

KANTAR IMRB



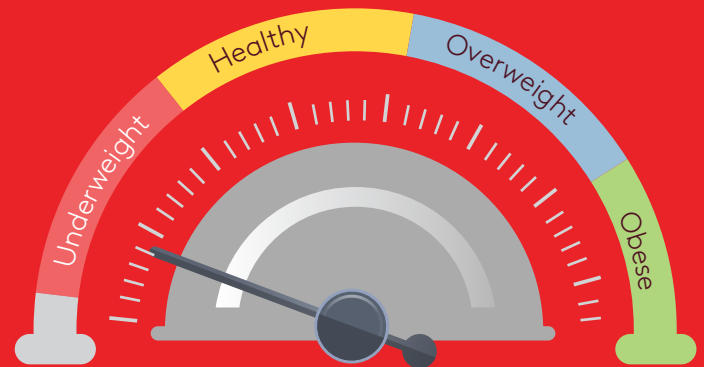
Underweight CONSUMER-
THE FORGOTTEN PROBLEM

Underweight Consumer – The Forgotten Problem

A quick search on google with the keywords underweight or thin throws back pages and pages of links on obesity, weight reduction and stay slim techniques!!

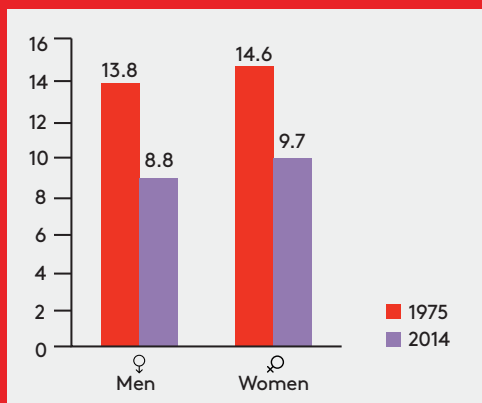
Has the global obsession with size zero and skinny jeans inched out the concerns of those at the opposite spectrum of the weighing scale?

While it is true that obesity has increased at an alarming rate with the ratio more than doubling since 1975, a look at the opposite spectrum of the weighing scale reveals some startling facts

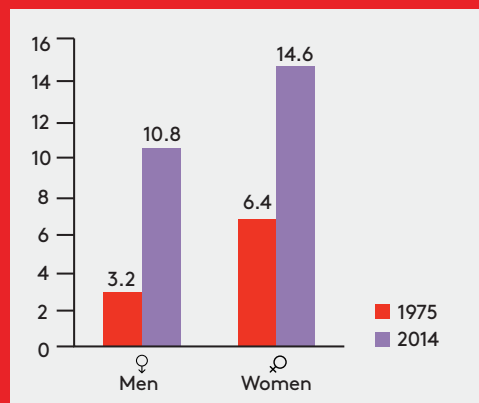


The ratio of underweight people in the world declined at a slower rate than obesity grew, presenting a double whammy at both ends of the weighing scale. The global focus on the obesity epidemic has largely overshadowed how underweight persists in some countries. More than one-quarter of severely obese men and nearly one-fifth of severely obese women in the world live in the United States alone, while nearly a quarter of people in South Asia are underweight.

% Underweight



% Obese



Source: Study published in The Lancet Medical Journal



Mapping India on the Weighing Scale

While obesity experienced a surge in India from 1.2 million in 1975 to 29.8 million in 2014, pegging it as the third highest nations in terms of obese and overweight population, it paradoxically retained the number one position in underweight population housing 40% of the global underweight population

All over the world, the obese population might have overtaken the underweight, but in India, the number of underweight people at 200 million clearly tips the weighing scale balance towards the lighter side

With underweight being equated to malnutrition and poverty and overweight to rising affluence and sedentary lifestyle, it would seem to be a problem relegated to the less affluent and hinterlands of rural India



Underweight Urban India - No Light Matter

Too much to eat or too little to eat seems to be the problem faced in urban India. The prevalence of unhealthy weight (underweight or overweight) among the Indian population aged 54 and younger was 38% in urban areas. While it houses half of the national overweight burden, it also accounts for a quarter of the national underweight burden. Is this then an urban poor phenomenon? A closer look at the consuming class (SEC ABC, 15-55 years) in urban India follows.

Close to a third of SEC ABC urban India is underweight as compared to 17% of those overweight. This accounts for a demographic potential of 50 million consumers that cannot be taken lightly.

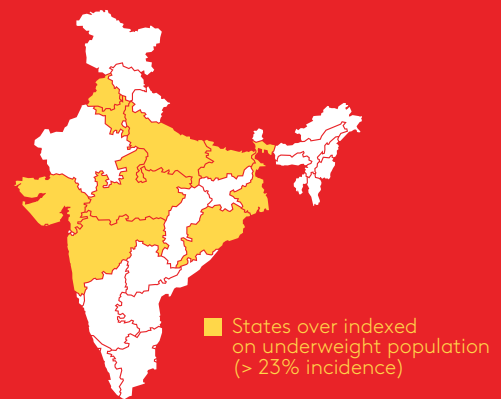
Fifty Million Underweights Unravelling

I. Finding Them

Over 60% of the underweight population in urban India is concentrated in the nine states of Punjab, Haryana, UP, Bihar/Jharkhand, Orissa, MP, Maharashtra and Gujarat

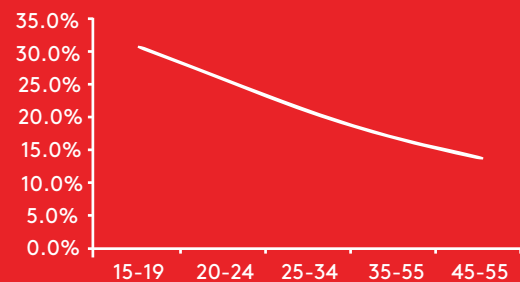
The South zone has the lowest incidence of underweight population at 17%

Low BMI is less of a metro and more of a lower town class phenomena, under indexed in 40 lakh + (83) and over indexed in the less than 10 lakh pop strata (108)



II. Identifying Them

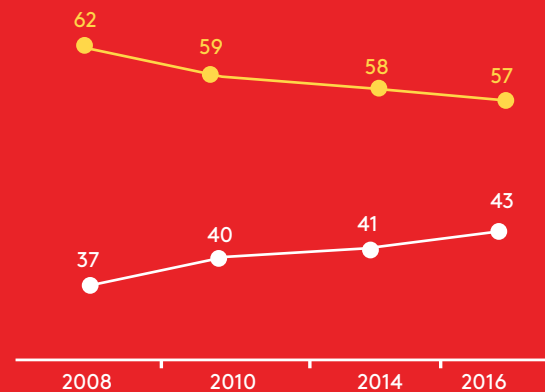
The incidence of the underweight issue is higher among females as compared to males. More than half of the underweight population in urban India comprises of women They are heavily over indexed among the younger population; close to 70% are below the age of 34 with over 40% within the age band of 15-24 years (140). Ageing results in a fall in basic metabolic rate, leading to an increase in BMI. The incidence of underweight population declines with rising age The underweights are more likely to be from the lower SEC, close to 40% of them are from SEC C (105). However, in terms of spending power they are at par with the average urbanite, those with MHI above Rs.15, 000 indexed at 99



III. Knowing Them

How different are the needs of those negotiating diminishing waistlines from those battling the bulges?

1) Being Underweight – A matter of choice or chance? A large chunk of the urban underweight consuming class (two third) is inherently underweight. However, a sizeable chunk (over two fifth) consciously choose to remain so While the real underweight issue seems to be on a slow decline, this segment of conscious weight watchers is on a steady rise









Inherently Underweight vs Consciously Underweight

Gender	Equally split between the genders (50:50)	More females than males(53:47)
SEC	More middle class	More upper class
	SEC A - 26%	SEC A - 29%
	SEC B - 35%	SEC B - 32%
	SEC C - 39%	SEC C - 39%
Age	More college goers	More out of college youth
	15-24 years - 43%	15-24 years - 40%
	25-34 years - 25%	25-34 years - 28%
	35-55 years - 32%	35-55 years - 32%
Education	Lower educated	Higher educated
	High school or less - 51%	High school or less - 46%
	College and above - 49%	College and above - 54%
Zone	More from the West	More from the North
	North-27%	North - 33%
	South-23%	South-24%
	East-13%	East-12%
	West - 37%	West-31%

It follows that the behavior and needs of these two segments present distinct opportunities and challenges for marketers

The Consciously Underweight – Looking fit over Feeling fit

The Inherently Underweight – Feeling fit over Looking fit

Compared to the Inherent Underweights	Compared to the Consciously Underweights
 <p>Food habits- More likely to diet (125) and cut down on fat (120) and sugar (116). More likely to buy into low-fat items like margarine (123)</p>	 <p>Food habits - Less likely to diet (80) and more likely to consume rich food like butter (108) and ghee (105). More likely to use dietary supplements like energy drinks (188) and protein powder (199)</p>
 <p>Fitness - More likely to pay for fitness gadgets and devices. The percentage of those who have downloaded paid apps like Nike Running are over indexed (126)</p>	 <p>Fitness - Higher proportion of those enrolled in health clubs (128) and inclined towards activities like weight training and nutrition counselling (114)</p>
 <p>Looks - Heavy users of personal care and cosmetics. Over indexed on make-up (116), perfumes (114) and fairness creams (104)</p>	 <p>Looks – Basic care category usage like body lotion, face wash, sunscreen at similar levels</p>



2) Do we need a Minus size in a Free size market?

"Madame, Free size hai! ", the friendly chant from the local shopkeeper at the neighbourhood store is a definitive endorsement that one size fits all. Mass market clothes still cater to this sentiment especially in the lower pop strata which houses most of India's underweight population. The underweight consumers weigh around 9 kgs lower than the average consumer in urban India. Close to a fifth are 5, 7" or taller (158)

Size does matter since this segment is no less fashion conscious. Over 60% feel it is important to be well dressed and the preference for ready-made brand of clothing is at par with the general population

The shopping behavior of the underweight segment reveals that they are exploring multiple avenues to circumvent the size availability problem and obtain a well-fitting wardrobe

Buying material for tailoring - Higher propensity to buy material for clothes as compared to the average urbanite (120) across traditional and western wear

Online shopping - While online shopping is under-indexed among this segment due to security concerns (95), when it comes shopping online for clothes and shoes it is at par with the average population. Websites like fashionandyou; yebhi and zovi are over- indexed on underweights, while sites like jabong, amazon and flipkart are under indexed

3) Is being thin a recipe for good health?

With well-established linkages between obesity and chronic lifestyle diseases like diabetes, high blood pressure, heart diseases, it would seem so. This is not entirely true, while underweight people are relatively less likely to be afflicted with chronic diseases; they are more prone to common ailments like flu/fever (116), allergy (115), and headaches (106), as compared to the average urbanite

This segment is also more likely to immediately seek medical intervention at the onset of common ailments (115) as compared to the average urbanite. Compared to the obese segment, they are significantly more disposed to availing periodic health check-ups (105)

Only 15% of the underweight consumers hold a Health Insurance policy, while close to 80% are keen to evaluate policy options in the near future.

4) What matters more – the size of the portion or the size of the company?

A recent research published in the Journal of Consumer Research states that people's choices of food portions are influenced by the body make of those around them and the choices they make

As the underweight consumers are from the younger age band, they are more likely to hang out in groups and be influenced by their peer eating habits. When eating fast food like pizza, they more likely to eat out with friends as compared to the obese (154) and less likely to order in. Eating with groups also increases the possibility of sharing from a common order as opposed to consuming whole portions by oneself

While targeting the underweight consumers, social influences matter. Marketers need to first understand the structure of the social network they live in and direct marketing activities that impact group behavior because You are not just what you eat but also who you eat with

Data Sources:

Kantar IMRB's TGI

Published reports from The Lancet Medical Journal, The Journal of Consumer Research, National Family and Health Survey, Indian Human Development Survey

Have a question or want to know more? Contact us!
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Weighty Matters

- Urban India accounts for a quarter of the underweight population in the country
- There are 50 million underweight consumers in the major urban consuming class (15-55 years, SEC ABC)
- Underweight is not an urban poor phenomenon, spending potential almost at par with average urban
- Two third of underweight consumers actively seek weight gain measures
- Small and long apparel sizes – a lacuna especially in smaller towns
- Online module the low hanging fruit – high acceptance, limited choices
- Health plans and packages tailored to address common ailments have a higher likelihood of buy-in
- Providing social proof of visible efficacy can amplify the marketing efforts in this segment