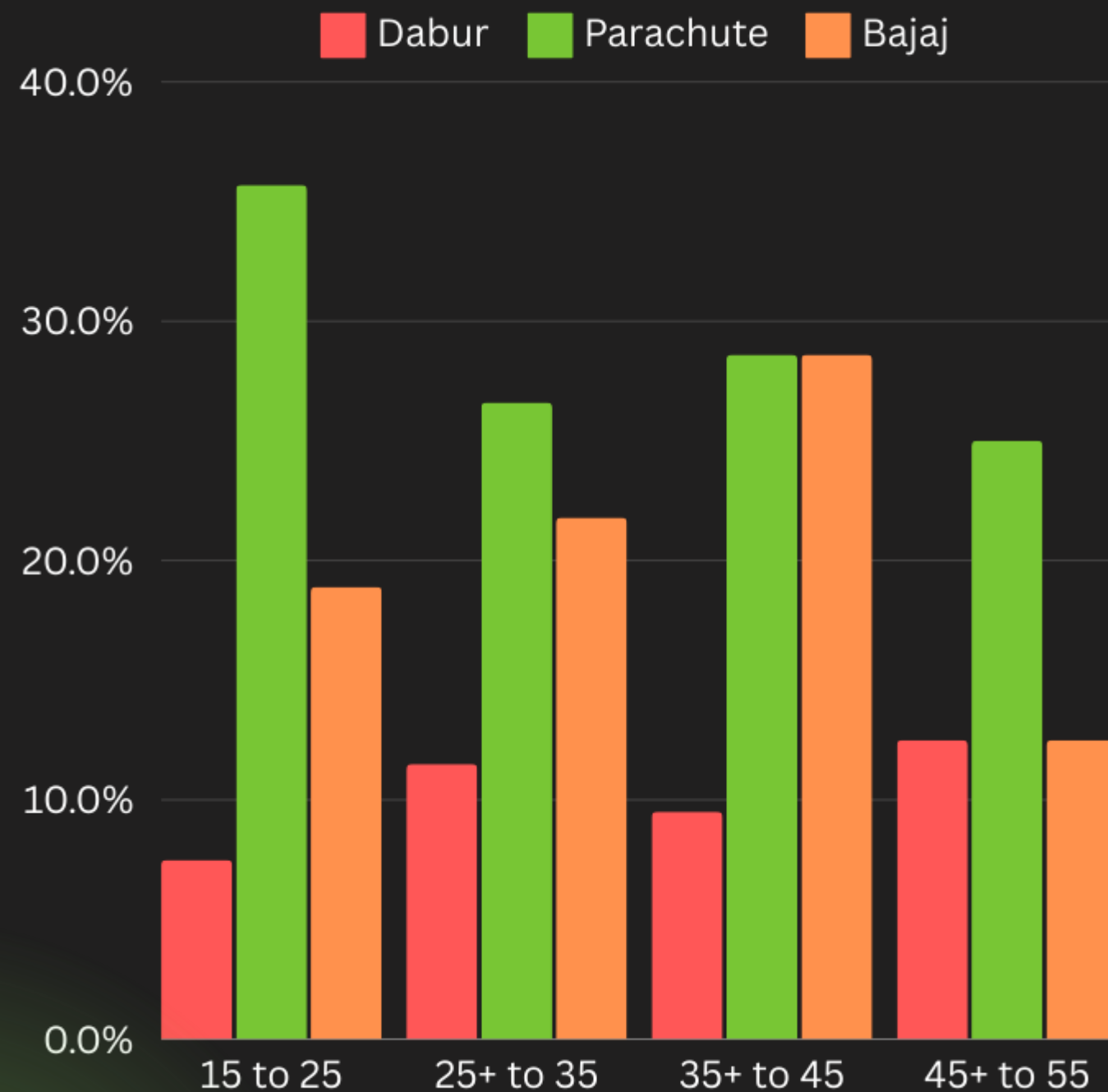
Dabur Amla has relatively more market share in the age groups of 25-35 years and 45-60 years as compared to 15-25 years which has more regular users in comparison to the other age groups.

Brand share among income groups

Legend: Bajaj, Dabur, Parachute

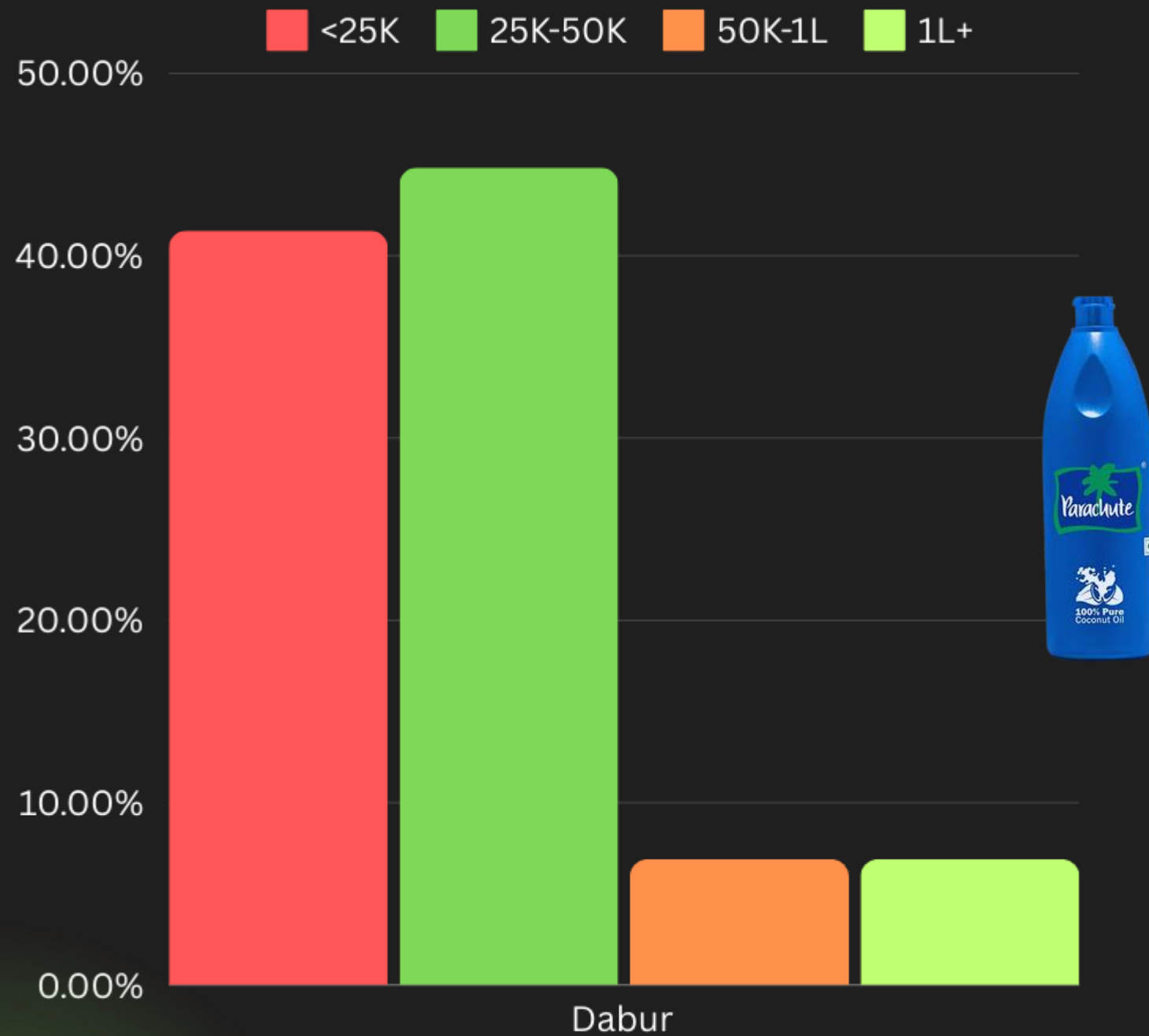Y-axis: 0.00%, 10.00%, 20.00%, 30.00%, 40.00%, 50.00%
X-axis: < 25K, 25k-49k, 50k-99k, 100k+

Dabur Amla's market share drastically drops among high income groups in comparison to thw low income groups. This can be linked with Dabur Amla being not perceived as a premium brand.
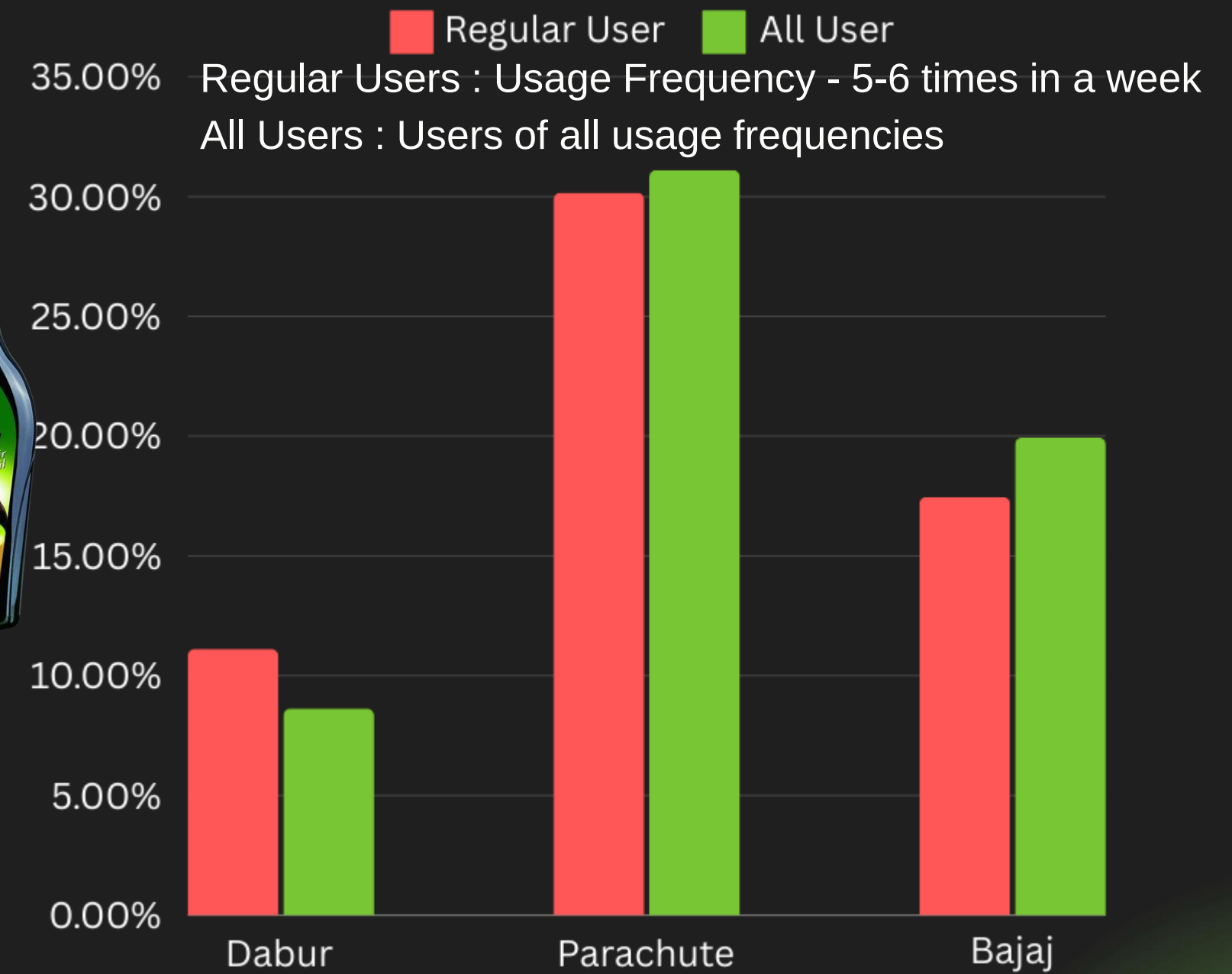
Contribution of different income groups to Dabur

Legend: <25K | 25K-50K | 50K-1L | 1L+

- <25K: ~41%
- 25K-50K: ~45%
- 50K-1L: ~7%
- 1L+: ~7%

(X-axis: Dabur)
(Y-axis: 0.00% to 50.00%)

Continuing from the last graph, the contribution to Dabur's market share is more than 85% by the low income groups.

Most Often Used Brand Regular Users vs. All Users

Legend: Regular User | All User

Regular Users : Usage Frequency - 5-6 times in a week
All Users : Users of all usage frequencies

Brand	Regular User	All User
Dabur	~11%	~8.5%
Parachute	~30%	~31%
Bajaj	~17%	~20%

(Y-axis: 0.00% to 35.00%)

Dabur's MOUB share amongst regular users is more than it's MOUB share amongst all users. It is vice versa for Bajaj Almonds and Parachute.

Contribution of diff. Locations to Dabur's MOUB
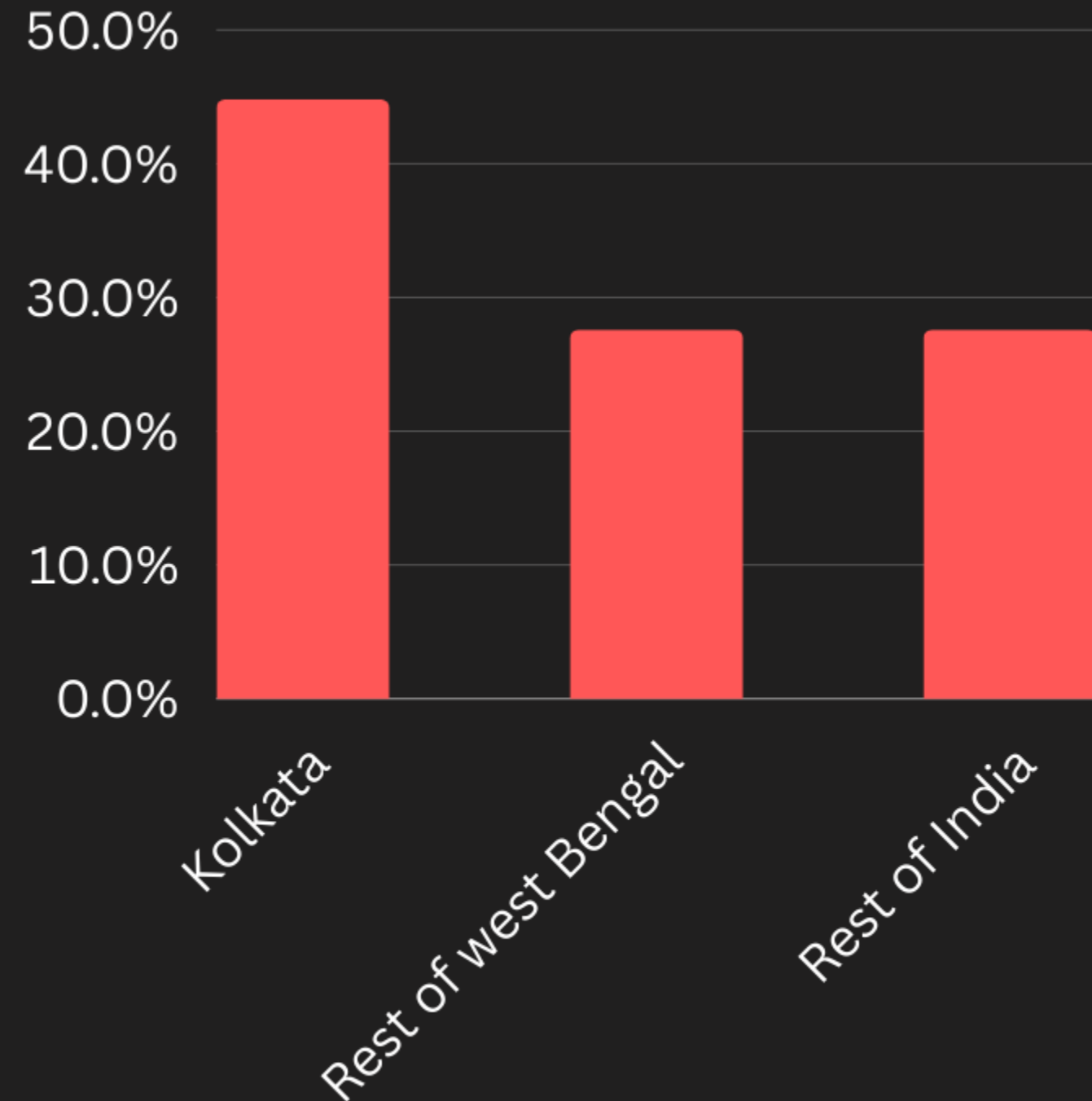
Maximum contribution to MOUB of dabur comes from Kolkata.

Contribution of diff. Age groups to Dabur's MOUB
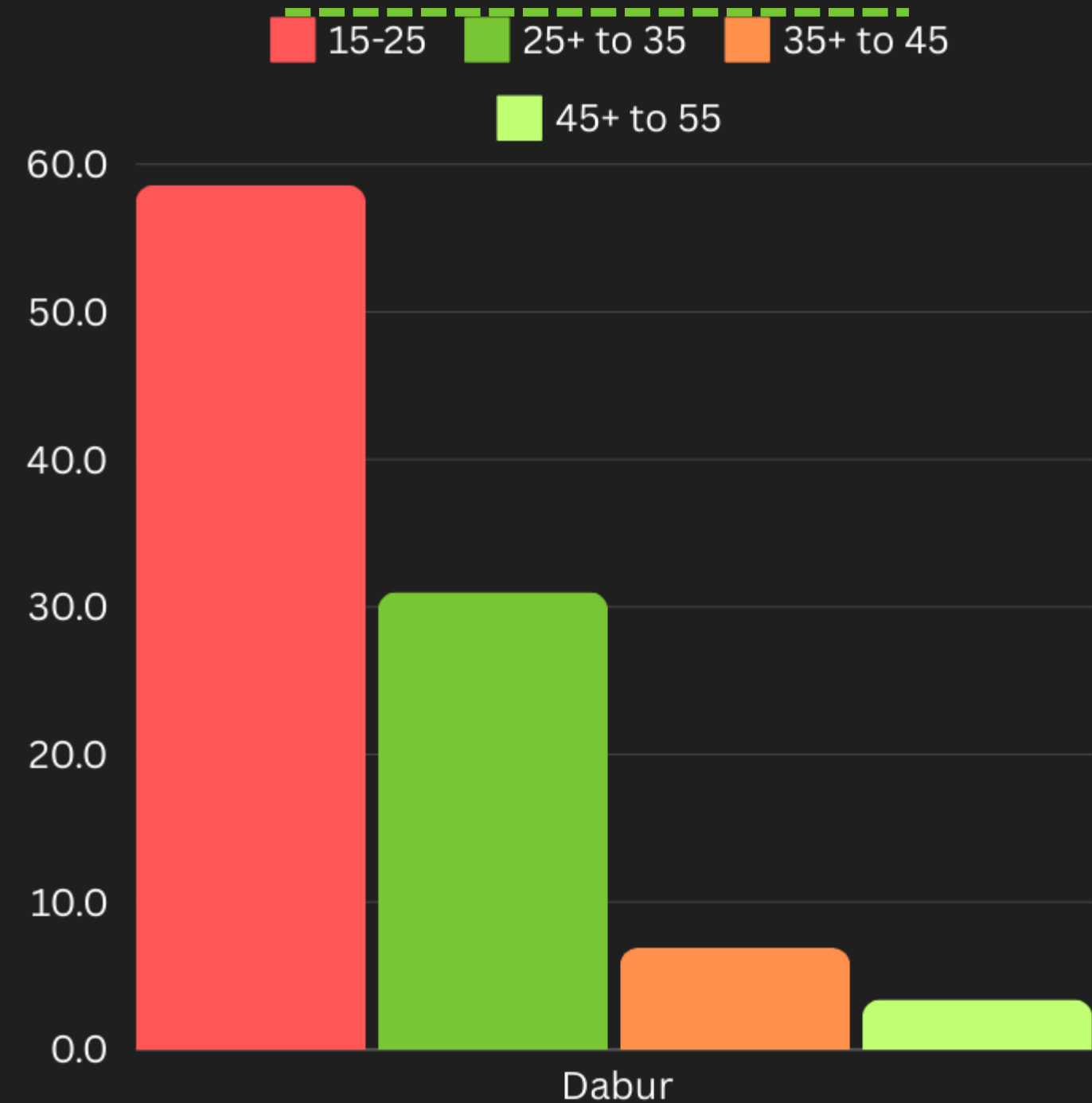
15-25 years age group contributes more than the other age groups combined in the MOUB of Dabur Amla. So there could difference in brand preference amongst age groups.

CHECKING WHETHER BRAND PREFERENCE DEPENDS ON AGE GROUP

Age	15-25	25+ to 35	35+ to 45 y	45+ to 55	Total
Dabur	17	9	2	1	29
Parachute	81	20	6	2	109
Bajaj	43	17	6	1	67
Total	141	46	14	4	205

Chi Square Test

- H0: There is no association between age and brand preference
- H1: There is signifiacnt association between age and brand preference
- The chi-square statistic is 4.2876 The p-value is 0.637823. The result is not significant at $p < 0.05$
- Result: We have to accept the null hypothesis

Conclusion : Brand preference does not depend on age.

CHECKING WHETHER BRAND PREFERENCE DEPENDS ON GENDER

Gender	Male	Female	Total
Dabur	14	15	29
Parachute	38	71	109
Bajaj	42	24	66
Total	94	110	204

Chi Square Test

- HO: There is no association between gender and brand preference
- H1: There is signifiacnt association between gender and brand preference
- The chi-square statistic is 13.7642
  The p-value is 0.001026. The result is significant at p < 0.05
- Result: We can't accept the null hypothesis. The alternate hypothesis stands

Conclusion: Brand preference depends on gender significantly. It is most obviuos for Parachute and Bajaj but no such difference can be observed for Dabur.

CONCLUSION

- Hair oil category incidence is quite high, even amongst the relevant sub groups
- Maximum users are under the frequent user (1-2 times a week) category and mostly buy from kirana stores followed by departmental stores
- While Dabur's total awareness is still comparable to the other brands but trials are drastically low and subsequently the conversion rate of trials to regular users is also very low compared to the other brands
- But the regular users of Dabur Amla are mostly brand loyal though product quality is the main customer painpoint
- The study further confirms the brand's intended image to be natural and brand positioning of strengthening hair
- Dabur's market share amongst the regular users is more compared to its market share amongst all users
- There is significant association among brand preference and gender though it can't be observed amongst regular users of Dabur

Here is the link to the questionnaire we used for our study and here is the data and workings.

Thank You

Stronger hair will always lead to a
Stronger spirit
and a **stronger you**