Major Project Report

on

Indian Home Care Products: A Study of Changing Consumer Behaviour During Covid-19

Submitted By:

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CERTIFICATE

This is to certify that the work titled **'Indian Home Care Products: A Study of Changing Consumer Behaviour During Covid-19'** as part of the final year Major Research Project submitted by Poonam in the 4th Semester of MBA, Delhi School of Management, Delhi Technological University during January-May 2021 is her original work and I have not submitted it anywhere else.

The project is submitted to Delhi School of Management, Delhi Technological University in partialfulfillment of the requirement for the reward of the degree of Master of Business Administration.

Prof. G.C. Maheshwari

DECLARATION

I hereby declare that the work titled **'Indian Home Care Products: A Study of Changing Consumer Behaviour During Covid-19'** as part of the final year Major Research Project submitted by me in the 4^{th} Semester of MBA, Delhi School of Management, Delhi Technological University, during January-May 2021 under the counselling of Prof. G. C. Maheshwari is my original work and I haven't submitted it anywhere else.

The report was only made and written by me in my own words not taken elsewhere. Anything from this report that is not my original work is properly indicated / referenced / received.

Poonam

(Roll No 2K19/DMBA/065)

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I would also like to thank my faculty for giving me this opportunity of work.

Last but not the least I thank the almighty for enlightening me with his blessings.

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EXECUTIVE SUMMERY

In the research we are studying about the various market, consumer and behavioral changes because of pandemic and the covid-19 infection.

In the first section we are taking a brief introduction of the topic. We will see the home & hygiene, how consumers are more aware of hygiene and staying at home, taking care of home hygienes. Look into covid-19 and its effect on FMCG industry.

We will have a good look into the consumer behaviours during the pendamic, impact of covid-19 virus on home care, personal care, laundry care and surface care.

Also we have collected the prepared the questionnaire and collected the data which helps us under the consumer need changes in a better way.

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ABOUT THE INSTITUTE

Delhi Technological University (DTU), it is used to known as Delhi College of Engineering (DCE). DTU is state level University and also one of its kind. It is a Delhi based University, used to be a Diploma College or we can say a Polytechnic which established in 1941. Institute starts providing degree in 1952 when it if affiliated with DU(Delhi University). The institute comes under Delhi Government since 1963.University Status was given to the college back in year 2009 and from then onwards the name changed to DTU(Delhi Technological University) instead of DCE.

INTRODUCTION

i. Home & Hygiene

Home care is omnipresent and fulfils a basic need of humans that falls between health, hygiene, quality of life as well as self-esteem and the wider concern of family.

Domestic cleaning is a way of eliminating germs and microorganisms from the living environment. Cleaning is required to control contamination of the environment and to reduce the spread of microorganisms.

Cleaning also has aesthetic consequences and a clean atmosphere facilitates more hygienic acts. The home environment serves as a reservoir for large number of microorganisms, particularly in kitchen and bathrooms (Beumer and Kusumaningrum, 2003).Dirty cloths used for cleaning further augment microbial spread through surfaces (Kagan et al., 2002).

Consumers, increasingly, are evolving their attitude towards home care and home hygiene to keep the family environment clean and safe. They are progressively getting mindful of the significance of cleanliness and are seeking convenience because of their busy lifestyles and are also pursuing value for money products that are cost effective.

Moreover, consumers are gradually going beyond basic cleaning and adopting sanitising & disinfecting widely. This further indicates the shift of consumer habits from cleaning as an obligation to cleaning as a duty(Euromonitor International, 2019).

Laundry is a significant zone of study as it is one of the most pervasive household chores and has an enormous impact in the ordinary co-ordinations of running a house and building up self-personality (Pakula&Stamminger, 2010; Pink, 2005). It is a multifaceted procedure that includes considerably more than just tidiness. Social and technical facets of clothing (what should be washed, when does it should be washed, what devices will be utilized, by whom) make it an intricate household system (Shove 2003).

When washing machines were first presented, manufacturers keenly re-imagined 'tidiness' as 'whiteness' as opposed to the removal of germs to change the credence that boiling was required. However, the requirement for washing garments has moved once more, with consumers washing all the more every now and again for newness of garments as opposed to cleanliness, invoking significant connections to the process of laundering (Pink, 2005; Shove, 2003). Thus, it can be said that garments are washed only out of habit. With regards to laundry, it is imperative to focus on the job of culture on the elements of consumption and conduct. Utilization and behaviours are strongly connected to fortunate or unfortunate past encounters and the influence of friends and family.

Hence, the objective of cleaning is to eliminate germs from the living environment. Cleaning and sanitizing forestalls the infestations of pest by decreasing deposits and residues that can pull in and bolster the growth of bees, pests etc.

In sum, the study aims to explore the changing consumer behaviour towards Indian home care products, specifically Laundry Care and Surface Care due to Covid-19.

ii. Covid-19

The COVID-19 pandemic found its origin in the SARS-CoV-2 virus. The disease was first reported in Wuhan, China in December 2019.The disease gradually spread to the other parts of the world from China due to no travelling restrictions in place then. This further worsened the situation for other countries of the world (McKibbin& Fernando, 2020). A massive outbreak of the virus in Europe, America and Asia Pacific led the World Health Organization to declare it a pandemic on 11th March, 2020.

India's first Covid-19 case was reported in January 2020 in Kerala in a student who had returned from china (World Health Organization, 2020). After the pandemic, the impacts of the disease beyond mortality and morbidity have become evident in a closely linked and integrated world. The restrictions put in place and the resulting slowdown of economic activities shrank the global economy by up to one percent in 2020 according to the United Nations.

iii.FMCG Industry in India

Fast Moving Consumer Goods(FMCG) makes the fourth largest sector in the Indian economy. Rising disposable incomes in both rural and urban areas coupled with young Indian population and sophisticated distribution channels are some of the factors for growing demand of FMCG. The leading segment of FMCG sector in India is Household & Personal Care with approximately 50 per cent of the contribution. Additionally, with the growth in modern retail, the organised FMCG sector is expected to witness substantial growth. The increasing number of online retail stores and opportunities of penetration of branded products explains the high growth potential of the sector in India (India Brand Equity Foundation, 2020).

Home Care in India has been continually witnessing stable growth for the past few years. It is majorly because of increase in hygiene standards and the availability of information about products' attributes and benefits. India is presently seeing trends of premiumisation and penetration in home care. While premiumisation includes introducing products with superior features & formulations and is aimed at mid to high income urban consumers, target market for product penetration is low income consumers in smaller cities and rural areas.

Air Care, Home Care Disinfectants, Multipurpose cleaners, detergents and fabric softeners are spearheading the growth of this sector. With the rising levels of awareness, consumers demand products with superior cleaning properties. Busy lifestyles of consumers reckon for convenient and flexible products. Fragrance is increasingly being correlated to perceptual cleanliness, thus healthy lifestyle habits, progressing attitudes towards home care and cleanliness is leading to hygiene focused product development.

Further, with the rise in digital maturity and developing infrastructure, India is experiencing an increasing internet penetration which is leading to increase in the number of online transactions (Euromonitor International, 2019).

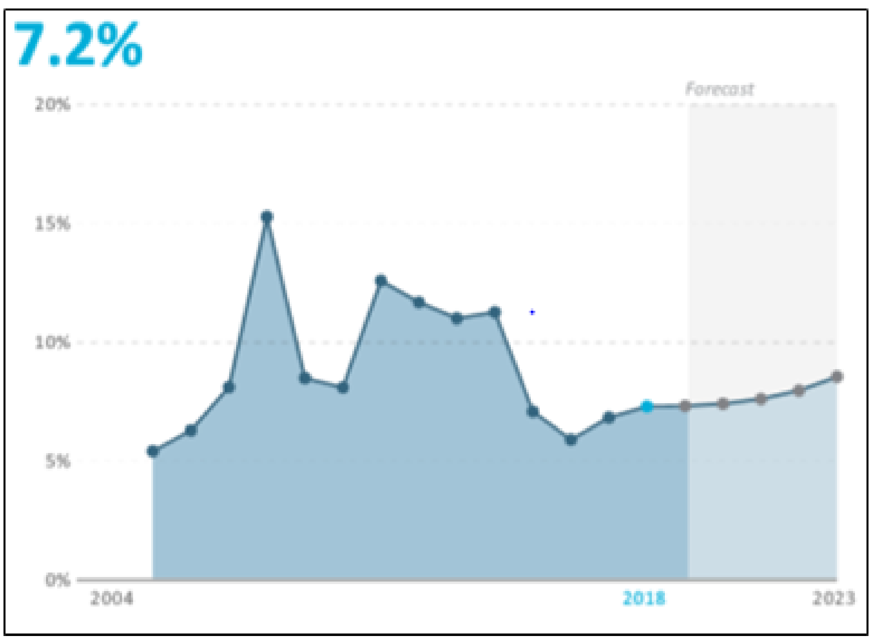

Figure 1: Sales Performance of Home Care (% YOY Retail Value RSP Growth 2004-2023)

Source: Euromonitor International

Table: Sales of Home Care in India by Category

Categories	Sales of Home Care (INR Million)		% Value Growth
	2017	**2018**	**2013-18 CAGR**
Air Care	7,929.6	9,101	15.7
Dishwashing	30,209.7	32,849	9.3
Home Insecticides	46,789.1	50,570.3	8.6
Laundry Care	2,27,953.8	2,45,631.9	9.2
Polishes	4,601.7	4,880.1	7.2
Surface Care	17,571.8	19,835.8	13.9
Toilet Care	9,047.6	9,954.4	11.6

LITERATURE REVIEW

i.Consumer Shopping Behaviour during Pandemics

“Consumer behaviour is the study of how individuals, groups and organisations select, buy, use and dispose of goods, services, ideas, or experiences to satisfy their needs and wants”- Kotler & Keller, 2006.

The buying process in the situation of crisis can be altered from a limited decision-making buying behaviour to become the comprehensive decision-making buying behaviour. The buying behaviour of consumers before the crisis is notall encompassing and information gathering but after the crisis the process becomes complex.

Rise in levels of unemployment, inflation and freezing or dwindling wages severely affects the purchasing power of the consumers. Thus, bad economic situations severely impact the consumers (P. Amalia& P. Ionut, 2009).

The buying and consumption patterns of people change in times of economic crisis. The consumer reacts to the prevailing situation by changing his consumption patterns. The primary reason for this is the change in the levels of his perception of risks which in turn affects consumers psychologically.

People become more money minded and don't want to spend on premium products. They switch to only necessities and have a more rational view on promotions(Nistorescu&Puiu, 2009).

Risk and perception of risk influence behavioural changes in the consumer buying in a crisis. Risk attitude represents consumer's perception of the risk content and the degree of likeness towards the content of the risk (P. Amalia& P. Ionut, 2009).

During economic depression, threats of consumers related to their financial security or sources of income motivate them to save more and spend less. However, the trend reverses as economic conditions improve. Therefore, the rate of saving is influenced by economic and psychological factors. People who are harmed directly in such situations by way of decreasing wages or loss of jobs don't save much because of the need to spend on necessities (Katona, 1974).

Research suggests that consumer behaviour during crisis is inclined towards simplicity. It is considered one of the dominant trends as downturns are stressful which leads to people's desire for unpretentiousness. Consumers, in an attempt to avoid risk, seek simple and valuable offers. Another tendency, although much less frequently observed otherwise is Propensity to Save. Consumers are reluctant to consume too much at the time of crisis which also impacts their tendency to jump from one offer to another post crisis.

The purchases of consumers post the recession is expected to be less versions of the originals (Flatters &Willmott, 2009).Crisis situation followed by propensity to save also results in decreased loyalty of consumers towards a brand. Fear of well-being drives consumers' interest towards benefits of buying at lower costs, reducing purchase risk and receiving hard purchase benefits (Simon, 2009).

In the wake of an economic recession, consumers keep purchasing the goods at significant prices, and in effect require and need strong reasons to make a purchase, regardless of the market segment to which the commodity belongs. They agree to pay an extravagant cost only when they are looking for absolute quality of goods and efficacy of the product. They tend to wait for a price drop or discounts if they are loyal to certain brands (Egol et al., 2010).

Such economic downturns also impact the confidence of the consumers in brands. Consumers in-turn trust the opinion of their peers more than the messages conveyed by the brands through commercials (Voinea&Filip, 2011).

Covid-19 pandemic will influence consumers' behaviour in three ways:

- Category Expansion – Product category with germ killing and antiseptic benefits will be impacted
- Product Upgrade – Traditional disinfectant will become multi-functional with added properties such as gentle & purifying
- New Usage Occasion – Products for specific and not general needs will be demanded owing to lifestyle changes

Customers globally are taking fewer trips, buying larger packs, and shifting online

Source: Oliver Wyman Customer survey (N=500); April 2-5, 2020

ii.Impact of Covid-19 on Home Care

Economic repercussions with respect to financial security arising out of lockdown are expected to drive significant behavioural shifts. Crisis buying habits may become the new normal behaviour and online players might become the gatekeepers of the FMCG ecosystem. This can also lead to increased emphasis on and adoption of Direct-To-Consumer Strategy by FMCG companies (World Advertising Research Center, 2020).

Home Care which is a facet of the chemical industry has tried to position itself around claims such as scent and gentleness. However, due to Covid-19, such claims as well as the trend of premiumisation are subdued without product efficacy (Euromonitor International, 2020).

Consumers globally are quick to orient their shopping behaviour with the situation. With coronavirus, the sentiment around hygiene and sanitation has augmented the relevance of products aimed at health protection. Consumers now believe that product with attributes such as killing germs, providing immunity and overall health promotion are more important than other claims of naturalness, sustainability, eminence and the brand name (The Nielsen Company, 2020).

The pertinence of such claims echoes a noteworthy shift in consumers' attitudes and shopping behaviour. The shift is not independent as the benefit of having a germ-free environment with the benefit of naturalness in the process has the strongest significance.

Categories such as floor cleaners and toilet cleaners will keep up to observe increased in usage post-COVID-19 mainly because of habit persistence. This reflects a notable shift in consumers' attitudes and shopping behaviour and has resulted in a slight shift in the standard of essentials and discretionary purchases (Euromonitor International, 2020).

OBJECTIVES OF THE STUDY

1. This study investigates the impact of Covid-19 on consumer behaviour and habits on Laundry Care and Surface Care segments of Home Care.

2. It focuses to identify the impact of crisis on factors such as product efficacy, brand loyalty, stockpiling and product up-gradation.

3. It also aims to study consumer habits with respect to choice of channel for the aforementioned product categories.

METHODOLOGY

This study is done with descriptive research design and for primary data collection, a structured online survey questionnaire was used as it is convenient and allows collection of data in a short period of time (Ozaki & Sevastyanova, 2011). Convenience sampling was deployed because of its ease of access (Sekaran& Bougie,2013).

Additionally, the questionnaire was designed in two parts; the first part was designed to collect the respondents' demographic information and the second part had questions related to all the independent and dependent variables of the study.

Other minor details and data for the study was reformed from various sources such as academic journals, research papers, magazines, books and internet sources.

Descriptive statistics has been used for analysing the population tally of the respondents. The data was examined using frequency and percentages on Microsoft Excel software program. To achieve the objectives of the study regarding understanding the change in behaviour and habits of the consumers of Home Care due to Covid-19, factor analysis has been used with SPSS (Statistical Package for the Social Sciences).

Factor Analysis is used to simplify the data by reducing the independent variables of a study to recognize a compact factors which can elucidate majority of the discrepancy detected in the immense set of discrepancy (Tucker & MacCallum,1993).

It was carried out to ensure the unidimensionality of each construct and Cronbach's alpha was obtained so the authenticity of the test can be measured.

Analysis and Findings|

Variables	Frequency	Percentage
Gender		
Male	84	58.0
Female	61	42.0
Age Group		
18-25 years	71	49.0
26-35 years	36	25.0
36-50 years	27	19.0
51 years & above	11	8.0

Profile		
Business (Self-Employed)	26	18.0
Employed	51	35.0
Home maker	25	17.0
Student	43	30.0

Household Size		
Single	10	7.0
2 persons	4	3.0
3 persons	26	18.0
4 persons	62	43.0
More than 4	43	30.0

Frequency of Purchase		
Laundry Care		
Never	0	0.0
Bi-weekly	11	7.59
Weekly	24	16.55
Bi-monthly	27	18.62
Monthly	83	57.24

Surface Care		
Never	0	0.0
Bi-weekly	11	7.59
Weekly	25	17.24
Bi-monthly	37	25.52
Monthly	72	49.66

The research was conducted with 145 respondents with majority of them being women. Women constitute 58% of the total respondents as cleaning is usually associated with women in Indian households.

Approximately 50% of the respondents are from the age group 18-25 years and 25% from the age group 26-35 years. Further, 35% of the respondents represent salaried class and further 30% are students. Studying the family size of the respondents has an important impact as it makes us understand the purchases made for laundry care and surface care products and how frequently. 43% of the respondents have family size of 4 persons and 30% have family size greater than 4 persons.

Majority of the respondents of both surface care and laundry care purchase products once a month followed by bi-monthly purchase and weekly purchase. A very small percentage of respondents purchase these products on a bi-weekly basis. Monthly purchase of products is common for students and respondents who are employed and have a family size of four or more than four.

Laundry Care

As much as 39% of respondents pay via cash while buying these products followed by 21% of respondents who use digital wallets for making the payment and approximately

18% of respondents pay via plastic money only. Only 20% of the respondents have stated using two or all three of the payment gateways. Further, digital payments are common for people who are employed.

Additionally, 46% of the respondents stated that they hold quality of goods as the most important factor while making a purchase decision followed by price, product availability and fragrance.

Surface Care

As much as 40% of respondents pay via cash while buying these products followed by 21% of respondents who use digital wallets for making the payment and approximately 19% of respondents pay via plastic money only. Only 18% of the respondents have stated using two or all three of the payment gateways. Further, digital payments are common for people who are employed.

Additionally, 43% of the respondents stated that they hold quality of goods as the most important factor while making a purchase decision followed by price, product availability and fragrance.

Thus, it can be concluded that respondents from across profiles prefer to use hard cash for payment of products of these categories. Digital wallets and plastic money are the most preferred payment methods used by respondents who are salaried.

CONCLUSION

People will undoubtedly develop a more stringent and attentive approach to cleaning now as compared to pre Covid-19 period. Personal well-being, mental well-being and physical health have become paramount for consumers. This has largely uplifted the home care segment, especially laundry care and surface care.

This has not only significantly increased the consumption of household cleaners but has also aggravated demand for proven and powerful products that have strong germ killing properties and can give protection against spread of infectious diseases.

The study has revealed that all the five constructs tested have an influence on the consumer behaviour and their habit formation. Due to coronavirus, people are more concerned about the efficacy of products. The respondents have also shown inclination towards product upgradation.

Although, respondents have been neutral towards brand loyalty, nevertheless the study has made it evident that forthcoming strategies of the firms in home care business should be focused on all five of the aforementioned constructs.

The study further gives enough evidence regarding permanent change in habit of the consumers and also about their increased importance to quality and assurance claims of the laundry care and surface care products.

Various studies suggest that consumers will be cautious about their purchasing decisions even after the end of the pandemic. The loss of financial security as a result of increasing unemployment is expected to shift consumer spending from discretionary to rational for a while even after the end of the pandemic.

Consumers are expected to be thriftier in spending as they will re-evaluate their needs and priorities. Loss of investment in businesses will further attenuate this situation by bleak prospects of income growth which will in-turn impact the consumer spending confidence severely.

Brands must strategize keeping in mind long term implications and not short term consequences arising out of Covid-19. With demand for increased product efficacy, products with long lasting cleaning actions and that make cleaning process less time consuming are expected to appeal to a wider consumer base.

It is also suggested that lower disposable income will induce stress and anxiety among people. Household brands have another opportunity here to invoke serenity and calmness. Inculcation of aromatherapy in cleaning products can help alleviate stress and worry in consumers, thereby helping them to maintain good personal and mental well-being.

The study has revealed a positive outlook of consumers towards online channel for purchase of products. This represents greater opportunity for brands to capitalize on the growing online community by optimizing their online channels. This would also help them in reaching out to consumers who are new to online shopping especially for home care products segment.

This would require brands to increase digital consumer engagement, cashless payments and direct to consumer services. In order to better serve their consumers, brands should look for collaborative partnerships with other companies to adapt to the changing habits of consumers.

This will not only ensure last mile delivery of products and service but is also less capital intensive. Further, as more and more consumers switch to online channels for purchase of laundry care and surface care products, brands should not only optimize packaging of these products but also launch concentrated solutions so as to aid safe shipping.

A Nielsen study suggests value of a product as the top ranked reason for consumers switching from one brand to another. This is closely followed by quality of the product. However, the recent shift in perception of consumers owing to Covid-19, quality assurances may replace value derived from a purchase, especially in the chosen product categories.

This is because of increased emphasis on protection against disease causing germs and bacteria. This may further imply low price sensitivity for these product categories. Thus, brands should capitalizeon this opportunity by bringing modifications in their way of communication to consumers.

Quality claims and not price or value should be used as a lever in communication. Furthermore, brands should adopt a more transparent approach by highlighting measures that have been adopted for safe transfer of products. This would enhance loyalty and also increase consumer engagement with the product and brand (Leggett, 2020).

The study has further revealed that consumers are not likely to stick to stockpiling habits as observed in the beginning of lockdown. Respondents have shown neutral behaviour towards persistence of its habit. However, it is expected that the consumer basket size will increase as a result of fewer shopping trips in an attempt to avoid crowded places with multiple touch points.

Thus, it can be concluded that Covid-19 will change consumer habits forever. Home care products are most likely to see increased consumption.

Consumers will definitely seek more assurances that the goods are risk-free and highly effective in terms of safety standards, especially with regard to cleaning products. In short term, consumers would demand safety information regarding not only the products but also supply chain. This would also help in building loyalty amongst consumers.

However, in the long term, depending upon the impact the pandemic may have on the behaviour and habits of consumers, it may lead to consumers rethinking about how they evaluate their purchases and the key factors that drive their purchase decision.

Brands would have to be quick and agile in their decision making and would also have to constantly bring better offerings in the market for the consumers. Similarly, timely innovations in e-commerce are likely to accelerate demand for home care products online.

It might also lead to willingness of consumers to adopt sustainable and eco-friendly home care products. Therefore, brands would have to deeply monitor the consumer sentiment regarding home care products in order to accurately frame their short term and long term strategies.

ANNEXURE A

Questionnaire

1. Name

2. Gender

3. Age

    a) 18-25 years

    b) 26-35 years

    c) 36-50 years

    d) 51 years & Above

4. Occupation

    a) Home maker

    b) Business/Self-Employed

    c) Employed

    d) Student

5. Family Size

a) Single

b) 2 persons

c) 3 persons

d) 4 persons

e) More than 4 persons

6. How often do you buy products of these categories?

a) Never

b) Bi-Weekly

c) Weekly

d) Bi-Monthly

e) Monthly

7. How do you pay when you buy these products?

a) In Cash

b) Using Digital Wallets (Paytm, PhonePe, etc.)

c) Through Debit or Credit Card

8. Which factors do you consider while buying products of these categories?

   a) Price
   b) Product Availability
   c) Quality
   d) Packaging
   e) Fragrance
   f) Discounts & Offers
   g) Peer group
   h) Celebrity Endorsements

9. Do you keep yourself updated about the Covid-19 pandemic?

   a) Yes
   b) No

10. Please indicate the response to the following statements for Laundry Care as well as Surface Care as:

   a) Strongly Disagree

b) Disagree

c) Neutral

d) Agree

e) Strongly agree

i. I will pay more importance to product’s properties & benefits

ii. I will prefer to buy products with high quality

iii. Claims such as fragrance will not influence my buying decision

iv. I will prefer products that prevent disease causing germs

v. I will prefer stocking more quantity of products than before

vi. I will buy products on need basis

vii. I will prefer safe but effective chemicals in my products

viii. I will prefer products that are safe for my family

ix. I will prefer products that are safe for human skin

x. I will switch to online channels for buying the products because of convenience

xi. I will switch to online channels to prevent human contact

xii. I will switch to online channels as it is better for collecting productinformation (new trends, comparison, etc)

xiii. I intend to keep purchasing the same brand as before Covid

xiv. I am willing to pay a higher price to purchase the same product

xv. I would not buy any other brand if the brand I usually buy is available

ANNEXURE B

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