

## Personal Appearance in 2010. Changing values

**GfK** **The crisis generated a return to core values and relaxation regarding people displayed image,** "because we are all going through this crisis".

**GfK** What does this mean for products and brands that push the "personal appearance button"?

**GfK** For this issue of GfK FMCG Newsletter we have prepared **a 360 view of personal appearance subject:** consumer understanding in terms of values and perceptions, product categories evolution and marketing tips derived from our learnings.

## Lifestyle and Values. Roper Reports Is looking good a value in crisis?

**GfK** **Youthfulness** is essential for half of the population and ranks 19 in the top list of values

**GfK** **Women - the "traditional" customer for personal appearance products**

When making choices people are guided by their values – in case of choices related to personal appearance, looking good and youthfulness are the values that determine in the end different behaviours.

**Looking good** is one of the less important values for urban Romanian consumers (rank 44 out of 54). On the other hand, **youthfulness is extremely important for half of the population** and ranks 19 in the top list of values. Thus personal appearance is more important in this context, of the desire to feel young.



**Consumers who pay attention to personal appearance represent 15% of the urban population** aged 15 or more. These are people who regard looking good and being youthful as extremely important, and try to groom and dress up in order to be noticed.

**Women are the "traditional" customer for products that offer personal appearance benefits,** but men are definitely interested as

well, so consider them too when offering such products. Have in mind that they talk about personal appearance less than women, but are interested in the subject.

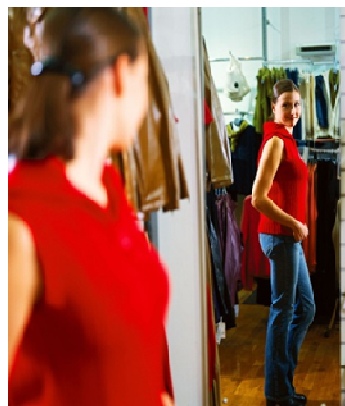
**Don't forget about the aging active consumer!** Older consumers who are still working are many times at the peak of their career, earn more than young consumers, and are in a life stage when their spending needs decrease. Also they are almost as interested in personal appearance as the young ones.

Consider the different ways that personal appearance relates to consumers' most basic motivations – the personal values. A broader value set associated to your brands can get consumers more attached to them.

**Build word of mouth strategies for targeting women.** A significant part of them talks to others about personal appearance, fashion and beauty and make recommendations.

## Qualitative analysis

### The Romanians, between looking good and feeling good



The image displayed - from the way you look to the "image accessories" you associate with and which speak about you - remains a defining characteristic of the Romanians. What is seen on the outside, the opinion of the others are elements which are built around self-image, important milestones depending on which most Romanians answer the question "Who am I?".

Although challenged at a declarative level, looking good is a value that, especially youngsters, wish for because it is a sign of status, power and success.

**Looking good is directly linked to personal success.** Those who look good implicitly have more self-confidence, they hold more control, they are better looked at and accepted by others, attract sympathy and respect much easier.

**In times of crisis, people began to value looking good less,** as well as the need for status or power. It does not mean that these values have lost some of their importance. Only, in such a context, the priorities acquire slight reinterpretations - from status to emotional comfort.

**Before looking good, Romanians want to feel better.** The crisis is a period full of hardships, frustrations and what people want is extra wellness.

Going through a tough time, what they are seeking for now is a state of detachment, a plus of relaxation, pleasure, of life enjoyment and optimistic mood, more than looking good.

**But this change in the hierarchy of values is a contextual one.** Once the crisis period is overcome, the need of looking good will be fast reactivated. The first things sacrificed in times of crisis are pleasures, personal indulgences, which, for example, does not change women's desire to look good, the need to take care of themselves.

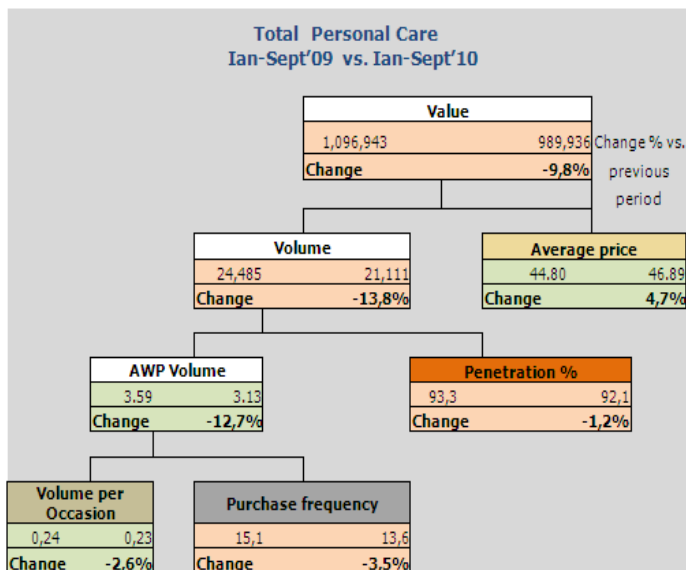
In this context of crisis, it is important for the brands that communicate benefits in the area of personal appearance to adapt speech, **moving the focus from promoting the idea of glamour and status to creating for consumers the state of emotional comfort and of regaining the desired balance.**

## Trends in household consumption GfK Market Flavour on Personal Care



New multi-client report with two modules "GfK Market Flavour on Hair Care" and "GfK Market Flavour on Personal Wash" is now available!

Personal care segment was the most affected by the expenditure's decrease and dropped off by almost 10% in January – September 2010 versus the same period of 2009. The main reason was the smaller purchasing frequency, while the number of buyers remains rather constant.



Deodorants registered the highest volume decrease within personal wash segment (-20%) as they were more rarely bought by fewer consumer. On the other hand Hair Styling and Conditioners went down the most among hair care products because buyers left the category. **Hair Conditioner lost 27% of its buyers.**

Considering this trends as a starting point, we were asked for more detailed information about the purchasing behaviour of specific categories and segments, based on household panel data.

We are happy to announce you the launch of a new multi-client report with two modules "GfK Market Flavour on Hair Care" and "GfK Market Flavour on Personal Wash" respectively. It offers information about:

- GfK Main drivers which influenced the evolution of analyzed categories and segments
- GfK The presence of the "upsizing" phenomenon in a certain category
- GfK Evolution and importance of main outlet types together with the buyers' socio-demographic profile

## Word of mouse into power

Almost three quarters (72%) from American consumers analyzed in Roper Reports® US are more skeptical today as they were in the past regarding the messages transmitted by the brands. As substitute, they tend to be more confident in other consumers' opinions, including those on the Internet.

Roper Reports Worldwide results show that 47% of consumers in the developed markets are convinced by the online comments about products, versus only 9% having trust in online advertising.

## Influentials

**10%** of Urban Romania is part of **Appearance Category Influentials.**

They have access to a large number of social networks and give advice or make recommendations about personal appearance/ fashion, beauty.

As they are **indicators** of consumer trends and "market multipliers", **convince them to become your brand advocates.**