

The Future of Laundry Care: Capitalizing On Emerging Trends and Changing Preferences

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Abstracts

Introduction

The laundry care market in established economies is resistant to change and is characterized by some degree of inertia. However, consumers' preferences and product innovations are gradually evolving even in the most stable markets, with marked change occurring in emerging markets, as relative affluence increases and the approach to laundry care progresses.

Scope

Covers laundry care, with a thorough exploration of market value and volume figures at the category level

Detailed analysis on consumer attitudes towards, and perceived influence of, different product features and benefits impacting choice

In-depth action points offering practical strategies based on the trends and insights uncovered in the report

Covers five major geographic territories: North America, Europe, Asia Pacific, MENA and Latin America

Highlights

The sales of laundry detergents, as a proportion of overall laundry care products are lowest in Saudi Arabia (55.9%) and Japan (58.5%) and highest in Russia (84.7%) and India (84.5%).

In Sweden, conditioners account for less than 4% of the market value, but as much as 32.2% in Saudi Arabia; a significant variance. Where conditioner sales are relatively low, producers should attempt to increase sales or bundle the ingredients and price of conditioners into the price of complete multi-function detergents.

For Indian consumers, natural ingredients are indeed a high level concern (for 72.8% vs. 76.1% for ease of use). In India, the high prevalence of washing by hand makes natural ingredients more welcome for consumers due to their enhanced gentleness on the skin.

Reasons to Purchase

Develop better targeted products with detailed understanding of laundry care needs and preferences of consumers across 17 countries

Access data analysis from two waves of primary consumer research, and best practice examples of innovative and effectively marketed products

Improve your marketing with best-practice examples. Develop action plans using Datamonitor's recommendations as a catalyst for idea generation

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THE FUTURE DECODED

INTRODUCTION

Consumers' laundry product choices are influenced by a variety of inherent and product-external factors

TREND: The laundry care market shows slow value growth in mature national markets

Sales of detergents form the bulk of the laundry care market

Consumer spending on fabric conditioner varies widely

Stain removers are also an important section of the laundry care market

Key takeouts and implications: The value of the laundry market is likely either to remain stable or experience slight growth or decline

TREND: The volume of the laundry care market is likely to decline in the short term

Consumers can still be encouraged to use fabric conditioners more extensively

Key takeouts and implications: volume gains in emerging economies will be offset by apparent losses in established markets

INSIGHT: Inherent product attributes matter to consumers, but are not everything

Product effectiveness is taken as a given by consumers

Men's view of product performance differs from that of women

Natural ingredients have been a key area of product development but elicit little consumer response

Gender differences are slight in relation to natural ingredients

Consumers value the fragrance or scent of laundry products

Women greatly appreciate the fragrance profile of their preferred laundry products

Time saving products appeal to consumers but are aligned with one of the least important core attributes

Women value time-saving laundry products more than men

Among inherent product features, multi-function convenience is moderately important as a purchase driver

Multi-functionality in laundry products appeals to men

Consumers want ease of use as a given

Ease of use is a major consideration for women in laundry product choice

Key takeouts and implications: inherent product attributes enjoy varying levels of importance for consumers.

INSIGHT: Attributes of the 'extended product' have widely varying effects on purchase

Price has a high importance for consumers for many reasons

Price divides opinion between men and women in differing ways

Consumers are not inclined to consider ethics when buying laundry products

The differing importance of ethics to men and women consumers is slight

Consumers buy ethical and eco-friendly household and laundry products (marginally) more frequently than those with natural ingredients

Consumers state that brand image has little influence in their shopping choices

Brand image is both one of the least consequential and most gender-neutral purchase drivers

Key takeouts and implications: the concept of the extended product has the greatest effect on consumers' purchases of laundry products

INSIGHT: Storage is a low level purchase driver for consumers

Ease of storage is at present a moderate concern for consumers

Men are relatively appreciative of easy storage

Key takeouts and implications: product storage is a minor consideration for consumers

INSIGHT: Consumers feel that inertia has little effect on their laundry care purchases

Inertia varies among consumers of different countries

Women are greater brand adherents than men

Inertia at the household level is thought to have only a minor impact

Men buy the brands they think other members of their households want

Key takeouts and implications: the laundry care market is affected by inertia, but consumers believe they are open to change

INSIGHT: Consumers feel that many marketing techniques do not affect their behavior

Consumers do not recognize word-of-mouth as an important influence on their laundry care purchases

Men and women attribute similar importance to word-of-mouth recommendations

Free product samples have a moderate effect on consumer behavior

Women appreciate free samples of laundry care products

The importance of promotional offers to consumers varies widely by national market

Consumers view promotional offers differently according to retail norms in their home market

Key takeouts and implications: marketing tactics are not regarded as influential but their necessity cannot be denied

ACTION POINTS

- ACTION: Target the rich variety of clothing colors, shades and finishes
- ACTION: Cater for the variety of garment fabrics available to consumers
- ACTION: Formulate effective products to clean exercise clothing
- ACTION: Tailor detergents to specific washing tasks
- ACTION: Address the polarizing demographic trends in many countries
- ACTION: Make skin sensitivity a core theme of product development
- ACTION: Address the clothes drying needs of consumers
- ACTION: Cater to the money-saving preferences of recession-inspired consumers
- ACTION: Use packaging to create stand-out shelf presence
- ACTION: Consider the possibilities beyond traditional laundry detergents

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