**Objectives:-**

* To conduct structured market analysis to assess & evaluate the unmet needs of the tier 2 operators.

**Methodology**- Virtual + F2F IDI’s

**LOI-** ~100 Mins

**Timelines- 2 weeks.**

**Area & Sample coverage:-**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **1. Tier 2 Hotels** | **2. Tier 2 Laundromats** | | | **3. Tier 2 Restaurants** |  |
| **Centres** | **Hospitality** | **B2C Launderettes** | **B2B Launderettes** | **Mixed B2C & B2B Launderettes** | **Restaurants** | **Total** |
| **Mumbai** | 3 | 2 | 2 | 2 | 3 | **12** |
| **Delhi** | 3 | 2 | 2 | 2 | 3 | **12** |
| **Bangalore** | 3 | 2 | 2 | 2 | 3 | **12** |
| **Goa** | 3 | 2 | 2 | 2 | 3 | **12** |
| **Total** | **12** | **8** | **8** | **8** | **12** | **48** |

**Target Group:-- Total 3 segments:-**

1. **Tier 2 Hotels:**

* Head of Housekeeping or Head of Laundry, Key Decision maker of laundry powder, Understanding of product usage, etc.
* 2–3-star hotels (having minimum 15 rooms)
* Must have inhouse laundry for the hotel linen (as well as for the guest clothes)
* Standalone hotels (first preference) / Not more than 10 outlets

1. **Tier 2 Laundromats:**

* Owner, manager, person leading the laundry operation, Key Decision maker of laundry powder, Understanding of product usage, etc.
* B2C: only washing for consumers.
* B2B: only washing for businesses (small to medium) as health care clinics, independent restaurants, tier 2 hotels.
* Mix: This is for both à B2B & B2C
* Exclude laundromats with contract with Diversey or Ecolab and/or wash for big operators as big chains or airlines.
* Laundromats that use proxy chemicals to be excluded; mix their own.
* Standalone hotels (first preference) / Not more than 10 outlets

1. **Tier 2 Restaurants:**

* Owner, manager, head of cleaning staff, Key Decision maker of laundry powder, Understanding of product usage, etc.
* Seating areas and toilets: at least 15 tables
* They use multi-purpose powder or are open to use it.
* Some have inhouse laundry; if they do not, they should all at least buy laundry powder for other purpose anyhow.