A CROSS-GENERATIONAL STUDY OF THE POSITIONING OF SKIN CARE PRODUCTS BASED ON FEMALE PERCEPTIONS.

By

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Professor Debbie Vigar-Ellis

The Baby Boomer market is a lucrative market, largely ignored by marketers. This fact has attracted much media attention, both in South Africa and abroad. Research conducted by the UCT Unilever Institute of Strategic Marketing and Synovate shows that the mature market often feels marginalised and ignored by the retail, corporate and media worlds (Scher, 2008:Para 7). Furthermore, they feel estranged from marketing communications, disregarded by product developers and dissatisfied with customer service (Mitchell, 2008:Para 10). Hence there is an opportunity for marketers to communicate with this market, by positioning products better in the minds of Baby Boomers.

Positioning as described by Mullins, Walker and Boyd (2008:191) is "both the place a product or brand occupies in customers minds' relative to their needs and competing products or brands, and to the marketer's decision-making intended to create such a position". Thus, positioning has many facets. It relies on consumer perception, segmentation and targeting and selecting attributes which are both important to the target market and distinctive in comparison to competitors. Hence it is important to choose a position which creates a competitive advantage and use this position to guide the development of the marketing strategy, more specifically the marketing mix. Ultimately the marketing mix communicates with the target market and thus potentially influences perception as well as the way consumers position the product.

Generational theory explains how different generations develop different value systems, and the impact that this has on how younger and older people interact with the world around them and with each other (Codrington, 2008:1). Schewe and Meredith (2004:51) explain that, generations experience similar external events during their late adolescent and/or early adulthood years which influence their values, preferences, attitudes and buying behaviour in ways that remain with them over their entire life. Hence, since each generation experiences different events, generations differ and need to be targeted separately and differently from the other generations. As Underwood (2007: 43) stresses since career, consumer, and lifestyle decisions are significantly influenced by generational values and attitudes, all businesses need to be trained in generational marketplace strategy and generational workplace strategy.

One industry which seems to have recognised the attractiveness of the lucrative Baby Boomer market and recognised the necessity for targeting this generation using an approach which has been customised, is the skin care industry as many facial care products are specifically developed and targeted at the ages which make up the Baby Boomer Generation. Thus, this research investigates the positions occupied by skin care brands based on the perceptions of three generations of females, namely the Baby Boomers, Generation X and Generation Y. The research focuses on determining if there are differences amongst the generations and whether Baby Boomers feel marginalised by the facial care industry. Consequently the literature review focuses on positioning, generational theory and how it affects marketing strategy as well as the current state of the facial care industry.

A triangulation methodology was implemented to conduct the research. The triangulation methodology combines qualitative and quantitative data (Banister *et al.*, 1994, cited in Holzhausen, 2001: Para 28) and for the purpose of this research the methods were used sequentially, collecting qualitative data before the quantitative data. One of the biggest advantages of using qualitative and quantitative research is that the styles have complimentary strengths, and as a result research that uses both methods tends to be more comprehensive (Neuman, 2006:150). First three focus group sessions were conducted to gather qualitative data, each focus group representing one of the three generations central to this study. The participants were selected using a snowball sampling method which is a non-probability sampling technique where an initial group of respondents identify others who belong to the target group and subsequent respondents are selected based on referrals (Malhorta, Hall, Shaw and Oppenheimer, 2008:274). This initial group was selected purposively to ensure all race groups were included and to attempt to ensure representivity. A mall-intercept method was used to collect quantitative data, where respondents were selected using convenience sampling.

The findings were presented and briefly discussed. This was followed by an in-depth discussion of each of the research objectives, which enabled conclusions to be drawn. It was found that in terms of the attributes which are most important when choosing facial care, Boomers most important attributes differed from the other two generations. Boomers look for facial care products which last all day, have effective moisturising capabilities and make skin soft and smooth. The perceptual maps showed that based on the perception of Baby Boomers, Clinique held the most favourable position. In addition this research identified that Boomers are more sceptical of advertising than the other two generations and generally rated the various media vehicles as less effective than both Xers and Yers did.

Finally a number of recommendations were made, these included recommendations as to how the generations differed and how marketers could ensure they target the specific generations and capture their attention. It also included brand specific recommendations, focussing on ways each brand could improve their positioning. Since the study found that females from the three generations central to this study do differ and place importance on different attributes the main recommendation is that each brand needs to ensure their marketing efforts are focused on the generation they wish to target and that they base their positioning on an attribute which is important to the target customers and which will allow customers to differentiate the brand from competitor brands.

DECLARATION

I, Nydia Drews, declare that

a) The research reported in this dissertation/ thesis, except where otherwise indicated, is my original research.

b) This dissertation/ thesis has not been submitted for any degree or examination at any other university.

c) This dissertation/ thesis does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons.

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Signed: ___________ Date: 7 May 2010

Nydia Drews

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1.1 BACKGROUND AND MOTIVATION

Research conducted by the UCT Unilever Institute of Strategic Marketing and Synovate suggests that South African marketers are largely ignoring the Baby Boomer generation (Scher, 2008:Para 1). The study which is the result of months of extensive quantitative and qualitative research shows that the mature market often feels marginalised and ignored by the retail, corporate and media worlds (Scher, 2008:Para 7). The research shows that the mature market believe marketing messages are aimed at individuals in their 20s and 30s, emphasising that this market feels estranged from marketing communications, disregarded by product developers and dissatisfied with customer service (Mitchell, 2008:Para 10).

The research indicates that there may be an opportunity for South African marketers to position their products better in the minds of Baby Boomer consumers. The female skin care industry is interesting as this industry has developed and designed products that are specifically aimed at various age groups. It seems to be the one industry that has recognised the attractiveness of the lucrative Baby Boomer market. Furthermore, the research indicates that marketers need to consider the importance of generational marketing and suggests that in order to engage individuals from one generation, marketers need to target generations differently and use different approaches for each generation. Thus the purpose of this research is to determine whether Baby Boomer females feel marginalised by the skin care industry.

1.2 STATEMENT OF THE PROBLEM

The research conducted by the UCT Unilever Institute of Strategic Marketing and Synovate shows that the mature market perceives their needs to differ from the needs of their younger counterparts. The aim of this research is to establish how products in the South African skin care industry are positioned in the minds of females across three generations (Baby Boomers, Generation X and Generation Y).

The problem statement that this research will address and wishes to verify is: "Females from different generations have different needs, thus positions occupied by skin care products are likely to vary across generations."

The research objectives were as follows:

1) To determine what factors or attributes female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products
2) To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women
3) To determine if Baby Boomer females feel marginalised by the skin care industry
4) To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products

In addition to the research objectives, certain additional hypotheses, which aligned with the research objectives, were tested when investigating the differences between generations. As there are 16 additional hypotheses, their details aren't provided here but are elaborated on in the methodology, findings, discussions and conclusions chapters.

1.3 Importance/ Significance of the Study

This study will once again reiterate the importance of positioning products in the mind of the consumer, demonstrating the importance of segmenting the target market and selecting the attributes, which are most important to and appealing to, a specific segment. Furthermore, marketers will be given insight into the perceptions of the different generations towards certain skin care brands and products.

The research will also provide valuable insights into the differences and similarities between Baby Boomer, Generation X and Generation Y women. These similarities and differences will give an indication of how marketers of skin care products can develop positioning strategies to communicate with and engage women from a particular generation. The research will also answer the question of whether Baby Boomer women feel marginalised by the skin care industry – this may provide useful hints on how to engage the mature market, to industries which aren't currently developing products for this market.

1.4 Overview of Research Approach

In order to obtain a better understanding of the key aspects involved with this research, secondary research was collected. A literature review of positioning, the generations and the skin are industry was completed using secondary sources, which included academic books, journals, electronic sources and prior research literature. The secondary research assisted in establishing a comprehensive understanding and theoretical framework of positioning, the Baby Boomer, Generation X and Generation Y consumers, and the skincare industry. It also assisted with the planning of the primary research conducted.

A triangulation methodology for the research was utilised, which entails combining both qualitative and quantitative research methods. The research methods were conducted sequentially, with stage 1 of the research being a series of focus groups and stage 2 being a mall-intercept survey. A combination of the literature review and the focus group results were used to assist with developing the questionnaire for the quantitative research.

The statistical programme SPSS was used to analyse results, using various statistical tests. The findings chapter presents the results per question in the questionnaire and where generational differences were of interest, for example in terms of the use of facial care products, the importance of attributes and the brand perceptions, as well as the effectiveness of media, then specific hypotheses were developed and tested. These were discussed and interpreted, so that conclusions could be drawn by pulling together the literature review and the findings of both the qualitative and quantitative research. Finally recommendations based on the findings were presented.

1.5 Chapter Plan

The following section gives a brief outline of the chapter plan of this research.

Chapter 2: In this chapter the positioning literature is reviewed in order to give a better understanding of positioning. The chapter discusses the importance of positioning and focuses on the role that perception, segmentation and targeting play in positioning. It also focuses on the development of a positioning strategy and how companies can be successful with their positioning. Some positioning mistakes are examined and repositioning is discussed. Finally, the chapter considers the options available to marketers to measure and/ or research their position, or that of their brands.

Chapter 3: This chapter focuses on generations. It gives a brief outline of past studies which have been conducted on generational differences. The importance of generations and the impact generational theory has had specifically on the marketing discipline is discussed. The three generations under study, namely the Baby Boomers, Generation Xers and Generation Yers are discussed and insights are given relating to how marketers can develop marketing communications for each generation, in an attempt to better meet their individual needs. Finally, some commonalities between the three generations are discussed.

Chapter 4: This chapter provides the context for the research and looks into both the global and the South African facial care markets. The major competitors in the sector are discussed and an outline of the facial care brand portfolio of each company is discussed. Furthermore, the chapter considers the factors and the current trends driving the facial care industry. Finally the chapter looks at the specific brands which were included in the survey questionnaire.

Chapter 5: This chapter deals with the research methodology and gives an overview of the reasons why research was conducted and what methods were selected and indicates why the methods chosen were deemed most appropriate. Since a triangulation design was used, the chapter begins by discussing all elements of the focus group study and then discusses the elements associated with the survey.

Chapter 6: This chapter discusses in depth the focus group design, specifically the discussion guide and the rationale for including the various questions. This is followed by the presentation of the findings of the focus groups.

Chapter 7: This chapter deals specifically with the second stage of the research, the survey. An in-depth discussion of the questionnaire design is included, followed by the presentation of the findings of the survey.

Chapter 8: This chapter focuses on the interpretation and discussion of the findings and features the interpretation of the key findings with regards to the secondary research from the literature review. Finally, conclusions are drawn from the pivotal findings.

Chapter 9: This chapter presents the recommendations which have been made based on the conclusions drawn from the research conducted. This includes insight which marketers could use to develop a communication strategy which targets Baby Boomers or Generation X or Generation Y.

Chapter 10: This chapter focuses on limitations of the research, followed by recommendations relating to any future research which may be conducted.

Chapter 11: Finally this chapter concludes the research report, focusing on the most important findings and recommendations.

2.1 INTRODUCTION

In a rapidly evolving marketplace, faced with increasing competition businesses need to ensure that they establish a strong competitive advantage in order to be successful. As Michael Porter (1996 cited in Mullins *et al.*, 2008:192) points out, "a company can outperform its rivals only if it can establish a difference that it can preserve." Differentiation lies at the heart of positioning, is a powerful theme in marketing and is one way of how marketers can establish a competitive advantage (Mullins *et al.*, 2008: 192). Positioning involves the complex set of perceptions, impressions, and feelings that consumers have for the product relative to competitors (Kotler and Armstrong, 2001:269). Therefore, the positioning notion comprises both competitive and customer need considerations, and as a consequence the success of a product is dependant on how well it is positioned i.e. how well it performs relative to competitive offerings and to the needs of the target audience (Mullins *et al.*, 2008:191). By determining how consumers position a product, businesses are able to explore how successful their marketing has been. Since positioning is a central aspect of the research it is imperative to have a full understanding of positioning theory. This chapter deals with the various factors that impact the complex process of positioning to provide a base on which to build the research.

2.2 POSITIONING DEFINED

Positioning simply put, is the image that a product has in the mind of the customer (Schiffman and Kanuk, 2000:141). Positioning is a marketing concept which was first popularised by Ries and Trout in their book "Positioning - a battle for your mind". Ries and Trout (1981:3) define positioning as follows: "Positioning starts with a product, a piece of merchandise, a service, a company or even a person…but positioning is not what you do to a product, positioning is what you do to the mind of the prospect, i.e. you position the product in the mind of the prospect."

Kotler (2000:298) defines positioning as "the act of designing the company's offering and image to occupy a distinctive place in the target market's mind." According to Kerin, Hartley and Rudelius (2004:201) positioning is the place a product occupies in the consumer's mind based on important attributes in relation to competing products. Lamb, Hair, McDaniel (2006:249) explain positioning as "developing a specific marketing mix to influence potential customers' overall perception of a brand, product line or organisation in general". Baker (2003:279) speaks of positioning as "the process of designing an image and value so that consumers within the target segment understand what the company or brand stands for in relation to its competitors". Jobber (2007:305) defines positioning as a process where companies aim "to create and maintain a distinctive place in the market for a company and/or its products", and finally Mullins *et al.* (2008:191) define positioning as "both the place a product or brand occupies in customers minds' relative to their needs and competing products or brands, and to the marketer's decision making intended to create such a position". Thus, positioning is a consumer's perception of a brand or product based on important attributes. This perception is influenced by the marketing mix of the brand or product and the consumers' perception of competing brands.

Hooley and Saunders (1993 cited in Percy and Elliot, 2005:106) define positioning in two parts, it is "the identification of a target market or markets, the customers that the organisation will seek to serve" and "the creation of a differential advantage, or competitive edge that will enable the organisation to serve the target market more effectively than the competitor". Whilst Doyle and Stern (2006:84), define positioning as "the choice of target market segments, which determines where the business competes, and the choice of differential advantage, which dictates how it competes". Jobber (2007:305) is of the same opinion as he believes positioning is about where and how we want to compete and suggests that market segmentation, target market and differential advantage are key tasks in positioning.

What can be concluded from the above definitions is that although there are many different definitions for positioning, most marketers agree that positioning is something that happens in the minds of the target market and relates to the way consumers view or perceive a product relative to competitors on important attributes. Whilst positioning is something that happens in the minds of consumers, segmentation, targeting and differentiation are also important aspects of the positioning process. Basically there seem to be three common topics which influence positioning – perception, segmentation and targeting, and establishing a competitive advantage through differentiation. As a result when discussing the positioning theory all of these topics are covered in the sections that follow.

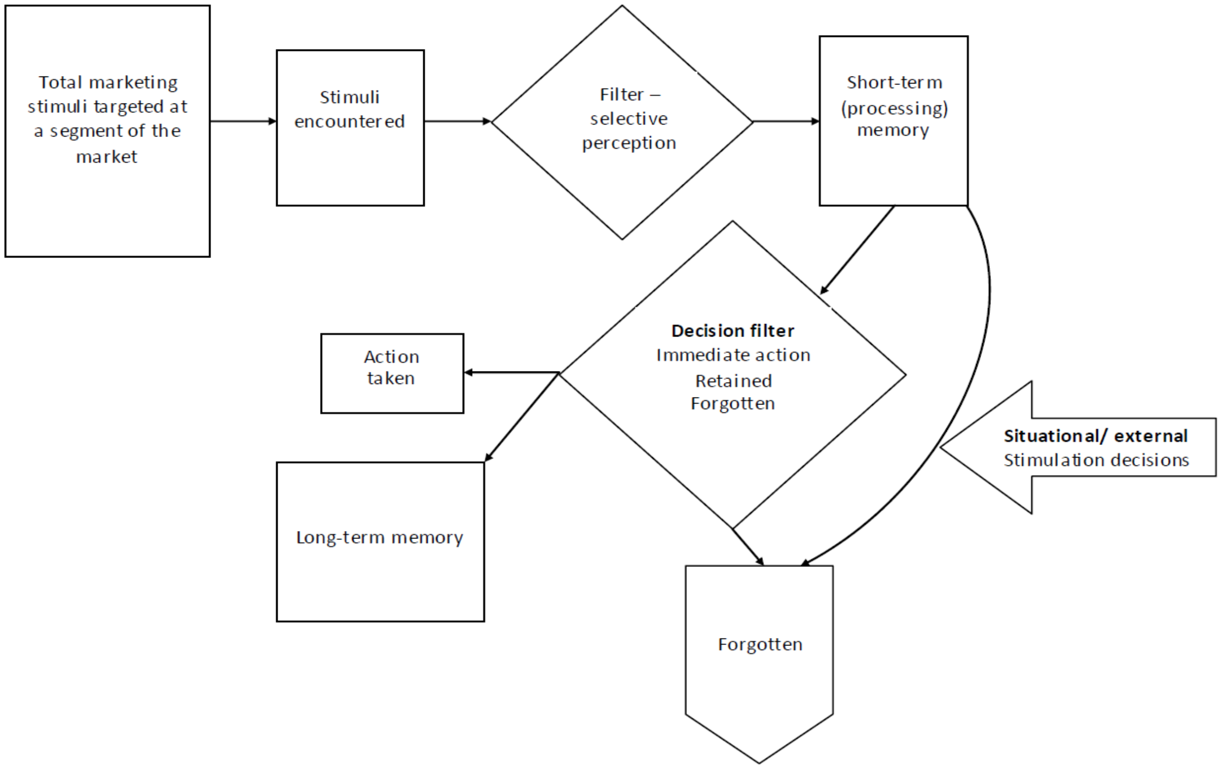
2.3 PERCEPTIONS IN POSITIONING

Ries and Trout have always defined positioning not as what is done to the product but as what is done to the mind (Trout and Rivkin, 1996: ix). "The ultimate marketing battleground is the mind, and the better you understand how the mind works, the better you'll understand how positioning works" (Trout and Rivkin, 1996: ix-x). Buying behaviour is influenced by the way in which consumers perceive their world and successful products are those which are positioned favourably in the minds of the target market (Brennan, Baines, Garneau and Vos, 2008:23). As concluded from the preceding section and highlighted by Brennan *et al*. as well as Ries and Trout, perception is a central theme in positioning and in order to understand positioning it is imperative to understand the mind and perceptions. The major challenge to successful positioning is that minds are limited, dislike confusion, are insecure, are hard to change and lose focus (Trout and Rivkin, 1996:8).

"Perception can be defined as the meaning attributed, on the basis of our experiences, to stimuli as received through the senses" (Monger, 2007: 276). Jobber (2007:132) defines perception as "a complex process by which people select, organise and interpret stimulation into a meaningful picture of the world". A "stimulus is any unit of input affecting one or more of the five senses: sight, smell, taste, touch, and hearing" (Lamb *et al.*, 2006:179). Stimuli come in the form of products, packaging, promotions, advertising and word-of-mouth and are cues that make consumers aware of and learn about brands. According to Foxall, Goldsmith and Brown (1998:51), "after consumers become aware of brands, their buying decisions are guided by their perceptions or impressions of the brands formed from the information they get about brand characteristics". Consumers act on their perceptions, which stem principally from the information they choose to pay attention to, comprehend and retain (Hutt and Speh, 2001:79). Consumers are unlikely to attempt to obtain all available information about every choice, instead their information-seeking efforts cease when they perceive to have sufficient information about the alternatives to make a satisfactory decision (Schiffman and Kanuk, 2000:440). Thus, consumers act on perceptions and their pre-processed perceptions of, for example, the position of a product in relation to competitors, are often used as shortcuts to subsequent processing. Schiffman and Kanuk (2000:440) state that consumers often develop short-cut decision rules, which facilitate the decision making process and also help them cope with exposure to too much information.

Monger (2007: 276) states that perceptions are interactive and continuous and are shaped by the characteristic and the context or situation of the stimuli. In a broad sense perception is concerned with the translation from the external, physical world to the internal mental world – consumers mental experiences are biased to a greater or lesser extent and consequently they experience only a limited degree of the total physical world (Wilkie, 1994:205). As explained by Schiffman and Kanuk (2000:122), although two individuals may be exposed to the same stimuli under the same conditions, the way each individual recognises, selects, organises and interprets the stimuli is a highly individual process based on the individuals needs, values and expectations. Figure 2.1 below shows the reaction consumers go through when exposed to stimuli. What is important to note is that not all stimuli are retained; this is because there are limits to perception.

Figure 2.1. Reaction to stimuli



(Monger, 2007:277)

As a result a person will select only what stimuli they retain to form meaningful coherent pictures of the world (Schiffmann and Kanuk, 2004:159). And since the world is full of stimuli, and people can not perceive every stimulus they encounter, they use processes to sort out the masses of stimuli that can be perceived into a manageable amount through a process called selective perception (Jobber, 2007:132). The following selective processes also known as perceptual limits are applied by consumers to prevent them from hearing or seeing all stimuli.

1. **Selective exposure** is a process where consumers choose which stimuli to expose themselves to and which to ignore (Lamb *et al.*, 2006:178). According to Schiffman and Kanuk (2000:135), "Consumers actively seek out messages that they find pleasant or with which they are sympathetic, and actively avoid painful or threatening ones". For example consumers would expose themselves to messages that reassure them that their purchase decision was good (Schiffman and Kanuk, 2000:135).

2. **Selective attention** is a process where consumers exercise a great deal of selectivity in terms of the attention they give to commercial stimuli – portraying heightened awareness of stimulus meeting their needs and interests and minimal awareness to irrelevant stimuli (Schiffman and Kanuk, 2000:135). According to Jobber (2007:133) there are a number of factors influencing selective attention. Consumers will pay more attention to stimuli that contrast with their background, whilst size, colour, movement and position of a stimulus will also impact attention and finally consumers are more likely to notice those messages that relate to their needs (Jobber, 2007:103). This means for example, a Generation Y women watching a television advert, advertising an anti-wrinkle product aimed at Baby Boomers, will less likely be influenced by the advert than a Baby Boomer women who is concerned about wrinkles and looking for an anti-wrinkle product.

3. **Selective distortion or selective comprehension** is a process by which consumers change or distort information that conflicts with their existing beliefs and attitudes (Jobber, 2007: 133 and Lamb *et al.*, 2006:180). Basically consumers interpret discrepant information so that it is consistent with their attitudes and beliefs (Kerin *et al.*, 2004:107). This occurs when a person perceives the information, but does not interpret the message in the way that it was intended. Methods of distorting information include thinking a message has been misheard, or disregarding the message source (Jobber, 2007:133). For example, smokers may choose to ignore the fact that smoking is bad for their health despite evidence proving otherwise.

4. **Selective retention** is the process of retaining in their long term memory only the information that is relevant to the decision and/ or conforms to existing beliefs and attitudes (Assael, 2004:196). Thus consumers will not remember all the information they see, read or hear, even minutes after exposure to the information (Kerin *et al.*, 2004:107). Thus after seeing and or hearing an assortment of advertisements the individual chooses to retain only those messages which are relevant to their needs and forget the ones that are unaligned to their needs.

5. **Perceptual blocking** is the process by which consumers 'tune out' in order to protect themselves from being bombarded with stimuli (Schiffmann and Kanuk, 2000:135). Consumers do so out of self-protection and this is done for example when consumers consciously ignore messages, by changing the channel or by turning the page of the magazine where the advertisement appears (Schiffmann and Kanuk, 2000:135).

According to Keller (2003, cited in Romaniuk and Nicholls, 2005:181) perceptions and associations can influence the response consumers have to marketing activities. Wilkie (1994:205) is of a similar opinion and states that marketers are interested in understanding perception because shopping, purchase and use activities require interactions with the external world and all marketing stimuli exist in the external world, and in order to have an impact, marketing stimuli must be perceived by customers. According to Foxall *et al.* (1998:60), "the selective nature of perception restricts the efforts of any given advertisement no matter how prominently it is positioned or whatever stimuli it incorporates". Thus, marketers need to recognise that the stimuli may not be perceived and interpreted by consumers and the selective processes described above help explain why some people are affected by certain marketing communications and others are not. Since selectivity limit's a consumer's perception, it is imperative that the stimuli provided through marketing communications are special, to ensure that a product stands out and is memorable (Monger, 2007:276).

In order for marketing messages to be perceived by the target market, marketers must ensure that messages prevail over perceptual limits. For example, in order to minimize the effect of selective exposure, messages should appeal to and capture the consumers' attention. Etzel, Walker and Stanton, (2007: 102) agree and state that in order for marketing stimuli to be perceived it should capture and hold the consumers attention. By aligning both the positioning and the marketing communications with consumer needs and wants the chance of selective exposure will be minimised. Selective distortion will be minimized if marketers ensure messages are presented clearly and without ambiguity, using a highly credible source (Jobber, 2007:133). When it comes to selective distortion, marketers also need to be aware that a message even if factually correct will not necessarily be accepted as fact. Marketers need to consider the distance between the consumer's current belief and the position proposed by the message and must recognise that if the distance is large, a moderate claim may be more believable than a dramatic claim (Etzel, Walker and Stanton, 2001:109). Since consumers tend to remember messages which are aligned with existing beliefs and attitudes, this is necessary in order to diminish the occurrence of selective retention (Jobber, 2007:134).

In other words since consumers act on perceptions marketers must ensure that their positioning and the messages used to communicate their position are formulated in such a way that will counter the defence mechanisms described above which protect consumers from perceiving unwanted stimuli, in order to ensure that consumers will act on the perception formed. Furthermore, Foxall *et al.* (1998:61) stress that "all elements of the marketing mix communicate something about the firm to the consumer, of course, and it is not enough to get the advertisement 'right' while paying insufficient attention to the factors that complement or detract from it. Thus, marketers also need to recognise that all elements of the marketing mix may affect sales, as they all contribute to influencing the consumer's perception of the overall market offering.

2.4 THE IMPORTANCE OF POSITIONING

Malik (2007: Para 1) states that "positioning is no doubt the single most important aspect of marketing in the globally competitive market place." Lovelock and Wirtz (2007:194) also emphasise the importance of positioning stating that a positioning strategy is the core of the marketing strategy. According to Delvin *et al.* (1995 cited in Blankson, Kalafatis, Cheng, and Hadjicharalambous, 2008:107), positioning is fundamental to the success of a firms marketing strategy. Kanzler (1999:51) sees positioning as "the heartbeat of an effective communications plan", whilst Chapin (2009: Para 5) goes as far as saying "positioning is the fundamental starting point for all your marketing efforts - the DNA of marketing." What becomes obvious from the above statements is that the importance of positioning should not be underestimated.

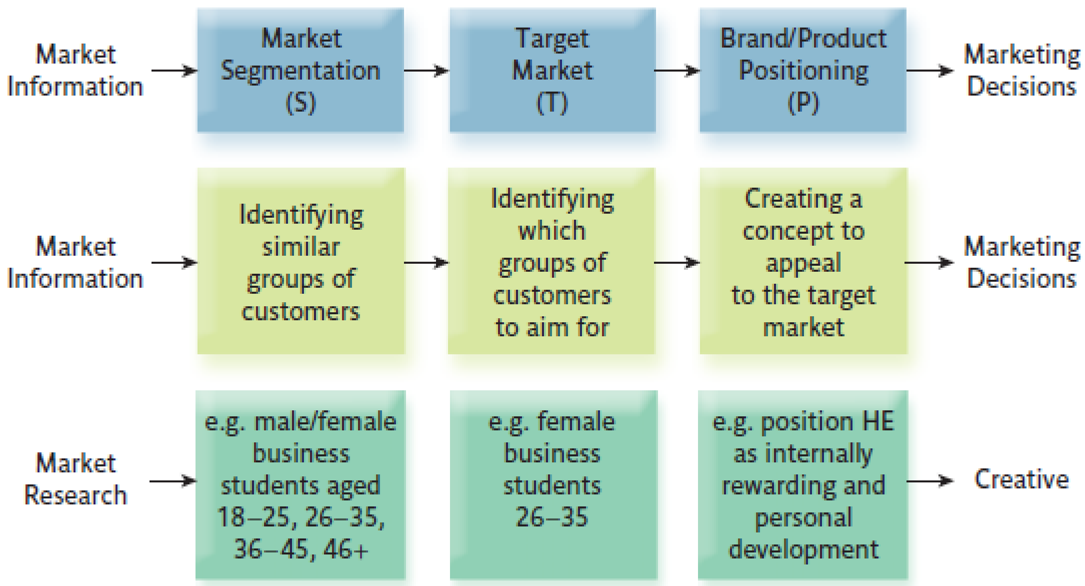
Although the above statements all agree that positioning is important, more clarity is needed as to why positioning is so important to marketing strategy. In an attempt to clarify the importance of positioning it is critical to remember that the goal of positioning is to create a unique image of a product in the consciousness of the consumer (Chapin, 2009: Para 5). Chapin (2009: Para 5) and Malik (2007: Para 2) agree that due to the increase in competition, in order for a product to be successful it has to have a clear and distinctive image. Murtagh (2003:9) makes the point that consumers make buying decisions based on how they perceive a product or brand and as a result positioning is the most important marketing task an organisation can perform. This makes sense when considering that positioning is something that happens in the minds of the target market and relates to the way consumers view or perceive a product relative to competitors. Furthermore, because perception is so important to positioning, a marketer needs to ensure that positioning is communicated distinctively and without ambiguity, therefore positioning must be managed at every point where the customer comes into contact with the company (Malik, 2007: Para 3).

Aaker and Shansby (1982 cited in Cravens, 2000:190) conclude that positioning is important as it is central to consumers' perception and choice decisions. Furthermore, since positioning affects all elements of the marketing strategy, positioning should be used as the focus in development of the marketing strategy to ensure that all elements of the marketing strategy are consistent and supportive (Aaker and Shansby, 1982, cited in Cravens, 2000:190). This view is supported by Blankson *et al*. (2008:106) who state that "how a firm chooses to position itself and/or its offerings is central to the creation of marketing strategy and dictates the implementation of advertising and marketing communications in the short, medium and long term". Positioning has implications for the design of goods and services as well as the development of the other elements of marketing strategy - pricing, promotion, and distribution decisions follow from and contribute to the effectiveness of positioning (Mullins *et al*., 2008:191). Thus, positioning affects all elements of the marketing mix and the implementation of a clear positioning strategy will enable the marketer to create a consistent and clear marketing message where all elements of the marketing mix are contributing towards the creation of a clear and consistent image.

2.5 Positioning in Market Strategy: Relationship to Segmentation and Targeting

According to Kotler (2003:308), "all marketing strategy is built on STP – Segmentation, Targeting and Positioning". Once a company has discovered different needs and groups in a market, they need to select and target the needs and groups which can be satisfied in a way which is superior to their competitors, and then position their offering so it is both recognisable and distinctive in the eyes of target customers (Kotler, 2003:308). Figure 2.2 shows the steps involved in marketing strategy and how segmentation, targeting and positioning fit into marketing strategy.

Figure 2.2 STP Process



(Baines, Fill and Page, 2008:216)

According to Baines *et al.* (2008:216-217), there are three key benefits of implementing the STP process, these are:

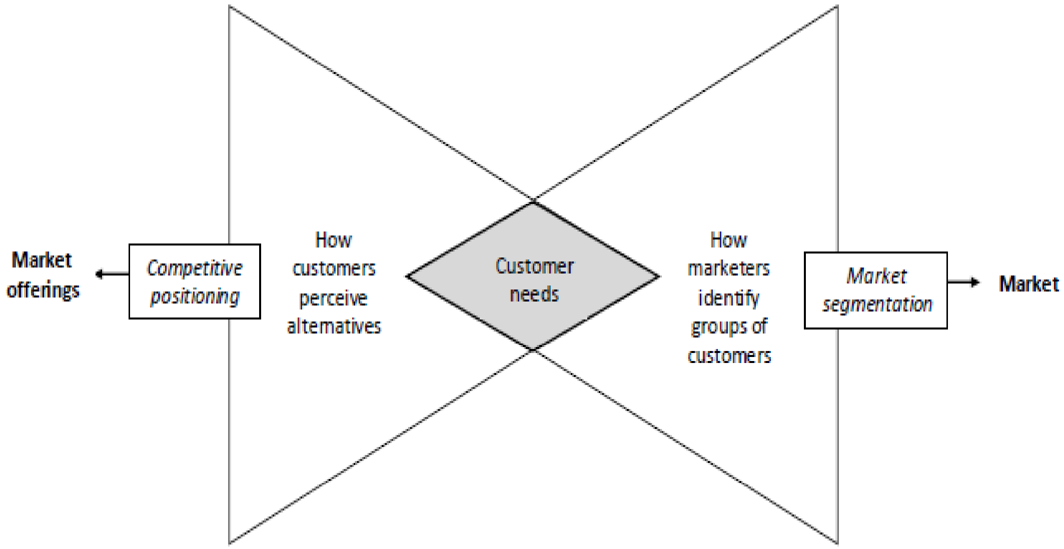
- A company's competitive position is enhanced as this process provides direction and focus for marketing strategies such as targeted advertising, new product development and brand differentiation.
- It allows companies to examine and identify growth opportunities in the market as it assists in identifying new customers, growth segments or new product uses.
- A higher return of investment as there will be more effective and efficient matching of company's resources to targeted market segments.

Segmentation involves identifying the most productive bases for dividing a market, identifying the customers in different segments and developing segment descriptions (Hooley, Saunders and Piercy, 2004:266). Segmentation can be defined as the process of dividing a market into distinct groups that have similar value requirements concerning specific brand or product attributes and will react similarly to marketing activities (Cravens, 2000:112 and Monger, 2007:307). According to Evans (2003:246), "the basic principle of market segmentation is that markets are not homogenous and that it makes commercial sense to differentiate marketing offerings for different customer groups".

Hanson (1972, cited in Brooksbank, 1994:11) explains the business logic of segmentation as follows, "if you can divide a larger market into smaller segments with different preferences and subsequently adjust your product to the preferences in the different segments, then you reduce the overall distance between what you are offering to the market and what the market wants. By doing so the marketer improves their competitive position". This logic indicates how segmentation and positioning are linked. This logic is supported by Cravens (2000:112) who states that "market segmentation is the process of placing the buyers in a product market into subgroups so that the members of each segment display similar responsiveness to a particular positioning strategy". Another advantage of segmentation is that "customer satisfaction can be improved by providing a value offering that matches the value proposition the buyer in a segment considers important" (Cravens, 2000:112).

Hooley *et al.* (2004:266) state that "while positioning and segmentation are different concepts, ultimately they are linked by customer needs, in the sense that the most robust form of segmentation focuses on the customer benefits that matter most to different types of customer, while the strongest competitive positions to take are those where customers recognise that a supplier or product is the one they choose because it best meets their needs". In Figure 2.3 below Hooley *et al.* (2004:266) depict how segmentation and positioning are linked by customer needs.

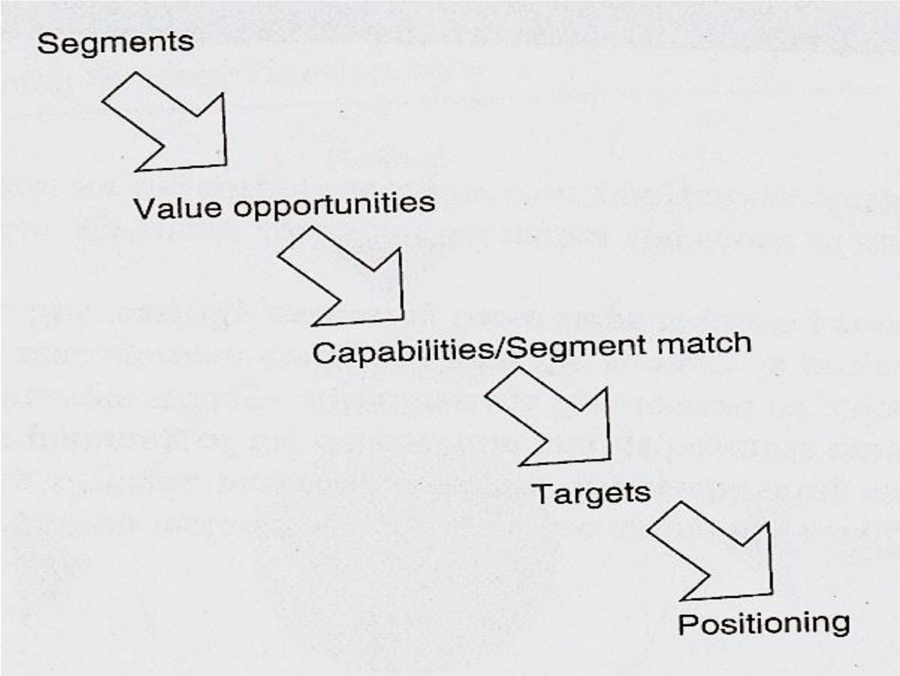
Figure 2.3 Competitive positioning and market segmentation



(Hooley *et al.*, 2004:266)

Cravens (2000:34) takes this further emphasising that segmentation is not the only critical element and that targeting also needs to be considered. Market targeting is the central point of marketing strategy, as it steers objective setting and the development of positioning strategy (Cravens, 2000:34). Basically segmentation offers the opportunity for companies to select a group of consumers whose needs are similar, which ultimately enables them to better match their capabilities with customer requirements i.e. targeting. Figure 2.4 below graphically represents the relationship between segmenting, targeting and positioning.

Figure 2.4 Segmentation, Targeting and Positioning



(Cravens, 2000:113)

Once different segments have been identified companies need to examine the segments in order to explore in which segments buyer preferences and organisation capabilities match closely and to distinguish and compare the company's strengths and weaknesses to those of competitors (Cravens, 2000:112). The next step is to identify a target market.

"Market targeting consists of evaluating and selecting one or more segments whose value requirements provide a good match with the organisations capabilities" (Cravens, 2000:113). Thus targeting is a selection process that allows companies to select one or more segments where there is a close match between buyer preferences and organisations capabilities, which will enable marketers to better understand the customer and meet their needs more effectively than competitors. Once the target market or markets have been defined marketers can prepare a positioning strategy, which will involve implementing ways to ensure that the product occupies a clear and distinctive place in the mind of the target market.

From the definitions provided by Hooley *et al.* and Cravens we can conclude that whilst segmenting and targeting are separate functions from positioning, they are linked and as a result both concepts are important considerations in the development of a marketing strategy. Segmentation and targeting are important in positioning because it is during these processes that insights about the consumer are gained, which may give a company important competitive advantages by identifying buyer groups that will respond favourably to the firms marketing efforts as well as giving marketers clues about ways they can achieve favourable responses (Cravens, 2000:114). Thus positioning can be described as a strategy which directs marketing resources amongst the intended target market (Hassan and Craft, 2005:83).

2.6 Developing a Positioning Strategy

"Developing a positioning strategy entails gaining a clear understanding of the criteria target customers use to evaluate competing products and then convincing them that your product will meet those needs" (Solomon, Marshall & Stuart, 2006:212). Cravens (2000:36) defines positioning strategy as "the combination of product, channel of distribution, price and promotion strategies a firm uses to position itself against key competitors in meeting the needs and wants of the market target". According to Boone and Kurz (2001 cited in Ostasevičiūtė and Šliburytė, 2008:98), "Marketers use a positioning strategy to distinguish their firms offerings from those of competitors and to create promotions that communicate the desired position". Therefore the positioning strategy is the way a company portrays its product or brand and aims to establish a favourable position in the minds of consumers, by convincing customers that a product or brand will meet their needs better than competing brands or products.

Although some companies find it easy to develop a positioning strategy, it is more common to find that one or more other companies are going after the same position. When this happens each of the companies need to find alternate ways of setting themselves apart from competitors (Kotler, Brown, Adam and Armstrong, 2004:364). Thus, they need to differentiate their offering further by building sets of unique competitive advantages which appeal to a substantial group of the target market. Basically customers must perceive the product or service as sharing important attributes with other brands in the product category and at the same time being superior on differentiating attributes (Bearden, Ingram and LaForge, 2001:170). The development of a positioning strategy consists of three steps: Identifying possible competitive advantages, selecting the right competitive advantages and effectively communicating and delivering the chosen position to the market (Kotler *et al.*, 2004:364).

2.6.1 Identifying possible competitive advantages

The second part of Hooley and Saunders' (1993, cited in Percy and Elliot, 2005:106) definition of positioning states: "Positioning is the creation of a differential advantage, or competitive edge that will enable the organisation to serve the target market more effectively than the competitor". Kotler *et al.* (2004:367) define competitive advantage as, "an advantage over competitors gained by offering consumers greater value, either through lower prices or by providing more benefits that justify higher prices." According to Kotler and Armstrong (2003:261) "positioning begins with actually differentiating the company's marketing offer so that it will give consumers more value than competitors offers do". Thus it can be concluded that differentiation plays a critical role in the positioning process. Furthermore, Mullins *et al.* (2008:191) state that "positioning is basically concerned with differentiation", whilst Ries and Trout, (1982, cited in Mullins *et al.,* 2008:191) view positioning as a creative process whereby a product or brand in an overcrowded marketplace, is given a distinctive position in the minds of customers.

In order to create a distinctive position a competitive advantage needs to be created. Hooley *et al.* (2004:49) state that "a differential advantage can be created out of any of the company's strengths or distinctive competencies relative to competitors". Since differentiation helps an organisation to build competitive advantages that will provide value to the target customers (Gilligan and Wilson, 2003:441), it ultimately affects the way in which they perceive the product or brand in relation to competitors. According to Monger (2007:104) successful differentiation allows an organisation to:

- command a premium price and/or
- sell more units of it's value offering at a given price, and/or
- realise greater degrees of buyer loyalty.

In order for an advantage to be differential it must provide value to the target market, which competitors find hard to copy (Hooley *et al.*, 2004:49). In order to identify possible competitive advantages it is imperative to analyse the competitors' positions in the marketplace (Solomon *et al.*, 2006:213). A full understanding of competitors is critical to effective positioning because competitors provide the benchmark within the minds of consumers (Schewe, 1991:60). It is also important to know competitor profiles, as weaknesses of competitors on relevant attributes or personality traits can represent an opportunity to differentiate and develop an advantage (Aaker, 2008:46). Furthermore the strengths of competitors on important dimensions may represent challenges for exceeding or outflanking the competition (Aaker, 2008:46). Consequently in order for marketers to develop an effective positioning strategy they must understand their competitors and how they are perceived by the target market. According to Solomon *et al.* (2006:213) marketers need to consider direct competitors in the product category as well as indirect competitors i.e. other products or services that provide the same benefits people are seeking.

Not every company finds many opportunities for differentiating its offer and gaining a competitive advantage. Furthermore it is imperative to remember that a strong position cannot be built on empty promises and thus critical to positioning is delivering the promised competitive advantage (Kotler *et al.,* 2004:367). A company or market offer can be differentiated along the lines of product, services, channels, personnel or image differentiation (Kotler and Armstrong 2003:261 and Lamb, Hair, McDaniel, Boshoff and Terblanché, 2000:156).

- ***Product differentiation:*** Differentiating the physical product can be achieved by differentiating one or more of the following: attributes and features, consistency, durability, reliability, performance or repairability or through style and design (Kotler *et al.*, 2004:367-368). Differentiation on features or attributes involves enhancing the products basic functioning (Lamb *et al.*, 2000:157). Kotler (2003:320) indicates that differentiation on consistency or conformance relates to the degree to which all produced units are identical and meet the promised specifications. Differentiating on durability has to do with the expected operating life of the product (Lamb *et al.*, 2000:158), whilst, reliability has to do with the probability of the product not malfunctioning or failing within a specified time period (Lamb *et al.*, 2000:158). Differentiating on performance involves ensuring that the primary characteristics function at a level which is superior to competitors (Lamb *et al.*, 2000:157). Repairability differentiation has to do with the ease of fixing a product when it malfunctions or fails (Kotler, 2003:320). Using style differentiation has the advantage of creating a distinctiveness that is hard to copy and describes the product's look and feel (Kotler, 2003:320). The totality of features that affect how a product looks and functions in terms of customer requirements is what design differentiation is all about (Kotler, 2003:321).

- ***Services differentiation:*** It is also possible to differentiate the services accompanying the product. This can be achieved by differentiating delivery, repair, customer training or consulting services (Kotler *et al.*, 2004:368). Another way of differentiating the service is through convenience, Lehmann and Winer (2008:272) highlight that many consumer products are differentiated on the basis of convenience. According to Kotler and Armstrong (2008:237), service differentiation can be gained through speedy, convenient or careful delivery.

- ***Channel differentiation:*** Channel differentiation is gained through the way in which the channel's coverage, expertise and performance is designed (Kotler and Armstrong, 2008:237). As Lehmann and Winer (2008:272) point out, "a marketing manager can sometimes gain differential advantage by reaching customers more efficiently and effectively than competitors".

- ***Personnel differentiation:*** This can be achieved through hiring and training better people than the competitors, and involves careful selection and training of customer-contact employees (Kotler and Armstrong, 2003:262). According to Lamb *et al.* (2000: 160) and Kotler *et al.* (2004:369), trained customer-contact employees will develop and exhibit certain desirable characteristics. These people are competent, possessing the required skills and knowledge (Kotler *et al.*, 2004:369). They exhibit courtesy, which is achieved by being friendly, respectful and considerate (Lamb *et al.,* 2000: 160). Kotler *et al.* (2004:369) also indicate that trained people recognise the importance of performing the service with consistency and accuracy. Furthermore, these trained customer contact employees are responsive, responding quickly to customer requests and problems (Lamb *et al.,* 2000: 160). And finally trained employees communication skills are finely tuned and they make a concerted effort to understand and communicate clearly with customers (Lamb *et al.*, 2000: 160).

- ***Image differentiation:*** "Even when competing companies offer the same products and accompanying services, buyers may perceive a difference based on company or brand images" (Kotler *et al.*, 2004:369). Similarly, Lehmann and Winer (2008:270) state that an aspect of image involves brands, these and their values or brand equity communicated to customers can serve as a point of differentiation. A company or brand image, according to Kotler and Armstrong (2008:237) should convey the product's distinctive benefits and positioning. Kotler *et al.* (2004:369) and Lamb *et al.* (2000:160) further stress that this image should be conveyed in a distinctive way with a singular message to establish the products benefits and positioning. Furthermore, "an image must deliver emotional power that appeals to both the heart and the mind of the buyer" (Lamb *et al.,* 2000: 160). Lamb *et al.* (2000: 160) state that "dedicated, creative work over long periods of time is a prerequisite for developing a strong image for a brand or firm. Most well-known brands have established their images over a long period of time and with the use of all the available marketing communication media and tools". According to Kotler (2003:326) symbols, colours, slogans and special attributes can provide strong company or brand recognition and image differentiation. The chosen symbols must be communicated through every available communication vehicle and brand contact (Kotler, 2003:326). Furthermore according to Kotler (2003:326) the image should "be worked into ads and media that convey a story, a mood, a performance level - something distinctive about the company or brand". An image can also be created through the sponsorship of events or by using surrogates or metaphors (Kotler *et al.*, 2004:369-370).

Whatever the choice, a product's positioning must be based on criteria that are meaningful and desirable from the customers perspective yet completely distinctive (Wood, 2007:76). Aaker (1998:164-165) states that "a differentiation strategy must add value for the customer, and the value must be perceived by the customer." Hence it is important to select and communicate the right competitive advantages, one that is meaningful to the target market. As Garden (2004:21) states: "the success of positioning comes from driving the competitive advantage home to customers". Marketers have several options when it comes to positioning as there are several positioning possibilities or bases which companies can use. These are discussed below.

1. **Attribute or benefit positioning:** A brand or product is positioned highlighting a selected product trait or characteristic that sets the brand apart from other products (Clow and Baack, 2005:12). This strategy is popular with advertisers as it allows the advertiser to focus on a particular attribute, characteristic, or benefit of the product being promoted (Clow and Baack, 2005:12). In addition this is a useful strategy when advertisers want to position the brand or product as a leader in a certain attribute or benefit (Kotler, 2003:311), and as Jobber (2007:511) states, "a powerful attribute for positioning purposes is being number one, as people tend to remember objects that are number one".

2. **Use or application positioning:** This base focuses on stressing uses or applications (Lamb *et al.*, 2006:250). Basically it involves creating a memorable set of uses for a product and positioning it as the best for that use or application (Clow and Baack, 2005:174-175 and Kotler, 2003:312). For example, Red Bull is positioned as an energy drink that 'gives you wings'. A second example is 'Lemsip for flu' (Jobber, 2007:511). Jobber (2007:511) explains that the basic idea behind use positioning is that when people think of flu they will automatically remember the Lemsip brand.

3. **User positioning:** This positioning base focuses on a personality or type of user, distinguishing a brand or product by clearly specifying the user group i.e. who might use it (Lamb *et al.,* 2006:250 and Clow and Baack, 2005:131). The goal of specifying a product user is to help the advertising team understand user characteristics so that messages can be structured to move these buyers to action (Clow and Baack, 2005:131). For example Jobber (2007:511) states that Land Rover Freelander has been successful in positioning their brand with 'action man' associations.

4. **Competitor positioning:** Using this strategy the brand or product is positioned as better in some way or other than a competitor (Kotler, 2003:312). Using competitors to acquire a position in the consumer's mind is a common positioning tactic which will help a consumer recall and think positively about a new brand as it creates a favourable comparison to a brand which may already be present in the cognitive maps of many consumers (Clow and Baack, 2005:39). "Comparing new or relatively unknown brands to market leaders is an excellent positioning strategy because the goal is to provide an alternative choice and also for the consumer to think of the new or unknown brand within the same context as the market leader" (Clow and Baack, 2005:39).

5. **Product category (class) positioning:** The objective is to position the product as being associated with a particular category of products (Lamb *et al.,* 2006:250). This means using points-of-parity, thus the association may not be unique to the brand but may be shared with other brands (Kotler and Keller, 2009:310). The class can be narrowly defined or viewed from a broader perspective (Clow and Baack, 2005:130).

6. **Quality or price positioning:** With this base for positioning **"**the brand or product is positioned as offering the best value" (Kotler, 2003:312). There are three possible expressions of a price-quality relationship; the first two involve price-quality relationships on the extremes of the price range where at the top end high quality is emphasised, whilst at the bottom end low prices are emphasised (Clow and Baack, 2005:128). The third strategy is the price-quality messages that suggest the most value for money (Clow and Baack, 2005:128). "The critical ingredient in each of the three positions, highest price and quality, lowest price, or high quality at a reasonable price, is to match the position with the nature of the product as well as all other marketing messages" (Clow and Baack, 2005:128).

7. **Emotional positioning:** This approach uses emotion to position a product by focusing on how the product makes customers feel (Lamb *et al.*, 2006:250). Instead of revealing what the product is this type of positioning focuses on hitting a soft spot.

The above examples indicate that there are several options or bases which marketers can use to position their products or brands. Basically these bases can be used in order to position products in the mind of the consumers, and according to Lamb *et al.* (2000:164) it is not unusual for a marketer to use more than one of these bases.

2.6.2 Selecting the right competitive advantages:

"In essence, positioning is concerned with understanding how customers compare alternative offerings on the market and building strategies that describe to the customer how the company's offering differs in important ways from those of existing or potential competitors" (Hooley *et al.*, 2004:270). "Consumers build up a position for a product based on what they expect and believe to be the most pertinent features of the product class" (Blythe, 2005:87). Furthermore, consumers choose brands whose attributes they perceive as being consistent with their goals (Arora, 2006:292). Each product is a bundle of attributes and Lancaster (1979, cited in Gwin and Gwin, 2003:32) shows that consumers have preferences for attributes of products. As a result understanding why a consumer chooses a product based on its attributes helps marketers understand brand preferences of consumers. If a company is fortunate enough to discover several potential competitive advantages, it needs to decide which differences as well as how many differences to promote.

- ***Which differences to promote:*** Although all products can be differentiated to some extent, not all differences are worth establishing. Theoretically consumers could use many attributes to evaluate products and brands, however the number of attributes influencing consumer choice is typically small (Mullins *et al.*, 2008:199). As a result, knowledge of the attributes that are important to target customers is critical. In order to determine which features to accentuate in positioning marketers need to recognise that the importance attached to attributes varies and as a result marketers need to focus on determinant attributes i.e. attributes that play a major role in helping customers to differentiate among alternatives and to determine which product or brand they prefer (Mullins *et al.*, 2008:199). According to Kotler *et al.* (2004:371) a difference is worth establishing if it satisfies the following criteria:
  - *Important:* The difference delivers a highly valued benefit to a sufficient number of buyers.
  - *Distinctive:* The difference is delivered in a distinctive way.
  - *Superior:* The difference is superior to other ways of obtaining the benefit.
  - *Communicable:* The difference is communicable and visible to the target market
  - *Pre-emptive:* The difference cannot be easily copied by competitors.
  - *Affordable*: The buyer can afford to pay for the difference.
  - *Profitable:* The company will find it profitable to introduce the difference.

  Finding a determinant attribute that meets all the above criteria is almost impossible, however the more qualities the attribute has, the more benefit it will bring to marketers and their ability to position their product in a way which will provide a competitive advantage (Ostasevičiūtė and Šliburytė, 2008:100). "Positioning assumes that consumers compare products on the basis of important features. Marketing efforts that emphasise irrelevant features are therefore likely to misfire" (Lamb *et al.*, 2006:249). Ultimately the benefit which a company chooses to communicate must distinguish the brand or product from competitors in a way that is important to the target market, so as to impact consumers purchase behaviour (Percy and Elliot, 2005:121).

- ***How many differences to promote:*** Many marketers are of the opinion that only one benefit should be promoted, and that a company should develop a unique selling proposition (usp) for each brand and stick to it (Kotler *et al.*, 2004:370). Chernev (2008: Para 10) calls this the single-benefit approach and stresses that this approach does not imply that the product is inferior on other secondary attributes; it simply identifies an attribute which is of primary importance to target customers. If positioning on a single attribute the product can be positioned as 'number one' on that attribute, this is effective in today's over-communicated society as buyers tend to remember 'number one' better (Kotler *et al.*, 2004:371). However if two or more firms are claiming to be best on the same attribute it may not be possible to choose only one attribute and it may be necessary to position on more than one differentiating factor (Kotler *et al.*, 2004:371).

  Other marketers believe companies should position themselves on more than one differentiating factor (Kotler *et al.*, 2004:371). Chernev (2008: Para 15) calls this the multi-benefit approach as it involves emphasising benefits delivered by a product on two or more primary attributes. Some marketers are choosing to position their products on more than one benefit due to the fact that the mass market is fragmenting into many small segments (Kotler *et al.*, 2004:371). In an attempt to broaden their positioning strategies to appeal to more segments companies are choosing to position products on more than one differentiating factor (Kotler *et al.*, 2004:371). According to Chernev (2008: Para 15) a further advantage of multi-benefit positioning is that it better reflects different aspects of the offerings value proposition. Some consumers may want more benefits, and the challenge is to convince the target market that the brand delivers on all the benefits (Kotler *et al.*, 2004:371). The downside of multiple-benefit positioning according to Chernev (2008: Para 15) and Kotler *et al.* (2004:371), is that multiple-benefit positioning runs the risk of diluting the products image in the mind of consumers this is because as companies increase the number of claims they risk disbelief and a loss of clear positioning.

Therefore when choosing which competitive advantages to communicate and ensuring the right choice is made marketers need to consider firstly which attributes are important and determinant and then marketers need to make a decision as to how many differences they want to promote. Brooksbank (1994:12) states that "managers of successful companies always have a crystal clear understanding of their competitive advantage, and use it as a blue print for all marketing mix decisions".

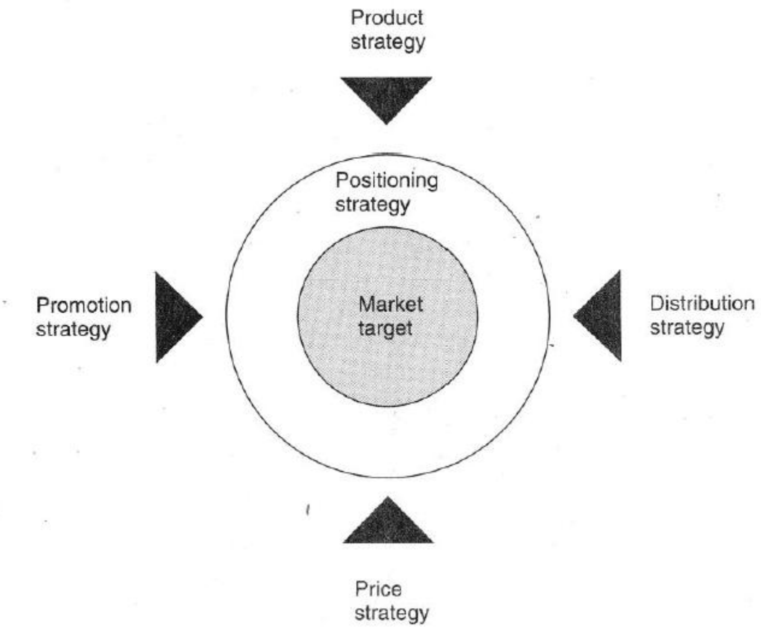
2.6.3 Effectively communicating and delivering the chosen position to the market:

Bearden *et al.* (2001:169) state that "positioning a product or service involves designing a marketing program, including the product mix, which is consistent with how the company wants its products or services to be perceived". Brooksbank (1994:10) states that as soon as the company knows how it wants to present itself, the company must implement a plan of action through the construction of a suitable marketing mix. Similarly Kotler *et al.* (2004:372) state that once the company has chosen its position, steps must be taken to communicate the position to the target market - this involves ensuring that all marketing mix elements support the positioning strategy. Thus, it can be said that positioning of a product induces its marketing mix (Aaker, 1996, cited in Ampuero and Vila, 2006:101). Since marketing mix elements are used to communicate the position and are responsible for reaching and determining the product positioning in the minds of consumers the use and role of the marketing mix elements need to be discussed.

- **The use of the marketing mix elements in Positioning:** "The marketing mix - product, price, place and promotion - is essentially the working out of the tactical details of the positioning strategy" (Kotler, 1997:298). Kotler (1997:298) believes that the advantage of solving the positioning problem is that it enables the marketer to decipher the marketing mix elements. Cravens (2000:36) too indicates the importance the marketing elements have on positioning and regards the elements as the strategies a firm uses to communicate the position against it's key competitors.

The intention of the positioning strategy is to favourably influence consumer perception, whilst the product, distribution, price, and promotion strategy components make up a bundle of actions that are used to influence buyers' perceptions (Cravens, 2000:36). Figure 2.5 indicates how the marketing elements fit into the positioning strategy.

Figure 2.5 Positioning Strategy Development



(Cravens, 2000:37)

Although marketing mix elements are only one aspect of positioning, all four components interact and need to be considered as the positioning strategy is developed (Percy and Elliot, 2005:109). The marketing mix elements need to be aligned with the positioning and with one another so that they can provide a clear message and value to the customer (Percy and Elliot, 2005:109). Basically the marketing mix needs to be interpreted so as to offer meaningful and desired benefits that consumers can relate to, impacting on their underlying motivation to behave (Percy and Elliot, 2005:109). Thus Percy and Elliot (2005:109) recommend that the following points need to be considered when developing a positioning strategy and implementing it:

1. Product: Must provide attributes that are seen as offering particular benefits to the consumer.
2. Price: Must be seen within the context of a price-value relationship.
3. Place/ Distribution: Must provide convenient access to the product as well as a positive store image.
4. Promotion: Will alert the consumer to potential benefits.

"An effective position lets a brand occupy a preferred and unique position in the customers' minds while being consistent with the firms overall marketing strategy" (Bearden *et al.*, 2001:169). This means finalising the marketing mix by putting all the pieces into place i.e. the product or service must deliver benefits that the customer values in order to satisfy their needs, it must be priced at a level that the target market is willing to pay, the offering should be available at places consumers are likely to go and communication efforts should be placed in the locations where consumers are likely to take notice (Solomon *et al.*, 2006:213). In short, it is imperative to remember that a strong position cannot be built on empty promises and thus critical to positioning is communicating and delivering the promised competitive advantage, consistently using all of the available marketing mix elements.

2.7 SUCCESSFUL POSITIONING

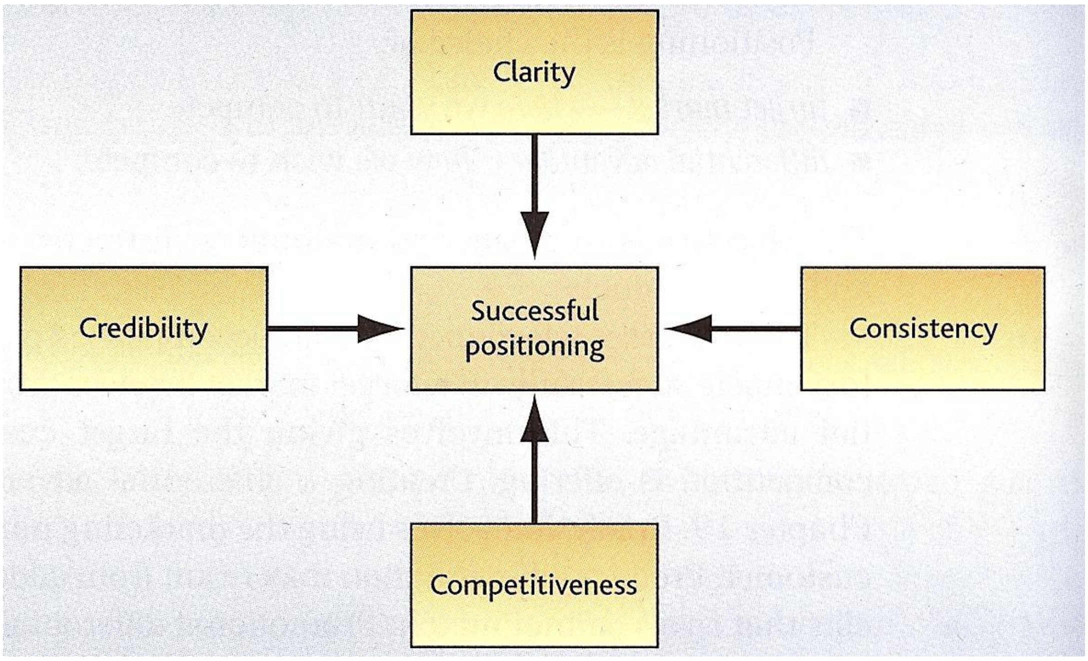
Successful positioning involves reaching a desirable position in the minds of consumers. This happens when a product occupies an explicit, distinct and proper place, in the mind of potential and existing consumers, relative to other rival products in the market (Ostasevičiūtė and Šliburytė, 2008:98). Successful positioning is not easily attainable and a few authors offer advice as to how marketers can ensure that their positioning is successful.

McDonald and Payne (2006:129) suggest that there are three main ingredients of successful positioning:

- The positioning should be meaningful – the positioning should be relevant to target customers and their needs.
- The positioning must be believable – customers must believe the claims made, ideally companies should strive to under-promise and over-deliver.
- The positioning must be unique – companies should occupy a distinct position where they are able to consistently outpace the competition.

Jobber (2007:306) states that successful positioning is associated with products which are perceived favourably, posses favourable connotations and have a differential advantage. According to Jobber (2007:306) such positioning is hard won and relies on four factors which are depicted in Figure 2.6.

Figure 2.6 Keys to successful positioning



(Jobber, 2007:306)

The four factors which are imperative for successful positioning according to Jobber (2007:306) are:

1. **Clarity:** "Positioning must be clear in terms of both target market and differential advantage. Complicated messages are unlikely to be remembered" (Jobber, 2007: 306). Therefore positioning messages should be simple and clear in order to be memorable.
2. **Consistency:** As people are constantly bombarded with messages, messages should be consistent in order to conquer this noise, furthermore a consistent message will prevent confusion (Jobber, 2007: 306).
3. **Credibility:** "The differential advantage chosen must be credible in the minds of the target customer" (Jobber, 2007:307).
4. **Competitiveness:** The differential advantage should have a competitive edge and offer something which is of value and that competitors are failing to supply (Jobber, 2007:307).

Abinanti (No date: Para 4) states that when it comes to positioning, consistency and repetition are the keys to success, failing to deliver a consistent message, over a long period of time, will result in a company's failure to reap the benefits of product positioning. Abinanti (No date: Para 6, 11& 13) explains:

- Consistency entails using the same, carefully crafted message strategy in all of the marketing communications.
- Repetition entails claiming a position and consistently communicating and repeating a message which has meaning to the target market. Repetition is important since it takes at least 10 impressions before a target buyer even notices the marketing message.

Lovelock and Wirtz (2004: 57) state that "successful positioning requires managers to understand both their target customers' preferences and the characteristics of their competitor offerings". Day (1990, cited in Lovelock and Wirtz, 2004: 58) states that to be successful, a business must identify and position themselves as the best provider of attributes which are important to customers in a way which sets them apart from competitors.

To sum up, it can be concluded that successful positioning requires a thorough understanding of the target customers as well as the competitors. Furthermore, marketers must ensure that their positioning clearly and consistently communicates their differential advantage, in a meaningful way to target customers. Also imperative is that they recognise that it takes time to build a strong position, therefore positioning requires patience and needs to be repeated often and consistently.

2.8 Positioning Mistakes

In the previous sections it has becomes obvious that positioning plays an important part in marketing strategy and is a somewhat complex process. The key strategic issue associated with positioning is to present a clear and consistent message to the target audience, and a company who constantly tinkers with its image stands the chance of confusing its target market (West, Ford and Ibrahim, 2006:169). Marketers need to be aware that if mistakes in the process occur; they risk the chance of undermining the company's marketing strategy. In general there are four positioning mistakes which companies need to avoid:

1. **Under-positioning:** Buyers have only a vague idea of a brand and the brand is seen as just another entry in a crowded marketplace (Kotler, 2000:311). Thus consumers do not perceive the product or brand as anything special.
2. **Over-positioning:** Here buyers have a misconception about the brand. They believe the product or brand to be exclusive and too expensive for them, when in actual fact the brand also offers lower priced goods - thus they fail to recognise the full breadth of the range (Gillingham and Wilson, 2003:443).
3. **Confused positioning:** This occurs when companies make too many claims or change the company's positioning too frequently which may result in contradictory messages - resulting in an unclear and confused perception of the brand or product (Kotler, 2000:311).
4. **Doubtful positioning:** This occurs when buyers find it hard to believe the brand claims, which may be in view of product features, price or manufacturer (Kotler, 2000:311). Claims are doubtful or are simply not accepted.

Further to the four positioning mistakes Trout and Rivkin (1996, cited in West *et al.*, 2006:170) present six positioning pitfalls which marketers need to be aware of and avoid:

- ***The obvious factor:*** Positioning is the search for what is obvious, and when marketers feel that things need to be more clever, complex or creative; they run the risk of replacing obvious with complex and confusing (West *et al.*, 2006:170).

- ***The future factor:*** This occurs when marketers doubt that their position will hold up in the future (Trout and Rivkin, 1996:156). As a result of their uncertainty, marketers constantly change and modernise strategy to deal with the future and its possible changes (West *et al.*, 2006:170). However what they don't realise is that "if you don't get niched in the customer's mind, your future options will be quite limited" (Trout and Rivkin, 1996:157). This is because in order to build a strong position the position should be stable, when constantly changing or adapting the position the marketer runs the risk of confusing customers.
- ***The cutesy factor:*** "Instead of telling things in a straightforward way many companies like to get cute and creative" (West *et al.*, 2006:170), and as Trout and Rivkin (1996:157) state, "powerful ideas tend to tell it like it is. They're straight not cute".
- ***The would-be hero factor:*** This pitfall occurs when an employee who in trying to get the CEO's attention, second-guesses the hard chargers in the company and plays around with the positioning of the product (West *et al.*, 2006:170). According to Trout and Rivkin (1996:158), these ideas are likely to evolve from 'inside-out thinking' and the reason why they fail is because in order for positioning thinking to succeed, it has to be 'outside in thinking'.
- ***The numbers factor:*** This occurs when companies develop endless line extensions in an attempt to maintain a healthy increase in sales to generate larger numbers (West *et al.*, 2006:170). Trout and Rivkin (1996:161) state that the reason why this fails is by running out endless line extensions marketers run the risk of cluttering the shelves, which often confuses perceptions and opens the door for specialised competition. Furthermore, they stress that when it comes to positioning, the program needs to be implemented properly and requires patience, if these two ingredients are present the numbers will follow (Trout and Rivkin, 1996:161).
- ***The tinkering factor:*** "What are seen as improvements internally can often be seen as confusing by the target market" (West *et al.*, 2006:170). This is because often improvements don't line up with the perceptions of the customers and, as Trout and Rivkin (1996:162) stress, "in positioning, once you've gotten a brand up to altitude your watchword should be 'steady as she goes'".

When examining the pitfalls that have been discussed above it becomes obvious that these factors cause problems because the company fails to take a distinctive position in the mind of the consumer or maintain it consistently. Ultimately this causes confusion, undermining the position of the company. As West *et al.* (2006:169) state, "if strategic decisions are made which are inconsistent from time to time, the consumer is left with potentially mixed messages which become confusing and create cognitive dissonance".

2.9 REPOSITIONING

"A repositioning strategy involves altering or changing a product's or brand's current positioning" (Monger, 2007:334). Due to the existence of embedded perceptions about, and attitudes towards, a product or brand repositioning is often difficult to accomplish (Monger, 2007:334). It may however become necessary to reposition a product under the following circumstances:

- a strong propriety advantage has been gained and it would be beneficial to work this into the positioning
- primary differentiating benefits have been lost
- the organisation wants to appeal to additional buyer segments
- a new superior competitor has entered the market, and has taken or rendered the position as ineffectual
- the organisation is altering it's strategic direction
- the product or brand has a bad or vague image

(Monger, 2007:334-335)

- customer expectations and needs have changed
- sales performance is poor or growth needs to be sustained in slow markets

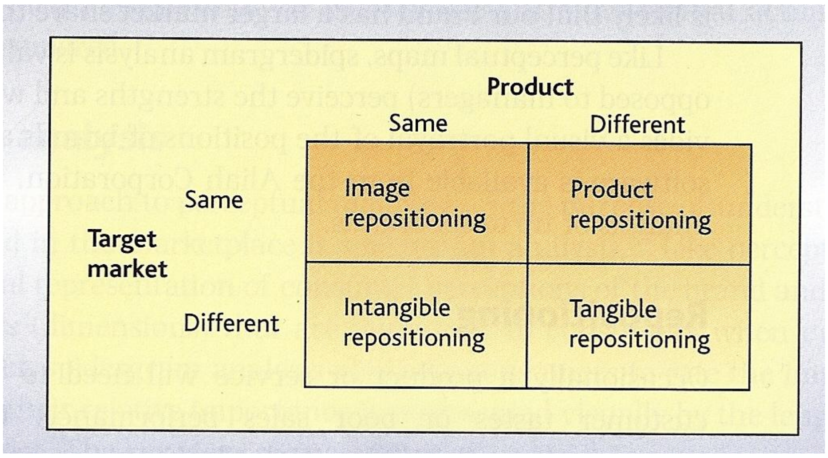
(Jobber, 2007:309)

- positioning mistakes have occurred which need to be corrected

(Lamb *et al.*, 2006:251)

Under circumstances where it is appropriate to change positioning a company may choose to make real changes, cosmic changes or they may seek to change only consumers' perceptions of a brand's positioning (Clarke and Wilson, 2008:183). Jobber (2007:310) states that when repositioning, product differentiation and the target market should be used as the key variables. According to Jobber (2007:310) there are four generic repositioning strategies (depicted in Figure 2.7) which can be implemented:

Figure 2.7 Repositioning Strategies



(Jobber, 2007:310)

1. **Image repositioning:** This entails keeping product and target marketing the same and changing the image of the product (Jobber, 2007:310). This is useful in markets where products act as a form of self expression and the product is acceptable in functional terms, but fails because it lacks the correct image (Jobber, 2007:310).
2. **Product repositioning:** This strategy changes the product whilst the target market remains the same (Jobber, 2007:310). This strategy is useful when the needs of the target market have changed.
3. **Intangible positioning:** Here the focus is on using the same product to target a different market segment (Jobber, 2007:311). This strategy can be useful in international marketing, or when there is a need to increase growth by attracting a broader target market.
4. **Tangible positioning:** This strategy changes both the product and the target market (Jobber, 2007:311). This strategy is useful when a company wishes to move up- or down the market by introducing a new range of products to meet the needs of new target customers.

Thus repositioning may involve changing the target markets, the differential advantage or both. Whatever the marketers' choice, it becomes clear that repositioning does not always entail complete change; sometimes it entails strengthening and clarifying an existing identity. Marketers must recognise also that repositioning does not always hold the key to success, and thus they need to carefully consider whether it's worth repositioning a product. Thus, prior to considering whether to reposition marketers should utilise the tools available to measure and research their positions as perceived by the target market.

2.10 MEASURING/ RESEARCHING POSITIONING

There are various tools available to help marketers make positioning decisions. According to Walker, Boyd, Mullins and Larréché (2003:187) these software tools include applications that identify important determinant attributes, as well as statistical applications that can plot positioning grids from market research data. Perceptual mapping, conjoint analysis, factor analysis, discriminant analysis and factor analysis are tools that can assist with positioning and will be discussed below:

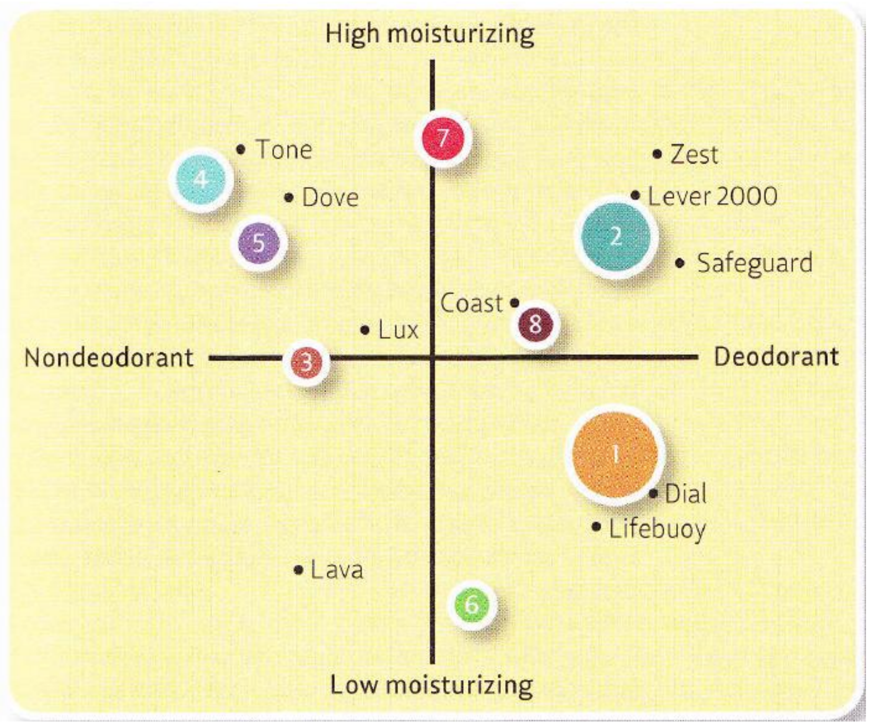
2.10.1 Perceptual Mapping

A perceptual (positioning) map is a graphic representation of consumer perceptions' of a brand or product relative to competing products or brands in the market (Monger, 2007:333). Jobber (2007:307) defines a perceptual map as "a visual representation of consumer perceptions of the brand and its competitors using attributes (dimensions) that are important to consumers".

A perceptual map is a quantitative market research tool which uses scaling techniques designed to represent consumers' product perceptions and preferences as visual representations or points on a map or graph (Monger, 2007:333). "Maps are created using market research input and are based on the segmentation key buying criteria (important perceptions/ requirements) of specific target markets" (Monger, 2007:333). The key steps in developing a perceptual map, according to Jobber (2007:307) are:

1. Identify a set of competing brands.
2. Identify important attributes that consumers use when choosing between brands using qualitative research (e.g. group discussions).
3. Conduct quantitative marketing research where consumers score each brand on all key attributes.
4. Plot brands on a two dimensional map(s).

Figure 2.8 Perceptual Map of Bar Soaps



(Perreault and McCarthy, 2005:83)

Figure 2.8 is an example of a perceptual map. These maps are used by marketers when developing their positioning strategy and are useful analysis tools which assist marketers to determine how consumers perceive and evaluate a product or brand in a particular market (Arnould, Price, and Zinkham, 2002:60 and Monger, 2007:333).

In addition to being useful for determining consumer perceptions about a brand and competing brands, a perceptual map can also be valuable in identifying strengths and weaknesses (Jobber, 2007:308). Another valuable aspect of perceptual maps is that consumers can be asked to score their ideal position on each attribute so that actual and ideal positions can be compared (Jobber, 2007:308).

2.10.2 Conjoint Analysis

Conjoint analysis is a useful tool to access which key attributes are important to customers (Walker *et al.*, 2003:187). Conjoint analysis is a multivariate technique that estimates the utility of the levels of various attributes or features of a product or brand, as well as the relative importance of the attributes themselves (Hair, Bush and Ortinau, 2000:601). This method tries to estimate the product attribute importance weights that best match the consumer's indicated product choice or preference (Hair *et al.*, 2000:601). Thus conjoint analysis determines which combination of a limited number of attributes consumers most prefer and is helpful for identifying appealing new product designs and important points that might be included in a product's advertising (Walker *et al.*, 2003:187). However, although conjoint analysis can provide some insights about preferences it does not provide information about how consumers perceive existing products in relation to product dimensions, and therefore it should be used only to narrow down a set of product attributes to consider in product design and positioning decisions (Walker *et al.*, 2003:187).

2.10.3 Factor and Discriminant Analysis

Factor and discriminant analysis are statistical techniques useful in constructing positioning grids based on actual marketing research data (Walker *et al.*, 2003:187). Factor analysis is a multivariate statistical technique that is used to summarise the information contained in a large number of variables into a number of subsets or factors (Hair *et al.*, 2000:590). The purpose of this method is to reduce to a manageable number, many attributes that belong together and have overlapping measurement characteristics (Cooper and Schindler, 2001:591). In order to make use of factor analysis it is necessary to identify salient attributes consumers use to evaluate products, collect data from a sample of customers to determine their ratings of each product or brand on all salient attributes (Walker *et al.*, 2003:187). The factor analysis program determines which attributes are related to the same underlying construct – these underlying factors are used as the dimensions for a product space map, and the program indicates where each product or brand is perceived to be located on each factor (Walker *et al.*, 2003:187).

Discriminant analysis requires the same input data as factor analysis and the discriminant analysis program then determines consumers' perceptual dimensions on the basis of which attributes best differentiate among brands – these are then used to construct a product space map – however these are usually not so easily interpretable as the factors identified through factor analysis (Walker *et al.*, 2003:187). However with both methods, the underlying dimensions may be more a function of the attributes used to collect consumer ratings than of the product characteristics that consumers actually consider to be most important (Walker *et al.*, 2003:187).

2.11.4 Multidimensional Scaling

Multidimensional scaling creates a special description of a respondent's perception about a product, service or brand (Cooper and Schindler, 2001:600). This technique is different to the other techniques described. Instead of the underlying dimensions identified being dependant on the attributes supplied by the researcher, this technique produces dimensions based on consumer judgements about the similarity of, or their preferences for, the actual brands (Walker *et al.*, 2003:187). These underlying dimensions are thought to be the basic attractive dimensions that consumers actually use to evaluate alternative brands in the product class (Walker *et al.*, 2003:187). Multidimensional scaling programs that use data on similarities construct geometrically spaced maps on which the brands perceived to be most similar are placed close together, whilst those that use consumer preferences produce joint space maps showing ideal points and then they position the most-preferred brands close to these ideal points (Walker *et al.*, 2003:187). The underlying dimensions of the maps produced can be difficult to interpret, the dimensions identified are only those that exist for currently available brands and therefore this technique is less useful for investigating new products involving new characteristics (Walker *et al.*, 2003:187). Furthermore this method is subject to statistical limitations, when the number of brands being investigated is small, typically this technique should only be applied when eight or more different products or brands are being examined (Walker *et al.*, 2003:187 and Keegan and Green 2005:216).

Thus, there are various options available to marketers which will assist them in planning and implementing a positioning strategy, as well as assist in measuring the effectiveness of their positioning strategy. There are advantages and disadvantages to all measurement tools and marketers need to consider which will enable them to best meet their objectives.

2.11 Conclusion

What can be concluded from the previous sections is that positioning involves various elements and in order to influence the way that consumers perceive and position a brand it is imperative to take all the elements into account. Because the process begins with the consumer and ends with the consumer, the importance of understanding what drives the consumer that the company wishes to target cannot be under-estimated. What becomes clear from the sections discussed is that consumers position a product with or without the help of marketers, however marketers cannot afford to leave their products position to chance (Kotler and Armstrong, 2001:270). Marketers need to plan positions that will give their products the greatest advantage in selected target markets, and they must design marketing mixes to create these planned positions.

Whilst this chapter discussed the theory of positioning, the next chapter discusses in detail, the generational theory. It gives further insights into why generations are important and provides clues as to how marketers can develop strategies that target the three generations central to the study, namely the Baby Boomers, the Generation X and Generation Y.

3.1 INTRODUCTION

In the previous chapter, target markets and the importance of targeting when it comes to designing and implementing a positioning strategy were discussed. Research conducted by the UCT Unilever Institute of Strategic Marketing has indicated that the Baby Boomers, in South Africa, believe marketing messages are aimed at persons in their 20s and 30s, and feel alienated from marketing communications, overlooked by product developers and are displeased with customer service (Mitchell, 2008: Para 10). This indicates that there seem to be differences between generations. This chapter looks at three target markets segmented on the basis of generations. Included are the Baby Boomer generation, Generation X and Generation Y. This chapter assists in forming an understanding of the three generations, which are central to the study, as well as exploring what distinctive differences exist between these generations.

3.2 BACKGROUND

Recently the Baby Boomer generation, has come into the media spotlight. Abroad marketers are rapidly becoming aware of the fact that the Baby Boomers comprise not only the largest generation, but are also the single most lucrative segment (Hart, 2007:34, Vence, 2007:28, Unknown, 2007a:120 and Blake, 2006:85). According to Osborn (cited in Vence, 2007:28), Baby Boomers are a market which is largely untapped and that marketers across many fields are just beginning to realise the value of this market. Hart (2007:34) agrees, stating that "marketing campaigns today too often address younger consumers, blithely ignoring the Baby Boomer women born between 1946 – 1964".

Similarly in South Africa research conducted by the UCT Unilever Institute of Strategic Marketing and Synovate suggests that South African marketers are largely ignoring the baby boomer generation (Scher, 2008: Para 1). The study which was the result of months of extensive quantitative and qualitative research shows that the mature market often feels marginalised and ignored by the retail, corporate and media worlds (Scher, 2008: Para 7). Furthermore, the research shows that the mature market believe marketing messages are aimed at individuals in their 20s and 30s, emphasising that this market feels estranged from marketing communications, disregarded by product developers and dissatisfied with customer service (Mitchell, 2008: Para 10).

The fact that baby boomers feel neglected by South African Marketers and the fact that they believe their needs to be different from the needs of their younger counterparts, highlights the fact that marketers in South Africa need to be aware of generational differences when they're positioning their products in the minds of consumers. This indicates that there may be an opportunity for South African marketers to position their products better in the minds of Baby Boomer consumers. Furthermore, the fact that this generation feels marginalised may indicate the importance of generational marketing in South Africa. Generational marketing has also gained some popularity recently and marketers are starting to recognise that in order to engage individuals from one generation, marketers need to target generations differently and use different approaches for each generation.

3.3 THE IMPORTANCE OF GENERATIONS

In recent years generational theory has become fairly well known. It attempts to explain how different generations develop different value systems, and the impact that this has on how younger and older people interact with the world around them and with each other (Codrington, 2008:1). A generation can be defined as "an age cohort that shares unique formative years' experiences and teachings (roughly the first 20 to 23 years of their lives) and thus develops unique core attitudes that are different from other generations" (Underwood, 2007:43). Schewe and Meredith (2004:51) explain cohorts as "groups of individuals who are born during the same time period and travel through life together. They experience similar external events during their late adolescent/ early adulthood years. These 'defining moments' influence their values, preferences, attitudes and buying behaviour in ways that remain with them over their entire life". Thus, the notion of generations and cohorts is based on an assumption that individuals are highly influenced by events which occur in their formative years. Previous generational research offers good reason to believe that individuals are deeply affected by impactful events experienced in their formative years (Mannheim, 1952, cited in Motta and Schewe, 2008:1098).

According to Smith and Clurman (1997, cited in Norum, 2003:56), "members of a generation are linked through their shared life experiences, and because of these experiences, each generation develops and retains its own values and life skills that differentiate one generation from another". Furthermore, Smith and Clurman (1997:87) found that "common experiences of a generation create a specific sensibility that touches all its members in some way: It teaches them what's funny, what's stylish, what's status, what's taboo, what works and what doesn't. It tells them what to aspire to and what to avoid". Since individuals are shaped by life experiences, individuals who grew up in different time periods will have different world views, expectations and values, resulting in preferred methods of communicating and interacting with one another (Glass, 2007:98). When generations collide, the differences may cause conflict and in order to avoid or minimise conflict it is imperative to be aware of, and understand the underlying values of the generations.

Since, career, consumer, and lifestyle decisions are significantly influenced by generational values and attitudes, all businesses need to be trained in generational marketplace strategy and generational workplace strategy (Underwood, 2007: 43). Motto and Schewe (2008:1097) state that the underlying understanding of generational or cohort theory can be applied to various business functions as well as everyday life interactions between individuals from different generations. Furthermore, Codrington (2008:3) states that "there is plenty of hard evidence and ongoing research to show that a generational approach to understanding society and groups of people is scientifically acceptable and well grounded in good social science". Thus, indicating that an understanding of generational theory can be applied to various business functions and is an important aspect to understanding groups of people.

3.4 Generational Marketing

Generational theory has recently gained importance in the marketing discipline with generations being associated with marketing opportunities, consumer behaviour and segmentation (Noble and Schewe, 2003, cited in Motta and Schewe, 2008:1097). Fishman (2004:4) states that generational mindsets and feelings are of major importance in determining what and how individuals buy and therefore in developing an effective marketing strategy. According to Smith and Clurman (1997:87) the aspirations and expectations which make generations distinct, play a critical role in shaping consumer trends. Furthermore, they conclude that "generationally determined lifestyles and social values exercise as much influence on buying and purchasing as more commonly understood demographic factors like income, education and gender do – maybe even more" (Smith and Clurman, 1997:87).

Generational marketing is being used by astute marketers around the world, as they recognise that a generation produces a group of consumers with strong homogeneous bonds (Schewe and Meredith, 2004:51). These similarities allow marketers to target a generation by offering the same product, distribution and or communications programmes to a large number of potential customers that are likely to respond in the desired way (Schewe and Meredith, 2004:51). However targeting and customising for generations requires knowledge of the generation's particular attitudes and inclinations (Nicholas, 2009: 47).

Therefore, by understanding how consumers' motivations are tied to the underlying values of a generation which they belong to allows marketers to tailor products, services and communications to consumer needs, interests and desires, enabling them to target and reach a specific generation more effectively.

Each generation brings different core values and life stages to its consumer decisions, and have unique preferences regarding the way they want to be marketed and messaged to (Underwood, 2007:43). A smart marketer who considers generational marketing knows that the deeply implanted preferences will stick to a generation as they pass through each life stage (Smith and Clurman, 1997:88). Thus, paying attention to generational differences is critical to marketing. An understanding of generations will help guide marketers toward a comprehensive plan for targeting different generations of consumers who are savvy, resistant to obvious attempts at generalised pitches, and have access to millions of companies through as many internet sites (Bailor, Beasty, Lager and Sebor, 2006:23).

3.5 Baby Boomers

Baby Boomers are classified as individuals born between (and including) 1946 and 1964 (Musico, 2008:35). The most significant influences which shaped the boomer generation include the Great Society (in which poverty was abolished and all races were equal under the American law (Unknown, 2009:5)), general economic prosperity and the expansion of suburbia, Nixon colour TV, and sex, drugs and rock 'n roll (Smith and Clurman, 1997:88). This generation was born during times of booming economic expansion and enjoyed unprecedented employment and educational opportunities (Smith and Clurman, 1997:88). Born in times of a booming birth-rate, to parents who taught them to believe they could achieve anything, this generation is competitive, idealistic and optimistic and live life in the fast lane with little disposable leisure time (Lancaster and Stillman, 2003:11 and Strategic Edge, 1996: Para 2). Growing up in times which allowed for experimentation and unlimited possibility has given this generation a certain sense of flexibility (Beasty, 2006:35). Researchers have also found that two consistent but often conflicting attitudes of individualism and social activism guide Boomers behaviour (Huber and Skidmore, cited in Dann, 2007:430). Smith and Clurman (1997 cited in Bergen, 1997: Para 13) explain this as follows, born in times of prosperity and economic expansion this generation took the riches and opportunities for granted and developed a sense of entitlement. Furthermore, since there was 'enough for all' and this generation believed that there was ample to go around they were able to embrace inclusive social policies (Smith and Clurman, 1997, cited in Bergen, 1997: Para 13).

Although this generation is reaching retirement age, this group is not one that wants to hear about retirement or growing old, and as life expectancy increases so are Boomer expectations about how long they want to work (Beasty, 2006:32). Most Boomers intend to continue working beyond the traditional retirement age, but on their terms - choosing to phase into retirement or adopting a cyclical pattern of retiring and re-entering the workforce at different stages (Dann, 2007:430). Whilst accepting the fact that they're getting older this generation places a great deal of value on health, beauty, and an active lifestyle, and Boomer women especially want to look and feel younger (Beasty, 2006:34-35). As Weimann (2005:21) says "they seek ways to maintain a healthy, active, energetic, active and engaging lifestyle". Thornhill (2008 cited in Musico, 2008:36), predicts that just as Boomers influenced the mass adoption of fitness centres so too will they influence keeping the brain supple and exercised and staying sharp mentally.

"Boomers are reaching their peak earning years as expenses begin to bottom out" (Beasty, 2006:34). This is because for most boomers their children have moved out, and mortgages and other loans are ending, and they are inheriting money from their parents, making them a generation with a lot of disposable income (Beasty, 2006:34). Furthermore, "Baby Boomers love to spend money on themselves" (Beasty, 2006:34) and "are typically big spenders" (Strategic Edge, 1996: Para 4) making them an attractive segment for marketers. Boomers are smart and knowledgeable consumers with high expectations, that aren't going to waste money (Beasty, 2006:35). These consumers put value into expertise and education and like data (Gjertsen, 1999:13). Marketers can't afford to make the assumption that Baby Boomers will be the next seniors and act like them; they need to understand that Boomers are neither young adults nor old people, instead they're a group in the middle (Musico, 2008:37).

Table 3.1 Characteristics of Baby Boomers

Characteristics	*Baby boomers*
Attitude:	If you have it flash it
Outlook:	To boldly go where none has gone before. Age is a state of mind. You are only as old as you think. It's not *what* you know but *who* you know.
Mind-set:	Idealistic, with a focus on vision and values
Values:	Optimism, idealistic, team orientated and individualistic, personal gratification, health & wellness, personal growth, youth, work, involvement.
Behaviour:	**Positives:** Service-orientated, driven, willing to "go the extra mile", good at relationship, want to please, good team players. **Negatives:** Not naturally "budget minded", uncomfortable with conflict, reluctant to go against peers, may put process ahead of result, overly sensitive to feedback, judgemental of those who see things differently.
Characteristics:	Talkative, bossy, inquisitive, stylish, competitive
Likes & Dislikes:	**Likes:** shopping, ostentation, winning, leading, vision **Dislikes:** Paying off debts, ageing
Buying Behaviour	Spends a lot

(adapted from Laurel, 2005:9 and Codrington and Grant-Marshall, 2004:37)

Table 3.1 describes the characteristics of Boomers, highlighting their attitude, outlook, mindset, values, behaviour, characteristics, likes and dislikes and buying behaviour. The table shows that Boomers are optimistic and competitive in nature, dislike being referred to as old and are big spenders (Laurel, 2005:9 and Codrington and Grant-Marshall, 2004:37).

3.5.1 Marketing to Baby Boomers

In the previous sections characteristics of the Boomer generation have been given attention, as well as the attitudes that have resulted from these moments. Although it is important to recognise that people of this group are different, the attitudes formed by the generations defining moments can be used to develop marketing messages that will effectively target this group of consumers (Nayyar, 2001:6). The Boomer generation is often ignored as the assumption is made that brand preferences are locked by the age of 40 (Lee and Kiely, 2005: Para 19). However various research studies have shown that Boomers are just as likely, and in some cases more likely, as everyone else to try different brands (Lee and Kiely, 2005: Para 19). The sheer size of this segment means that more and more marketers are beginning to recognise the value of this generation.

The Boomer Generation has a sense of entitlement, and as a result they want to be treated as special at all times (Fishman, 2004:5). This means it is imperative for marketers to know their audience and speak their language (Freeman, 2008:23).

Words and phrases that resonate with Boomers and their needs should be used such as activity, contribute, experienced, grace, growth, independence, direction, health, love, mature, new, options, passion, start now, staying involved, time for yourself, well-being and wise (Freeman, 2008:23).

This generation also resents authority; they like to be in control, which means marketers need to treat them as part of a team (Fishman, 2004:5). This means not telling them what to do, but allowing them to choose. According to Freeman (2008:23), Boomers respond well to choices, and respond better to product offerings which are flexible, allowing them to create their own packages which will best meet their needs. However Harwood (2002:30) warns, Baby Boomers are strapped for time, therefore they should be offered limited choices making purchasing decisions easy. Furthermore, Baby Boomers respond to marketing messages that focus on how the product or service can make their lives easier, and ones that are easy to grasp (Fishman, 2004:4). In addition, Baby Boomers are a generation that will pay extra for convenience and quality (Underwood, 2006:42).

These consumers are lifelong learners, their love for learning means they want to know more and information is important (Fishman, 2004:5). Their strong desire to change and evolve means marketers should ensure their messages show how Boomers can learn, grow or better themselves (Freeman, 2008:23). Figure 3.1 represents the 10 Marketer Commandments which marketers need to be aware of and build into their strategies if they want to target baby boomers successfully.

Figure 3.1 Marketer Commandments for Baby Boomers

10 Marketer Commandments

1| Treat everyone differently.
2| Use emotionally meaningful concepts, words and images.
3| Be positive.
4| Realise more information is better.
5| Tell a story.
6| Understand my changing needs.
7| Make it relevant to me.
8| Play in the grey.
9| Use life stage not age.
10| Learn, baby, learn.

(Musico, 2006:38)

Baby Boomers are smart and vague messages will not work with this generation; instead they want to know the benefits and want information, marketers need to communicate benefits and value in a clear-cut way, making it relevant to the targeted consumers (Beasty, 2006:35). When it comes to Boomers, these consumers like to be in control of the buying process, and the information search is very important (Harmon, Webster and Weyenberg, 1999:31). An advert that is information intensive is more likely to be received than an image-orientated advertisement (Hodges and DeCoursey, 1996, cited in Harmon *et al.*, 1999:31). Whilst Baby Boomers want lots of information, they also want marketers to help them filter and organise the information. “Overall they want to know about benefits rather than features” (Hart, 2007:34). When marketing to Baby Boomers web, advert, brochures and word-of-mouth are important communication tools (Hart, 2007:34). Hart (2007:34) emphasises that they are all important as Boomers will consult each one whilst reaching a decision. Moore (2008: 40,42,44), too suggests using various methods to reach Baby Boomers, as Baby Boomers are “wired”, “radio active” and “linked to ink”.

Radio is particularly effective as research shows that music is a potent connector with Boomers, especially the music which Boomers love and can relate to (Mills, 2008, cited in Moore, 2008:42).

Being born in a time where youth was celebrated means this generation looks for products and services that give them and edge and energetic feel (Beasty, 2006:35). "Boomer women aren't content to be labelled "seniors" and never will be" (Unknown, 2005:70). "Marketing efforts must reflect Boomers' view of themselves as perpetually young" (Finn, 2005, cited in Unknown, 2005:70). Baby Boomers will not respond well to messages that refer to them as either old or as seniors, however there is a tremendous opportunity for marketers to speak to this generation playing on ways of how the product can help this generation stay active (Musico, 2008:37). In short the key to marketing to Boomers is to focus on their youthfulness.

When it comes to developing marketing messages for the Boomer generation, Codrington and Grant-Marshall (2004:185) suggest "Make me feel special" should be the key marketing theme and they provide the following tips for marketing to Boomers:

- They are busy and want everything faster and more convenient – and don't mind paying for it.
- Put the label on the outside of the product – make it reek of class and quality. Boomers enjoy displaying their conspicuous consumption.
- Use 1960s and 70s music – Boomers were the first to put music into adverts and they like their 'music' the best.
- They believe they know better than anybody else, so forget products endorsed by any generation other than Boomers.
- They distrust authority so communicate product benefits straightforwardly and honestly.
- BUT they are attracted by celebrity endorsements and image.
- Use loyalty schemes.

(Codrington & Grant-Marshall, 2004:186-187)

Thus when marketing to Boomer women, marketers need to create products with the right mix of image, performance, relevance and simplicity, whilst at the same time accommodating and responding to the many demands on her time (Unknown, 2006:18). Since Boomers are constantly seeking ways to simplify their lives it is important for marketers to simplify messages, minimising the use of jargon (Koco, 2008:59). Furthermore, advertising should aim to reach Boomers on a rational and emotional level (Koco, 2008:59).

3.6 Generation X

Generation X consists of a group of people born between (and including) 1965 and 1981 (Underwood, 2007:42). Divorce, AIDS, Sesame Street, the influx of women into the work place, MTV, crack cocaine, Gameboy and the PC are things that have significantly influenced and shaped this generation (Smith and Clurman, 1996:87). Their younger years were buffeted by tumultuous political and economic conditions resulting in a wary and uncertain generation (Smith and Clurman, 1996:88). Being the first generation to be heavily affected by divorce this generation was accustomed to coming home to an empty house and has seen too many promises broken, resulting in a highly independent and entrepreneurial group that are highly sceptical (Lancaster and Stillman, 2003:12). All in all X-ers are extremely savvy and enthusiastically ready, willing and able to take on the challengers they face (Smith and Clurman, 1996:88). For this generation hard work is a pragmatic necessity, and they tend to be careful about planning for the future (Smith and Clurman, 1996:88). Influenced by the explosion of media, when it comes to marketing this generation is more sceptical, more cautious and very aware of being manipulated (Lager, 2006:28).

"The more senior members of Generation X are about to enter their primary earning years" (Mitchell *et al.*, 2005:28). This generation is one of the best-educated generations and in the workplace are more comfortable with women and minorities in leadership roles than the previous generations were (Mitchell *et al.*, 2005:27). Rejecting the accumulation of material possessions, X-ers place value on the accumulation of experiences and other intangibles and work is viewed as a means to an end, providing leisure, family, lifestyle or experiential learning (Mitchell *et al.*, 2005:28). As Generation X-ers are becoming parents, the Generation X women are looking for careers that will allow them the flexibility to work and be parents at the same time (Lager, 2006:30). Members of Generation X have redefined their goals and indicators of success focusing on personal satisfaction and family - sometimes at the cost of financial and social status (Lager, 2006:30).

This generation likes to talk and share, they value relationships and opinions of friends and family, making purchasing decisions with thought for and input from the rest of their family (Lager, 2006:30). Buying brands they believe in, services that are tailored to their needs or items that are recommended to them, a straight-forward marketing approach works best with this generation (Lager, 2006:30). Van Someren (2006, cited in Lager, 2006:30) suggests that creative appreciation, relevance and convenience, and sense of community are three drivers which are essential for engaging this generation. However, "the challenge for today's marketers is to develop specific strategies to appeal to Generation X while recognising the extreme diversity (cultural, attitudinal, economic) within this group itself" (Mitchell *et al.*, 2005:30).

Table 3.2 Characteristics of Generation X

Characteristics	*Generation X*
Attitude:	'Whatever…', enigmatic
Outlook:	Just tell me, is this going to be on the test? Be careful out there. It's a dangerous world. Always ask, 'Why?' I want to have a life.
Mind-set:	Reactive, with a focus on survival and adventure.
Values:	Diversity; thinking globally; balance; techno literacy; fun; informality; self-reliance; pragmatism, pessimistic.
Behaviour:	**Positives:** Adaptable; techno literate; independent; unintimidated by authority; creative; ability to multitask. **Negatives:** Impatient; poor people skills; inexperienced; cynical.
Characteristics:	Pragmatic, individualistic, arrogant, risk-taking
Likes & Dislikes:	**Likes:** Sharing, chilling, being individualistic, being with friends, change **Dislikes:** Bossiness, corporate culture
Buying Habits	Very sceptical consumers

(adapted from Laurel, 2005:10 and Codrington and Grant-Marshall, 2004:47)

Table 3.2 summarises the characteristics of Generation Xers, from this table we can conclude that Xers are a reactive, practical generation and tend to be risk-takers, however at the same time they are both cynical and sceptical consumers (Laurel, 2005:10 and Codrington and Grant-Marshall, 2004:47).

3.6.1 Marketing to Xers

Known to be extremely disloyal to brand and companies (Lager, 2006:31), Generation X provides a real challenge to marketers, but at the same time offers marketers great opportunities. As with the Boomer Generation it is imperative that marketers understand that although some commonalities exist amongst the people of this generation, differences are also common, thus in order to effectively segment using generational theory marketers need to focus on the commonalities. Xers resent being lumped together with other consumers, which has resulted in Xers demanding communications which speak directly to them; they do not want to be seen merely as participants in a mass market (Mitchell *et al.*, 2005:29).

According to DeBaugh (2003:53), "this group grew up being inundated with advertising and can smell a marketing campaign a mile away", which has resulted in them being cynical when it comes to adverting. Known to be both sceptical and careful consumers, Xers tend to research and try many products before committing to them (Fried, 1996: Para 7). Marketers should offer these consumers lots of information and allow them to interact with displays as well as sample products (Fried, 1996: Para 11). Their scepticism of advertising means Generation X's purchasing behaviour is often based on recommendations by friends and family (Lager, 2006:30). An opportunity for marketers is to develop messages that emphasise a sense of family, a sense of belonging – treat Xers like family (Fishman, 2004:5).

"Xers demand trust. Don't follow through once and you've lost them" (Fishman, 2004:5). Thus it is important to present products realistically using a straight talk approach and avoiding hype (Mitchell *et al.*, 2005:28). Fishman (2004:5) agrees, stating that Xers will see through hype and value an honest, straight-forward approach. In advertising it is important to engage this generation, empowering them to make the choice and focusing on keeping the tone of marketing communications light and humorous (Lager, 2006:30). The X-generation is seeking more than just products - they want an experience (Lager, 2006:30).

Van Someren, (2006 cited in Lager, 2006:30) states that, "as a result of the internet and mobile technology, Generation X has high expectations around receiving easy and personalised service at all times". Their preference for active engagement, has resulted in a preference for online interactions, whilst still maintaining an affinity for certain traditional channels (Lager, 2006:31). Philalithes (2006, cited in Lager, 2006:31) comments, that in order to reach this audience online, marketers could incorporate pay-per-click adverts and rich media advertising. Since Xers are visual the use of rich media advertising which is creative and original appeals to this audience (Philalithes, 2006, cited in Lager, 2006:31). Furthermore, it is important to ensure that the click-through from online adverts takes the audience directly to the relevant page of your website (Philalithes, 2006, cited in Lager, 2006:31). According to Fishman (2004:5), the fact that Xers are computer literate means that these consumers are likely search websites for more information prior to buying a product. If the website isn't easy to navigate, easy-to-read and visually pleasing to these consumers they lose interest (Fishman, 2004:5). Furthermore, Generation Xers are very comfortable communicating via email and sms (Unknown, 2007b:72). This means marketers should take advantage of the possibilities of online media and re-evaluate media selections.

As a group, this generation places less value on product prestige and symbolism; they want products that function well and offer affordable quality (Mitchell *et al.*, 2005:28). "Xers are, above all, practical. Point out the pragmatic reasons why they should buy your product and services" (Fishman, 2004:5). Remember also that Generation Xers have an affinity to companies that live up to their claims (Mitchell *et al.*, 2005:28).

This generation's characteristics are often portrayed in a negative way (Mitchell, McLean and Turner, 2005:29). For example, Xers are often referred to as the generation comprised of slackers and whiners and are often regarded to be psychically damaged children of divorce (Mitchell *et al.*, 2005:27). This is an opportunity for marketers, by portraying their characteristics in a positive light, Xers will be more responsive which can result into brand loyalty (Mitchell *et al.*, 2005:29).

The key marketing theme for Xers according to Codrington and Grant-Marshall (2004:188) is "I am an individual" and when developing marketing communications messages for this generation, the following should be considered:

- Give it to them straight – they are smart and savvy.
- They are easily bored so they enjoy clever tricks and the unexpected.
- Entertain them. The advert must be an art form in itself.
- They respond to up to date language that's irreverent, not politically correct and direct.
- Don't be linear – Xers are used to multilayering and enjoy mystery and paradox.
- Xers value friends – don't go for the 'lone ranger' image.
- Conversely, they're highly individualistic in the sense that they value choice, customer options and personalisation. The 'one size fits all' route is totally out.
- Forget product loyalty from Xers – concentrate on selling them a concept instead.
- They have no heroes – only celebrities
- They are not as brand conscious as Millenials; they buy a brand for quality, not its image.

(Codrington & Grant-Marshall, 2004:188-189)

When marketing to Generation X, marketers should emphasise price, reliability, durability, and genuine value that lasts (Barrow, 1994: Para 26). Furthermore, staff should be trained in product knowledge, database development and personal service, and finally marketers should learn all they can about all forms of direct marketing (Barrow, 1994: Para 26).

3.7 Generation Y

Generation Y (also referred to as Millennials) is defined as individuals that were born between (and including) 1982 and 2000 (Stillman and Lancaster, 2006:63). The defining moments which have shaped this generation include 9-11, War on terrorism, emerging countries and the global economy, school shootings, the internet and the cell phone (Unknown, 2008:2). This generation is more careful and watchful about their own personal safety, which has created a certain degree of risk-averseness and a distrust of the media (Paul, 2001:44). Furthermore, the extreme diversity which they have faced, has made them more interested and accepting of diversity in all areas of their lives (Paul, 2001:48). "This is one digital generation, and technology has made the world of the millennials into a global village" (Lancaster and Stillman, 2003:12). As a result this generation has the need to be in constant connection and communication with their peers. Due to the access they've had to cell phones, personal computers, email and internet they have the ability to communicate quickly (Stillman and Lancaster, 2006:63 and Hughes, 2008:10). As a globally aware generation, they are realistic and practical, smart, talented, outspoken and sensitive to criticism (Lancaster and Stillman, 2003:12 and Stillman and Lancaster, 2006:63). Generation Y is extremely optimistic, confident, aware and individualistic - however despite their individuality this group still wants to be considered as part of a group (Hughes, 2008:10).

New research indicates that Generation Y are showing power with retail sales that surpass all previous generations (O'Donnell, 2006: Para 1). According to online expert Kelly Mooney this generation is both large in size and the most influential, as these consumers have spending power and strong opinions at an earlier age (O'Donnell, 2006: Para 2). Furthermore, Generation Y is the newest generation to enter the workforce. Full of energy and ideas, this group want to collaborate on projects and crave feedback from supervisors yet are stunned when they are dealt harsh criticism (Stillman and Lancaster, 2003:63) Generation Y women are confident, commanding respect in the workplace and believing that they should receive the same pay for the same work a man does (Morton, 2002:47). However, these women are not feminists and still believe that men should behave chivalrously (Morton, 2002:47).

Table 3.4 Characteristics of Generation Y

Characteristics	*Generation Y*
Attitude:	Lets make the world a better place
Outlook:	"There are no absolutes." "What's the scoop on getting along with the teacher?"
Mind-set:	Civic-minded, with a focus on secular achievement and reward.
Values:	Optimism; civic duty; confidence; achievement; sociability; morality; street smarts; diversity and globalisation
Behaviour:	**Positives:** Collective action; optimism; tenacity; heroic spirit; multitasking capabilities; technological savvy; resilience. **Negatives:** Need for supervision and structure; inexperience, particularly with handing difficult people issues.
Characteristics:	Tolerant, caring, honest, balanced, independent, optimistic, clean-cut
Likes & Dislikes:	**Likes:** shopping, labels, family, friends, the environment, technology **Dislikes:** Dishonesty, unbalanced lifestyles, ostentation
Buying Habits:	Products with cool images are important

(adapted from Laurel, 2005:11 and Codrington and Grant-Marshall, 2004:56)

Table 3.3 briefly summarises the characteristics of Generation Yers, who are committed to achieving, are confident and optimistic and lead balanced lifestyles, they love shopping and have an affinity to cool products and brands (Laurel, 2005:11 and Codrington and Grant-Marshall, 2004:56).

3.7.1 Marketing to Millenials

Generation Y is both media-soaked and technologically advanced and marketers are finding that catching the eye of this generation is becoming increasingly difficult (Sebor, 2006:26). In order to effectively target this generation marketers must recognise that they are enlightened and empowered and they need to look for new and innovative ways to reach these elusive consumers (Hughes, 2008:16). Raised on the mantra 'you are special' this generation is looking for something different thus marketers should opt for messages that are highly customised and creative (Sebor, 2006:26). However despite being viewed as elusive, research suggests this generation is both brand–conscious and brand loyal (Unknown, 2000: Para 9), thus presenting an opportunity to marketers that can effectively reach this group of consumers.

Generation Y has grown up with and used various technologies like the internet, mobile phones and computers which has resulted in a more developed and sophisticated media consumption (Segger, 2006:16). Being tech-savvy means this generation is much more likely to ignore traditional media channels (Hughes, 2008:16). Raymond (2009:41) suggests TV and print ads will sway Millenials only if they are very clever and non-condescending. Generation Yers like to be entertained in the adverts directed at them and are especially fond of adverts that make them laugh (Unknown, 2000: Para 6). However, being tech-savvy also provides opportunities for marketers, who can use the internet and cell phones to target these consumers. Despite the fact that internet is important to these savvy consumers it's also true that traditional media still have a role, and marketers need to integrate their communication vehicles in order to really get their attention (Art, 2009:17).

According to Raymond (2009:41), Millenials tend to be reliant on friends recommendations and digital media. "Many believe that for Gen Y, grassroots is unmistakably the way to go" (Sebor, 2006:26). Thus, in order to connect with this generation marketers should use a word-of-mouth approach - by making this generation feel they have discovered a product as opposed to having it forced upon them they are likely to react favourably (Sebor, 2006:26). "Grassroots marketing can be tricky – a company can't make people talk to each other – but the good news is that the technology is out there for instant, widespread communication and this generation knows how to use it" (Sebor, 2006:26). Since this generation is more likely to congregate in common locations e.g. concerts, campuses, and bars there is the opportunity to go directly to the generation (Sebor, 2006:26). However in an attempt to get the generation to talk about a brand or product, marketers should employ innovative, fresh and fun tactics taking care to be subtle (Sebor, 2006:27). Gronbach (2000, cited in Unknown, 2000: Para 7) agrees and suggests that when targeting this generation marketers should use street marketing, or guerrilla marketing, a form of localised and personalised, non-conventional marketing that includes things like giveaways, samples and special events. Since these consumers place a lot of value on and enjoy experiences, marketers are given an opportunity to engage in experiential marketing - it is imperative that the connections made are relevant, memorable and interactive, giving consumers the opportunity to interact with products without feeling that they are being sold to (Hughes, 2008:17). Matthew (2006, cited in Segger, 2006:16) suggests that due to the fact that Millenials are less trusting of mainstream media, sources such as word-of-mouth, viral and experiential marketing are well received by this market.

It is imperative that marketers recognise that in order to reach Generation Y, advertising needs to be completely transparent (Broderick, 2007:22). Since Generation Y has access to so much information, if one doesn't tell the truth, these savvy consumers will find out and tell everyone (Broderick, 2007:22). The information that is available due to the advances in technology is taking some of the power away from the marketers and putting it into the hands of the consumers, however there are ways that marketers can make technology work for them to better reach their target.

Social networking sites are an area where marketers should focus, using sites to communicate with the Y-generation (Hughes, 2008:18). These sites are extremely popular with Generation Y, hosting some of the largest groupings of Generation Y consumers in one spot (Hughes, 2008:19). Because this generation has been exposed to the internet from an early age, sophisticated web applications are a necessary media for these consumers (Henon, 2006:32). In addition blogs, viral marketing and company websites offer marketers an opportunity to connect with this generation. Millenials are generally comfortable with SMS text, email, instant messaging, blogs and podcasts and they like to feel they can interact with a brand (Unknown, 2007b:72). In fact, Millenials expect an internet experience to be interactive, which is good news for marketers as this can be an opportunity for obtaining good feedback (Fishman, 2004:5).

For Generation Y (Millennials) the key marketing theme is 'Entertain me' (Codrington & Grant-Marshall, 2004:190). The following tips are suggested when marketing to this generation:

- They are confident, don't treat them like kids. They're so confident they're almost arrogant in the insistence that you don't look down to them.
- Know how the product you are marketing is produced – avoid skeletons in the cupboard.
- They're plugged in and want messages in sound bites on modem media.
- Make sure your website gives lots of information about who you are, not just what you sell.
- Your staff are a huge marketing tool – make sure they're passionate about your products, and create easy ways for them to generate word-of-mouth marketing – about the products AND the company vibe itself.
- Endorsements will work with them as they look up to heroes.
- They're extremely brand aware and know if you are 'hot' or not. Word-of-mouth marketing and capturing the 'influencers' is critical.

(Codrington & Grant-Marshall, 2004:191-192)

Fishman (2004:5) emphasises that these consumers want to be treated as perceptive consumers, not kids. Furthermore, they respond and react strongly to real-life examples (Fishman, 2004:5). For marketers, this means getting to know what their lives are like, understanding the issues and experiences that these consumers are facing and adapting the advertising to address the challenges and experiences they are faced with.

3.8. Commonalities between generations

According to Raymond (2009:40) there are some commonalities between the generations, these are:

1) They all benefit from sustainability information related to a product.
2) They all rely on friends' recommendations.
3) They all want to try a new product before they buy it.
4) Price is likely to be a greater consideration than before.

All of the three generations seem to be committed to environmentalism. According to Raymond (2009:42), Boomers are the most committed to environmentalism. It is widely reported that Xers too are concerned about the environment and that environmental concerns often guide their selection of products (Richie, 1995: Para 20). The following is said about Millenials, "they love things that are 'green'. They relate well to causes that help the environment and make the planet better for all people" (Unknown, 2000: Para 6). Thus, environmentalism seems to be a topic which each of the generations care about. However, research suggests that when it comes to purchase decisions, environmentalism, is more important to Baby Boomers than it is to Xers (Richie, 1995: Para 21).

Another commonality between the three generations is their use of the internet. Raymond (2009:41) says about Millenials and Generation Xers, "whilst these are different generations, both are always internet connected – and you must be too, if you want to create brand connections with them". Brown and Osborn (2007, cited in Unknown, 2007a:120) describing a Baby Boomer women, say that these women are technologically savvy.

Despite the fact that commonalities exist between generations Richie (1995: Para 19) states that marketers should never assume that one generation is the same as the next, even when they look the same. Thus although there are likely to be similarities between generations marketers should look for the differences and use them to better target one generation of consumers.

3.9. Conclusion

It is obvious that each generation has been affected by vastly different formative years, resulting in different defining moments and diverse attitudes. These shape how consumers think and act and ultimately impact the way marketers segment and target consumers. With a more knowledge and a better understanding of what defines each generation, marketers will be able to segment more accurately, resulting in a more consumer focused and targeted positioning and marketing communications strategy. Effectively reaching consumers has become imperative in today's increasingly competitive and media-soaked environment and without a true understanding of the consumer no company or brand is likely to make an impact.

4.1 INTRODUCTION

Since the research is looking at the way female consumers perceive skin care products it is necessary to spend some time looking into and discussing the skin care industry. This chapter attempts to give a better understanding of the industry as a whole, looking into the environmental factors impacting the industry as well as getting some perspective on the competitors in the industry. For the purpose of the research the skin care industry is restricted to consisting of all facial care products.

4.2 THE GLOBAL FACIAL CARE INDUSTRY

The facial care industry is made up of anti-agers, night creams, creams and gels, toners, face masks and other (including other moisturisers, cleansing wipes, exfoliating scrubs, pore strips and fade creams) (Datamonitor, 2009:7). The following section deals specifically with an overview of the global facial care industry, the competitive environment, an overview of the global competitors, and the trends shaping the industry.

4.2.1 Broad overview of the Global Facial Care industry

In 2008 the global facial care market was worth $ 33.3 billion, recording a 3.5% growth in revenue (Datamonitor, 2009:8).

Table 4.1 Global Facial Care Market Value for the Period Spanning 2004 - 2008

Year	$ billion	% Growth
2004	28.6	
2005	29.7	3.80%
2006	30.8	3.80%
2007	32.2	4.50%
2008	33.3	3.50%
CAGR, 2004-2008:		**3.9%**

(Datamonitor, 2009:9)

Table 4.1 shows that the annual market growth over the past five years (2004-2008) has been 3.9% (Datamonitor, 2009:9)

Table 4.2 Global Facial Care Market Value Forecast for the Period Spanning 2008 - 2013

Year	$ billion	% Growth
2008	33.3	3.50%
2009	34.4	3.40%
2010	35.6	3.40%
2011	36.7	3.10%
2012	37.8	3.10%
2013	38.9	2.90%
CAGR, 2008-2013:		**3.2%**

(Datamonitor, 2009:9)

Table 4.2 shows that whilst the global facial care market is forecasted to grow and be worth an estimated $ 38.9 billion in 2013, it is forecasted that the annual growth rate will decelerate to a rate of 3.2% in the next few years (Datamonitor, 2008:28).

Table 4.3 Global Facial Care Market Volume for the Period Spanning 2004 - 2008

Year	Units billion	% Growth
2004	3.4	
2005	3.5	2.30%
2006	3.6	2.80%
2007	3.7	3.00%
2008	3.8	2.30%
CAGR, 2004-2008:		**2.6%**

(Datamonitor, 2008:10)

The facial care market is very large, with a total of 3.8 billion units being sold in 2008, thus volumes increased at a growth rate of 2.3% (Datamonitor, 2009:10). The annual market volume growth rate for the period spanning 2004-2009, was 2.6% (Datamonitor, 2009:10).

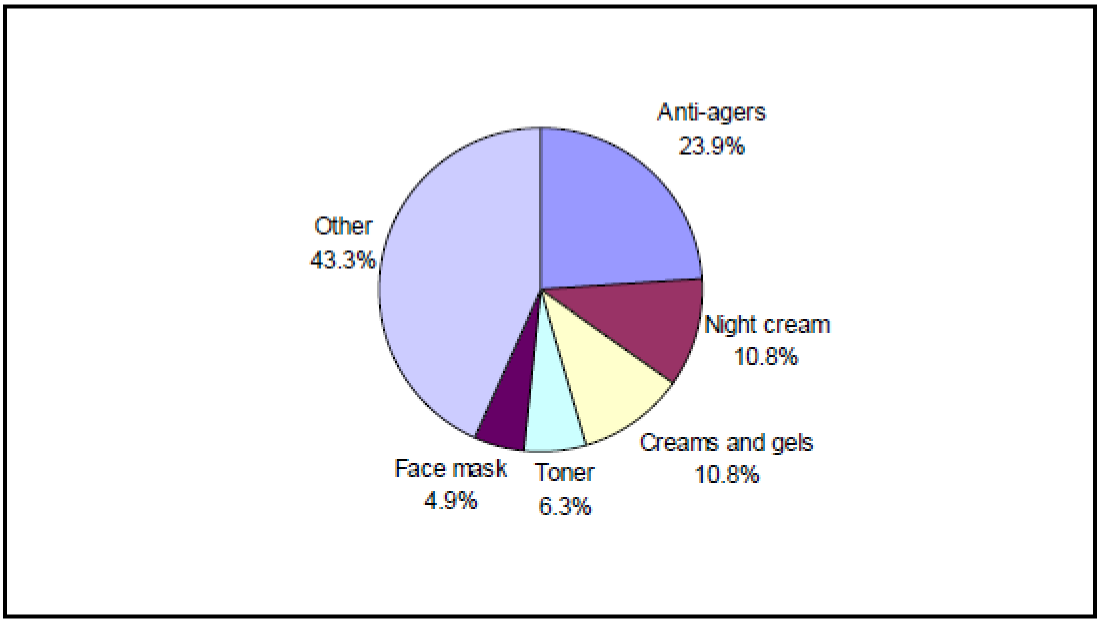
Table 4.4 Global Facial Care Market Volume Forecast for the Period Spanning 2008 - 2013

Year	Units billion	% Growth
2008	3.8	2.30%
2009	3.9	2.40%
2010	4.0	2.50%
2011	4.1	2.50%
2012	4.2	2.70%
2013	4.3	2.80%
CAGR, 2008-2013:		**2.6%**

(Datamonitor, 2008:10)

Table 4.4 shows that whilst the global facial care volume is forecast to be 4.3 billion by 2013, increasing by a total of 13.6% since 2008, the compound annual growth rate for the next five years (2008-2013) will be the same as the previous 5 years (2004-2008), which is a growth rate of 2.6%.

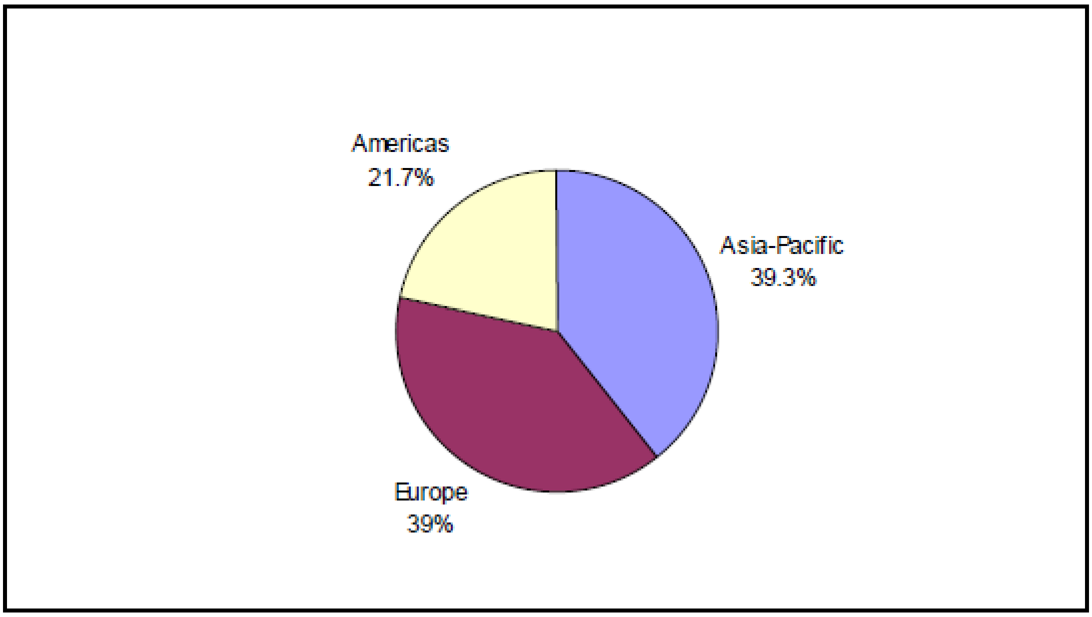
Figure 4.1 Global Facial Care Market Segmentation by product for the Period Spanning 2004 - 2008



(Datamonitor, 2009:11)

Figure 4.1 shows that anti-ageing product sales proved to be the most lucrative, making up 23.9% of the overall market's value, which means anti-ages generated total revenues of $ 7.9 billion (Datamonitor, 2009:7).

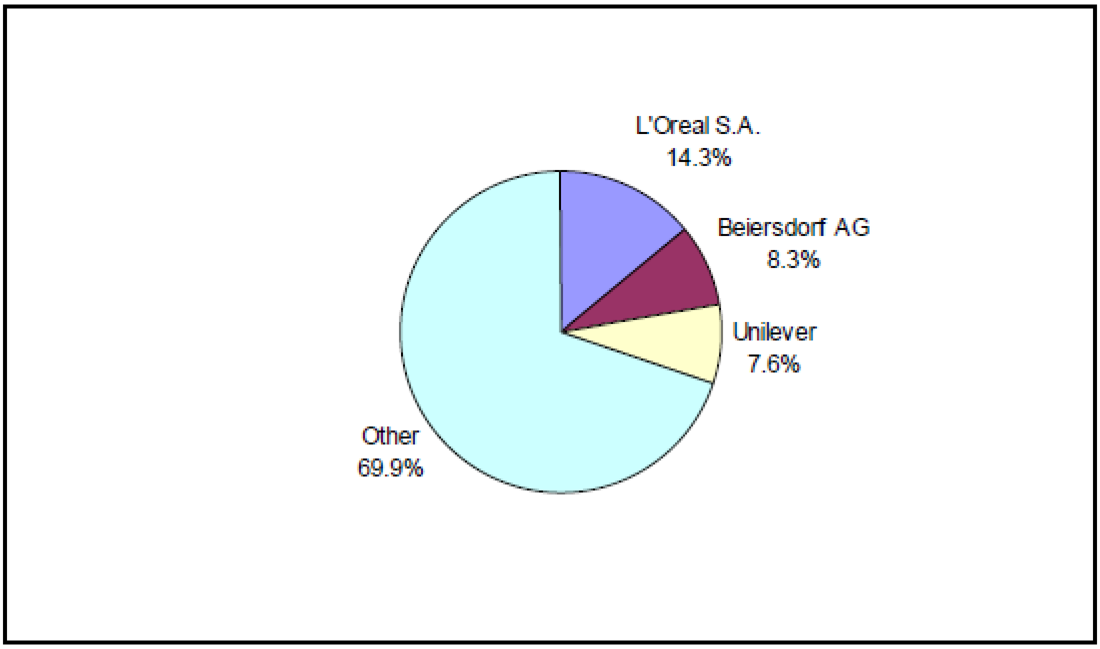
Figure 4.2 Global Facial Care Market Segmentation by area for the Period Spanning 2004 - 2008



(Datamonitor, 2009:12)

The largest facial care market is Asia-Pacific, which includes Australia, China, Japan, India, Singapore, South Korea and Taiwan which contributes 39.3% of the global markets revenues (Datamonitor, 2009:12).

Figure 4.3 Global Facial Care Market Share for the Period Spanning 2004 - 2008



(Datamonitor, 2009:13)

Holding a 14.3% share of the market, L'Oreal is the leading company from a global perspective (Datamonitor, 2009:13).

The facial care industry is a large industry, which has shown most growth in the anti-aging segment, is forecasted to continue growing. In order to determine the attractiveness of the industry the next section looks more closely at the competitive environment by using Porters five competitive forces.

4.2.2 The Competitive Environment

According to Mullins *et al*. (2008:81), five competitive forces collectively determine an industry's long term attractiveness these are: 1) rivalry amongst present competitors, 2) threat of new entrants, 3) the bargaining power of suppliers, 4) the bargaining power of buyers, and 5) the threat of substitute products.

Figure 4.4 The major forces that determine industry attractiveness

(Mullins *et al*., 2008:81)

L'Oreal holds a significant market share, but overall the global facial care market is somewhat fragmented (Datamonitor, 2009:14). Leading players in this market are quiet diverse, decreasing their reliance on the facial care market and resulting in moderate rivalry between competitors (Datamonitor, 2009:14). The main competitors globally include L'Oreal, Unilever and Beiersdorf AG.

The extreme diversity of the segments in this market has resulted in a high degree of product differentiation, with strong branding playing a key role in maintaining consumer loyalty, which tends to weaken rivalry (Datamonitor, 2009:15). However, rivalry is increased by the fact that switching costs for buyers (retailers) and consumers alike are low, resulting in a moderate degree of rivalry in the facial care market (Datamonitor, 2009:16). However, it is important to note that demand for certain products tends to be dependent on certain outside factors, and seasonal factors, like a particularly hot summer can have a direct effect on the level of rivalry in a particular section of market during a particular time of year (Datamonitor, 2009:16).

The facial care market is experiencing moderate market growth, which could entice new entrants to enter this market. In addition, switching costs for both buyers and consumers are negotiable, making market entry easier (Datamonitor, 2009:15). On the flip side of the coin however, is the fact that this market is dominated by strong brands which are mass produced and easily available in several geographical areas. As a result establishing a brand that can compete with the competitors may be costly. All in all due to high start up costs particularly relating to research and development and limited accessibility to market share entrance into the facial care industry remains difficult (Clinique, 2007:11). However, it will be easier for an existing cosmetics company to move into facial care than it is for an entirely new company (Datamonitor, 2009:15). New entrants may be able to start on a small scale, operating within a particular niche, but product testing and research would be both time-consuming and costly (Datamonitor, 2008:15). Consequently there is a moderate threat of new entrants to the global facial care market.

Overall, supplier power is moderate. This is because the main inputs for market players are the ingredients used in making facial care products, including oils, fragrances, and other fine/specialty chemicals, and packaging (Datamonitor, 2009:14). Chemicals used in these products must be of a particular standard and for some ingredients there are no substitutes (Datamonitor, 2009:14). Furthermore, there are a limited number of suppliers resulting in increasing supplier power (Clinique, 2007:11). On the other hand packaging is generally available from a wide range of suppliers, and involves low switching costs, decreasing supplier power (Datamonitor, 2009:14).

Supermarkets and hypermarkets, specialist retailers and department stores are amongst the leading distribution channels (Datamonitor, 2008:14). Due to the importance of branding to maintain end-user loyalty these retailers are motivated to stock popular brands, reducing the strength of their bargaining and buying power (Datamonitor, 2009:14). However, since switching costs are not particularly high, retailers can be more selective as to which brands they stock, increasing buying power and ultimately resulting in retailers having moderate buying power (Datamonitor, 2009:14).

Possible substitutes to products of the facial care market may include homemade products, cosmetic surgery and treatments such as Botox injections which operate in the anti-ageing segment of this market (Datamonitor, 2009:15). Homemade products would need to be prepared at home, which would be time-consuming and the results may be unpredictable. Cosmetic surgery and botox involve high costs, with questionable benefits. As a result there is a weak threat from substitutes in the facial care market (Datamonitor, 2009:15).

4.2.3 Overview of leading Global Companies and their Facial Care Brands

Beiersdorf AG, L'Oreal and Unilever are the leading companies in the global facial care market, with 13.4% market share L'Oreal SA is the leading company, followed by Unilever which holds a 7.6% share, Unilever is closely followed by Beiersdorf AG which currently accounts for a 7.3% market share (Datamonitor, 2009:13).

- ***Beiersdorf AG:*** Beiersdorf is an international consumer goods company principally engaged in the development of health and beauty products, and operates in more than 100 countries across the globe (Datamonitor, 2009:21). Their major facial care brands include the following: Nivea Visage, la prairie, Juvena, Eucerin and Florena.

- ***L'Oreal:*** "L'Oreal is a France-based global cosmetics company, engaged in the production and marketing of a range of perfume, make-up, hair and skin care products" (Datamonitor, 2009:17). The company operates in over 130 countries, marketing 25 global brands through three business divisions – cosmetics, The Body Shop and dermatology (Datamonitor, 2009:17). Their major face care brands include the following: L'Oreal Paris, Garnier, Lancôme, Biotherm, Helena Rubenstein, Kiehl's, Shu Uemura, Vichy, La Roche Posay, Skinceuticals and The Body Shop.

- ***Unilever:*** Unilever is a global manufacturer and marketer of consumer goods in the food, personal and homecare segments, with operations in over 100 countries worldwide (Datamonitor, 2009:24). Their major facial care brands include Ponds and Dove.

4.2.4 Driving forces and current facial care trends - Global

According to Euromonitor International analyst Virginia Lee, there are a few main trends fundamental to growing and shaping the skin care market across all categories (Euromonitor International, 2008: Para 1). These are:

1) ***The global population is getting older:*** As a result of increased lifespans, the global population in becoming older, especially in developed countries (Euromonitor International 2008:Para 2). With high disposable incomes and a strong interest in health and beauty these consumers contribute significantly to the growing skincare industry (Euromonitor International 2008:Para 3).

2) ***Increased wealth in emerging markets:*** Emerging markets have grown tremendously, which has led to more people moving from the poverty level into the middle class (Euromonitor International 2008: Para 4). With more money to spend this middle class is trading up and demanding higher quality and higher-priced brands (Euromonitor International 2008: Para 4). This is reflected in the triple digit growth rates for skin care sales in many of the emerging markets (Euromonitor International 2008: Para 5).

3) ***Pursuit of agelessness:*** Due to increased life spans and improved technologies, the pursuit of youth has intensified (Euromonitor International 2008: Para 6). As a result people are taking better care of themselves and they're feeling younger than their biological age would suggest (Euromonitor International 2008: Para 6). Leigh Ann Rowinski, former director of client solutions for Chicago based Information Resources Inc., says that anti-aging now represents both the largest and fastest growing segment of the facial skin care category (Leathers, 2008:58). Whilst the anti-aging trend is a global phenomenon, the drive to maintain a youthful appearance is strongest in the affluent Western markets of North America, Western Europe and Australasia (Dodson, 2008:58). Within facial care, nourishes/ anti-agers were the fastest growing with 67% growth from 2002-2007; this growth was due to an increased demand from aging Baby Boomers as well

as the introduction of numerous technological advances (Euromonitor International, 2008:13). Alexander (2007:104) agrees stating that "aging consumers, particularly female baby boomers who wield considerable spending power and are renowned for researching the products they use to maximise the returns on their expenditures, are the primary force driving sales in the anti-aging market". "Anti-aging products that do more than simply moisturise are the common thread driving growth across all regions, as an increasingly wide age range of women take an interest in the products" (Briney, 2005:34). The quest for youth shows no sign of aging, and research predicts that the U.S. anti-aging skin care segment will experience triple-digit growth through 2011 (Alexander, 2007:104).

4) ***Sun Protection:*** According to Anthony Gonzalez, Avon's Senior Manager of Research and Development says, "the anti-aging consumer is finally accepting the fact that the sun is the main driver in premature skin aging. As a result, the incorporation of a broad spectrum sun protection in anti-aging products is gaining popularity" (Meisel, 2008: Para 22). Kathy O'Brein, Dove's Marketing Director from Unilever, agrees saying that the awareness of the damaging effects of the sun has led to the introduction of products with an SPF factor (Meisel, 2008: Para 25).

5) ***Moisture is key:*** According to linique;s Global Truth in Beauty Survey, the majority of women in the United States ranked moisturisers as a product they could dot live without. In addition Kathy O'Brein of Unilever, states that "women find their skin is drier and less vibrant as they age" (Meisel, 2008: Para 24).

6) ***Technological advances:*** Bennett of Garnier notes that there is growth in 'technologically advanced' products, resulting in the emergence of new brands that are very science focused (Meisel, 2008: Para 34). Skin care companies have been able to charge higher prices by aggressively introducing technologically advanced formulations (Euromonitor International, 2008: Para 8). The rise in incomes in emerging markets combined with technological advances has persuaded many consumers to trade up to masstige brands (brands offering the qualities associated with premium products but at a lower price) (Euromonitor International 2008: Para 9). Furthermore, the emergence of advanced cosmeceutical brands (a product marketed as a cosmetic, containing biologically active ingredients and claims to have drug-like benefits) is one of the key developments to come out of the demand for progressively more efficacious anti-agers (Dodson, 2008:59).

7) ***Increased awareness of health and wellness:*** A number of factors (the rise of obesity, and a rise in the media's interest in topics regarding health and nutrition) have led to growing awareness of health and wellness (Euromonitor International 2008, Para 10). Consumers have become increasingly aware of the harmful effects of chemicals which has led to a desire to avoid pesticides, growth hormones, preservatives and artificial colours, and has resulted in an interest in natural and organic products (Euromonitor International, 2008:Para 10). Tait (2005: Para 3) states that one of the main drivers of growth in natural products has been the consumer trend towards healthier lifestyle, which is often associated with all things natural. The popularity of natural and organic products is on the rise and this trend is arguably the most significant in shaping cosmetics innovation today – as manufacturers look for natural answers (Dodson, 2008:60). According to John Lieber of Royal Labs Natural Cosmetics Inc., currently no governing body regulates the use of the terms 'natural' or 'organic' – leading to indiscriminate use of both terms by marketers anxious to cash in on this trend (Leathers, 2008:62). The NPD group found that 42% of consumers look for products that are made from natural/ organic ingredients (Meisel, 2008: Para 4). Lizz Starr, Executive Director, Origins Global Product Development, agrees, stating that "we are finding more and more consumers looking for greener options for facial skin care" (Meisel, 2008: Para 29).

8) ***Convenience:*** "According to industry insiders, convenience continues to top the list of features most in demand by

today's skin care consumers" (Leathers, 2008:60). John Lieber of Royal Labs Natural Cosmetics Inc., states that due to faster-paced lifestyles there is an increased demand for multi-purpose products – since people no longer have the time to use 10 different products a day (Leathers, 2008:60). Anthony Gonzalez, Senior manager, Research and Development, Avon Products, states that consumers are looking for multi-functional skin care products that can meet all of their needs in an elegant and convenient form (Meisel, 2008: Para 10).

9) ***Efficacy:*** The NPD group found that 77% of women skin care users say: "I don't mind paying more for a skin care product that really works" (Meisel, 2008: Para 4). Alfredo Remolina, Vice President of Marketing, SK-II, says: "Consumers are looking for a combination of qualities but first and most important the product must deliver on its promises; consumers expect to see and feel the results before even considering adding a new product into their skin care ritual" (Meisel, 2008:18). Avon's Vice President of Global product development, Gail Boyle, is of a similar opinion and says the sensorial experience is of lead importance when it comes to skin care (Meisel, 2008: Para 13). According to Beyer (2009: Para 10), developers need to be aware that products need to be efficacious to be distinguishable among countless products on the market.

10) ***Substantiate product claims:*** According to Beyer (2009: Para 10) the products must work and developers cannot make unsubstantiated claims. Jim Berkrot of San Mar Laboritories, indicates that due to extremely savvy consumers it has become necessary to substantiate product claims (Leathers, 2008:61). A study conducted by the NPD Group found that 28% of consumers prefer brands that have a physician/ doctor endorsement (Meisel, 2008: Para 4). As Beyer (2009: Para 28) says, consumers are impressed with founders who have medical, dermatological or other clinical credentials and having an impressive credential will get consumers to try a premium priced product.

11) ***Education***: Another important trend which can't be ignored is that women demand to be educated about the products they are purchasing (Beyer, 2009: Para 12).

12) ***Products designed specifically for a certain demographic:*** Another trend which is gathering steam is the shift towards products which are designed specifically for certain demographic groups: teens and tweens, men, women of colour, etc. There has been significant growth in the teen/ tween segment with US sales expected to reach $8 billion by 2009, increasing from the current market size of $ 6.9 billion (Packaged Facts cited in Bird, 2008: Para 12).

4.3 The South African Skincare Industry

The South African facial care industry is made up of moisturisers, nourishers and/ or anti-agers, cleansers, toners face masks and lip moisturisers. The following section deals specifically with an overview of the South African facial care industry, an overview of the main competitors, and the trends shaping the industry.

4.3.1 Broad overview of the South African Facial Care industry

For the past few years the South African facial care industry has experienced growth.

Table 4.5 South African Facial Care Market Value for the Period spanning 2003 – 2008

R million	2003	2004	2005	2006	2007	2008
Facial care	1,023.3	1,109.2	1,232.1	1,417.3	1,651.9	1,970.1
- Facial moisturisers	554.3	587.6	644.9	747.0	874.0	1,066.3
- Nourishers/anti-agers	135.8	156.1	176.4	196.7	224.2	264.5
- Facial cleansers	191.9	219.5	263.2	314.6	380.6	449.5
- Toners	35.2	37.6	38.6	41.6	45.1	49.2
- Face masks	12.7	13.6	15.2	15.8	16.2	15.4
- Lip moisturisers	93.3	94.8	93.8	101.6	111.8	125.2

(Euromonitor International, 2009:3)

Table 4.6 South African Facial Care market % Growth

% current value growth	2007/08	2003-08 CAGR	2003/08 TOTAL
Facial care	19.3	14.0	92.5
- Facial moisturisers	22.0	14.0	92.3
- Nourishers/anti-agers	18.0	14.3	94.8
- Facial cleansers	18.1	18.6	134.2
- Toners	9.0	6.9	39.5
- Face masks	-5.0	4.0	21.7
- Lip moisturisers	12.0	6.0	34.1

(Euromonitor International, 2009:3)

The South African facial care industry in 2008 was worth a phenomenal R 1.97 billion, and experienced a growth of 19.3% from 2007 (Euromonitor International, 2009:3).

Table 4.7 South African Facial Care Market Value Forecast for the Period spanning 2008 – 2013

R million	2008	2009	2010	2011	2012	2013
Facial care	1,970.1	2,143.6	2,302.9	2,451.7	2,601.1	2,772.7
- Facial moisturisers	1,066.3	1,183.6	1,290.1	1,386.8	1,481.2	1,589.3
- Nourishers/anti-agers	264.5	284.4	304.3	324.1	346.1	372.1
- Facial cleansers	449.5	484.8	516.2	547.5	579.5	616.1
- Toners	49.2	49.3	49.6	49.7	49.8	49.9
- Face masks	15.4	13.2	11.9	10.7	9.5	8.4
- Lip moisturisers	125.2	128.3	130.9	132.9	135.1	136.9

(Euromonitor International, 2009:9)

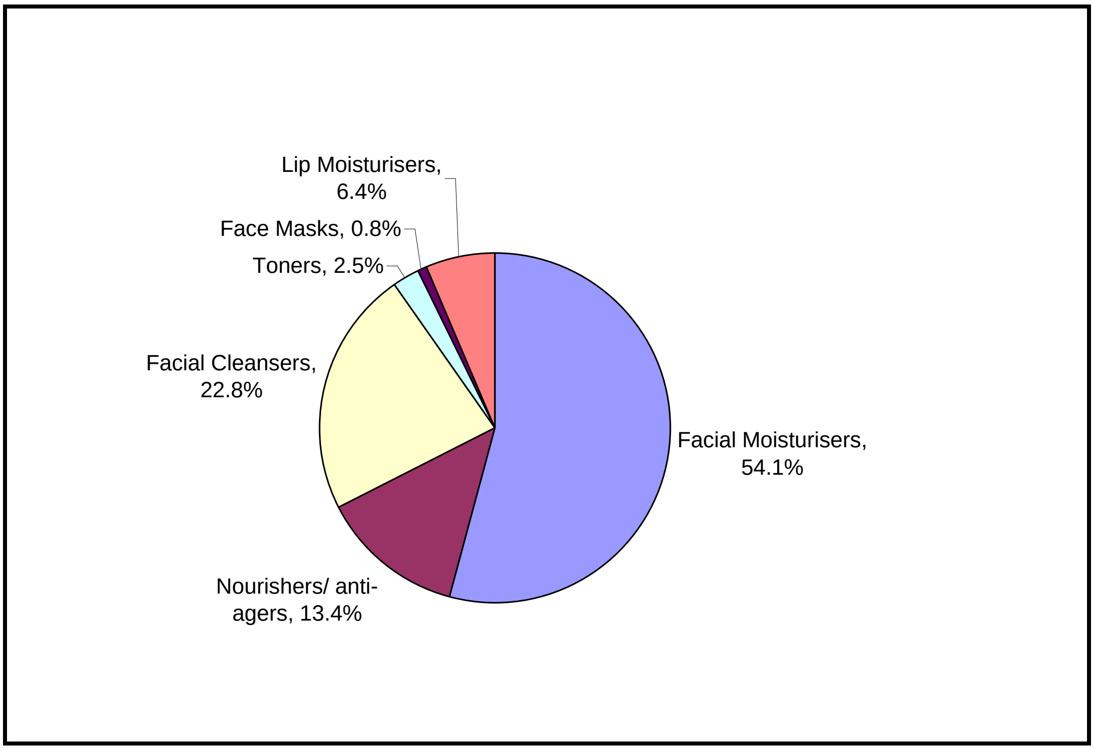
Table 4.8 South African Facial Care market % Growth Forecasted

% constant value growth	2008-13 CAGR	2008/13 TOTAL
Facial care	7.1	40.7
- Facial moisturisers	8.3	49.0
- Nourishers/anti-agers	7.1	40.6
- Facial cleansers	6.5	37.1
- Toners	0.3	1.5
- Face masks	-11.4	-45.5
- Lip moisturisers	1.8	9.4

(Euromonitor International, 2009:9)

Euromonitor International (2009:9) forecasts a compound annual growth rate of 7.1% for the period 2008 to 2013.

Figure 4.6 South African Skin Care Market Segmentation by product for 2008



(Euromonitor International, 2009:3)

Moisturiser product sales were most lucrative, making up 54% of the overall market's value (Euromonitor International, 2009:3). Clinique's Global Truth in Beauty survey, showed that the majority of US women ranked moisturisers as a product they couldn't live without (Meisel, 2008: para 26). Looking at Figure 4.6 and the facial moisturiser sales, it appears South African women have similar views.

Table 4.9 South African Skin Care Company Share by Retail Value 2004- 2008

% retail value rsp Company	2004	2005	2006	2007	2008
Unilever South Africa Home & Personal Care (Pty) Ltd	-	-	-	27.7	27.8
Beiersdorf Consumer Products (Pty) Ltd	9.7	11.2	11.8	12.3	12.9
Adcock Ingram Ltd	8.7	9.1	9.5	10.2	9.6
Johnson & Johnson South Africa (Pty) Ltd	7.8	9.4	9.0	8.9	9.2
L'Oréal South Africa (Pty) Ltd	7.3	7.5	6.7	6.2	6.6
Procter & Gamble (Pty) Ltd	4.9	5.1	4.9	4.9	5.2
Justine Avon (Pty) Ltd	3.5	3.8	3.7	3.8	3.3
Incolabs (Pty) Ltd	-	-	3.6	3.3	3.0
Amka Products (Pty) Ltd	1.8	2.3	2.5	2.7	2.6
GBP Cosmetics	1.5	1.7	2.1	2.4	2.3
Clinique Laboratories Inc	1.6	1.7	1.7	1.6	1.6
Nuclicks	1.1	1.3	1.4	1.5	1.6
Estée Lauder Cos Inc	1.6	1.6	1.5	1.3	1.3
Elizabeth Arden South Africa (Pty) Ltd	1.1	1.0	1.1	1.0	1.0
Boots Co (SA) (Pty) Ltd, The	0.6	0.8	0.6	0.6	0.5
Lever-Ponds (Pty) Ltd	26.1	26.4	27.0	0.4	0.4
Revlon SA (Pty) Ltd	0.8	0.5	0.4	0.3	0.3
Du Marc	0.4	0.4	0.3	0.3	0.3
GlaxoSmithKline SA (Pty) Ltd	0.3	0.3	0.3	0.3	0.2
Mentholatum Co Inc, The	0.1	0.2	0.2	0.2	0.2
Avroy Shlain Cosmetics	-	0.2	0.2	0.2	0.1
Kélémata SpA	0.0	0.0	0.0	0.0	0.0
Forever Young (Pty) Ltd	0.1	0.1	0.1	0.0	0.0
Sara Lee (South Africa) (Pty) Ltd	0.2	0.0	0.0	0.0	0.0
Permark International (Pty) Ltd	3.4	2.7	-	-	-
Innoxa Pty Ltd	0.4	0.5	-	-	-
Private Label	3.1	2.8	2.5	-	-
Others	14.0	9.3	9.0	9.7	9.7
Total	100.0	100.0	100.0	100.0	100.0

(Euromonitor International, 2009:3-4)

Holding a 27.8% share of the market, Unilever is the market leader in the South African skin care market (Euromonitor International, 2009:2).

Table 4.10 South African Premium versus Mass Skin Care Percentage Analysis for the period spanning 2003 - 2008

% retail value rsp	2003	2004	2005	2006	2007	2008
Premium	12.0	13.0	13.0	15.0	15.0	16.0
Mass	88.0	87.0	87.0	85.0	85.0	84.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

(Euromonitor International, 2009:3)

Table 4.11 South African Premium versus Mass Skin Care Forecast for the period spanning 2008 - 2013

% retail value rsp	2008	2009	2010	2011	2012	2013
Premium	16.0	16.5	17.0	17.0	17.5	18.0
Mass	84.0	83.5	83.0	83.0	82.5	82.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

(Euromonitor International, 2009:9)

The mass facial care products made up 84% of sales whilst the premium industry contributed 16% to industry sales (Euromonitor International, 2009:3). The premium industry has grown by 4% since 2003 and is forecast to grow gradually over the next few years and contributing 18% of total sales by 2013 (Euromonitor International, 2009:3& 9).

4.3.2 Overview of the leading South African Companies and their Facial Care Brands

Unilever, Beiersdorf Consumer Care and Adcock Ingram are the leading companies in the South African skin care market, with 27.8% market share Unilever is the leading company, followed by Beiersdorf Consumer Care which holds a 12.9% share, and in third place is Adcock Ingram which currently accounts for 9.6% market share (Euromonitor International, 2009:2). However in terms of facial care Unilever's Ponds and Proctor and Gamble's Olay brands lead sales in South Africa (Euromonitor International, 2009:2).

- **Unilever:** Unilever South Africa strives to meet everyday needs for nutrition, hygiene, and personal care with brands that help people feel good, look good and get more out of life (Unilever, 2008: Para 2). Ponds, is their only facial care brand distributed in South Africa.

- **Beiersdorf Consumer Care:** Beiersdorf is an international leading skin and beauty care company (Beiersdorf AG, 2006: Para 3). Their facial care brands available in South Africa include Nivea Visage, Eucerin and la prairie.

- **Adcock Ingram:** **"**Adcock Ingram is South Africa's market-leading pharmaceutical group that develops, manufactures, markets, and distributes a wide range of health, personal care and household hygiene products for Southern Africa and selected export markets" (Firstier Internet Solution, 2009: Para 1). Their portfolio includes the Lemon Lite Facial Care brand (Euromonitor, 2009:6)

- **Proctor & Gamble:** The company, markets over 250 brands in 130 countries, entered South Africa in 1994 (Coschem, No Date a: Para 1). In their South African product portfolio they have a single facial care brand, which is Olay (Coschem, No Date a: Para 8)

4.3.3 Driving forces and current facial care trends – South Africa

According to the Euromonitor International (2009:1), there are certain trends shaping the South African skin care industry these are:

1) Ethnic Skin Care Needs: Given the population dynamics of the South African population there is an opportunity for manufacturers to address the more premium skin care requirements of the ethnic population (Euromonitor International, 2009:1).

2) Increased awareness of health and wellness: Aligned with the global trends towards healthy living, similarily there is an increased awareness of health amongst South Africans, who are now also looking for products with natural ingredients (Euromonitor International, 2009:1).

3) Consumers trade down to cheaper Brand variants: Whilst increasing prices ensured that the skin care industry continued to experience strong growth, this is aligned with a trend which sees consumers trading down to cheaper variants of leading brands (Euromonitor International, 2009:1). However, it seems that whilst consumers are trading down when purchasing cleansers and toners, they seem to stay brand loyal to their moisturisers and anti-aging products (Euromonitor International, 2009:2)

4) Consumers choose products formulated for specific skin types: South African consumers tend to choose cleansers developed and formulated for their skin type, which could be oily, normal, combination, sensitive or dry (Euromonitor, 2009:1).

5) Growth of colour complexion creams: Whitening or vanishing creams are proving increasingly popular in South Africa and make up approximately 35% of total facial moisturiser sales (Euromonitor, 2009:1).

6) Growth in gradual tanning products: There has been substantial growth in gradual tanning products for both face and body (Euromonitor, 2009:1). This could be aligned with the fact that all over the world women seem to be realising that sun damage is one of the biggest contributors of aging (Meisel, 2008: Para 19).

4.4 Overview of most popular brands (based on focus group results)

Due to the large number of brands competing in the facial care market it was not possible to include all brands in the mall-survey questionnaire, as this would have caused a low response rate; hence the focus groups were used to determine a set of competing brands. The brands found to be most important from the focus groups were The Body Shop, Clarins, Clearasil, Clinique, Gatineau, L'Oreal, Nivea and Revlon. A brief overview of the brand, it's marketing mix and positioning are discussed next for each brand.

4.4.1 The Body Shop

The Body shop has been in South Africa, since June 2001(The Body Shop International plc., 2009:Para 19). The Body Shop believes there is only one way to beautiful and that's nature's way (The Body Shop International plc., 2009b: Para 2). Thus, the company constantly seeks out natural ingredients from all around the world, developing products which burst with effectiveness to enhance natural beauty (The Body Shop International plc., 2009b: Para 2). The company was one of the first to make a stand against animal testing in the cosmetics industry (The Body Shop International plc., 2009b: Para 6).

- **Product:** The Body Shop has a variety of products in their facial care range, made of natural ingredients to suit each specific skin type. Their product range includes cleansers, toners and moisturisers, exfoliators and masks. Furthermore they have serums, and specific products for the eye and lip areas. There are eight different ranges of facial care products available in Southern Africa. Each range uses a specific natural ingredient which is best suited to a specific skin type. The Body Shops Nutriganics Skin Care Range is formulated to smooth and revitalise skin (The Body Shop International plc., 2009c: Para 1). The Aloe range has been specifically formulated for sensitive skin (The Body Shop International plc., 2009d: Para 1). For combination/ oily skin, the Body Shop has formulated the Seaweed range (The Body Shop

International plc., 2009e: Para 1). The Tea Tree Range uses tea tree and is specifically formulated to treat oily/ blemished skin (The Body Shop International plc., 2009f: Para 1). The Vitamin C Range has been developed to boost the skins radiance (The Body Shop International plc., 2009g: Para 1). Vitamin E products are loaded with vitamin e and are suitable for all skin types (The Body Shop International plc., 2009h: Para 1). The Wise Women range is especially formulated for mature skin (The Body Shop International plc., 2009i: Para 1). Finally, the Moisture White Range is for all skin types, and ensures a brighter and smoother skin tone (The Body Shop International plc., 2009j: Para 1).

- **Price:** The Body Shop operates in the 'masstige' segment of the beauty market, predominantly serving females in the middle and upper income brackets (Clicks Group Ltd, 2009: Para 1). "Products are priced well below premium brands but the international status enables the brand to attract aspirational customers" (Clicks Group Ltd, 2009: Para 1). The prices range from about R 45 for a Vitamin E facial cleansing bar (The Body Shop International plc., 2009k: Para 1), to about R 220 for the Moisture White toner (The Body Shop International plc., 2009l: Para 1), and on average products are priced around R 120 .

- **Place:** Currently the Body Shop Products are sold exclusively at Body Shop Stores, which can be found at selected premium malls. There are a total of 38 Body Shop stores located in Southern Africa (Clicks Group Ltd, 2009: Para 7). Currently there are eight stores in the Western Cape (The Body Shop International plc., 2009m: Para 2), five stores operate in KwaZulu-Natal and three in the Eastern Cape (The Body Shop International plc., 2009m: Para 3-4). There are nine stores in both the Pretoria & East Rand and the Sandton and West Rand areas (The Body Shop International plc., 2009m: Para 5&7). Finally there is a single store operating in the Free State, Maphumalanga and Namibia areas (The Body Shop International plc., 2009m: Para 6,8&9).

- **Promotion:** The Body Shop logo is a dark green pod, and indicates it's commitment to the use of natural ingredients. Furthermore, it uses the slogan "against animal testing", indicating that as a company they are opposed to testing on animals. It's interesting to note that originally the retail environment was a particularly important communication channel for the brand as it relied on point-of-sale activity and window displays rather than advertising (Unknown, 2007c:10). Today Body Shop still relies heavily on their retail environment, point-of-sale activity and their packaging as a communication vehicle and all promotional materials remind customers of its roots as an ethical brand (Unknown, 2007c:10). In South Africa the Body Shop now also advertises in magazines and online and in 2009 relaunched the 'Love your Body' loyalty programme (Clicks Group Ltd, 2009: Para 5).

According to Hassan and Craft (2005:83) the Body Shop offers a focused positioning strategy, and have developed a uniform position for its ranges among environmentally conscious consumers. According to Eyers (2006 cited in European Cosmetic Market, 2006: Para 22), "the brand is currently moving to a 'masstige' positioning by developing innovative and credible products for customers at affordable prices". 'Masstige' is a term which is used to describe beauty products which are prestigious and offered to the mass market (Unknown, 2007c:10). Thus the positioning of Body Shop seems to be one which offers customers a shopping experience with excellent service, combined with a range of good quality, naturally inspired products (Unknown, 2007c:10).

4.4.2 Clarins

This company's international success is due to an exceptional product range of unrivalled quality (Clarins, 2010a: Para 2). Clarins is committed to using both medical and scientific experts in for their product development process, which ensures innovation and the most technologically advanced beauty products on the market (Clarins, 2010a: Para 2). Clarins is against testing on animals, thus no animal testing or the use of animal tissue extracts is tolerated (Clarins, 2010a: Para 2). Clarins' concern for 'natural' beauty goes well beyond the quest for effective natural extracts and since the launch of the 100% pure plant extract oils in 1954, Clarins has demonstrated a strong preference for natural vegetal complexes (Clarins, 2010b: Para 1&2).

- **Product:** Clarins has a wide variety of facial care products which include cleansers, toners, moisturisers, and exfoliators and masks (Clarins, 2010c: Para 2, 3&6). Clarins has also developed special face oil treatments, essences and serums, and special products especially designed for the eye, lip and neck areas (Clarins, 2010c: Para 4,5&7). The range also includes products which have been specifically formulated for certain skin types. The Clarins HydraQuench Range has been formulated to hydrate skin (Clarins, 2010d: Para 1). The Bright Plus Range produces clearer, even-toned and luminous skin (Clarins, 2010e: Para 1). The Truly Mate Range, targets oily skin and helps to control shine, for a pure matte complexion (Clarins, 2010f: Para 1). Providing comfort and beauty for sensitive skin is the Gentle Range (Clarins, 2010g: Para 1). In order to produce skin with radiance and vitality, Clarins has recently developed the Daily Energizer Range (Clarins, 2010h: Para 1).

  Clarins has also developed ranges which target the different stages of aging. The Multi-active range targets early wrinkles (Clarins, 2010i: Para 1). For long lasting firmness and radiance, Clarins has developed their Extra Firming Range (Clarins, 2010j: Para 1). Finally the Super Restorative range is for mature skin and boosts skins beauty after the age of 50 (Clarins, 2010k: Para 1).

  In addition to the listed products Clarins also offers spa treatments which are available at selected salons. "Clarins treatments are a unique place where botanicals are combined with the magic of the most sensitive and intelligent of tools, the hand" (Clarins, 2010l: Para 2). Focussing on the belief that each individual is unique Clarins beauty therapists mix products and selects an application technique for the individual, thus each person receives a truly personalised treatment (Clarins, 2010l: Para 6).

- **Price:** Clarins aims to sell to the high/ mid market, even though their products are expensive they are affordable to the mass market who search for quality (Lindsell Train Limited, 2006:2). Clarins' products are priced anything between R195 for the Truly Matte Blemish Control and clarifying lotion (Clarins, 2010m: Para 20) and R1500 for the Bright Plus intensive age brightening programme (Clarins, 2010m: Para 21).

- **Place:** Clarins products are sold mainly through department stores, however recently they have moved into online sales, in a few selected markets (Euromonitor, 2010:25). In South Africa Clarins uses a limited distribution channel with products being available at selected pharmacies like Dischem and selected stores which include Edgars, Red Square, Truworths Stuttafords, Woolworths, and Foshini (Clarins, 2010n: Para 1). Clarins products are also available at selected salons through beauticians (Clarins 2010l: Para 7).

- **Promotion:** Jacques Courtin-Clarins (1954, cited in Clarins, 2010o: para 4) states, "I created Clarins out of love and respect for women's beauty" and today this is conveyed in all of the various forms of communications used by the company. Their slogan 'for the love of beauty' and their use of white and red as colouring is aligned with their values. Clarins utilises both above- and below-the-line advertising.

All Clarins products are premium positioned, with exceptional brand equity (I Lead Beauty, 2009: Para 1). Clarins is dedicated to design products that produce visible results and therefore use ingredients that are 100% natural, cultivated exclusively for its formulations using plants from around the world (Clarins, 2010p: Para 1). Thus Clarins' positioning appears to be offering the consumer premium products, developed using natural ingredients which produce visible results.

4.4.3 Clearasil

The Clearasil range includes products for a daily skin care routine and those specifically targeting pimples and blemishes (Reckitt Benckiser Inc., 2008a: Para 1).

- **Product:** The Clearasil ranges offer products which include various different cleansers, scrubs and treatment creams (Reckitt Benckiser Inc, 2008a: Para 2). Clearasil has four different ranges, the Stay Clear range, the Ultra range, the Pimple Treatment range and the Blackhead Control range (Reckitt Benckiser Inc., 2008a: Para 1). The Stay Clear range has been developed especially for daily skin care needs for visibly clearer skin (Reckitt Benckiser Inc., 2008b: Para 2). The Ultra Range is for high performance cleansing and gets to work fast to tackle the causes of pimples (Reckitt Benckiser Inc., 2008c: Para 1&3). The Pimple Treatment range is "for precise targeting of pimples when they form" (Reckitt Benckiser Inc., 2008d: Para 2) and finally the Blackhead Control range helps to clear and prevent blackheads (Reckitt Benckiser Inc., 2008e: Para 2).

- **Price:** Clearasil products range from about R38 for Stay Clear Facial Wash to R65 for Clearasil Ultra Deep Pore Facial Scrub.

- **Place:** Clearasil is widely available and can be purchased at most pharmacies, stores such as Clicks and Dischem and most supermarkets, which include Pick 'n Pay, Checkers and Spar.

- **Promotion:** Clearasil is advertised using mainly the traditional media, such as television, radio and print. Although Clearasil utilises the web, the South African website specifically is very limited and currently only gives competition details – no product specific details are found on the site. Clearasil uses slogans with slight variations, these include 'feel the difference', 'clear skin all day everyday', 'clear skin confidence' and 'Clearasil may cause confidence'.

Clearasil believes that looking awesome is no accident, it's a science which is why the company has developed products which work with your skin (Reckitt Benckiser Inc., 2010: Para 1). Thus Clearasil's positioning seems to be to provide products which have been scientifically developed to target pimples and blemishes and give confidence.

4.4.4 Clinique

Founded on the philosophy that great skin can be created, Clinique pioneered the dermatologist-developed cosmetic brand (Clinique Laboratories llc., 2009a: Para 1). Clinique is clinically formulated by leading dermatologists and their products are customised for every skin type and concern, including the most sensitive (Clinique Laboratories llc., 2009a: Para 2). Furthermore, the products are allergy tested and 100% fragrance free (Clinique Laboratories llc., 2009a: Para 1). Clinique confides that natural is not always best, however the company will seek out the best of nature when it's best for skin (Clinique Laboratories llc., 2009a: Para 3).

- **Product:** Clinique products are created by dermatologists, through extensive research which ensures they are allergy tested and 100% fragrance free. Accepting that there are different skin types Clinique develops the products to address individual skin types and needs (Clinique Confidential, 2007:2). "The cornerstone of Clinique is our world-famous 3-Step Skin Care System: a twice-a-day routine of cleanse, exfoliate, moisturise. Customised for dry, oily or combination skin, 3-Step can help make any skin great skin." (Clinique Laboratories llc., 2009c: Para 5). Clinique has designed products for four different skin types, one for very dry to dry skin, two for dry to combination skin, three for oily skin and four for very oily skin.

  Furthermore, Clinique has designed products which combat the following skin concerns: aging, acne, redness, large pores, loss of radiance and uneven skin tones. The de-aging products include various products, the Superdefense and Super Rescue range is formulated for age prevention (Clinique Laboratories llc., 2009d: Para 3). The Youth Surge and Repairwear products are designed to target lines and wrinkles (Clinique Laboratories llc., 2009e: Para 3), whilst the zero gravity products lift and firm the skin (Clinique Laboratories llc., 2009f: Para 3). The Clinique Acne Solutions products targets acne, and promises to be fast, efficient and guaranteed (Clinique Laboratories llc., 2009g: Para 1). Clinique has developed the redness solution products which visibly reduce redness (Clinique Laboratories llc., 2009h: Para 2). The Pore Minimiser products help to keep pores healthy and unclogged (Clinique Laboratories llc., 2009i: Para 3). With Clinique's Turnaround products skin reveals radiance (Clinique Laboratories llc., 2009j: Para 1). Finally, the Even Better products target uneven skin tone (Clinique Laboratories llc., 2009k: Para 1).

- **Price:** Since Clinique is produced through extensive research by trained scientists and dermatologists, the products retail at moderate to premium prices (Clinique Confidential, 2007:7). The products are marketed toward the upper-middle class market as a prestige product (Clinique Confidential, 2007:10). On average the price of a Clinique Cleanser is about R195, whilst the Clinique Repair Lift products can retail at a price of about R 595.

- **Place:** Clinique uses limited distribution channels and it is stocked at only a selected number of Edgars, Red Square, Foshini, Stuttaford, and Truworths stores as well as a few selected pharmacies (Clinique Laboratories llc., 2009l: Para 2). This complements the premium image associated with the brand (Clinique Confidential, 2007:8). At each of the Clinique counters, Clinique consultants interact with customers, using a specially designed 'Clinique computer' to help access the customers skin type, which ensure customers are provided with Clinique products which will best meet their needs (SYL, 2005: Para 2).

- **Promotion:** Clinique is a successful and active advertiser in the shopping mall environment, making use of lift banners, interior billboards, hanging banners, lift doors and glass lift branding (Primall Media, 2009: Para 1&3). Clinique targets female consumers between the ages of 18 and 45, using an international creative concept and artwork, adapted specifically for each medium (Primall Media, 2009: Para 4). Clinique also advertises in magazines, on television, and have a comprehensive and easy to use website and use the slogan 'Allergy Tested. 100% Fragrance Free'.

According to Chilton, Marketing Manager of Clinique (2009 cited in Primall Media, 2009: Para 5), "besides prime positioning, Clinique understands the value of having a competitive edge. Clinique is a 40-year old brand and is still relevant today, in creating great skin, as it was then. It also offers a money back guarantee on it's 3-Step Skin Care System products – this is very hard for competitors to beat." Furthermore, this aims to achieve a sustainable competitive advantage by creating an image of products which are free of fragrances and chemicals causing allergies, are extensively researched and of superior quality (Clinique Confidential, 2007:7). According to SYL (2005: Para 2), Clinique intentionally positions itself as expensive, but with products which are of perfect quality. Clinique's positioning appears to be providing consumers with products which are both allergy tested and fragrance free, backed by years of research and providing exceptional quality (Clinique Confidential, 2007:18).

4.4.5 Gatineau

Gatineau believes beauty has no age, a pioneer in the development of products that draw their inspiration from cosmetic surgery and medicine they consider themselves to be age-defence experts (Gatineau Paris, 2010a: Para 1&5). Gatineau utilises a double approach to skincare, recognising the importance of both salon and home treatments (Gatineau Paris, 2010a: Para 7&8). Furthermore, the brand prides itself as being at the forefront of innovation, offering consumers innovative products, expertise, modernity, effectiveness, results and advice (Gatineau Paris, 2010a:Para 13-20).

- **Product:** Gatineau has a wide variety of products and has developed unique collections which target specific skin types. For sensitive skin Gatineau has developed the Serenite range, which offers a combination of synergistic cooling, calming, clarifying and strengthening (Gatineau Paris, 2010b: Para 6-7). Developed especially for dry skin the Nutriactive range nourishes, protects and comforts the skin (Gatineau Paris, 2010c: Para 3). The Aquamemory range is developed specifically for dehydrated skin and re-establishes 'osmotic balance' (Gatineau Paris, 2010d: Para 3). The Moderactive range has been uniquely developed for combination skin, to rebalance and normalise the skin (Gatineau Paris, 2010e: Para 5). Oily skin can be treated with the Mateliance range, which assists in reducing excess sebum and controlling shine, without stripping (Gatineau Paris, 2010f: Para 4-5).

  There are 4 further collections, which are specially formulated to bring radiance, vibrancy, lighten and even skin tone, and renew the skin. The Activ Eclat range is formulated to give skin radiance by stimulating cell metabolism and vitality (Gatineau Paris, 2010g: Para 2). The Therapie Marine range with natural marine extracts is Gatineau's 'natural' approach to skincare, maintaining healthy vibrant skin (Gatineau Paris, 2010h: Para 2). Gatineau's Whitening range is developed to lighten and even the skin's complexion, by reducing the appearance of pigmentation flaws (Gatineau Paris, 2010i: Para 1). The Skin Renewing range "is the first high-tolerance peeling kit: it is intended for all skin types and individuals, starting at age 25, who wish to renew skin on their face and neck and restore the appearance of youth and radiance with visible results from the very first application and throughout the entire treatment" (Gatineau Paris, 2010j: Para 5).

  In addition, Gatineau has developed unique ranges which target the various stages of aging. The first signs of ageing can appear from the age of twenty, and the Stratégie Jeunesse range offers a line of products whose action is both specific and complementary, preventing or minimising the appearance of fine lines (Gatineau Paris, 2010k: Para 1). The Melatogenine range is for the 30+ age group and helps to preserve a more useful appearance of the epidermis (Gatineau Paris, 2010l: Para 1). The Defi Lift 3D range is recommended for women as of the age of 35 as it rebuilds the skins natural cushion by restoring the skins support network at three different levels (Gatineau Paris, 2010m: Para 1). The Melatogenine Futur Plus offers women in the 40 plus age group the ultimate in anti-age skincare (Gatineau Paris, 2010n: Para 2). This range offers visible results, anti-aging effectiveness, and radiance and comfort (Gatineau Paris, 2010n:

Para 3). The Feminessence range addresses hormonal changes of pre and post menopausal demands and targets mature skin (Gatineau Paris, 2010o: Para 1). This range moisturises the skin, improves it's natural renewal cycle, and helps protect the skin (Gatineau Paris, 2010o: Para 1).

In addition to the products listed which are available for home use, Gatineau also offers salon treatments which allow consumers to discover precise skincare protocols, specific beauty massage techniques and products reserved exclusively for professional use (Gatineau Paris, 2010: Para 10).

- **Price:** Gatineau is a premium product, which demands premium prices. On average a Gatineau toner is priced from about R 250, whilst one can pay up to R 975 for a Melatogenine Futur Plus moisturiser.

- **Place:** Gatineau utilises a limited distribution channel and their products are available through selected beauticians, spa's and a handful of very select stores, which include Edgards, Red Square, Truworths, Foshini and Stuttafords. This is aligned with the image of prestige.

- **Promotion:** Since Gatineau products are distributed mainly through beauticians and spa's, Gatineau relies heavily on beauticians to promote these products. Gatineau aim to be at the forefront of modernity, which is communicated through attractive and convenient packaging designs (Gatineau, 2010p: Para 8). Gatineau packaging is white with black or silver writing. Gatineau uses the slogan 'Pure technology', which sums up the fundamental philosophy of the brand which is combining natures purest ingredients with the latest biotechnology (Mantrap (NZ) Ltd, 2005: Para 1). The company also utilise both magazines and the web as a communication vehicle.

"Synonymous with elegance and refinement, the Gatineau brand is recognised all over the world not only for its dependability, effectiveness and technological breakthroughs but also for its comprehensive approach to skincare and its professional techniques (Gatineau Paris, 2010a:Para 24). Gatineau is positioned as 'THE' expert in cutaneous aging (Gatineau Paris, 2010a: Para 5).

4.5.6 Johnson & Johnson

- **Product:** Johnson and Johnson has two facial care ranges which associate strongly with the Johnson and Johnson name, these are the Clean and Clear range and the Johnson's range.

The Clean and Clear Range has a variety of different products, including cleansers & scrubs, Toners, Moisturisers, Treatment Products and sun protection (Johnson & Johnson Limited, 2010: Para 2). Clean & Clear has products catering for oily, normal/ combination, and dry skin (Johnson & Johnson Limited, 2010: Para 3). There are also unique products which will assist in controlling the following skin problems, frequent acne, occasional acne, blackheads and clogged pores (Johnson & Johnson Limited, 2010: Para 4).

Johnson's Face care promises to leave skin looking healthy by producing a glowing and fresh complexion (Johnson and Johnson Limited, 2010a: Para 1). The products are tailored to meet individual needs and leave skin baby soft (Johnson and Johnson Limited, 2010a: Para 1). The cleansers offer effortless and effective cleansing solutions and moisturisers lock in moisture day and night (Johnson and Johnson Limited, 2010a: Para 1). Johnson's offers cleansing wipes, various 3-in-1 products, cleansers, moisturisers and lip care (Johnson and Johnson Limited, 2010a: Para 2). The products are tailored to meet certain skin types, which include, dry and sensitive skin, normal and combination skin and oily skin.

- **Price:** Both of the Johnson and Johnson ranges are priced low. The Clean and Clear range is priced between R 10 for a Blackhead cleansing bar and R 40 for the moisturiser. The Johnson's products retail at a price of between R 7 for a cleansing bar and R 58 for a facial moisturiser.

- **Place:** In line with their mass-market appeal Johnson and Johnson Clean & Clear products are widely available and can be purchased at most pharmacies or supermarkets.

- **Promotion:** The promotion for Clean and Clear includes a variety of communications media, relying mainly on traditional channels, whilst it's possible to find information about the brand on the web, they don't currently have a South African website. Communications used by the Clean & Clear products all use the slogan 'clean and clear and under control'.

  Johnson's products are advertised on television and in store brochures however the marketing of these products is limited and whilst the information is available online, it's hard to find. The only website which gives product information is a United Kingdom website. The slogan used by Johnson's is 'for softness. For Beauty. For Life'.

Clean & Clear products are specifically formulated to target blemishes and maintain healthy skin, thus their positioning appears to be to provide consumers with products which will target pimples, blackheads, and clogged pores to ensure consumers are able to maintain healthy, blemish-free skin.

Johnson's are committed to enhance natural beauty and offer a range of products that are perfect for every individual (Johnson and Johnson Limited, 2010a: Para 1). In addition Johnson's believe in a softer way to life (Johnson and Johnson Limited, 2010b: Para 1). Hence, Johnson's positioning appears to be to offer consumers a wide range of products which can be used throughout the consumers life, furthermore Johnson's enhances natural beauty and leaves skin baby soft.

L'ORÉAL
PARIS

4.4.7 L'Oreal

L'Oreal is a French company and global leader in beauty trends (L'Oreal Paris, 2010a: Para 1). L'Oreal Paris prides itself on being a brand which provides women who demand excellence in beauty with accessible luxury (L'Oreal Paris, 2010a: Para 1). "At the forefront of innovation in science, our teams of researchers use the latest technological discoveries to develop unique and visionary products that are, above all, easy to understand and use: our mission is make these scientific innovations accessible to all" (L'Oreal Paris, 2010b: Para 2). L'Oreal believes women of all ages have the right to beautiful skin (L'Oreal Paris, 2010b: Para 8).

- **Product:** Paris L'Oreal has a wide variety of products and uses sub-brands to target specific ages. The Pure Zone products have been specifically developed for teens (L'Oreal Paris, 2010c: Para 1), targeting imperfections at the source (L'Oreal Paris, 2010d: Para 1). For the 20+ age group L'Oreal recommends the HydraFresh Range (L'Oreal Paris, 2010c: Para 1), for firmer feeling and brighter, dewy looking skin (L'Oreal Paris, 2010e: Para 6). The 30+ age group should invest in the Derma Genesis Range (L'Oreal Paris, 2010c: Para 1), which is reinforces the skin's structure, making skin feeling firmer and looking brighter (L'Oreal Paris, 2010e: Para 9). The Revitalift range is aimed at the 40+ age group

(L'Oréal Paris, 2010c: Para 1), and intensely moisturises the skin, making it feel firm and reducing the appearance of wrinkles (L'Oreal Paris, 2010e: Para 12). For the 50+, the Age Perfect range caters for all your skin care needs (L'Oréal Paris, 2010c: Para 1), by protecting against the appearance of brown spots and leaving the skin feeling firmer, whilst providing intensive hydration (L'Oreal Paris, 2010e: Para 15). For those who are 60 and over, L'Oreal has developed the Age Re-Perfect range (L'Oréal Paris, 2010c: Para 1), with Pro-Calcium which caters specifically for the needs of very mature skin (L'Oreal Paris, 2010e: Para 18).

- **Price:** L'Oreal products are offered at reasonable prices for the mass market which they target. Product prices range from about R 60 for a cleanser and about R 205 for the Age Re-Perfect night cream.

- **Place:** L'Oreal products are targeted at the mass-market and use various retail distribution channels to ensure products are easily attainable (Coschem, No Date b: Para 3). Consumers can find L'Oreal products easily as they are widely available at pharmacies, supermarkets and other retail stores, which include Edgars, Red Square, Foshini, Stuttafords, and Truworths.

- **Promotion:** L'Oreal are renowned for their slogan 'because you're worth it', which is used consistently in all their marketing communications. L'Oreal adverts rely on the use of celebrities, using celebrities such as Jane Fonda, Claudia Schiffer, Andie MacDowell, Penelope Cruz and others as the spokesperson for L'Oreal Paris products (L'Oreal Paris, 2010f: Para 2). L'Oreal use both above-the-line and below-the-line advertising and are prominent in television and print media. The vision of beauty and excellence to all is illustrated through L'Oreal's luxurious packaging and innovations at point of sale (L'Oreal Paris, 2010b: Para 4). Although L'Oreal has a corporate website the company does not have one tailored for South Africa.

"L'Oréal Paris grew from one philosophy: to innovate and offer top performing products at great prices to the greatest number of consumers possible" (L'Oreal Paris, 2010g: Para 1). L'Oréal Paris products defend the right to beauty, of all types and the right to grow old with grace and self-assurance (L'Oreal Paris, 2010g: Para 6). Thus, L'Oreal Paris' positioning seems to be to provide a great number of consumers with innovative products at a great price, which will allow them to grow old gracefully maintaining their confidence in the way they look.

NIVEA VISAGE

4.4.8 Nivea Visage

According to the Brand owner Beiersdorf AG (2010a: Para 1), Nivea Visage is "Face care which visibly enhances your own beauty because it offers efficient solutions which are working in harmony with your skin".

- **Product:** Nivea has a wide variety of products targeting specific skin types. There are products which target dry to sensitive skin, normal to combination skin and oily skin (Beiersdorf AG, 2010b: Para 1). Nivea has also developed a range which targets dark marks and blemishes called Naturally Even (Beiersdorf AG, 2010c: Para 1). Furthermore, there are three anti-aging ranges (Beiersdorf AG, 2010d: Para 1), the Anti-Aging Q10 plus products have been developed for the 30 + age group (Beiersdorf AG, 2010d: Para 1), whilst the DNAge Cell Renewal range is formulated for the 40 + age group (Beiersdorf AG, 2010e: Para 1). In addition Nivea's Expert Lift Range has been specifically formulated for the 50+ age group (Beiersdorf AG, 2010f: Para 1).

- **Price:** Aligned with their mass-market brand image, Nivea Visage pricing is affordable (The Irish Times, 2000:2). A Nivea Visage facial wash retails for about R 48, whilst the DNAge moisturiser on average retails for about R 150.

- **Place:** Nivea Visage aims to use as many relevant distribution channels as possible, and is widely available (The Times Newspapers Limited, 2008:112). The main channels in South Africa include pharmacies, stores like Clicks and Dischem and most supermarkets, including Pick 'n Pay, Checkers, Spar etc. Since the products are aimed at the mass market it makes sense to use a broad distribution channel and make them available almost everywhere.

- **Promotion:** Nivea has a strong marketing heritage and campaigns dating as far back as the 1920s have always focused on the benefits and values the brand stands for (Brand Republic, 2005: Para 1). "Sub-brands are never too far removed from the heart of the masterbrand and have to demonstrate clear benefits for consumers" (Fry, 2008a: Para 1). All sub brands are supported by a fully integrated multi-media strategy, which encompasses both above- and below-the-line advertising, sampling, direct marketing and ambient media (Brand Republic, 2005: Para 25). In order to keep the brand young, familiar and likable, Nivea advertsing is constantly updated, showing real people in a real world (The Irish Times, 2000:1). Nivea finds it critical to engage consumers through touch and thus sampling plays a key role in their communications mix (Fry, 2008a: Para 3). In 2007, Nivea launched the 'Beauty is…' campaign, which is based on the thought that Beauty is not just about how you look, but also about how you feel and who you are (Fry, 2008b:7&8). Although the 'Beauty is…' campaign is conveyed on the South African website, the slogan used specifically for Nivea Visage Africa seems to be 'unlock the secret to beautiful skin' (Beiersdorf AG, 2010g: Para 1). Based on recent articles published in the UK, all Nivea products targeting women will be using the slogan 'Feel Closer' (Marketing Magazine, 2010:para 1). Based on the fact that Nivea adopts global campaigns it is assumed that this campaign will be seen in South Africa too. The campaign aims to emphasise the positive impact Nivea products have on female relationships by helping them to 'feel good in their own skin' (Marketing Magazine, 2010:para 2).

A brand born of dermological expertise, consumers continue to associate Nivea with trust, reliability, care, gentleness, accessibility and value for money for all the family (Manning-Schaffel, 2005: Para 2 and The Irish Times, 2000:1). In all communications the masterbrand is prominent, which reinforces the trust-bond developed by the Nivea Brand (Fry, 2008b: Para 6). Since Nivea's creative strategy and positioning is globally developed (Fry, 2008b: Para 16), Nivea has managed to maintain rock solid consistency in their visual and verbal messaging (Manning-Schaffel, 2005: Para 2). Thus Nivea Visage's positioning seems to be a trusted product which is caring and gentle and offers value for money for all women.

4.4.9 Revlon

REVLON

Revlon is a world leader in cosmetics, skin care, fragrance and personal care (Revlon, 2010: Para 2). "The Company's vision is to provide glamour, excitement and innovation to consumers through high-quality products at affordable prices" (Revlon, 2010: Para 2).

- **Product:** The Revlon facial care products include the Pure Skin Range, The Hydra Boost Range and Revlon's Age Defying Range. The Pure Skin Range has been developed to target normal to oily skin (Revlon Consumer Products Corporation, 2007a: Para 2). The Hydra Boost range has been developed specifically for sensitive skin (Revlon Consumer Products Corporation, 2007b: Para 4). Finally the Revlon Age Defying Range has been developed to target ageing, and reduces fine lines and wrinkles by up to 50% in two weeks (Revlon Consumer Products Corporation, 2007c:

Para 2). "Revlon strives for an elegant, upscale feel to its packaging" (Demetrakakes, 2005: Para 13).

- **Price:** Revlon products are offered at a fair price which is affordable to the mass market and skin care products range between R 59 for a cleanser and R 206 for a Revlon Age Defying moisturiser.

- **Place:** Revlon products are available through mass-market channels which include supermarkets, clothing retailers and pharmacies.

- **Promotion:** Like L'Oreal Revlon make use of various celebrity spokespeople. Their products are advertised using various forms of media which include television and print as well as a South African website. In order to convey their sexy, confident positioning Revlon uses the slogan 'be unforgettable'. Despite their presence in the facial care industry the company's focus seems to be on colour cosmetics.

"Revlon defines its niche as premium products offered through mass-market channels" (Demetrakakes, 2005: Para 4). Revlon chose to position itself as the brand that will create feelings of confident sexiness in the minds of their target market (Stahl, 2007: Para 8). This positioning became the core centrepiece of all marketing efforts (Stahl, 2007: Para 8). Revlon's positioning seems to be to provide women with premium products which are easily attainable and will allow them to feel confident and sexy.

4.5 Conclusion

This chapter covered the skin care industry, specifically a broad overview of the Global Facial Care Industry, the competitive environment and the leading companies were discussed. The South African Facial Care Industry and its leading companies and their brands were then discussed. The chapter also looked into the driving forces and current facial care trends and finally the brands which were included in the survey were discussed.

The next chapter gives a broad overview of the methodology which includes an overview of triangulation, the focus group process and the survey process.

5.1 INTRODUCTION

This chapter details the specifics of the research methodology involved in this research and includes the problem statement, the research objectives, the research design of the qualitative (stage 1) and quantitative (stage 2) data collection – the sections which follow will detail the research approach, rationale for the selection of the research methods used, purpose as well as the methodology.

5.2 PROBLEM STATEMENT

Research conducted by the UCT Unilever Institute of Strategic Marketing has indicated that the mature market in South Africa, believe marketing messages are aimed at persons in their 20s and 30s, and feel alienated from marketing communications, overlooked by product developers and are displeased with customer service (Mitchell, 2008: Para 10). From this research one can assume that the mature market perceives their needs to differ from the needs of their younger counterparts.

The fact that Baby Boomers feel neglected by South African Marketers and the fact that they believe their needs to be different from the needs of their younger counterparts, highlights the fact that marketers in South Africa need to be aware of generational differences when they're positioning their products in the minds of consumers. This indicates that there may be an opportunity for South African marketers to position their products better in the minds of Baby Boomer consumers, and that marketers could target generations more effectively by using different approaches for each generation. The female skin care industry is interesting as this industry has developed and designed products that are specifically aimed at various age groups. It seems to be the one industry that has recognised the attractiveness of the lucrative Baby Boomer market, as well recognising that different generations have different needs and therefore need to be targeted differently. This research therefore aims to determine whether Baby Boomer women feel marginalised by the skin care industry and to determine how their needs for, attributes sought, and positions occupied by skin care products differ from those of the Generation X and Y women.

5.3 RESEARCH OBJECTIVES

In order to pursue the topic *"A cross-generational study of the positioning of skin care products based on female perceptions",* it was imperative to identify research objectives. The research objectives were as follows:

1) To determine what factors/ attributes female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products
2) To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women
3) To determine if Baby Boomer females feel marginalised by the skin care industry
4) To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products

5.4 RESEARCH DESIGN

The research design as described by Aaker, Kumar, Day and Lawley (2005:58), is a detailed blueprint used to guide the research study towards its objectives. The research design "specifies the details of the procedures necessary for obtaining the information needed to structure and/or solve marketing research problems" (Malhotra *et al.*, 2008:64). In order to ensure that the information collected is appropriate for solving the problem, the research objectives need to be considered (Zikmund, 2003:58). The research design specifies the methods and procedures for collecting and analysing the needed information, e.g. the research approach, the sampling methodology, the design technique and the schedule and cost of the research (Zikmund, 2003:58).

For the purpose of this research a triangulation design was utilised. "Triangulation entails combining both qualitative and quantitative data" (Banister *et al.*, 1994, cited in Holzhausen, 2001:Para 28).

According to Hanson, Creswell, Plano Clark, Petska and Creswell (2005:226) the rationale behind using both qualitative and quantitative methods in a single study include:

- the results from one method could be used to elaborate on results from another method
- the results from one method could be used to help develop or inform the other method
- to recast results from one method to questions or results from another method
- to extend the breath or range of inquiry by using different methods for different inquiry components.

Mertens (2003) and Punch (1998, both cited in Hanson *et al.*, 2005:226) give the following reasons for using the triangulation design:

- to better understand a research problem by converging specific details from qualitative data and numeric trends from quantitative data
- to identify variables/ constructs that may be measured subsequently through the use of existing instruments or the development of new ones

One of the biggest advantages of using qualitative and quantitative research is that the styles have complimentary strengths, as a result research that uses both methods tends to be more comprehensive (Neuman, 2006:150). Mixing the styles can occur in several ways – the methods are either used sequentially or in parallel (Neuman, 2006:150). This research used the methods sequentially, the first stage of the process used a focus group to collect qualitative data, and the second stage used a mall-intercept survey to collect quantitative data.

Qualitative research can be defined as "research data not subject to quantification or quantitative analysis" and "can be used to examine attitudes, feelings and purchase motivations" (McDaniel and Gates, 2001:108). Techniques used to gather qualitative data tend to be less structured and more intensive, resulting in a longer, more flexible relationship with respondents and producing data with more depth and greater richness of context (Aaker *et al.*, 2005:122). Thus qualitative research shows greater potential for new insights and perspectives (Aaker *et al.*, 2005:122). Quantitative research on the other hand, can be defined as "studies that use mathematical analysis" and "can reveal statistically significant differences" (McDaniel and Gates, 2001:108). Quantitative research involves the use of structured questions where response options have been predetermined for a large sample size (Geocities, 2009:Para 2).

5.4.1 Stage 1: Focus Group

This section deals specifically with the focus group (stage 1) research design and covers the following topics, research approach, rationale, purpose, as well as methodology. Sample design, tool design, process, data collection, data analysis, reliability and validity, and ethics form part of the methodology section.

5.4.1.1 Research Approach

The choice of research approach depends largely on the nature of the research that one wants to conduct and can be exploratory, descriptive or casual (Aaker *et al.*, 2005:59). The focus group research was of an exploratory nature. Exploratory research can be defined as "research that seeks insights with little or no prior knowledge; that is research that explores (Aaker *et al.*, 2005: 59). This type of research intends to develop initial ideas and insights in order to provide direction for any further research (Wilson, 2006:33). Thus, the purpose of this type of research is to narrow the scope of the research topic and transform ambiguous problems into well-defined ones that incorporate specific research objectives (Zikmund, 2003:56). Exploratory research tends to be highly flexible, unstructured and qualitative (Aaker *et al.*, 2005:59). Secondary data, individual and group unstructured interviews and case studies are common data collection methods used in exploratory research (Aaker *et al.*, 2005:60).

5.4.1.2 Rationale for Focus Group Sessions

Focus groups are useful for exploratory research and are not intended to provide conclusive evidence; instead they are intended to develop initial ideas or insights and to provide direction for further research needed (Wilson, 2006:33). A Focus Group can be defined as "a formalised process of bringing a small group of people together for an interactive, spontaneous discussion on one particular topic or concept" (Hair, Bush and Ortinau, 2000:222). The aim of a focus group is to get a group of people together, encourage them to talk at length about a topic in order to draw out as many ideas, attitudes, feelings and experiences about the topic as possible (Hair *et al.*, 2000:222). Focus groups are useful tools which can be used to reveal consumers' hidden needs, wants, attitudes, feelings and behaviours, providing researchers with excellent opportunities to gain preliminary insights into what consumers think or feel about a wide array of products (Hair *et al.*, 2000:222). For the purposes of this research the focus group was used to gain preliminary insights.

Hair *et al.* (2001:237-238) and McDaniel and Gates (2001:121-123) discuss the following advantages and disadvantages of focus groups:

- **Advantages of focus groups:**
  - The spontaneous, unrestricted interaction of group members can stimulate ideas, thoughts, and feelings that may not be raised in one-to-one interviews.
  - Group pressure challenges respondents to keep their thinking realistic.
  - They allow researchers to collect detailed data about underlying reasons people act as they do in different market situations.
  - The energetic atmosphere allows researchers to observe first-hand consumer information, in a shorter amount of time and in a more interesting way than individual interviews.
  - Findings from groups tend to be easier to understand and have compelling immediacy and excitement.
- **Disadvantages of focus groups:**
  - The data structures developed from focus groups tend to lack representativeness and as a result can not be generalised to larger market segments.
  - Focus groups do not allow researchers to substantiate data reliability or to distinguish small differences.
  - The immediacy and apparent understandability of focus group findings can mislead instead of inform.

Maree (2007:91) states that another limitation of focus groups is that the collected information may be biased, due to domination of the discussions by the more outspoken individuals, groupthink and the difficulty in assessing viewpoints of the unassertive participants. Furthermore, the quality and usefulness of the discussion depend on the skill of the moderator.

To ensure that good-quality information is obtained from focus groups thorough planning and preparation is critical (Aaker *et al.*, 2005:131). The following decisions need to be considered: choice of moderator, developing a moderators' guide, identifying and recruiting respondents, decisions about how many groups and how many participants in each group, as well as venue and timing considerations (Aaker *et al.*, 2005:131).

5.4.1.3 Purpose

For the purpose of this research the focus group method was deemed advantageous as it was used to develop initial ideas or insights and to provide direction for further research. The focus groups were used to establish the most important attributes sought by consumers, the competitive set and whether individuals felt marginalised by the skincare industry. Furthermore the focus group sessions assisted in cutting down the number of attributes and the competitive set, to a number realistic for the survey questionnaire, thus the sessions assisted in developing the questionnaire. Due to cost and time advantages it was particularly functional.

5.4.1.4 Methodology

The following section details the methodology used for the qualitative research that took place. It includes sample design, tool design, the focus group process, data collection, data analysis, reliability and validity as well as ethics.

Sample Design:

There are five steps involved in the sampling design process, which are closely interrelated and relevant to all aspects of marketing research (Malhotra *et al.*, 2008:266). These steps are:

1. *Define the target population:* "This involves translating the problem definition into a precise statement of who should and who should not be included in the sample" (Malhorta *et al.*, 2008:267). Three generations of women were included in this study; they were the Baby Boomer women, the Generation X women and Generation Y women.

2. *Determine the sampling frame:* "This consists of a list or set of directions for identifying the target population" (Malhorta *et al.*, 2008:267). For the purpose of this research the sample frame consists of women that were Baby Boomers, Generation X or Generation Y and were available for focus groups.

3. *Select a sampling technique:* There are two types of sampling techniques which are commonly used. These are probability sampling and non-probability sampling. Probability sampling as defined by Denscombe (2003:12) is "based on the idea that the people or events that are chosen as the sample, are chosen because the researcher, has some notion of the probability that these will be a representative cross-section of people or events in the whole population being studied", whilst non-probability sampling is "sampling conducted without such knowledge about whether those included in the sample are representative of the overall population" (Denscombe, 2003:12). Non-probability sampling has been selected for this research. The reason for selecting this technique is due to the fact that it is impossible to state that each member of the population had an equal chance of being selected, since the population size is unknown. Furthermore this technique was selected due to financial and time constraints.

   There are four different types of non-probability sampling; convenience sampling, judgemental sampling, quota sampling and snowball sampling (Malhorta *et al.*, 2008:272-274). The focus group sample was selected using snowball sampling. Snowball sampling is a non-probability sampling technique where an initial group of respondents identify others who belong to the target group and subsequent respondents are selected based on referrals (Malhorta *et al.*, 2008:274). For this research the initial sample was selected purposively to ensure all race groups were included so as to attempt to ensure representivity. They then identified others within their personal networks from the target group to participate in the focus groups.

4. *Determine the sample size:* This is a complex procedure involving several qualitative and quantitative considerations and refers to the number of elements to be included in the study (Malhortra *et al.*, 2008:269). For the purpose of the focus group study 10 women from each generation were selected and included in three different focus groups. Thus, the ladies included in one session were all from the same generation.

5. *Execute the sampling process:* "This requires a detailed specification of how the sampling design decisions with respect to population, sampling frame, sampling unit, sampling technique, and sample size are to be implemented" (Malhorta *et al.*, 2008:271).

Tool Design & Focus Group Process:

A successful focus group requires a well-planned discussion or moderator guide, which is an outline of the topics to be covered based on the research objectives (McDaniel and Gates, 2001:116). The moderators' guide should be used as a checklist to ensure all topics are covered; it is not desirable to read formal questions to the group (Aaker *et al.*, 2005:132). This is because a focus group is usually unstructured and free-flowing. A flexible format encourages discussion (Zikmund, 2008:127). The moderators' guide tends to flow through three stages. In the first stage rapport is established and rules and objectives are explained (McDaniel and Gates, 2001:118). The second stage is used for provoking intensive discussion about the topic and objectives of the research and the final stage is used to summarise and test limits of belief and commitment (McDaniel and Gates, 2001:118). The details regarding the development and design of the discussion guide are covered in Chapter 6 and a copy of the discussion guide is available in Appendix 2.

Respondents were presented with and required to sign an informed consent document, prior to the commencement of the focus group. The informed consent document, which informed respondents that they were able to withdraw from the research at any stage and ensured them that their details would be confidential, can be found in Appendix 3. In addition a questionnaire was developed (see Appendix 4), and was answered by respondents during the sessions. The questionnaire was useful in order to record certain information which required little discussion, thus saving time and enabling the moderator to focus on discussion of the important qualitative data. The questionnaire was also useful for determining the respondents individual opinions prior to them being influenced by group discussions, thus it alleviated one of the short comings of focus groups.

Data Collection:

In order to collect the qualitative data the three focus group sessions were held. 10 ladies were invited to each focus group, which were held at the Pietermaritzburg Campus at the University of Kwa Zulu-Natal.

Table 5.1 Focus Group Details

Participants	Day & Date of Focus Group	Time	No. of Participants
Baby Boomers	Wednesday, the 24th of June 2009	09:00	8
Geneartion X	Thursday, the 25th of June 2009	08:15	8
Generation Y	Tuesday, the 23rd of June 2009	15:30	7

Details of when the focus groups were held are presented in Table 5.1 above. Despite having sourced 10 ladies for each group, some ladies cancelled at the last minute, whilst others just did not arrive.

Data Analysis:

According to Denscombe (2003:119), "data analysis involves the separation of things into their component parts. More specifically, it involves the study of complex things in order to identify their basic elements". The data from the focus group questionnaires was analysed using the statistical programme SPSS. SPSS is widely used by market researchers due to the many features offered, furthermore it is user friendly and enables a person to easily learn the various statistical techniques without having to use formulas and calculate the results (Shiu, Hair, Bush and Ortinau, 2009:693). SPSS allows a researcher to prepare reports and execute various statistical techniques, such as frequencies, correlation and regression, factor, cluster etc (Shiu *et al.*, 2009:693). Frequencies were used in the analysis of the focus group questionnaires.

Content analysis was used to analyse the focus group sessions. Content analysis is a tool which is appropriate for any type of qualitative research, but is the most widely used formalised procedure used by researchers to create meaningful findings from focus group discussions (Shiu *et al.*, 2009:190). Content analysis is defined as, "the systematic procedure of taking individual responses and grouping them into large theme categories or patterns" (Shiu *et al.*, 2009:191). Since all the focus group sessions were video recorded, the recordings were useful in writing transcripts of each of the focus group sessions. These transcripts were used to review participant's raw comments and analyse the discussions that took place. This enabled the researcher to extract key data. The table below describes what analysis and interpretative factors need to be taken into consideration when applying content analysis.

Figure 5.1 Important Analysis and Interpretive Factors when analysis Focus Group Data

Analysis/Interpretive Factors	Description and Comments
Consider the words	Thought must be given to both the words used by the participants and the meanings of those words. Because there will be a variety of words and phrases used by the group members, the researcher will have to determine the degree of similarity and classify them accordingly. It should be remembered that editing messy quotations is a difficult but necessary task.
Consider the context	The researcher will have to gain an understanding of the context in which participants expressed key words and phrases. The context includes the actual words as well as their tone and intensity (voice inflection). It must be remembered that nonverbal communication (body language) can also provide meaningful bits of data worth analysing.
Consider the extensiveness and frequency of participants' comments	In most situations, some of the topics presented in the session will be discussed by more participants (extensiveness) and some comments made more often (frequency) than others. The researcher should not assume that extensiveness and frequency of comments are directly related to their importance.
Consider the intensity of comments	Sometimes group members will talk about specific aspects of a topic with passion or deep feelings. While left undetected in transcripts alone, the intensity factor can be uncovered in audio- or videotapes by changes in voice tone, talking speed and emphasis placed on certain words or phrases.
Consider the specificity of responses	Those responses that are associated with some emotional first hand experience probably are more valuable than responses that are more vague and impersonal. For example, 'I feel that the new Aldi's cheese scone is a ripoff because I ate one and it tasted just terrible, especially at the price they are charging' should be given more weight than 'The new Aldi's cheese scone does not taste very good, considering what it costs.'
Consider the big picture	Because data from focus groups come in many different forms (words, body language, intensity, etc.), the researcher needs to construct an aggregate theme or message of what is being portrayed. Painting a bigger picture of what group members are actually saying can provide preliminary insights into how consumers view the specified product, service, or programme. Caution should be used when trying to quantify the data. Use of numbers can inappropriately convey the impression that the results can be projected to a target population, which is not within the capabilities of qualitative data.

(Shiu *et al.*, 2009:191)

Reliability & Validity:

"Reliability is fundamentally concerned with issues of consistency of measures" (Bryman, 2004:70). According to Shiu *et al.* (2009:194) data reliability is potentially a big issue of concern in focus groups due to the type of data collected. "The unstructured nature of the data (nominal nature of the verbalised comments and non-verbal body language) precludes analysing the results in standard statistical formats" (Shiu *et al.*, 2009:194). Thus, it was imperative that the focus group was video recorded; this enabled the researcher to watch the recordings and assisted in writing transcripts, and observing any non-verbal body language which may have been missed during the focus group discussion.

"Validity addresses the issue of whether what we tried to measure was accurately measured" (McDaniel and Gates, 2000:258). In an attempt to ensure that the focus groups were valid, clear objectives were formulated and the discussion guide was developed to be aligned with the objectives.

Ethics:

In adhering to good ethics an ethical clearance application was submitted to the University of KwaZulu-Natal in order to obtain approval to conduct the focus groups (refer to Appendix 1). An informed consent document was attached to every questionnaire to inform all participants that they were able to withdraw from the research at any stage and ensuring them that their details would be kept confidential.

Thus this section has detailed the rationale behind selecting the focus group method. Chapter 6 deals with the design of the discussion guide, which was carefully designed to align with the research objectives, to ensure that the data collected would be useful in developing the questionnaire for the mall-intercept survey as well as providing the researcher with some useful qualitative data, which is used in the analysis section. Since a triangulation approach was used the next section details the rationale of the mall-intercept survey, which was conducted after the focus groups.

5.4.2 Stage 2: Mall-intercept Survey

This section deals specifically with the mall-intercept (stage 2) research design and covers the following topics, research approach, rationale, purpose, as well as methodology. Sample design, tool design, process, data collection, data analysis, reliability and validity, and ethics form part of the methodology section.

5.4.2.1 Research Approach

The research obtained from the mall-intercept survey was of a descriptive nature. Descriptive Research can be defined as "a type of conclusive research which has as its major objective the description of something - usually market characteristics or functions" (Malhorta *et al.*, 2008:70). The major difference between exploratory and descriptive research is that descriptive research is characterised by prior knowledge and is pre-planned and structured, incorporating a large representative sample (Malhorta *et al.*, 2008:70). "Descriptive research provides answers to the questions of who, what, where, when and how" (Aaker *et al.*, 2005:62). "Descriptive research is used to gather information such as demographics, psychographics as well as to determine the extent of differences in needs, attitudes and opinions amongst subgroups (Aaker *et al.*, 2005:62 and Zikmund, 2008:51). The most common technique used to collect descriptive data is the survey or questionnaire (Aaker *et al.*, 2005:62). In order to conduct the descriptive research, a survey was conducted at 4 malls in KwaZulu-Natal, and a total of 495 females were included with approximately a third from each generation.

5.4.2.2 Rationale for mall-intercept survey

In order to collect quantitative data, a mall-intercept survey using a questionnaire was conducted. Hair *et al.* (2000:257), McDaniel and Gates (2001:184) and Martins *et al.* (1999:129-130), discuss the following advantages and disadvantaged of mall-intercept surveys:

- **Advantages of surveys:**
  - Cost advantages – respondents come to the researcher.
  - Less time consuming – interviewers spend more time interviewing and less time looking for respondents to interview
  - Complexity and versatility – products and materials can be used to demonstrate or test products
  - Fairly high response rates and substitutes are easy to find
- **Disadvantages of surveys:**
  - Sample may not be representative of a large area as non-probability sampling procedures are implemented
  - Have limits in terms of length and depth of questionnaires
  - Lack of sample control

5.4.2.3 Purpose

The objective of the mall-intercept survey was to establish the positions held by consumers of certain facial care products. A comparison of perceptions of the three generations of women was made in order to establish whether these differ. Furthermore the research established whether any of the women felt marginalised by the facial care industry, in terms of availability of products and marketing communications.

5.4.2.4 Methodology

The following section details the methodology used for the quantitative research that took place. It includes sample design, tool design, the focus group process, data collection, data analysis, reliability and validity as well as ethics.

Sample Design:

1. *Define the target population:* Three generations of women were included in this study; they were the Baby Boomer women, the Generation X women and the Generation Y women.

2. *Determine the sampling frame:* For the purpose of this research the sample frame consisted of those women shopping at the following malls Hayfields, Northway, Capital Towers and the Pavillion.

3. *Select a sampling technique:* Convenience sampling was selected for the survey. Convenience sampling is "a method of non-probability sampling where the samples are drawn on the basis of convenience" (Hair, *et al.*, 2006:680). This is a popular method to use for Mall-intercept surveys. The approach is relatively simple, and involves intercepting shoppers in public areas of shopping malls and interviewing them on the spot or at interviewing facilities in the mall (McDaniel and Gates, 2001:183).

4. *Determine the sample size:* Whilst it is acknowledged that the sample size should have been determined using population statistics; resource constraints limited the printing of survey questionnaires to 500. Attempts were however made to ensure equal representation of the 3 generations. However, since the data collection method was mall-intercept it was not always possible to judge the ages of the women surveyed. Thus, a total of 495 women completed the questionnaires. Of these 151 women were Baby Boomers, 183 were Xers and 150 were Yers. The remaining 11 respondents were born

before 1946 and thus belong to the 'silent generation'. This generation did not form part of the study and hence these respondents were not included in the study.

5. *Execute the sampling process:*

Questionnaire Design:

Questionnaire design is an important step in formulating a research design. A questionnaire can be defined as "a formalised set of questions for obtaining information from respondents" and "is characterised by some specific objectives" (Malhorta *et al.*, 2008:215). According to Malhorta *et al.* (2008:215), a questionnaire has three specific objectives:

- It must translate the information needed into a set of specific questions that the respondents will answer
- It must uplift, motivate and encourage the respondent to become involved in the interview, to cooperate and to complete the interview.
- And it should minimise response error.

In an attempt to determine what information is required, clear research objectives were defined. For the purpose of this research these objectives have been explored using secondary data and qualitative techniques which gave insight into how the objectives should be addressed in the quantitative survey. Consequently the questionnaire was based on a combination of the literature review and the focus group results.

Zikmund (2003:365) states that there are two basic criteria a questionnaire must meet if it is to fulfil a researcher's purpose. These are relevance and accuracy. "A questionnaire is relevant if no unnecessary information is collected and only the information needed to solve the marketing problem is obtained" (Zikmund, 2003:365). "Accuracy means that the information is reliable and valid" (Zikmund, 2003:366). In order to ensure that the questionnaire was relevant the questionnaire was developed based on both the objectives of the research and the qualitative data extracted from the focus groups. In an attempt to ensure accuracy the questions were formulated in such a way that there was no ambiguity and pilot testing was also conducted to ensure there was no ambiguity.

According to Aaker *et al.* (2005:242), the following steps should be used when designing a questionnaire:

1. Formulate questions to obtain the required information. Clearly defined objectives were used to develop the questionnaire. Furthermore the insight gained in the focus group sessions was applied, to ensure that questions obtained the required information.
2. Decide on the order and wording of questions. Words and phrases that would be understood by the average person were used. Furthermore, the questionnaire started off with very basic questions, this was to ensure that the respondents would carry on filling out the questionnaire. Next, the questions which were most important to the research were included. Finally, demographics were included.
3. Decide on the layout of the questionnaire. Since the mall-intercept method was used it was critical that the questionnaire looked short – thus it was imperative to limit the questionnaire to two pages. These were printed back to back.
4. Pretest for ambiguity. A pilot study was conducted in order to verify that the average person would understand the questions and be able to answer the questionnaire.
5. Correct the problems (and pretest again if necessary).

The details regarding the development and design of the discussion guide are covered in Chapter 7 and a copy of the Survey

Questionnaire is available in Appendix 9.

Pilot Testing:

Pilot testing is a means of testing the questionnaire on a small sample of respondents in an attempt to identify and eliminate potential problems (Malhorta *et al.*, 2008:233). A pilot study will assist in determining whether respondents have any difficulty understanding the questionnaire and whether ambitious or biased questions are included in the questionnaire (Aaker *et al.*, 2005:391). Pilot testing should be extensive and as a general rule of thumb no questionnaire should be used in a field survey without adequate pre-testing (Malhorta *et al.*, 2008:233). According to Malhorta *et al.* (2008:233), "all aspects of the questionnaire should be tested, including question content, wording sequence, form and layout". Pilot testing is beneficial as making a mistake with a sample of individuals can avoid the potential disaster of administering an invalid questionnaire to several hundred individuals (Aaker *et al.*, 2005:391). The respondents of the pilot study should be similar to those who will be included in the actual survey and the pilot questionnaire should be administered in an environment and context similar to that of the actual survey (Malhorta *et al.*, 2008:233).

A pilot study was conducted to make sure the questionnaire consisted of what was necessary to satisfy the objectives set out. In addition, the pilot study was used to make sure that the questionnaire was accurate and relevant and any ambiguous or irrelevant questions were removed. The pilot study was representative of the sample and 30 women, 10 from each generation were chosen, representing all races. The pilot study was conducted at the end of August and very minor changes were made.

Data Collection:

The quantitative data was collected at the following malls in Pietermaritzburg - Hayfields, Northway and Capital Towers, and in Durban at the Pavillion. One week was spent at each Mall in Pietermaritzburg and one week was spent at the Pavillion in order to collect data. A total of 495 respondents were interviewed. Of these 286 (58%) respondents were surveyed in Durban, whilst the remaining 207 (42%) respondents were interviewed in Pietermaritzburg. The quantitative data was collected in Durban in the last week of August 2009 and in Pietermaritzburg in September 2009. Prior to the mall-intercept survey, permission to conduct research at the participating malls was obtained.

Data Analysis:

The statistical program SPSS was used to analyse the data collected. SPSS is widely used by market researchers due to the many features offered, for purposes of this research the features that were used included frequencies, descriptive stats, significance testing of the hypotheses developed and reliability testing. Where generational differences were of interest, specific hypotheses were developed and tested. The following hypotheses were tested:

1. Use of facial care products

   H0: There is no significant difference in the use of facial care amongst generations

   H1: There is a significant difference in the use of facial care amongst generations

2. Importance of attributes

   H0: There is no significant difference in attribute importance amongst generations

   H1: There is a significant difference in attribute importance amongst generations

3. Brand preferences for the 12 attributes (*Lasts all day no need to reapply; moisturising ability; makes skin feel smooth and soft; contains anti-aging properties; contains SPF; removes impurities; contains natural ingredients; widely available; multi-purpose e.g. 3-in-1 product, moisturiser with SPF, etc; low price; mild fragrance; and quality packaging*)

   H0: There is no significant difference in Brand perception (on the *X* attribute) by the different generations

H1: There is a significant difference in Brand perception (on the *X* attribute) by the different generations

4. Brand perception between users and non-users and users of facial care products

   Ho: There is no significant difference in Brand Perception between users and non-users of facial care brands.

   H1: There is a significant difference in Brand Perception between users and non-users of facial care brands.

5. Media effectiveness

   H0: There is no significant difference in media effectiveness amongst generations

   H1: There is a significant difference in media effectiveness amongst generations

Significance testing was used in order to determine whether the null hypotheses should be rejected or accepted. Both the Kruskal-Wallis test and the Whitney-Mann U test were used to test significance. The Kruskal-Wallis test is a non-parametric test, which establishes whether more than two independent groups differ (Field, 2009:788). Similarly, the Whitney-Mann U test is also a non-parametric test, however it looks for differences between two independent samples (Field, 2009:789).

Cronbach's alpha was used to test reliability. Cronbach's alpha is a measure of reliability, which measures whether individual items produce results which are consistent with the overall questionnaire (Field, 2009:674). Furthermore the programme was useful in order to generate appropriate graphs, charts and tables which were useful for presenting the findings. Finally SPSS was also used in order to develop positioning maps.

Reliability & Validity:

Welman, Kruger and Mitchell*,* (2005:145) explain that "reliability is concerned with findings of the research and relates to the credibility of the findings". According to Hardy and Bryman (2004:23) the most common method of estimating reliability is Cronbach's alpha. Cronbach's alpha assesses the extent to which all items are measuring the same thing (Sapsford and Jupp, 2006:111). In interpreting Cronbach's alpha, it is generally accepted by researchers that a .70 coefficient is generally acceptable but indicates low reliability, a .80 coefficient indicates moderate reliability and a .90 coefficient indicates high reliability (Maree, 2007:216).

In an attempt to ensure that the questionnaire was valid and measured what was meant to measure, the questionnaire was developed using clearly defined objectives, furthermore the questions were developed based on a combination of the literature review and the focus group findings and were pilot tested.

Ethics:

In adhering to good ethics an ethical clearance application was submitted to the University of KwaZulu-Natal in order to obtain approval to conduct the survey (refer to Appendix 6). An informed consent document was attached to every questionnaire to inform all participants that they were able to withdraw from the research at any stage and ensuring them that their details would be kept confidential. Furthermore, permission from all relevant malls was obtained before research was conducted.

This section has shown the rationale behind the selection of the mall-intercept survey and focuses mainly on the theoretical aspect of choosing the mall-intercept method. The questionnaire design and how it aligns with the research objectives in discussed in more detail in Chapter 7.

5.5 CONCLUSION

The research process has been discussed in this chapter and provides a better understanding behind the selection of the triangulation design which was implemented. Furthermore, it gives basic information relating to the focus group study (stage 1) and the mall-intercept survey (stage 2). This chapter however doesn't go into a lot of detail regarding the designs of the focus group and the mall-intercept survey. Chapter 6, which follows, focuses in detail on the Focus Group Design (stage 1) and presents the findings of the qualitative research. Chapter 7 gives more detail about the mall-intercept and presents the findings of stage 2.

6.1 INTRODUCTION

The research conducted used a triangulation methodology, and was conducted in two stages. This chapter details the specifics of stage one, the focus group study. The focus group design is covered, which includes an in-depth discussion of the moderator's discussion guide and the rationale behind the questions which were included in the focus group study; finally the findings of the focus group are presented. Refer to Appendix 2 for the moderator's discussion guide.

6.2. FOCUS GROUP DESIGN

The main purpose of the focus group was to gain insight, which would enable a better and more relevant questionnaire design for the quantitative research. The focus group was used specifically to establish a competitive set and to investigate which were the common and most important attributes that women of the various generations considered when purchasing skin care products.

6.2.1 Discussion of Moderator's Discussion Guide

The moderator's guide used in the focus group sessions is discussed below. Refer to Appendix 2 to view the moderator's discussion guide.

6.2.1.1 Opening

In order to establish rapport a short opening paragraph was designed. The rules and objectives were explained and participants were given the opportunity to ask questions. This was important in order to ensure that the participants understood how a focus group works so that optimal information could be gathered. The opening was also used to ensure that the participants were relaxed and willing to participate in the discussion, as emphasis was made on the fact that a focus group is merely a search for opinions and there were no right or wrong answers.

6.2.1.2 Discussion Topics

In the next section was designed in order to discuss three main topics. These topics aimed to establish a competitive set, establish the most important attributes which are considered when purchasing skin care products and to establish whether women feel marginalised by the skin care industry, in terms of product availability and the marketing messages used by the industry.

Establishing the competitive set:

Ultimately these questions were important in order to establish which of the many brand names were most popular among the women. Since there are many brands of facial care products not all brands could be included in the questionnaire and hence the focus group was used to choose the brand names which would be included in the questionnaire for the mall-intercept survey, the second stage in the research. This in turn, would assist in meeting the second objective: to establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women.

Five questions were used in this section. The first question asked which brands came to mind when the participants thought about facial care products. They were required to answer on the questionnaire after which a short discussion took place as to why these brands stood out. This question was useful in determining the competitive set and also to determine whether the brands used were amongst the brands mentioned. The second question asked participants which brands of facial care products they used, stressing that participants should mention each of the brands they used. The question was asked in order to establish which brands were used by participants and whether participants used one brand exclusively or tended to use more than one brand. Whilst this question was useful in determining a competitive set it was also useful in order to determine brand loyalty amongst participants.

The third question aimed to find out whether participants tended to stick to the brands they use or whether they chopped and changed between brands, as well as the reasons behind their decision. This question too was helpful in determining brand loyalty amongst respondents. The fourth question was used to establish how faithful they were to the brand or brands that they were currently using; in terms of the length of time they had used a brand. The final question was asked to determine which brand alternatives they would consider if they were forced to change brands. This question was useful in order to determine what set of competing brands participants would consider, and helped to discover the competitive set. The most popular brands were selected and included in the mall-intercept questionnaire.

Establishing the most important attributes: These questions assisted in satisfying the first objective which was: to determine what factors female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products. The most important and most common attributes were then used in the questionnaire designed for stage two, the mall-intercept survey. It was not advisable to include all attributes in the second stage questionnaire. This is because the questionnaire needed to be as short and concise as possible to get a better response rate.

In an attempt to establish which attributes were considered when choosing facial care products three questions were used. The first question was used to clarify why they currently use their selected brands; specifically what it was about the brand that made them use the brand(s)? A discussion took place amongst respondents to ascertain if there were specific attributes which came through. The second question asked participants to name all the attributes they consider when they choose a brand. Respondents were asked to list all the attributes which they consider on the questionnaire provided. Finally the third question asked participants to rate the attributes in order of importance, on the questionnaire provided. After they had written down their answers a short discussion took place which focused mainly on the three most important attributes mentioned by each respondent. This section was also useful to determine exactly what they meant by the attributes they had written down.

Establishing whether these women feel marginalised by the skin care Industry: The questions in this section were developed in an attempt to satisfy the following objectives: to determine if Baby Boomer females feel marginalised by the skin care industry and to measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products.

Four questions were used to determine whether women felt marginalised by the facial care industry and their marketing communications. The first question simply asked if they felt marginalised or if there was a certain age group that they felt was ignored by the facial care industry. The next three questions were developed to deal specifically with the marketing communications which were developed and to establish if participants thought marketers developed their messages to target their particular age group. It was also asked whether the messages appeal, and why certain messages appeal and others don't – this question was asked as the literature review indicated that different generations looked for different things in advertising messages. Finally the participants were asked to elaborate on why some adverts appealed and others didn't. The last three questions also provided insight into the objective: to measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products. This objective was difficult to pursue in the mall-intercept stage since the objective is of a very qualitative nature.

6.2.1.3 Close

After all of the discussion topics had been discussed the focus group session was closed off by summarising what had been discussed and probing if there were any last comments, questions or suggestions. The participants were thanked for their time, and each participant was handed a rose as a token of appreciation.

6.2.2 Method

As discussed in greater detail in Chapter 5, three focus groups were held and a total of ten women, were invited to each of the focus group sessions, each session representing one of the three generations. The participants were selected using snowball sampling. All three focus groups were conducted in the week commencing 21st of June 2009, were held at the University of KwaZulu-Natal Pietermaritzburg campus and took 90 minutes. In order to save time and make data collection easier a questionnaire was used, and the participants were asked to record their answers after which the discussion took place. The questionnaire was useful for collecting demographic details of the participants for the sample profile quickly so as to limit the total time of the focus groups, as the participants were busy individuals. Furthermore, the questionnaire was useful in order to determine the participants' individual opinions prior to them being influenced by group discussions, thus alleviating one of the short comings of focus groups. All focus groups were recorded; these recordings were useful to make sure no details were missed.

6.3 Sample Profile for the Focus Groups

This section details the sample profile, giving more information regarding the demographics of the focus group participants.

Figure 6.1 Participants Generation

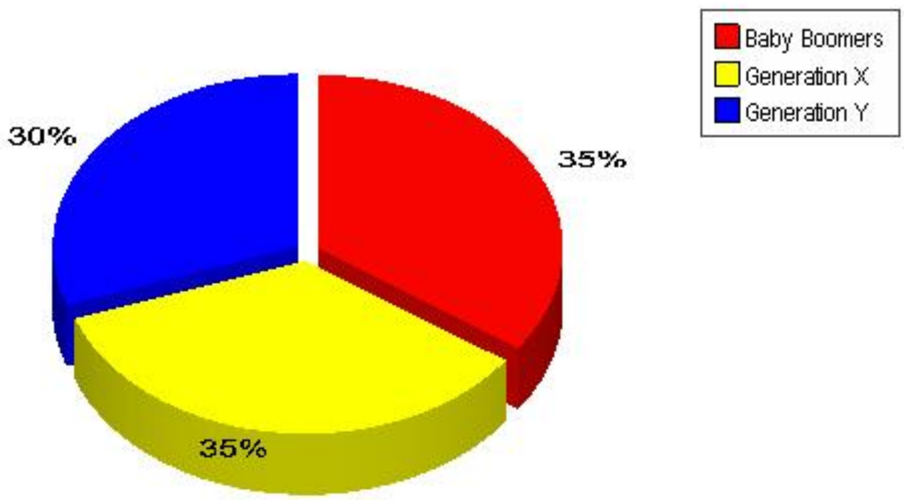


Table 6.1 Participants Generation

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Generation Y	7	30.4	30.4	30.4
	Generation X	8	34.8	34.8	65.2
	Baby Boomers	8	34.8	34.8	100.0
	Total	23	100.0	100.0	

In total 30 participants were invited to the focus groups, however, only 23 participated, therefore the response rate was 77%. 30% of participants were from generation Y, 35% were from Generation X and 35% were Baby Boomers. Thus each generation was well represented.

Figure 6.2 Race of Participants

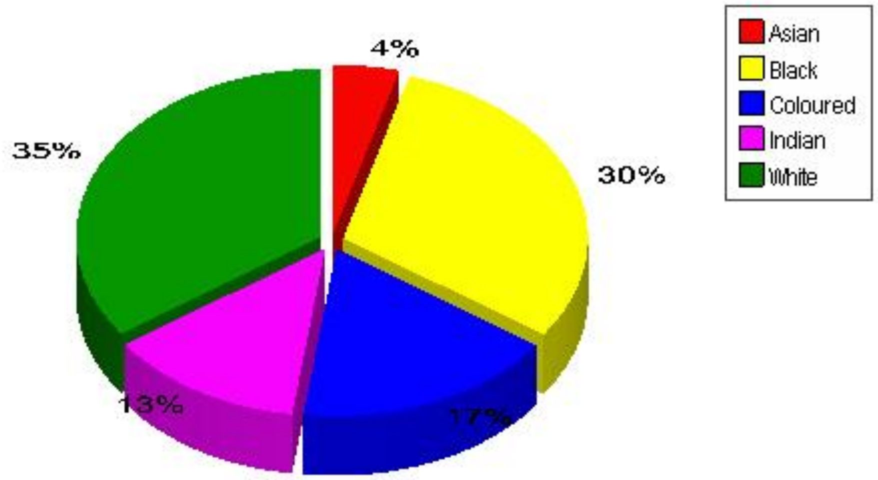


Table 6.2 Race of Participants

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Asian	1	4.3	4.3	4.3
	Black	7	30.4	30.4	34.8
	Coloured	4	17.4	17.4	52.2
	Indian	3	13.0	13.0	65.2
	White	8	34.8	34.8	100.0
	Total	23	100.0	100.0	

As indicated in Figure 6.2 and Table 6.2 the participants of the focus groups included Asian, Black, Coloured, Indian and White participants. While not representative of the South African population, all race groups were represented in the focus groups.

Figure 6.3 Marital Status of Participants

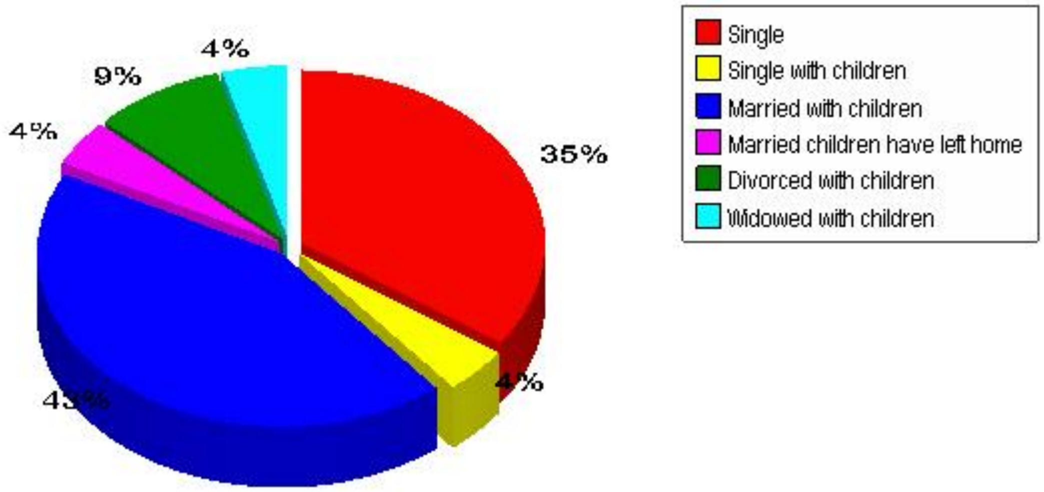


Table 6.3 Marital Status of Participants

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Single	8	34.8	34.8	34.8
	Single with children	1	4.3	4.3	39.1
	Married with children	10	43.5	43.5	82.6
	Married children have left home	1	4.3	4.3	87.0
	Divorced with children	2	8.7	8.7	95.7
	Widowed with children	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Of the sample, the majority of participants were married with children (44%), while 35% of the sample were single.

Figure 6.4 Net Income of Participants

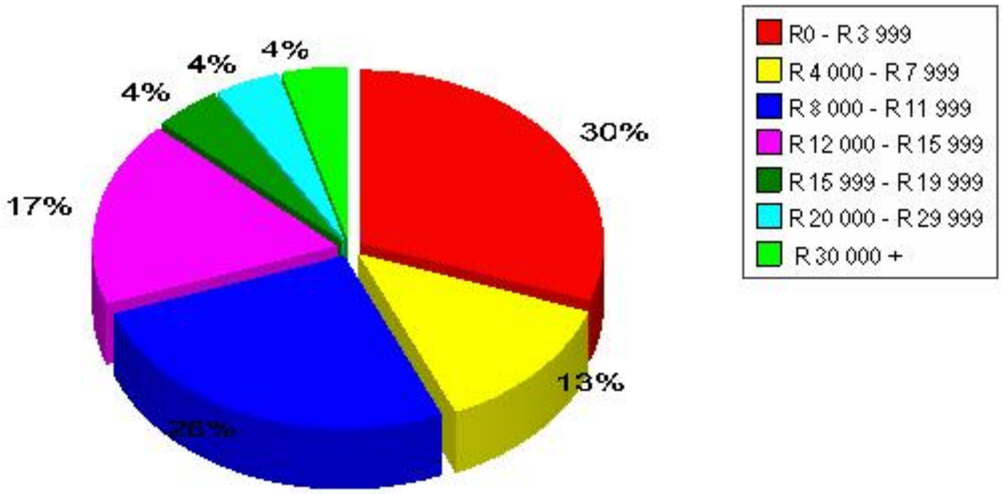


Table 6.4 Net Income of Participants

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	R0 - R 3 999	7	30.4	30.4	30.4
	R 4 000 - R 7 999	3	13.0	13.0	43.5
	R 8 000 - R 11 999	6	26.1	26.1	69.6
	R 12 000 - R 15 999	4	17.4	17.4	87.0
	R 15 999 - R 19 999	1	4.3	4.3	91.3
	R 20 000 - R 29 999	1	4.3	4.3	95.7
	R 30 000 +	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Seven options of possible net income groups were included and of the sample the R 0 – R 3 999 and R 8 000 – R 11 999 represented the largest groups, with 30% and 26% respectively. The majority of the Generation Y focus group participants were students or scholars that do not earn a salary and as a result this option was the most popular.

Figure 6.5 Average Monthly spend on Facial Care Products

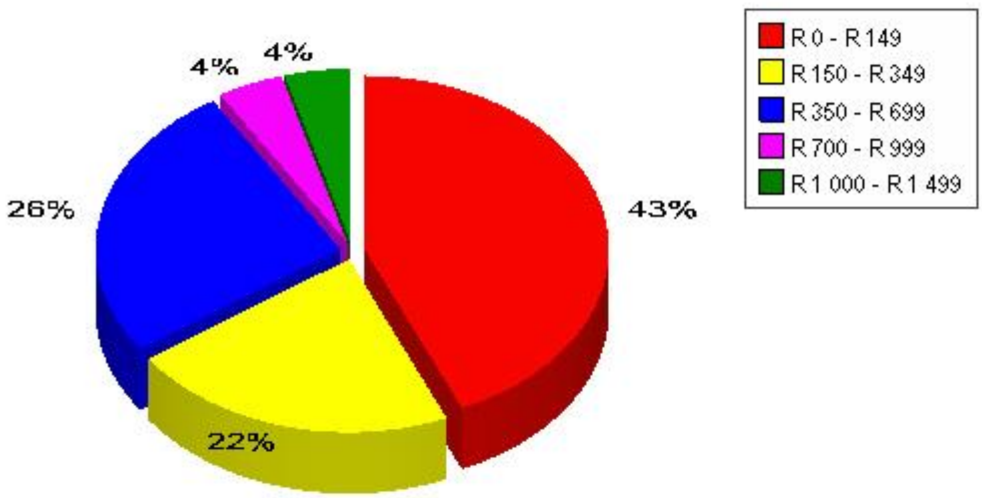


Table 6.5 Average Monthly Spend on Facial Care Products

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	R 0 - R 149	10	43.5	43.5	43.5
	R 150 - R 349	5	21.7	21.7	65.2
	R 350 - R 699	6	26.1	26.1	91.3
	R 700 - R 999	1	4.3	4.3	95.7
	R 1 000 - R 1 499	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Participants were asked to indicate how much they spent on facial care products each month. 44% of participants spent an average of R 0 – R 149 every month, whilst 26% spent an average of R 350 – R 699 per month.

6.4 Findings of the Focus Groups

This section presents and summarises the findings of the focus groups. Since questionnaires were used to gather some of the data, the questionnaires were analysed and are presented as well as the qualitative data which was extracted during discussions that took place. The focus groups were recorded which assisted in writing transcripts, these transcripts were analysed using content analysis which is defined as, "the systematic procedure of taking individual responses and grouping them into large theme categories or patterns" (Shiu *et al.*, 2009:191). Where qualitative data is presented, the exact words used by participants are presented in italics.

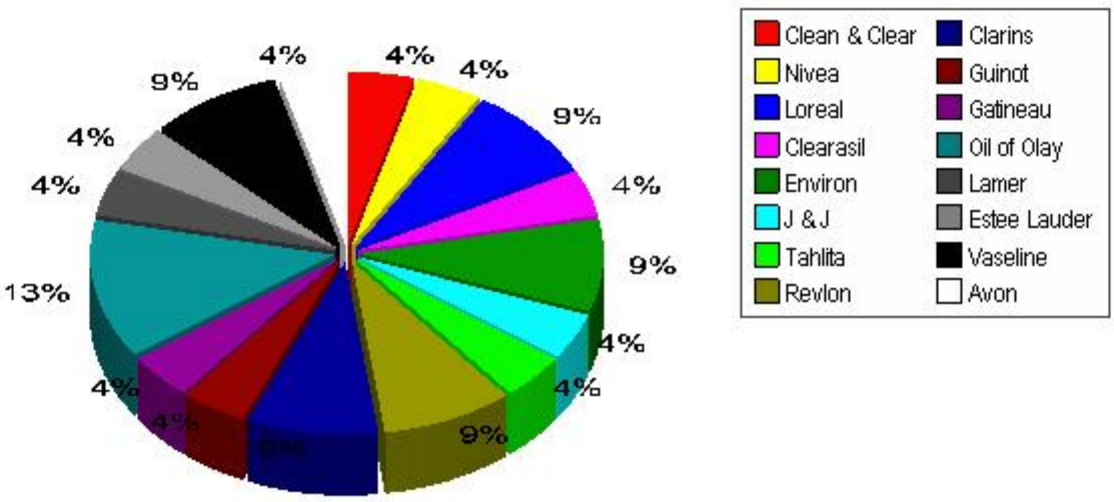
6.4.1 Question 1: Establishing the competitive set

The following questions sought to establish which were the most popular brands mentioned by participants and would be useful in determining a competitive set, which could be carried over to the mall-intercept questionnaire.

6.4.1.1 Question 1.1: When you think of facial care products which five brands come to mind?

When representing these findings the first section indicates which brands were 'top of mind' and written down first in the list by a combination of the participants. The graphs that follow represent the same data but are divided based on the responses of each generation. The next section summarises how often certain brands appeared in the top 5 list based on all responses, followed by the brands mentioned by participants of a particular generation.

Figure 6.6 Top Brands mentioned by participants



13% of participants indicated Oil of Olay to be top of mind. Each of the following products were mentioned by 9% of participants as being top of mind: L'Oreal, Environ, Revlon, Clarins and Vaseline.

Table 6.6 Top brands mentioned by Participants

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Clean & Clear	1	4.3	4.3	4.3
	Nivea	1	4.3	4.3	8.7
	L'Oreal	2	8.7	8.7	17.4
	Clearasil	1	4.3	4.3	21.7
	Environ	2	8.7	8.7	30.4
	J & J	1	4.3	4.3	34.8
	Tahlita	1	4.3	4.3	39.1
	Revlon	2	8.7	8.7	47.8
	Clarins	2	8.7	8.7	56.5
	Guinot	1	4.3	4.3	60.9
	Gatineau	1	4.3	4.3	65.2
	Oil of Olay	3	13.0	13.0	78.3
	Lamer	1	4.3	4.3	82.6
	Estee Lauder	1	4.3	4.3	87.0
	Vaseline	2	8.7	8.7	95.7
	Avon	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Table 6.7 Generational split of the Top brands mentioned by participants

	Baby boomers		Generation X		Generation Y	
Brands	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Clarins	1	13%	1	13%		
Environ	1	13%			1	14%
L'Oreal	-	-	-	-	2	29%
Oil of Olay	2	25%	1	13%	-	-
Revlon	2	25%	-	-	-	-
Vaseline	-	-	2	25%	-	-

Whilst Table 6.6 gives the top brands mentioned by all participants, Table 6.7 shows how the brands mentioned more than once were split per generation. Oil of Olay and Revlon were both mentioned by 25% of the Baby Boomer participants indicating that these were popular brands for Baby Boomers. Whilst Vaseline was mentioned by more than one respondent it isn't regarded as a facial care product as such and thus there were no facial care brands that stood out for the Generation X participants. L'Oreal was mentioned as top of mind by 2 of the Generation Y participants making it the Brand that was 'top of mind' for this group.

Table 6.8 Brands mentioned by all participants

Product in Top 5	Frequency	%	Ranking	Product in Top 5	Frequency	%	Ranking
L'Oreal	9	39%	1	Almay	1	4%	8
Nivea	9	39%	1	Avroy Shalain	1	4%	8
Clinique	7	30%	2	Body Shop	1	4%	8
Revlon	7	30%	2	Camphor Cream	1	4%	8
Oil of Olay	6	26%	3	Clicks	1	4%	8
Clearasil	5	22%	4	Dove	1	4%	8
J&J	5	22%	4	Gentle Magic	1	4%	8
Avon	4	17%	5	Innoxa	1	4%	8
Environ	4	17%	5	Justine	1	4%	8
Gatineau	4	17%	5	Lamer	1	4%	8
Clarins	4	17%	5	Oxy	1	4%	8
Clean & Clear	3	13%	6	Payot	1	4%	8
Garnier	3	13%	6	Regima	1	4%	8
Guinot	3	13%	6	Sensai	1	4%	8
Estee Lauder	3	13%	6	Tahlita	1	4%	8
Like Silk	2	9%	7	Yardley	1	4%	8
Neutrogena	2	9%	7	Vaseline	1	4%	8
Ponds	2	9%	7				

The table above shows how often each of the brands mentioned were in the top five. Some of the participants couldn't mention 5 brands and as a result only mentioned the brand names that came to mind. Nivea and L'Oreal were mentioned by 9 out of 23 participants – thus 39% of participants mentioned this brand in their top 5. Clinique and Revlon were mentioned by a total of 7 participants – a total of 30% of participants therefore mentioned each of these two products. Oil of Olay was mentioned 6 times, indicating that 26% of participants were familiar with this product. Clearasil and Johnson and Johnson were mentioned by 5 participants, amounting to 22%. The top five products mentioned were therefore Nivea, L'Oreal, Clinique, Revlon and Oil of Olay.

Table 6.9 Generational split of Brands mentioned by participants

	Baby boomers		Generation X		Generation Y	
Brands	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Avon	4	50%	-	-	-	-
Clearasil	-	-	1	13%	4	57%
Gatineau	-	-	4	50%	-	-
L'Oreal	3	38%	1	13%	5	71%
Nivea	3	38%	2	25%	4	57%
Oil of Olay	4	50%	2	25%	-	-
Revlon	6	75%	-	-	1	14%

Of the brands mentioned in the first five that came to mind, Revlon was mentioned by 6 of the Baby Boomers, making it the most mentioned brand amongst Baby Boomers. Avon and Oil of Olay was mentioned by 50% of the Baby Boomers. From the Generation X participants, 4 mentioned Gatineau, making this the most mentioned brand amongst Generation Xers. L'Oreal proved to be the most mentioned brand amongst Generation Y participants and was mentioned by 5 of the participants. Other popular brands were Clearasil and Nivea, which were mentioned by just over half of the Generation Y participants. The full list of brands appearing in each generation's top five can be found in Appendix 5, Section 5.1

6.4.1.2 Question 1.2: Why do these brands stick out?

The Baby Boomer focus group indicated that the brands stood out because *they use them currently*, *had used them before*, *they knew someone who used the brand* or *because the brand was recommended*. From the Generation X focus group participants indicated that they mentioned some brands *because they use them*, *they were pushed by beauty therapists*, or *because people they associate with sell the products*, and *because they were expensive*. From the Generation Y focus group participants indicated *that the brands stuck out because they were used by someone they know* and *because they work for them or they have seen the brands working for others*. The other common reason that stood out was *due to classy packaging*, *the adverts on TV* and *the endorsers*.

Thus to summarise the majority of participants mentioned brands that they used themselves or brands that were recommended by peers.

6.4.1.3 Question 1.3: Which facial care products do you currently use? We ask that you be brand specific. If you use more than one brand we are interested in knowing this information.

What is interesting here is that of the 23 participants, 9 used only a single brand, 9 of the participants used two brands, four of the participants used 3 brands and 1 of the participants used 4 brands. Thus the majority of the participants used either a single brand or 2 brands.

Table 6.10 Brand used by participants (1st Brand mentioned)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Nivea	1	4.3	4.3	4.3
	L'Oreal	1	4.3	4.3	8.7
	Neutrogena	1	4.3	4.3	13.0
	Clearasil	1	4.3	4.3	17.4
	Environ	1	4.3	4.3	21.7
	Regima	1	4.3	4.3	26.1
	J & J	4	17.4	17.4	43.5
	Revlon	2	8.7	8.7	52.2
	Clarins	2	8.7	8.7	60.9
	Gatineau	1	4.3	4.3	65.2
	Oil of Olay	2	8.7	8.7	73.9
	Vaseline	1	4.3	4.3	78.3
	Gentle Magic	1	4.3	4.3	82.6
	Body Shop	2	8.7	8.7	91.3
	Avon	1	4.3	4.3	95.7
	Prescription	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Table 6.10 indicates which of the brands used by participants was mentioned first. Of the brands used by participants J&J came up as the first brand mentioned 4 times, whilst the Body Shop, Clarins, Revlon, and Oil of Olay were written down first by 2 participants. All other brands were written down first by a single respondent only. This is interesting as it may indicate that these brands specifically are top of mind, hence may be the participants preferred brand.

Table 6.11 Brand used by participants (All Brands mentioned)

Brand use	Frequency	%	Ranking	Brand use	Frequency	%	Ranking
J&J	5	22%	1	Revlon	2	9%	4
L'Oreal	4	17%	2	Camphor Cream	1	4%	5
Avon	3	13%	3	Dove	1	4%	5
Body Shop	3	13%	3	Gentle Magic	1	4%	5
Clarins	2	9%	4	Guinot	1	4%	5
Clearasil	2	9%	4	Prescription	1	4%	5
Clinique	2	9%	4	Regima	1	4%	5
Environ	2	9%	4	Sensai	1	4%	5
Gatineau	2	9%	4	Tahlita	1	4%	5
Neutrogena	2	9%	4	Vaseline	1	4%	5
Nivea	2	9%	4	Yardley	1	4%	5
Oil of Olay	2	9%	4				

Table 6.11 shows how often each brand was used to determine which brands were most popular amongst respondents as opposed to focusing just on the first listed brands. J&J was used by 5 participants; L'Oreal was used by 4 participants whilst Avon and Body Shop was used by 3 participants.

Table 6.12 Generational split of Brands used by participants

	Baby boomers		Generation x		Generation Y	
Brand	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Avon	3	36%	-	-	-	-
Gatineau	-	-	2	25%	-	-
Johnson & Johnson	2	25%	-	-	2	29%
L'Oreal	1	13%	1	13%	2	29%
Neutrogena	-	-	-	-	2	29%
Revlon	2	25%	-	-	-	-

Of the brands used by participants Avon, J&J and Revlon were the more popular amongst the Baby Boomers. Gatineau was the only brand used by more than one Generation X respondent. Finally the three brands that were most popular amongst Generation Y participants were J&J, L'Oreal and Neutrogena.

6.4.1.4 Question 1.4: Do you stick to one brand or chop and change? Why?

Table 6.13 Comparison of participants who stick to brands versus those that chop and change

	Total		Baby boomers		Generation X		Generation Y	
Answer	No.	%	No.	%	No.	%	No.	%
Stick to brands	12	52	5	63	7	88	0	0
Chop & Change between brands	11	48	3	37	1	12	7	100
Total	**23**	**100**	**8**	**100**	**8**	**100**	**7**	**100**

Just over half (52%) of participants indicated that they tended to stick to one or two brands, while 48% said they chop and change facial care products. Of the Baby Boomer participants, 37% indicated that they chopped and changed and reasons given included because *they liked to try new things*, *that another brand had been recommended* and she *gets whatever is available but never spends a lot of money or time looking for one particular brand.* The remaining Boomers (63%) indicated they *stuck to the brands they use because they worked for them*. The over whelming majority (88%) of Generation X participants indicated that they stuck to brands, however one of these participants had just recently changed brands *due to the* *fact that she had recently turned 40 and she believed her skin care needs were changing she decided to experiment with a new product*. The other participants who indicated they stuck to brands indicated that the reason for sticking to the brands they used was *because they were working* or *because they worked and were cheap*. The remaining participant (12%) indicated that she chopped and changed and the reason given was *because she felt products lost effectiveness*. All of the Generation Y participants indicated that they chopped and changed. The main reasons given were *due to the fact that they're still finding products that work*, and *that disposable income impacted this habit*.

These findings show that whilst Boomers and Xers appear to be brand loyal, Yers are still experimenting with brands and appear to be less loyal. Thus, it appears as if the older generations rely heavily on experience.

6.4.1.5 Question 1.5: How long have you been using the brands you currently use?

This question was used to establish how faithful participants were to the brand or brands that they were currently using; in terms of the length of time they had used a brand. Although this was not meeting one of the objectives it was interesting information for the discussion and recommendations. First the means are presented, giving an indication of the average time each brand was used, followed by tables presenting the length of time each mentioned brand was used, as some of the participants used more than one brand there are four tables in this section presenting the length of time a brand was used.

Table 6.14 Means representing the length of time each brand mentioned was used (in months)

		Time using 1st Brand	Time using 2nd Brand	Time using 3rd Brand	Time Using 4th Brand
N	Valid	23	14	5	1
	Missing	0	9	18	22
Mean		78.70	58.71	18.40	24.00

Table 6.14 shows that the average length of time that participants used the first brand mentioned is 78.7 months, thus on average participants used the first brand mentioned for about 6.5 years. The length of time the 2nd brand mentioned was used was less than 5 years and the 3rd and 4th brands were used for 2 years or less.

Table 6.15 Length of time using 1st Brand mentioned

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1 mnth	2	8.7	8.7	8.7
	2 mnths	3	13.0	13.0	21.7
	8 mnths	1	4.3	4.3	26.1
	1 yr	2	8.7	8.7	34.8
	1.5 yrs	1	4.3	4.3	39.1
	3 yrs	4	17.4	17.4	56.5
	5 yrs	2	8.7	8.7	65.2
	6 yrs	1	4.3	4.3	69.6
	7 yrs	1	4.3	4.3	73.9
	10 yrs	2	8.7	8.7	82.6
	15 yrs	2	8.7	8.7	91.3
	20 yrs	1	4.3	4.3	95.7
	41 yrs	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

From the above table one can see that the majority of the participants (57%) have used the first brand mentioned for 3 years or less. 4 participants (17%) have used the first brand mentioned for 5 years, but less than 10 years. The remaining 26% of participants indicated that they have used the first brands mentioned for more than 10 years; this indicates that there are participants who appear to be extremely brand loyal when it comes to their preferred brand.

Table 6.16 Length of time using 2nd Brand mentioned

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2 mnths	2	8.7	14.3	14.3
	7 mnths	2	8.7	14.3	28.6
	2 yrs	6	26.1	42.9	71.4
	10 yrs	2	8.7	14.3	85.7
	15 yrs	1	4.3	7.1	92.9
	20 yrs	1	4.3	7.1	100.0
	Total	14	60.9	100.0	
Missing	0	9	39.1		
Total		23	100.0		

Of the 14 participants to mention a second brand, 71% have used the second brand for 2 years or less. In general the second brand mentioned was used for less time than the brand mentioned first, which is supported by the means in Table 6.14.

Table 6.17 Length of time using 3rd Brand mentioned

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	2 mnths	1	4.3	20.0	20.0
	6 mnths	1	4.3	20.0	40.0
	1 yr	2	8.7	40.0	80.0
	5 yrs	1	4.3	20.0	100.0
	Total	5	21.7	100.0	
Missing	0	18	78.3		
Total		23	100.0		

Of the 5 participants using a third brand the majority (80%) of them had used the 3rd brand for a year or less. To summarise it can be concluded that it appears that participants mentioned the brand used for the longest time as their top brand; hence it appears that although participants may use more than one brand they do have a preferred brand. Furthermore, the fact that participants have used their preferred brand for the longest time period indicates that participants are relatively brand loyal.

6.4.1.6 Question 1.6: If one of the brands you currently use are taken off the shelves or discontinued which alternatives would you consider? Why?

Table 6.18 below shows that only 20 of the 23 participants gave an alternative brand, however 2 of the participants indicated that they *don't know* which alternatives to use, and 1 respondent indicated that *she would go to a dermatologist or beautician to seek advice*. A total of 4 participants indicated two brands whilst one indicated 3 alternative brands.

Table 6.18 Brand Alternatives indicated by participants (1st Brand)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Nivea	4	17.4	17.4	17.4
	L'Oreal	1	4.3	4.3	21.7
	Clearasil	2	8.7	8.7	30.4
	Clinique	2	8.7	8.7	39.1
	Garnier	2	8.7	8.7	47.8
	Revlon	1	4.3	4.3	52.2
	Gatineau	1	4.3	4.3	56.5
	Oil of Olay	1	4.3	4.3	60.9
	Body Shop	1	4.3	4.3	65.2
	Camphor Cream	1	4.3	4.3	69.6
	Elizabeth Arden	1	4.3	4.3	73.9
	Dermologica	1	4.3	4.3	78.3
	Roc	1	4.3	4.3	82.6
	Home Brands	1	4.3	4.3	87.0
	Don't know	2	8.7	8.7	95.7
	Seek beautician/ dermatologist advice	1	4.3	4.3	100.0
	Total	23	100.0	100.0	

Nivea was the most popular of the alternatives mentioned first (17.4%). Clearasil, Clinique and Garnier were other more popular first choices. All other brands were mentioned by only a single participant.

Table 6.19 Brand Alternatives indicated by participants (All Brands)

Alternative Brand	Frequency	%	Ranking	Alternative Brand	Frequency	%	Ranking
Nivea	5	22%	1	Elizabeth Arden	1	3%	4
Clearasil	3	13%	2	Gatineau	1	3%	4
Dermologica	3	13%	2	Home Brands	1	3%	4
Clinique	2	9%	3	L'Oreal	1	3%	4
Garnier	2	9%	3	Oil of Olay	1	3%	4
Avon	1	3%	4	Prescription	1	3%	4
Body Shop	1	3%	4	Revlon	1	3%	4
Camphor Cream	1	3%	4	ROC	1	3%	4
Dior	1	3%	4				

When second and third choices are included, of all the brands mentioned Nivea was also the brand that was mentioned the most times by participants. Clearasil and Dermologica took the second place with 3 participants mentioning them as alternative brands they would like to try, whilst Clinique and Garnier were mentioned by 2 participants and the remaining brands were only mentioned by only a single respondent.

Table 6.20 Brand Alternatives indicated by participants as per generation (All Brands)

	Baby boomers		**Generation x**		**Generation Y**	
Brand	Frequency	%	Frequency	%	Frequency	%
Clearasil	-	-	-	-	3	43%
Clinique	2	25%	-	-	-	-
Dermologica	1	13%	2	25%	-	-
Garnier					2	29%
Nivea	2	25%	-	-	3	43%
Don't know	-	-	2	25%	-	-

The more popular brand alternatives selected by Baby Boomers were Clinique and Nivea. Generation X favoured Dermologica, whilst Clearasil, Nivea and Garnier were most popular brand alternatives selected by Generation Y participants.

After the participants indicated which brand alternatives they would consider if their current brand were discontinued a discussion regarding why they would choose the alternative brands took place. Baby Boomers said their choice of alternative was mainly *based on the fact that they knew someone who used the product* or *that they would revert to a brand they had used before*. Of these Baby Boomers 2 participants indicated that they chose an alternative *because of the natural ingredients contained*.

The Generation Xers reasons were vastly different. One respondent indicated *cost* to be the main reason, and another indicated that *she looks for natural products*. Another respondent indicated her choice of alternative *was a product she had never tried*. The remaining participants all indicated they would *try a brand which was used by someone they know*.

Generation Y's reasons for considering the alternatives they had written down were all different however most of them indicated that they would *choose the brands that were used by friends or family*. *Samples they had received and tried* and *convenience* were also mentioned as important reasons for their choice of alternative brands.

6.4.1.7 Summary of Brands mentioned throughout the focus group questionnaire and thus used in the survey questionnaire

The following section summarises the results and gives and indication of the total number of times a brand was mentioned in the participants' questionnaires. This was done in order to ensure that the top brands per generation were included in the questionnaire for the quantitative data.

Table 6.21 Brands mentioned by All Participants (Combination of Questions)

Product in Top 5	Frequency	Ranking	Product in Top 5	Frequency	Ranking
Nivea	16	1	Gentle Magic	2	19
L'Oreal	14	2	Like Silk	2	19
Clinique	11	3	Ponds	2	19
Clearasil	10	4	Regima	2	19
J&J	10	4	Sensai	2	19
Revlon	10	4	Tahlita	2	19
Oil of Olay	9	7	Yardley	2	19
Avon	8	8	Vaseline	2	19
Gatineau	7	9	Almay	1	19
Clarins	6	10	Avroy Shalain	1	29
Environ	6	10	Clicks	1	29
Body Shop	5	12	Dior	1	29
Garnier	5	12	Elizabeth Arden	1	29
Guinot	4	14	Innoxa	1	29
Neutrogena	4	14	Justine	1	29
Clean & Clear	3	16	Lamer	1	29
Estee Lauder	3	16	Oxy	1	29
Camphor Cream	3	16	Payot	1	29
Dove	2	19	Prescription	1	29

Nivea, L'Oreal, Clinique, Clearasil, Johnson and Johnson and Revlon were included in the survey questionnaire as they were the top 6, with frequency scores of 10 or higher.

Table 6.22 Generational split of Brands mentioned by participants (Combination of Questions)

	Baby boomers		Generation x		Generation Y	
Brand	Frequency	Ranking	Frequency	Ranking	Frequency	Ranking
Avon	7	2	-	-	1	-
Clearasil	-	-	2	7	8	1
Clinique	6	3	3	4	2	7
Clarins	3	8	3	4		
Garnier	-	-	-	-	5	4
Gatineau	-	-	7	1	-	-
Guinot	-	-	4	2	-	-
Johnson and Johnson	4	7	-		5	4
L'Oreal	5	4	2	7	7	3
Neutrogena	-	-	-	-	4	6
Nivea	5	4	3	4	8	1
Oil of Olay	5	4	4	2	-	
Revlon	9	1	-	-	-	-

Revlon was also included as it was the most popular brand mentioned amongst Baby Boomer participants. Gatineau was included in the survey questionnaire because it was the brand most mentioned by Generation X participants. Clearasil was also included in the survey questionnaire as it was the most popular brand amongst Generation Y participants and was therefore carried trough to the questionnaire.

6.4.2 Question 2: Establishing the most important attributes

The following questions sought to assist in satisfying Objective 1: to determine what factors female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products. The most important and most common attributes were then carried through in the questionnaire designed for stage two, the mall-intercept survey.

6.4.2.1 Question 2.1: Can you tell me why you used the brands you use?

The Baby Boomers indicated that the main reasons behind their choice of product was *that it worked*, *was conveniently available*, or *was reasonably priced*. Baby Boomers are a very busy generation and place a lot of importance on convenience (Harwood**,** 2002:30), furthermore they are likely to research products well before buying (Fishman, 2004:5) and this generation wants products that work and are willing to pay the right price for a product that produces results (Underwood, 2006:42). Two of the Baby Boomer participants indicated *that tea tree being an ingredient swayed their choice of brand*.

The Generation X participants gave the following reasons; *price*, *word-of-mouth* and *that the product is effective*. The majority of the Generation Y participants indicated they were using a brand *because someone they knew used the brand*. Another major reason mentioned *was packaging and look* and *what you got with the product* (e.g. extra quantity or freebies) was deemed important. The reason why Generation Y participants are thought to place so much value on what friends and peers used was because many of the Generation Y participants were teenagers thus are often influenced by friends and peers. Furthermore because they are at an age where they are most likely to still be experimenting with products and brands, they use friends and peers as reliable sources of information.

6.4.2.2 Question 2.2: What attributes do you consider when choosing facial care products? We ask that you list all attributes you consider. Please rank the listed attributes (1 = most important)

Since this was an open ended question various different words were mentioned. Content analysis was applied, and because a variety of words and phrases were used, the degree of similarity was determined in order to group them into large theme categories or patterns (Shiu *et al.*, 2009:191). The words could be grouped into 22 attributes. Table 6.24 below presents the mean score of the ranks of the attributes mentioned as well as the number of participants who mentioned a particular attribute. The means were calculated on rank, where 1 = the most important, hence the lower scoring means were more important.

Table 6.23 Brand Attributes mentioned by Participants

	Total		Baby boomers		Generation X		Generation Y	
Attributes	Mean	Valid	Mean	Valid	Mean	Valid	Mean	Valid
Low Price	3.41	17	2.83	6	3.00	6	2.80	5
Mild Fragrance	3.53	15	3.00	5	4.50	4	3.17	6
Makes skin smooth & soft	2.82	11	1.00	3	2.25	4	4.75	4
Widely Available	3.91	11	2.67	3	3.83	6	6.00	2
Quality Packaging	4.56	9	-	-	2.25	2	5.00	7
Moisturising Ability	3.00	9	2.67	3	3.00	5	4.00	1
Effectiveness	1.57	7	-	-	1.00	4	2.33	3
Other	3.75	7	3.00	3	3.33	3	5.50	1
Reputation	8.00	5	-	-	4.00	1	4.00	4
Word-of-Mouth	4.80	5	4.00	1	5.00	1	5.00	3
Multi-purpose	3.60	5	4.50	2	3.00	3	-	-
Skin Type	2.25	4	3.00	2	-	-	1.50	2
Contains SPF	5.50	4	5.00	2	7.00	1	5.00	1
Lasts all day	5.00	4	5.00	2	5.00	2	-	-
Removes Impurities	1.67	3	2.00	1	4.75	1	1.00	1
Texture	4.00	3	-	-	-	-	4.00	3
Marketing Communications	4.00	3	-	-	4.00	1	8.00	3
Contains Natural Ingredients	2.33	3	3.00	1	2.00	2	-	-
Sensitivity	3.00	3	4.00	2	1.00	1	-	-
Foaming Cleanser	3.33	3	3.00	1	-	-	3.50	2
Contains Anti-Aging Properties	4.00	2	-	-	2.00	1	6.00	1
Makes skin Glow	4.50	2	-	-	4.50	2	-	-

The attributes which were mentioned by 9 or more participants were *low price*, m*ild fragrance, makes skin smooth and soft, widely available, quality packaging and moisturising ability. Effectiveness, skin type, removes impurities* and *contains natural ingredients* were attributes with mean scores of less than 2.5 and thus these were deemed as important attributes by participants.

6.4.2.3 Question 2.3: Why are the attributes you listed important?

Baby boomers indicated that *they didn't like an overpowering smell* and hence *mild fragrance* was important. Furthermore there was a long discussion regarding the cost of the product and participants agreed that *they looked for products which were low cost* or *at least represented value for money*. *Moisturising ability* of the products was stressed and participants indicated the importance *of products making their skin feel comfortable throughout the day, i.e. last all day long and don't need to be reapplied*. Interestingly, when discussing anti-aging, these participants indicated that *aging is a natural process and the anti-aging properties of a product are not too importan*t. There was also a discussion on the SPF factor and Boomers agreed that *the sun causes most damage to the skin and it is vital to use an SPF*.

Generation X participants indicated that the most important attribute was *effectiveness*; participants agreed that *a product must work*. They wanted a product which *delivered on the promise it made, lasted all day* and *made their skin look younger*. When discussing anti-aging properties these participants agreed that this was starting to impact their choice of product and many of the participants *had recently started using a product which contained anti-aging ingredients*, however other participants *believed that anti-aging was just a gimmick and a way to make money*. *Texture,* i.e. that it makes skin smooth and soft was also discussed at length and deemed to be important. There was also a discussion regarding price and participants indicated they wanted *products which are low in price or cost effective*. Interestingly, one participant spoke out and mentioned in the focus group that *a high price does not always indicate quality*.

Price was very important to Generation Y participants as *they have limited disposable income and hence look for products which are priced low*. Furthermore this group was *very concerned with having smooth skin and as result it was important that the brands delivered on promise, by successfully producing the desired smooth skin and eliminating impurities and blemishes quickly*. Many of the participants preferred *a mild smell* and therefore fragrance was important. Two of the participants said they thought *SPF was critical and that it was something they looked for in a moisturiser*. The remainder of participants were under the impression that *the products they used had an SPF factor* and agreed that it was important, but at the same time *they assumed all moisturisers contain SPF*. Furthermore due to the age of the participants, packaging was important and they believed *packaging to affect quality and image*.

6.4.2.4 Summary of the most important attributes for inclusion in the survey questionnaire

Based on a combination of the frequency of mention of an attribute, the mean scores and the discussion in the focus groups, the following attributes were carried through to the questionnaire for the mall-intercept survey. Since a large percentage of participants mentioned the following attributes *low price*, m*ild fragrance, makes skin smooth and soft, widely available, quality packaging* and *moisturising ability*, they were carried through to the questionnaire. *Effectiveness, skin type, removes impurities* and *contains natural ingredients* all had mean scores of less than 2.5. *Removes impurities* and *contains natural ingredients* attributes were carried through to the attributes section of the questionnaire, whilst *effectiveness* and *skin type* were dealt with else where in the questionnaire, specifically the statement section. The reason behind this is that *effectiveness* can be explained in terms of *makes skin feel smooth and soft*, *removes impurities*, or *lasts all day (no need to reapply)* and is a fairly broad term, whilst *skin type* was deemed to be a fairly obvious selection criteria. Finally, the *lasts all day* and the *contains SPF* attributes were also carried through to the questionnaires as the discussions indicated that these were important.

6.4.3 Question 3: Establishing whether participants feel marginalised by the facial care industry

Research conducted by the UCT Unilever Institute of Strategic Marketing has indicated that the Baby Boomers in South Africa, believe marketing messages are aimed at persons in their 20s and 30s, and feel alienated from marketing communications, overlooked by product developers and are displeased with customer service (Mitchell, 2008: Para 10). Hence these questions were included in order to meet Objective 3: to determine whether Baby Boomer females felt marginalised by the skin care industry the next set of four questions were asked. It was especially useful to gain insight as to why specifically they felt marginalised. Since these questions were of qualitative nature, content analysis was applied in order to create meaningful findings from the focus group discussions. Hence individual comments were grouped into large themes categories and patterns (Shiu *et al.*, 2009:191); the exact words used by participants are presented using italics.

6.4.3.1 Question 3.1: Do you feel marginalised/ ignored by the skin care industry? Is there an age or race group that you believe is being ignored by the facial care industry?

The Baby Boomers indicated that women in their 70s and 80s and teenagers were the ones that were marginalised by the skin care industry. One Baby Boomer indicated that when asking for advice on teenage products specifically *no one was able to advise (her) on which products were specifically developed for teenagers.* In general, they felt there were more than enough products available for their age group. However, what did come up is that they felt that there were no products for ethnic skin and especially the Indian participants felt marginalised.

The Generation X participants also believed they weren't marginalised with the exception of an Indian participant who indicated that *there are no products available for Indian skin, and further pointing out that amongst Indians there were vast colour variations and products should be developed for fair, medium and dark Indians*. This group also believed that teenagers were marginalised, in the sense that *there wasn't enough information available regarding products*. Furthermore there was a general consensus that *the products available for teenagers were too harsh* and that teenagers were *lacking information and education about the products available*.

The teenagers in the Generation Y focus group indicated that they felt marginalised and believed *there are not enough products for their skin,* indicating that *nothing stood out as being developed for their age group specifically, except for Young Solutions*. These young consumers believed that *a company who put on the label that their skin care was designed for teenagers could sell a lot of products.* Generation Y Participants also felt that they *didn't have enough information regarding a skin care routine, what ingredients to look for etc*.

6.4.3.2 Question 3.2: In terms of marketing communications which skin care companies develop, would you say that their messages are developed with you in mind and do marketers target your age groups? Please elaborate.

The Baby Boomers felt that marketing communications were aimed at them and that there were more than enough products available for Baby Boomer women.

Generation X participants believed that the communications were very much orientated at women in their 40s and 50s and in general were appropriate for their age group.

Generation Y believed that in terms of TV advertising adverts were aimed at women over 30, and *all the products advertised on TV focussed on anti-wrinkle creams*. Furthermore, they felt ignored as all the marketing communications used by facial care companies seemed to use models that were in their 20s or older and *models that had flawless skin*. These participants recognised that they are going through a blemish phase and they wanted products that use someone who has the same problem skin as them.

6.4.3.3 Question 3.3 & 3.4: Do the marketing messages appeal to you? Please specify which particular companies appeal to you and which don't. Can you elaborate why some adverts appeal to you and why some don't? What do you like about their communications and what don't you?

(Although these were separate questions the answers given by participants regarding which adverts they liked also answered the last question)

From the Boomer focus groups it was established that whilst TV was an effective medium of communication, Boomers believed that print adverts (specifically magazines and pamphlets) were more convincing as they *generally gave more information* and they could *revisit print adverts in magazines easily and quickly*. Furthermore, saying that *TV adverts are just a flash and then it's gone.* However, they did point out that *TV could gain their attention initially make them aware of the brand and they could always refer to the website for more information which was useful*. This generation believed samples to be an effective means of promoting skin care and *would rather buy a product that promised a refund if the product didn't deliver*, as they found it *risky to buy new products that ended up not working*. Furthermore, some participants believed the *use of celebrities is convincing*, but the celebrity should be their age. Boomer participants indicated that they *trusted adverts using Jane Fonda or Penny Coelen*. Other participants indicated that they were very sceptical of adverts using celebrities, and believed that *all models used in adverts were airbrushed*.

Regarding the type of adverts which were effective, the Baby Boomers didn't pinpoint specific facial care adverts, with the exception of one Nivea advert. However what came out was that the television adverts that they found appealing where those that were *nostalgic and brought them back to their younger years by using music from their youth i.e. 70's music*. As this period was *fun, colourful and optimistic* they indicated that they enjoyed adverts that are *optimistic and fun*, and incorporate humour. Adverts that look at aging positively were appealing. Adverts which blended the different South African cultures, focussing on the differences positively and incorporating fun aspects were well received, as Boomers liked the idea of adverts *which were unique to the country they loved and focussed on building one nation for the people*. Furthermore they indicated that the adverts that *showed wrinkles disappearing were unrealistic* and as a result they did not trust these types of adverts.

Generation X participants agreed that despite TV adverts being effective they believed *they tended to buy more based on print adverts than they did based on TV advertising*. Generation Xers voiced that samples were effective, as *they wanted to touch and feel a product before putting it on their face*, and prior to committing to the purchase. Furthermore some Xers believed that although they recognise that *celebrity endorsers more than likely do not use the product, they can sway you to try a product*, but it is important that the *celebrities used have similar morals and a good value system which aligns with their own values, so basically a celebrity they could aspire to one who was beautiful inside and out*. Other Xers indicated that celebrities were not effective as *there was no way that celebrities used the products they endorsed.*

Generation X participants battled to pinpoint a skin care advert that they found particularly appealing or one that they hated, however the participants indicated that the television adverts they found appealing were those that used *appropriate slogans*, *hit a 'soft spot'* and *related to daily life* - and those that *conveyed some type of truth and sentiment* and those that *used humour*. Participants indicated that there was *nothing which made them remember an advert more than a catchy slogan, like the 'nothing sux like electrolux'* slogan. The advert that related to daily life was the KFC Advert, *the father takes away a milkshake as his daughter told him they boy had stolen it, he then goes to the mother saying can you believe that little boy stole our daughters milkshake, she looks at him and says, but she never had a milkshake*. The example of an advert which incorporated truth was the Allan Grey Advert, where the father tries to teach his son to look into the future*; the advert shows this little boy looking at the mother of a pretty little girl to see if the girl will stay pretty.* The fun advert which was mentioned was the Vodacom Advert, *the one with this guy in the very short shorts singing the song 'if you liked it, you should have put a ring on it'.* They also found that adverts that spoke to the average person were more effective and particularly liked *different adverts, those that weren't the norm, like the Bidvest advert which uses all these nude dancers to create different shapes, this advert is absolutely beautiful and amazing, completely unexpected*. They hated *cheesy*, *unrealistic adverts* and *crude adverts*. The examples used were the L'Oreal and Nando's adverts. Participants found the L'Oreal adverts *too unrealistic* and voiced that the slogan 'because you're worth it' was *too cheesy.* Xers voiced they *didn't like the Nando's adverts* saying they *were crude and not at all funny.*

Generation Yers found the use of celebrities effective, with one participant saying that she *bought L'Oreal Pure Zone because Beyoncé endorsed the product*. These participants found print adverts were more effective than TV adverts saying that *the minute the advert disappears it's gone, but print can be kept and referred back to easily*. Based on the belief that *friends won't lie,* Millenials were of the opinion that *word-of-mouth was very effective.* Millenials also said that *they would trust a beautician or dermatologist but they don't trust promoters as they are paid to say the product is good.* These young consumers also indicated that *blogs and online forums were effective as these were real people's opinions*.

Generation Y participants indicated that the television adverts that appealed to them were those that had appealing slogans e.g. *L'Oreal, 'because you're worth it', Maybelline, 'Maybe you're born with it, maybe it's Maybelline' or 'Garnier, takes care'*. They liked adverts which used celebrity endorsers which *they liked, like Beyoncé but not Miley Cyrus*. They were also of the opinion that the celebrity endorser which facial care companies selected must have great skin, as *seeing the celebrity in Heat (magazine) with blemished skin is likely to tarnish the celebrity's credibility*. These participants also indicated that they like adverts that seem natural, using nature and animals in their adverts to hit a 'soft spot'. The advert which they were thinking of was the Garnier advert, which shows *a leaf with water droplets and the background music is soothing*, *making them think and believe it's pure, clean and good*. Generation Y participants indicated that *using music in adverts made them remember adverts*. They hated unrealistic adverts for example *the Oxy advert where a school boy asks the teacher to the prom*, or adverts that *depict a perfect women, with perfect skin, a perfect body and in perfect surroundings*.

6.5 Conclusion

This chapter has covered an in-depth discussion of the Discussion Guide design and the findings of the focus group sessions. It included the sample profile of the Focus Groups. The rationale of including the questions was given and results were summarised using various frequency tables, cross-tabulation tables, and pie and bar charts, which were useful to give a clear picture of the research findings. The chapter that follows focuses on stage two of the research; the questionnaire design for the survey as well as a presentation of the findings.

7.1 INTRODUCTION

The research conducted used a triangulation methodology, and was conducted in two stages. This chapter details the specifics of stage two, the mall-intercept survey. The Survey Design is covered and includes an in-depth discussion of the questionnaire. Furthermore it explains the rationale behind the questions included in the questionnaire, and explains how data from the focus group discussions contributed to the questionnaire design. Finally the findings of the Mall-intercept survey are presented.

7.2 SURVEY DESIGN

The following questions which will be discussed were developed in an attempt to meet specific research objectives. The questions were developed using a combination of extracts from related literature and research material and the focus group sessions. Please refer to Appendix 8 to view the questionnaire.

7.2.1 Question 1

- *Do you use facial care products? Yes ☐ (Answer question 2-9) No ☐ (Answer question 3 & 5-9)*

  This question was asked in order to establish if participants used facial care products. This question was asked in order to save participants time, ensuring that the participants who did not use facial care products could skip the questions asking them to specify which brands they use. This question was also useful in giving insight into how many women use facial care products. Furthermore it was interesting to observe if there was a difference between the top brands and the way facial care brands were rated by women that do not use facial care products versus those that use facial care products.

7.2.2 Question 2

- *Which brand(s) of facial care products do you use?*

  This question was intended only for those women that used facial care products and aimed to establish what the most popular brands were. Furthermore, it was used to establish whether participants stuck to one brand or used more than one brand of facial care products.

7.2.3 Question 3

- *In your opinion what are the top 3 facial care products/ brands?*

  This question was asked to determine which brands participants consider to be the best. This question was not asked to answer a specific objective but to give some insight into what brands were perceived to be the best by participants and to see if these differed across the generations. Furthermore it also aimed to establish whether participants using facial care products considered the brands they were using to be in the top three.

7.2.4 Question 4

- *What attributes are most important to you when choosing facial care products.*

  This question was only intended for those participants that used facial care products. Participants were given a list of product attributes and asked to rate these attributes on a scale of 1 to 10, where 1 was totally unimportant and 10 was very important. This question was asked to satisfy Objective 1: to determine what factors Baby Boomers versus non-Baby Boomers look for when purchasing skin care products. Furthermore the most important attributes were used to create positioning maps.

The following attributes were included in the list *Low Price, Mild Fragrance, Quality Packaging, Moisturising ability, makes skin feel smooth and soft, Multi-purpose e.g. 3-in1 product, moisturised with SPF etc, Widely available, contains SPF (Sun Protection Factor), contains natural ingredients, contains anti-aging properties, removes impurities and lasts all day (no need to reapply).*

Rationale for attribute selection

As mentioned in the previous chapter *low price, mild fragrance, quality packaging, moisturising ability, makes skin smooth and soft and widely available* were included in the questionnaire because they were mentioned most often by focus group participants when asked which attributes were considered when purchasing facial care products. In addition the importance of some of these attributes are supported by the literature review.

The inclusion of *quality packaging* is supported by Codrington and Grant-Marshall (2004:186) who state that "Boomers enjoy displaying their conspicuous consumption", therefore they suggest that marketers put their label on the outside of the product and "make it reek of class and quality". This indicates that Boomers value packaging and it may be found that Baby Boomers rate this attribute higher than the other two generations.

According to Clinique's Global Truth in Beauty survey, the majority of US women ranked moisturisers as a product they couldn't live without (Meisel, 2008: para 23). Hence this strengthens the rationale of including the *moisturising ability* attribute. The importance of the *makes skin feel smooth and soft* attribute is supported by Avon's Vice President of Global product development Gail Boyle says the sensorial experience is of lead importance when it comes to skin care (Meisel, 2008: Para 13).

The *contains natural ingredients* and the *removes impurities* attributes were included due to their low mean scores, which indicated that they were of key importance to focus group participants. Furthermore, the inclusion of the *contains natural ingredients* attribute is supported by the literature review. Dodson (2008:60) states that the popularity of natural and organic products is on the rise and this trend is arguably the most significant in shaping cosmetics innovation today, whilst the NPD group found that 42% of consumers look for products that are made from natural/ organic ingredients (Meisel, 2008: Para 4).

The *lasts all day (no need to reapply)* and the *contains SPF (sun protection factor)* attributes were added as these attributes were discussed at length during focus group discussions, with participants indicating that these attributes were important. The inclusion of the *contains SPF (sun protection factor)* attribute is supported by Kathy O'Brein, Dove's Marketing Director from Unilever, who says that the awareness of the damaging effects of the sun has led to the introduction of products with an SPF factor (Meisel, 2008: Para 25). In addition Anthony Gonzalez, Avon's Senior Manager of R&D skincare, states that because of the fact that the consumer is finally accepting that the sun is the main driver in premature skin aging, SPF and anti-aging products are gaining in popularity (Meisel, 2008: Para 8&19).

Finally two more attributes, the *multi-purpose e.g. 3-in-1 product, moisturiser with SPF, etc.* and the *contains anti-aging properties* attributes were included because the literature review indicated that these were trends which were shaping the global skin care industry. The *multi-purpose* attribute is important as according to Avon's Senior Manager of R&D skincare, Anthony Gonzalez consumers are looking for multi-functional products (Meisel, 2008: Para 8&19). The *contains anti-aging properties* attribute was included based on the recent growth anti-agers experienced (Euromonitor International, 2008:13), and the fact that the worldwide market forecast for anti-aging and nourishing products is accelerating upward" (Beyer, 2009: Para 6).

7.2.5 Question 5

- *Please rate each of the following brands on the following attributes.*

  Participants were given the scale: *1–Does not meet the criterion/ possess the feature at all, 2-Poor, 3-Average, 4-Good* and *5-Excellent*. Furthermore, participants were reminded that this question related specifically to their perception/ opinion.

The attributes listed were the same used for Question 4, and brands were selected based on the most popular brands taken from a combination of the literature review and the focus group results. As has been mentioned in the previous chapter the following brands, Clinique, Clearasil, Johnson and Johnson, L'Oreal, Nivea and Revlon were included as they were the top six. The inclusion of Revlon and Clearsil is strengthened as these brands also the most popular brand mentioned by Boomers and Millenials respectively. Gatineau was included based on the fact that it was the most popular brand mentioned by Xers. The two leading companies in the Global skincare industry are L'Oreal and Beiersdorf (Datamonitor, 2009:13) which strengthens the inclusion of L'Oreal and Nivea.

Finally based on the importance of natural ingredients The Body Shop and Clarins were included as both these products contain natural ingredients (The Body Shop International plc., 2009b: Para 2 and Clarins, 2010b: Para 1&2). Since this information was used to create a positioning map, to observe where the sample placed each brand, this question supports Objective 2: to establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women.

7.2.6 Question 6

- *Do you feel marginalised/ ignored by the facial care industry? If you answered yes why?*

  This question was asked to meet Objective 3: to determine if Baby Boomer females feel marginalised by the skin care industry. Participants that answered *'yes'* to the question were asked to explain their answer. This provided insight into why participants felt marginalised.

7.2.7 Question 7

- *In your opinion are any of the following individuals' marginalised or ignored by the facial care industry?*

  Here participants were given the following choices and asked to select the groups they felt were marginalised. The choices were, teenagers, 20-29, 30-39, 40-49, 50-59, 60-69, 70+ as well as Black, Coloured, Indian, and White females, or other. Participants were asked to specify if they selected the other option. During the focus groups participants suggested that teenagers, women in their 70's and 80's and Indian females were marginalised.

7.2.8 Question 8

- *Rate the following marketing media according to how effective they are to you when advertising facial care products.*

  Participants were asked to rate each of the marketing communications methods according to how effective they felt they were when advertising facial care products. A scale of 1 to 10 was used where 1 was totally ineffective and 10 was very effective. The following choices of marketing communication methods were given; TV Adverts, Print Adverts, Radio Adverts, Blogs, Websites, Samples, Sponsorships, Web Campaigns, Word-of-Mouth, Store Display, Endorsed by a Celebrity and Endorsed by an Expert (e.g. Dermatologist, Doctor, Beautician). Since focus group sessions indicated that in general the participants found that print advertising was more effective, this question was included to investigate whether one method of advertising was preferred and if there were differences regarding the preferred media or most effective media between the generations. This question helped meet the fourth objective: To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products.

TV, *Print* and *Radio adverts* and *Store Displays* were included as these tend to be very popular choices of media. *Blogs*, *Websites* and *Web Campaigns* were included, since the following tip was provided by Codrington and Grant-Marshall (2004:191) for advertising to Generation Y, "They're plugged in and want messages in sound bites on modem media".

Endorsed by a celebrity was included as according to Codrington and Grant-Marshall (2004:187&192), both the Boomer generation and Millenials are influenced by celebrity endorsers and are very brand and image conscious. Thus, *Endorsed by a celebrity* was included in order to test whether Boomer women and Millennial women would rate celebrity endorsement higher than Generation Y women.

Endorsed by an expert (e.g. Dermatologist, Doctor, Beautician) was included since the NDP Group cited in Meisel (2008:para 4) found that a products marketability was enhanced by a Dermatologists/ Doctors endorsement or recommendation.

7.2.9 Question 9

- *Please indicate your extent of agreement/ disagreement with the following statements*
  Participants were required to indicate their level of agreement with statements using a Likert scale where: 1=Strongly Agree, 2=Agree, 3=Neutral, 4=Disagree, and 5=Strongly Disagree.

  The first two statements were included in order to test whether respondents preferred products that were firstly designed for their age group and secondly designed for their skin type. These statements played a role in determining whether women believed their facial care needs differed, and were two important criteria discussed in focus group sessions, resulting in these statements being included.

- *Statement 1: I am more likely to use facial care products that are designed for my age group*
  The respondents of the focus group session indicated that at various stages of their lives they changed products as they believed that skin care needs differed depending on age.

- *Statement 2: I am more likely to use facial care products that are designed for my skin type*
  During focus group sessions, it was indicated that skin type was an important consideration when purchasing facial care products. This discussion took up quiet a bit of time during focus group sessions and as a result this statement was included in the questionnaire.

Codrington and Grant-Marshall (2004:185,188&190) suggest that the key marketing theme for the Baby Boomer generation is “Make me feel special”, whilst the key marketing theme for Xers is “I am an individual”, and the key marketing theme for Generation Y is “Entertain me”. The statements 3-8 were adapted from Codrington and Grant-Marshall’s statements and tips regarding advertising to the various generations and were included in order to meet the fourth objective: To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products.

- *Statement 3: I am more likely to use facial care products that use entertaining adverts*
  Codrington and Grant-Marshall (2004:189) provide the following tips for advertising to Generation X:
  “They are easily bored so they enjoy clever tricks and the unexpected; Entertain them. The advert must be an art form in itself; Don’t be linear – Xers are used to multilayering and enjoy mystery and paradox.” Furthermore, Codrington and Grant-Marshall (2004:187) state that Xers want entertaining adverts whilst Generation Y considers entertaining adverts normal. As a result, it was expected that Generation X and Y would have a higher tendency to favour this statement.

- *Statement 4: I am more likely to use facial care products that use the music from my era in their advertising*
  Statement 4 was included to investigate whether Boomers agreed with Codrington and Grant-Marshall (2004:186) who indicate that because Boomers were the first to use music in advertising and like ‘their music’ best, advertisers should use 60’s and 70’s music in adverts aimed at them.

- *Statement 5: I am more likely to use facial care products that use endorsers from my age group*
  Statement 5 was included since according to Codrington and Grant-Marshall (2004:186), Boomers seem to trust only endorsers that are of similar age to them. Consequently Boomers were expected to have a stronger tendency to favour this statement than Generation X and Generation Y respondents.

- *Statement 6: I am more likely to use facial care products that are effective*
  Whilst Boomers and Millenials are brand and image conscious, Generation X is concerned with quality (Codrington and Grant-Marshall, 2004:189). Thus, it was expected that Generation X respondents would favour this statement more than the other respondents. However it also needs to be noted that the NDP Group cited in Meisel (2008:para 4) found that effectiveness enhanced a products marketability. This indicates that in general all the respondents should have been inclined to agree with this statement.

- *Statement 7: I am more likely to use facial care products that are recommended by my friends*
  According to Codrington and Grant-Marshall (2004:189), Xers value friends. Therefore this statement was included to check whether Xers were more likely to favour this statement. Beyer (2009: Para 2) states that 64% of women recommended beauty brands to friends on a regular basis. What’s more is that Beer (2009:Para 1) states that “understanding the power of women listening to recommendations from girlfriends and also making their own recommendations is gaining importance for all beauty marketers. Thus, it needs to be noted that it may have been found that recommendations from friends in general were favoured by all respondents regardless of which generation they belong to.

- *Statement 8: I am more likely to use facial care products that educate me about facial care routines in their communications*

  In the focus groups participants indicated that teenagers were marginalised by the facial care industry. Participants felt that this was mainly due to lack of information and education relating to what products were available for this group. Furthermore, participants indicated that when it comes to facial care they look for as much information as possible prior to purchasing a product. This statement was included to test whether this was applicable to one generation in particular or whether women in general found education a key factor when purchasing facial care. In addition to the focus groups, the literature revealed that an important trend is that women demand to be educated about the products they are purchasing (Beyer, 2009: Para 12)

- *Statement 9: I consider myself to be brand loyal when it comes to facial care products*

  Codrington and Grant-Marshall (2004:189) suggest that advertisers can not expect loyalty from Generation X. Based on this, one would have expected this statement to be favoured by Baby Boomers and Millenials. Statement 9 was also included because marketers give as a reason for focusing on the youth, the fact that older consumers are set in their ways and are brand loyal. If Boomers generally disagreed with this statement showing that they are not set in their ways, then potentially there is an opportunity for marketers to target this segment.

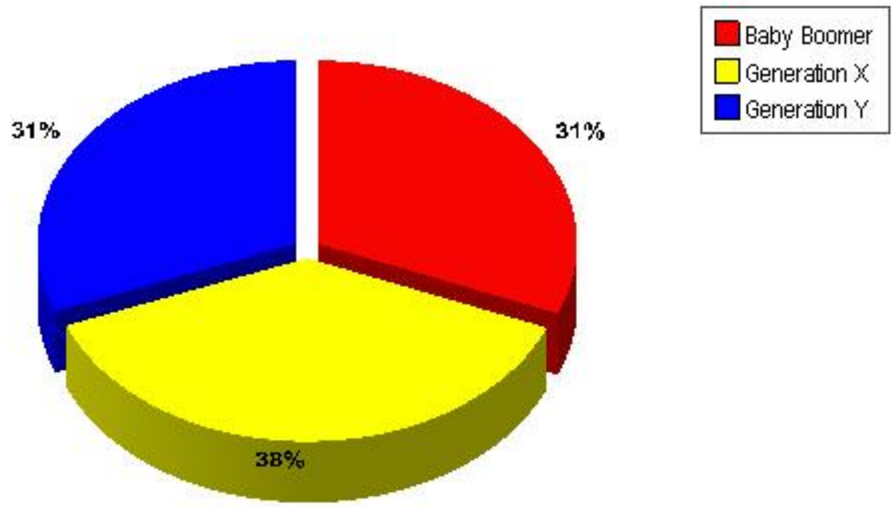
7.2.10 Demographics

The participants were asked to fill in their demographics which included the year in which they were born, race, monthly net income, monthly spend on facial care, marital status, as well as whether participants had financially dependant children.

7.3 Sample Profile for the Mall-Intercept Survey

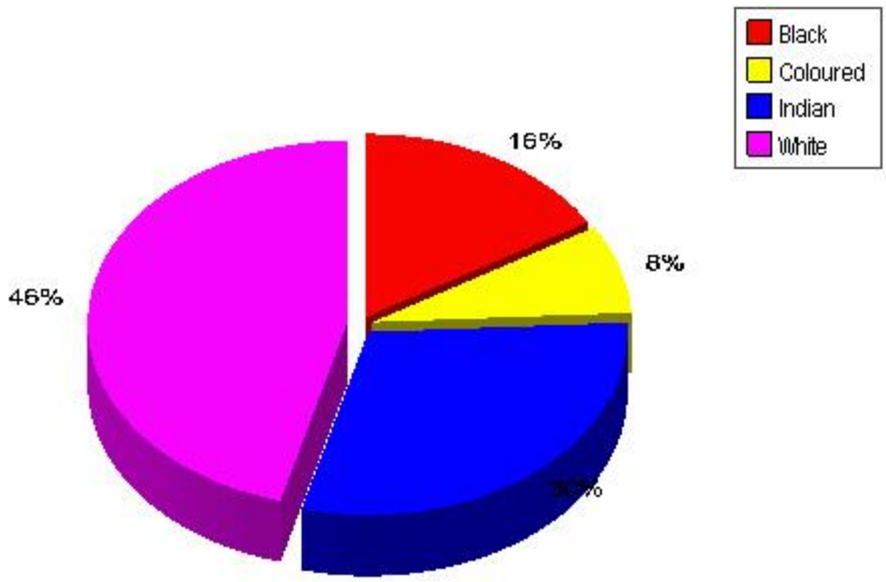
A total of 495 questionnaires were distributed. Of these, 287 (58%) respondents were surveyed in Durban at the Pavillion during a mall intercept, whilst the remaining 208 (42%) of respondents were interviewed in Pietermaritzburg at one of the following malls; Hayfields Mall, Capital Towers Centre or Northway Mall. Of the 495 respondents, 11 respondents were born before 1946, thus they form part of the Silent Generation – therefore these participants did not form part of the study. Hence 484 of the total 495 questionnaires distributed could be used, giving a response rate of 98%.

Figure 7.1 Generation Respondents belonged to



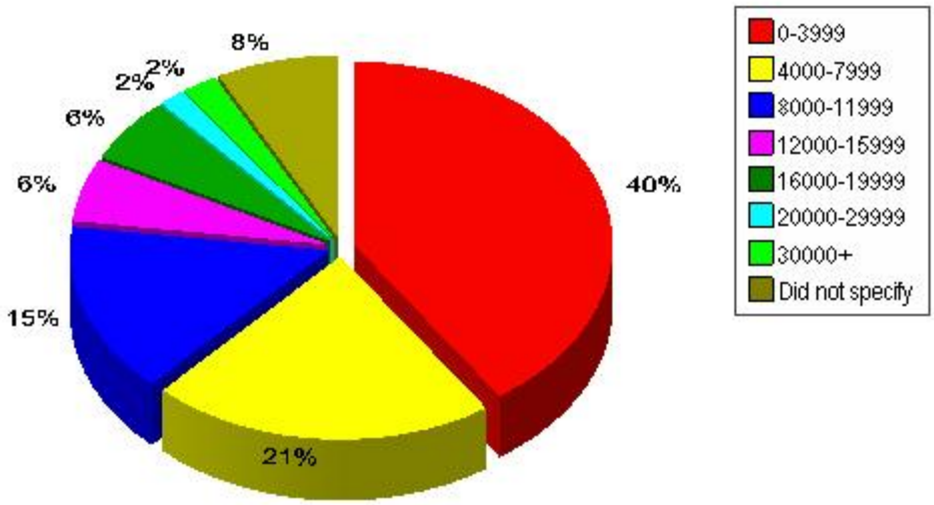
As Figure 7.1 indicates, of the 484 respondents included in the study, 31% (151) of the respondents were Baby Boomers, 38% (183) of respondents were classified as Generation X and 30% (150) of respondents were Millenials. Thus there is a good representation of each of the three generations forming part of the study.

Figure 7.2 Race of Respondents



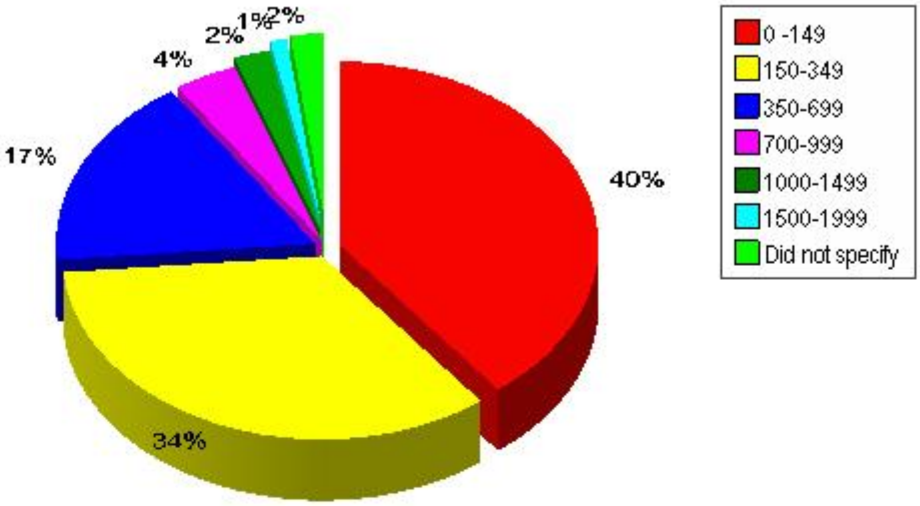
As depicted in the above graph, 46% of respondents were White. Indian respondents made up 30% of the total. Black and Coloured respondents accounted for 16% and 8% respectively. Thus, there was a good representation of both white and non-white participants. However in terms of equal representation of each race the sample was unrepresentative.

Figure 7.3 Net Salary of Respondents



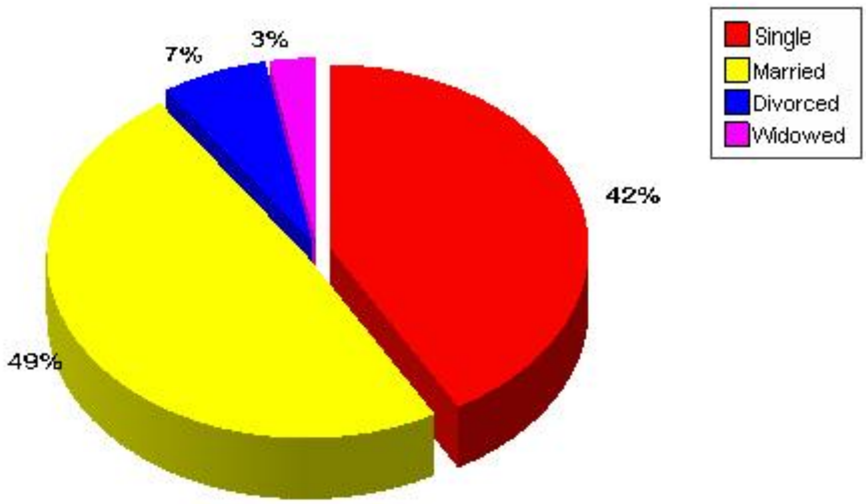
Although a large percentage of the respondents (40%) fell into the first income category (0- R 3999 per month), each category had some percentage of representation. Due to the fact that the mall intercept method was used and most of the data (85%) was gathered during week-days. One reason for a large proportion of women being in the 1st income bracket might be that they are mothers and have part-time jobs or are stay-at-home mothers and don't earn a salary. Another alternative may be that they are retired. Generation Y is made up of individuals born between 1982 and 2000 (Stillman and Lancaster, 2006:63). The oldest Generation Y consumers are 27 and the youngest are 9. Hence, another reason for most respondents falling into the first income bracket could be due to the fact that many of Generation Y respondents could be students or scholars and thus rely on parents for a small allowance or alternatively they have low paying part-time jobs. 52% of respondents do however earn R 4000 or more per month.

Figure 7.4 Average Monthly Spend on facial care product by Respondents



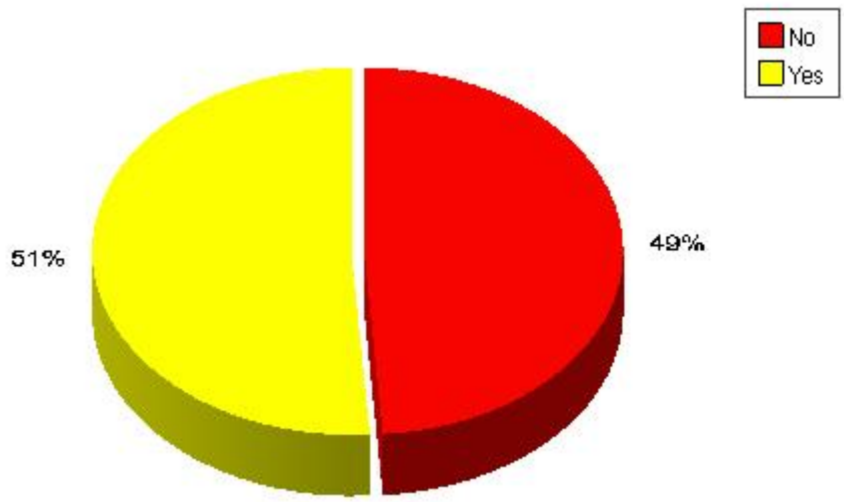
Most of the respondents (74%) fell into the 1st or 2nd spend bracket i.e. R0 – R349 per month, however there was representation in most of the spend brackets indicated. This may be because most products last for longer than a month. As a result even if respondents use an expensive brand such a Clinique costing about R 195 for a cleanser, they would unlikely purchase the product monthly.

Figure 7.5 Marital Status of Respondents



There was a similar representation of married and single women, and a minority of the respondents were divorced or widowed.

Figure 7.6 Dependants of Respondents



Whilst 51% of respondents indicated that they had financially dependant children the remaining 49% indicated that they did not have dependants. This question was asked as it is believed that those women who do not have dependants have more disposable income, thus may buy the more expensive brands.

7.4 Findings of Mall-Intercept Survey

This section summarises and presents the findings of the mall-intercept survey. Questionnaires were used to gather the data, which was then analysed using Spss.

7.4.1 Question 1: Do you use facial care products?

This question was asked in order to establish if participants used facial care products and gave insight into how many women use facial care products and whether this differed across the three generations. It would also determine whether there were differences between the way facial care brands were perceived by women that use facial care products versus those that don't.

Figure 7.7 Usage of Facial Care Products

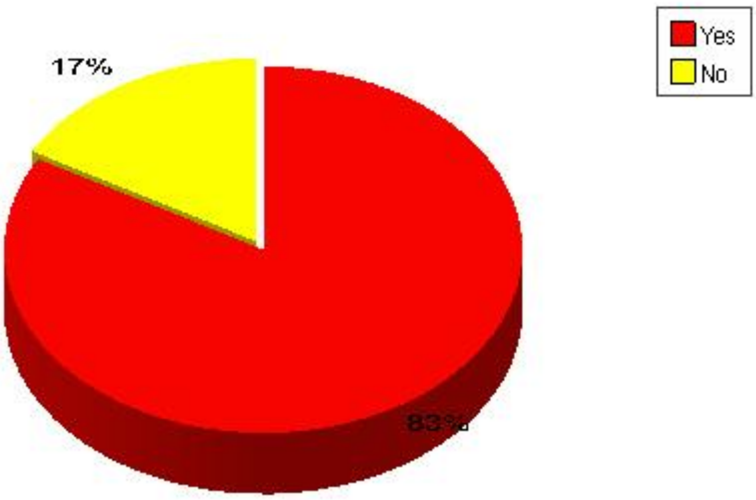


Figure 7.7 shows that the majority (83%) of respondents were users of facial care products.

Table 7.1 Usage of facial care products as per generation

	Total		Baby boomers		Generation X		Generation Y	
Answer	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Yes	402	83	135	89	146	80	121	81
No	82	17	16	11	37	20	29	19
Total	**484**		**151**		**183**		**150**	

Table 7.1 indicates the percentage of respondents using facial care products per generation. In order to test if there were significant differences amongst the generations with regards the use of facial care; a Kruskal-Wallis significance test was run and the following hypothesis was tested:

Ho: There is no significant difference in the use of facial care amongst generations

H1: There is a significant difference in the use of facial care amongst generations.

When the calculated P value is greater than .05 then the null hypotheses is supported indicating that there are no differences in the use of facial care amongst generations. However, if the P value is equal to or less than .05 then there is a significant difference (Field, 2009:342) amongst generations regarding the use of facial care and the Ho hypothesis is rejected. Since the P value was .043 the Ho hypothesis is rejected which shows there was a significant difference.

Whilst the Kruskal-Wallis significance test determines whether there were significant differences in terms of the use of facial care between all three generations, the Mann-Whiney U test compares two unpaired groups (Field, 2009:788-789). Thus, the Mann-Whitney U test was useful in order to determine between which two generations the significant differences occurred. When the calculated P value is less than or equal to 0.05 then there is a significant difference between the groups (Field, 2009:342).

When comparing Baby Boomers to Generation X (.017) and Generation Y (.034) the Mann-Whitney U test indicated that there were significant differences, whilst there were no significant differences between Generation X and Generation Y. Table 7.1 shows that the number of Baby Boomers (89%) using facial care was significantly higher than the number of Xers (80%) and Yers (81%) using facial care products. The higher number of Baby Boomers using facial care could be aligned with growth of anti-agers, which is attributed to an increased demand from aging Baby Boomers (Euromonitor International, 2008:13).

7.4.2 Question 2: Which brand(s) of facial care products do you currently use?

This question aimed to establish what the most popular brands were as well as giving insight regarding the number of different brands each respondent used. Since Question 2 allowed respondents to list more than 1 brand the total number of responses exceeds 484. Hence, as a result of some respondents using more than one brand the total number of responses was 575 and 81 different brands were mentioned. A table of the complete list of the brands used by respondents can be found in Appendix 9, section 9.1.

Table 7.2 Top Brand use amongst Respondents

Brand	Responses	% of Respondents	Ranking
Clinique	49	12.2%	1
Nivea	47	11.7%	2
Ponds	44	10.9%	3
Johnson & Johnson	34	8.4%	4
L'Oreal	32	7.9%	5
Avon	31	7.7%	6
Estee Lauder	22	5.5%	7
Garnier	21	5.2%	8
Clearasil	20	4.9%	9
Oil of Olay	18	4.5%	10
Justine	18	4.5%	10
Innoxa	17	4.2%	12
Yardley	15	3.7%	13
Environ	14	3.5%	14
Neutrogena	14	3.5%	14
Revlon	14	3.5%	14
Clarins	11	2.7%	17
Avroy Shlain	8	1.9%	18
Dermologica	7	1.7%	19
Like Silk	7	1.7%	20

Table 7.2 shows the top 20 Facial Care Brands that were used by respondents. Of the 402 respondents that used facial care products 12.2% used Clinique, 11.7% used Nivea and 10.9% used Ponds. Johnson and Johnson (8.4%), L'Oreal (7.9%), Avon (7.7%), Estee Lauder (5.5%) and Garnier (5.2%) were other popular brands used by respondents and were used by at least 5% of all respondents using facial care products.

Table 7.3 Most Popular 5 Brands used amongst Respondents according to the different generations

	Baby boomers		Generation X		Generation Y	
Brand	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Ponds	-	-	21	14.4	15	12.4
Nivea	17	12.6	12	8.2	18	14.9
Oil of Olay	14	10.4	-	-	-	-
L'Oreal	20	14.8	-	-	-	-
Johnson & Johnson	-	-	14	9.6	15	12.4
Garnier	-	-	16	11.0	-	-
Clearasil	-	-	-	-	14	11.6
Avon	10	7.4	-	-	-	-
Clinique	17	12.6	15	10.3	17	14.0

Table 7.3 shows that whilst Clinique was the top brand listed as being used when all groups were combined, it does not feature as the top brand for any of the generations separately. Nivea was the 2nd most popular brand used overall and it was the most popular brand used by Generation Y respondents and appeared in the list of top five brands used by both Boomers and Xers. Being the 3rd most used brand overall, Ponds was the most popular brand used by Xers and appeared in the top five brands used Millenials, but did not feature in the top five brands used by Boomers. L'Oreal was the most popular brand used by Boomer respondents, whilst overall it was the 5th most used brand. However this brand was not in the top five brands used by Generation Xers or Millenials. Thus there appear to be different brand preferences across the generations.

Table 7.4 Most Popular 3 Brands used amongst Respondents with dependants versus those without dependants

	Respondents with Dependants		Respondents without Dependants	
Brand	**Frequency**	**Percentage**	**Frequency**	**Percentage**
Avon	19	9.2%	11	5.6%
Clinique	17	8.2%	31	15.8%
L'Oreal	12	5.8%	20	10.2%
Nivea	16	7.8%	31	15.8%
Ponds	29	14.1%	14	7.1%

Table 7.4 shows the most popular brands used by respondents with dependants versus those without dependants. Out of the 402 respondents using facial care products, 206 had dependants and 196 had no dependants. The top three brands used by dependants with children were Ponds (14.1%), Avon (9.2%) and Clinique (8.2%) and top three brands used by respondents without dependants were Clinique (15.8%), Nivea (15.8%) and L'Oreal (10.2%). Hence it appears that respondents without dependants choose use more expensive brands.

Table 7.5 Multiple Brand use amongst the different Generations

	Total		Baby boomers		Generation X		Generation Y	
Answer	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Yes	122	30.3	33	24.4	39	26.7	50	41.3
No	280	69.7	102	75.6	107	73.3	71	58.7
Total	**402**		**135**		**146**		**121**	

The majority (69.7%) of respondents using facial care products indicated that they used a single brand. This indicates that when it comes to the use of facial care products respondents tend to stick to a single brand. The reason for this could be that the respondents using facial care products have found brands that are effective and they choose to stick to these rather than trying others. A Kruskal-Wallis test showed that there were no significant differences between the generations regarding the use of multiple brands.

7.4.3 Question 3: In your opinion what are the top 3 facial care brands?

This question was used to determine which brands respondents perceived as the best and gave insight into how these differed across the three generations. In addition, this question helped to determine whether the facial care brands used by each respondent also appeared in the list of top brands mentioned i.e. Whether they use the products they perceive to be the best. The complete list of top brands mentioned can be found in Appendix 9, section 9.2.

Table 7.6 Top Brands according to respondents

Brand	Responses	% of Respondents	Ranking
Clinique	174	35.9%	1
L'Oreal	97	20.0%	2
Nivea	93	19.2%	3
Estee Lauder	89	18.4%	4
Clarins	77	15.9%	5
Ponds	75	15.5%	6
Revlon	73	15.1%	7
Johnson & Johnson	59	12.2%	8
Garnier	54	11.2%	9
Oil of Olay	52	10.7%	10
Clearasil	34	7.0%	11
Avon	29	6.0%	12
Justine	29	6.0%	13
Environ	28	5.8%	14
Dermologica	27	5.6%	15
Elizabeth Arden	23	4.8%	16
Gatineau	21	4.3%	17
Neutrogena	20	4.1%	18
Innoxa	18	3.7%	19

Of all 484 respondents, 35.9% mentioned Clinique in the top three brands, making Clinique the top brand mentioned. It also needs to be mentioned that Clinique was also the most used brand, thus it appears as if respondents act on perception, since they believe Clinique to be the top brand, they use it. L'Oreal and Nivea took the second and third places, with 20.0% and 19.2% of respondents respectively mentioning these two brands. Whilst Nivea was the 2nd most popular brand used by respondents, L'Oreal was only the 5th most popular brand by respondents. The other brands which were amongst the top ten included Estee Lauder (18.4%), Clarins (15.9%), Ponds (15.5%), Revlon (15.1%), Johnson and Johnson (12.2%), Garnier (11.2%) and Oil of Olay (10.7%). It's interesting to observe that with the exception of Clarins and Revlon, all the brands appearing in the top ten brands as perceived by respondents, were also amongst the top ten brands used. Hence it appears that respondents use brands which they perceive as the best i.e. they act on perceptions.

Table 7.7 Top 3 Brands of facial care according to different Generations

	Baby boomers		Generation X		Generation Y	
Brand	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Clinique	60	39.7	69	37.7	45	30.0
L'Oreal	43	28.5	-	-	-	
Estee Lauder	41	27.2	-	-	-	-
Clarins	-	-	36	19.7	-	-
Nivea	-	-	33	18.0	40	26.7
Ponds	-	-	-	-	35	23.3

Clinique was mentioned as the top brand overall, furthermore this was the only brand which also appeared in the top 3 brands mentioned as rated by each of the generations. When relating this to usage it is interesting to note that Clinique was the most used brand, but did not feature as the most used brand by any particular generation. Since it was however perceived as the top brand but did not feature as the top used brands for the generations an anomaly in terms of positioning has occurred which could indicate that something such as income plays a role in the brands purchased.

L'Oreal was the most popular brand used by Baby Boomers, however in terms of top brands it was ranked 2nd. Whilst Estee Lauder did not feature in the top brands used by Boomers it was perceived as the 3rd top brand.

Xers rated Clarins as being perceived as a top brand; however it did not appear in the list of top 5 brands used by Xers. Nivea was perceived by Xers as being the 3rd top brand, and in terms of usage Nivea was the 4th most used brand by Xers. Hence an anomaly also occurred for Estee Lauder as rated by Boomers, and Clarins as rated by Xers and again this could be attributed to income as both Estee Lauder and Clarins are premium brands and expensive. Millenials rated Nivea as the 2nd top brand, however in terms of usage it was the most popular. Ponds was rated 3rd in terms of both usage and top brand by Generation Y.

Table 7.8 Percentage of Brands used by respondents appearing in the Top 3 Brands mentioned

	Total		Baby boomers		Generation X		Generation Y	
Answer	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Yes	310	77.1	98	72.6	118	80.8	94	77.7
No	78	19.4	30	22.2	25	17.1	23	19.0
Missing	14	3.5	7	5.2	3	2.1	4	3.3
Total	402	100	135	100	146	100	121	100

Of the 402 respondents using facial care brands 77% mentioned at least one of the brands they used in the brands which they perceived as the top three. Thus, this shows that the majority of respondents use brands which they perceived as the top brands. The literature review indicated that buying behaviour is influenced by the way in which consumers perceive their world and successful products are those which are positioned favourably in the minds of the target market (Brennan *el al.*, 2008:23). Hence this may be justification of own purchases, but also strengthens the case for positioning i.e. people act on beliefs. The Kruskal-Wallis test showed that there were no significant differences between the generations when it comes to the percentage of brands used appearing in the top brands mentioned. Thus, it appears that each of the generations act on their beliefs about brands.

In order to determine whether there was a difference in the way brands are perceived by women who use facial care products versus those that don't, the following section depicts the top 5 brands as rated by women who use facial care products and those who don't.

Table 7.9 Top 5 Brands as rated by respondents using facial care (yes) versus those not using facial care (no)

	Yes		No	
Brands	**Frequency**	**Percentage**	**Frequency**	**Percentage**
Clinique	151	37.6%	23	28.4%
L'Oreal	80	19.9%	17	21.0%
Estee Lauder	79	19.7%	-	-
Nivea	76	18.9%	-	-
Clarins	67	16.7%	-	-
Ponds	-	-	20	24.7%
Johnson & Johnson	-	-	18	22.2%
Revlon	-	-	17	21.0%

Table 7.9 shows that whilst Clinique and L'Oreal were rated as the top two brands by respondents using facial care products and respondents not using facial care products, the other top brands mentioned by respondents using facial care products differed from those mentioned by respondents who did not use facial care products.

7.4.4 Question 4: What attributes are most important to you when choosing facial care products? (Please rate on a scale of 1 to 10. Where 1 is totally unimportant and 10 is very important).

This question was only intended for those participants that used facial care products. A total of twelve attributes were provided and rated by respondents according to importance, in order to determine what factors Baby Boomers versus non-Baby Boomers look for when purchasing skin care products. Since numbers were assigned to this question, mean scores were calculated in order to establish the most important criteria according to respondents. Furthermore the most important attributes were used to create positioning maps. Detailed means and frequency tables can be found in Appendix 9, section 9.3.

Table 7.10 Respondents mean ranking of attributes' importance

Criteria	Mean	Ranking
Makes skin feel smooth & soft	9.33	1
Lasts all day (no need to reapply)	9.21	2
Moisturising Ability	9.09	3
Contains SPF	8.94	4
Removes Impurities	8.91	5
Widely Available	8.50	6
Contains Natural Ingredients	8.45	7
Contains anti-aging properties	8.38	8
Multi-purpose e.g. 3-in-1 Product, Moisturiser with SPF, etc	7.88	9
Mild Fragrance	6.17	10
Low Price	6.15	11
Quality Packaging	5.88	12

Respondents rated the *makes skin feel soft and smooth* attribute as most important, with a mean score of 9.33. The attributes *lasts all day (no need to reapply)* and *moisturising ability* took 2nd and 3rd place with mean scores of 9.21 and 9.09 respectively. It is interesting to note that all 12 attributes included in the questionnaire had mean scores of over five. This indicates that these attributes are all considered to be relatively important to respondents. Since these attributes were prioritised through the literature review and the focus groups, this was expected.

Importance of attributes – Generational split

The next section looks at the importance of attributes according to the 3 different generations in order to access whether the different generations allocate different levels of importance to the various attributes. Detailed means and frequencies are available in Appendix 9, section 9.4. It also includes results of the Kruskal-Wallis significance tests which were run to determine if there were significant differences on important attributes between generations. The Mann-Whitney U significance test results are also included; these were run to determine where differences lay between the generations. Please refer to Appendix 9, section 9.5 for details of the Kruskal-Wallis and Mann-Whitney U tests.

Table 7.11 Respondents mean ranking of attribute importance according to the different generations

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Lasts all day (no need to reapply)	9.42	1	9.26	3	8.91	3
Moisturising Ability	9.41	2	9.23	4	8.60	4
Makes skin feel smooth & soft	9.32	3	9.55	1	9.08	1
Contains anti-aging properties	8.98	4	8.96	6	7.06	9
Contains SPF	8.93	5	9.27	2	8.56	5
Removes Impurities	8.68	6	9.09	5	8.94	2
Contains Natural Ingredients	8.67	7	8.70	8	7.90	7
Widely Available	8.54	8	8.73	7	8.17	6
Multi-purpose e.g. 3-in-1 Product, Moisturiser with SPF, etc	7.98	9	8.12	9	7.49	8
Low Price	6.39	10	6.25	12	5.8	11
Mild Fragrance	6.26	11	6.68	10	5.49	12
Quality Packaging	4.88	12	6.38	11	6.33	10

From Table 7.11 it's clear to see that whilst Baby Boomers consider the *lasts all day (no need to reapply)* attribute as most important, both Generation Y and Generation X, ranked the *makes your skin feel soft and smooth* attribute as the most important. The *moisturising ability* attribute was 2nd most important to the Baby Boomers, whilst Generation X regarded the *contains SPF* attribute to be the next most important attribute and Generation Y regarded the *removes impurities* as the 2nd most important attribute. Baby Boomers rated the *makes your skin feel smooth & soft* as third most important, whilst both Generation X and Generation Y rated the *lasts all day (no need to reapply)* attribute in third place. Overall, although some overlapping of the order of important attributes occurred, each generation differed from the other.

A Kruskal-Wallis significance test was run, to see if there were any significant differences amongst the generations regarding importance of attributes. Thus the following hypothesis was tested and results are shown in Table 7.11.

Ho: There is no significant difference in attribute importance amongst generations

H1: The is a significant difference in attribute importance amongst generations

Table 7.12 Kruskal-Wallis significance testing of the importance of attributes between the Generations

Criteria	Significance
Mild Fragrance	.007
Quality Packaging	.000
Moisturising Ability	.000
Contains SPF	.002
Contains Natural Ingredients	.005
Contains anti-aging properties	.000
Lasts all day (no need to reapply)	.022

From Table 7.12 it can be concluded that there were attributes that had significantly different levels of importance to the generations. They included the *mild fragrance, quality packaging, moisturising ability, contains SPF, contains natural ingredients, contains anti-aging properties,* and the *lasts all day (no need to reapply)* attributes. The remaining attributes were not significantly different.

Using the Mann-Whitney U test to determine between which two generations the significant differences occurred, the following was found.

Table 7.13 Mann-Whitney U Significance testing of Attributes between the Generations

	Significance (Mann-Whitney U Test)		
Criteria	**Baby Boomers & Generation X**	**Baby Boomers & Generation Y**	**Generation X & Generation Y**
Mild Fragrance	.355	.043	.002
Quality Packaging	.000	.000	.770
Moisturising Ability	.274	.000	.001
Contains SPF	.621	.009	.001
Contains Natural Ingredients	.882	.005	.005
Contains anti-aging ingredients	.943	.000	.000
Lasts all day (no need to reapply)	.270	.006	.089

Table 7.13 shows that when comparing Baby Boomers and Generation X, the only significant difference was in terms of *quality packaging*, where (from Table 7.11), Baby Boomers mean (4.88) was significantly lower than Generation Xers mean importance of 6.38, thus, indicating that quality packaging is far more important to Generation Xers than Baby Boomers. This contradicts Codrington and Grant-Marshall (2004:186) who state, "put the label on the outside of the product – make it reek of class and quality, Boomers enjoy displaying their conspicuous consumption". However, Codrington and Grant-Marshall (2004:189) also state that Xers will buy brands based on quality. The importance Xers attached to the *quality packaging* attribute may indicate that Xers use packaging to judge a brand's quality. Looking at focus group findings showed that whilst Xers mentioned packaging as an important attribute, this was not mentioned by Boomers in the focus groups.

From Table 7.13 it is evident that when comparing Baby Boomers and Generation Y respondents, there are significant differences on all attributes, where generational differences were significant, i.e. perceptions with regards to what is important in facial care products differ significantly between these two generations. From Table 7.10 we can conclude that *mild fragrance* was more important to Baby Boomers, with mean importance of 6.39 versus the Generation Yers mean importance of 5.77. Focus group findings suggested that Boomers placed more importance on fragrance, thus these findings clarify that Boomers prefer a milder fragrance.

The *quality packaging* attribute was deemed more important by Generation Yers (6.33 versus 4.88). Again this contradicts Codrington and Grant-Marshall's (2004:186) research which indicated that packaging was important to Boomers who enjoy displaying their conspicuous consumption. However it aligns with focus group findings, as the various elements of packaging which came up during focus groups were primarily from the Generation Y focus groups. The *moisturising ability* attribute was more important to Baby Boomers, with a mean score of 9.41 versus the Yers mean score of 8.60. The literature review indicated the importance of this attribute, however there was no prior research which compared this attribute as rated by different generations. These findings aligned with those of the focus group findings as Boomers placed more importance on this attribute than Generation Y did. Perhaps this is due to older skin requiring moisturising far more than young skin would. It should be noted that Boomers mentioned that their skin needed more moisture now than it did when they were younger.

With a mean importance of 8.93 and 8.98 Baby Boomers considered the *contains SPF* and the *contains anti-aging properties* attributes to be more important than Generation Yers, who rated the attributes to have a mean importance of 8.56 and 7.06 respectively. According to Gonzalez (2008, cited in Meisel, 2008: Para 8&9) consumers are finally accepting that the sun is the main driver in premature skin aging, thus it is not surprising to find that both attributes were more important to Baby Boomers, who are older and hence more likely to be worried about aging. Furthermore, Beasty (2006:34-35) suggests that Boomers place a great deal of value on health, beauty and an active lifestyle stating that Boomer women especially want to look and feel younger, hence it is not surprising that Baby Boomers placed more importance on the *contains anti-aging properties* attribute. The mean score of the *contains natural ingredients* attribute was 8.67 for Baby Boomers versus Generation Yers mean of 7.90, thus Baby Boomers considered this attribute to be of higher importance than Yers. According to Raymond (2009:42) Boomers show the most commitment to environmentalism. Thus, it is not surprising that they rated the *contains natural ingredients* higher than Millenials. The *lasts all day (no need to reapply)* attribute was also rated more important by Baby Boomers (9.42) than it was by Generation Yers (8.91).

Although beyond the scope of the objectives it is interesting to note from Table 7.13 that when comparing Generation Xers and Generation Yers there were significant differences regarding the importance of the following attributes *Mild Fragrance, Moisturising Ability, Contains SPF, Contains Natural Ingredients* and *Contains anti-aging properties*. As per Table 7.11 it is apparent that Xers found the *mild fragrance* (6.68 vs. 5.49), *moisturising ability* (9.23 vs. 8.60), the *contains SPF* (9.27 vs. 8.56), the *contains natural ingredients* (8.70 vs. 7.90) and the *contains anti-aging* (8.96 vs. 7.06) attributes to be more important that Yers. Thus Generation Xers seem to have a preference for a milder fragrance and are more concerned about the moisturising ability of a brand than Millenials are. Similarly to the Boomers, the fact that Generation Xers place a higher importance on *SPF* and *anti-aging* is not surprising given the fact that consumers are accepting that sun damage and premature aging are linked (Gonzales, 2008, cited in Meisel:Para 8&9) and the fact that Xers are older than Millenials and thus more likely to be worried about aging. Based on the focus groups results it is not surprising that Xers placed a higher importance on the *contains natural ingredients* attribute, which wasn't mentioned as important by Millenials but was mentioned and discussed at length during the Generation X focus group.

To summarise Baby Boomers and Generation Xers are quiet similar but very different from Yers when it comes to attributes sought and deemed important in facial care products.

7.4.5 Question 5: The following questions relate specifically to your perception / opinion. Please rate all of the following brands on the following attributes using this scale: 1-Does not meet the criterion/ possess the feature at all, 2-Poor, 3-Average, 4-Good and 5-Excellent.

This question aimed to establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women and would be used to create positioning maps in order to observe where the sample placed each brand. The figures and tables below show how each brand scored on each attribute based on mean scores and include detailed data of the overall responses, Baby Boomer responses, Generation X and Generation Y responses (refer to Appendix 9, section 9.6 for detailed means and frequencies).

7.4.5.1 Low Price

Figure 7.8 Perception of the Low Price attribute by respondents

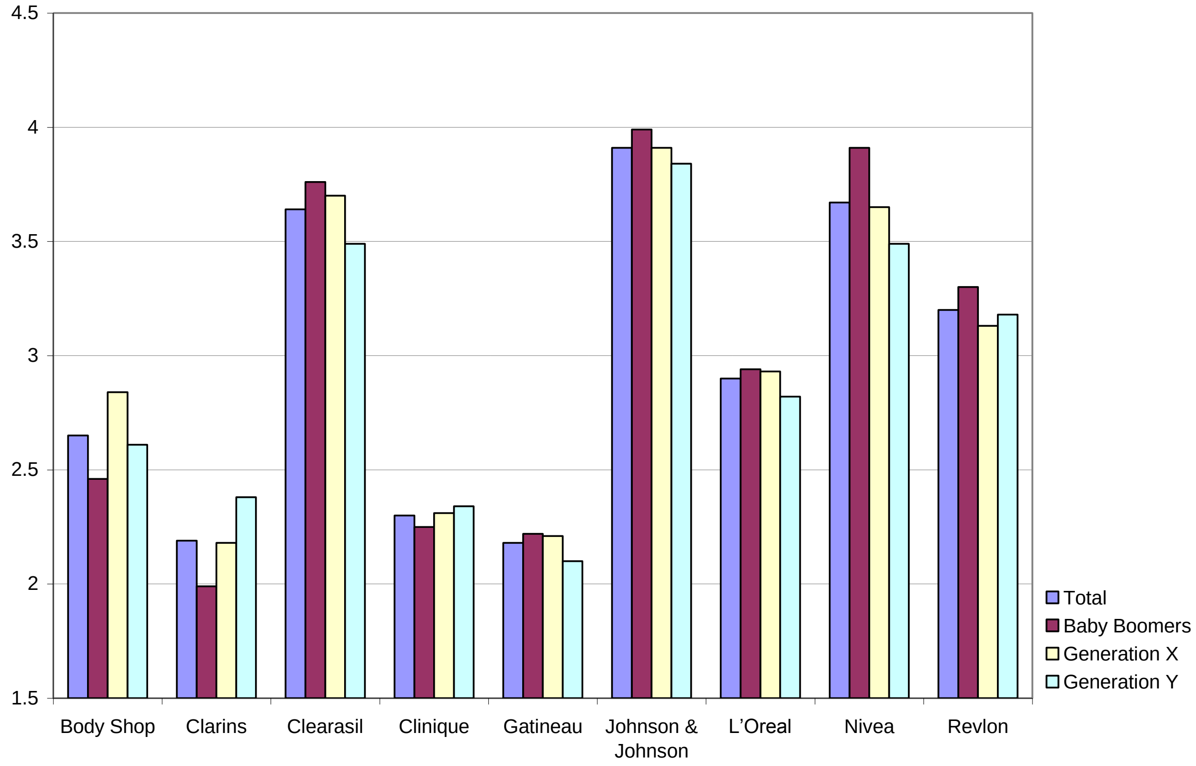


Table 7.14 Perception of the Low Price attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	**Mean**	**Ranking**	**Mean**	**Ranking**	**Mean**	**Ranking**	**Mean**	**Ranking**
Body Shop	2.65	6	2.46	6	2.84	6	2.61	6
Clarins	2.19	8	1.99	9	2.18	9	2.38	7
Clearasil	3.64	3	3.76	3	3.70	2	3.49	2
Clinique	2.30	7	2.25	7	2.31	7	2.34	8
Gatineau	2.18	9	2.22	8	2.21	8	2.10	9
Johnson & Johnson	3.91	1	3.99	1	3.91	1	3.84	1
L'Oreal	2.90	5	2.94	5	2.93	5	2.82	5
Nivea	3.67	2	3.91	2	3.65	3	3.49	3
Revlon	3.20	4	3.30	4	3.13	4	3.18	4

Based on Table 7.14 it can be seen that overall, respondents perceived Johnson and Johnson, Nivea and Clearasil to be the lowest priced brands, whilst Gatineau, Clarins and Clinique were considered to be the most expensive. Looking at the means per generation showed similar results. Clarins was rated the most expensive by both Baby Boomers and Generation X respondents, whilst Generation Y perceived Gatineau to be the most expensive brand. Johnson and Johnson was perceived to be the cheapest brand by all generations. In general there weren't large differences between mean scores.

Significant testing was done using the Kruskal-Wallis test. The following hypothesis was tested.

Ho: There is no significant difference in Brand Perception (on the *Low Price* Attribute) by the different generations.

H1: There is a significant difference in Brand Perception (on the *Low Price* Attribute) by the different generations.

The results (available in Appendix 9, section 9.7) indicated that there was only one brand which differed significantly based on the generations' ratings of the various brands on the *Low Price* attribute. The generation's perceptions of Nivea (on the *Low Price* attribute) was significantly different (.009). A Mann-Whitney U test showed that the significant difference for Nivea (.002) occurred between Baby Boomers and Generation Y respondents. Baby Boomers (mean of 3.91) perceived Nivea to meet the *Low Price* attribute better than Generation Y (3.49). This could be due to the fact that Baby Boomers have more disposable income, as many of the Generation Y respondents were students or scholars and therefore did not earn an income. They thus perceived Nivea to be more expensive.

7.4.5.2 Mild Fragrance

Figure 7.9 Perception of the Mild Fragrance attribute by respondents

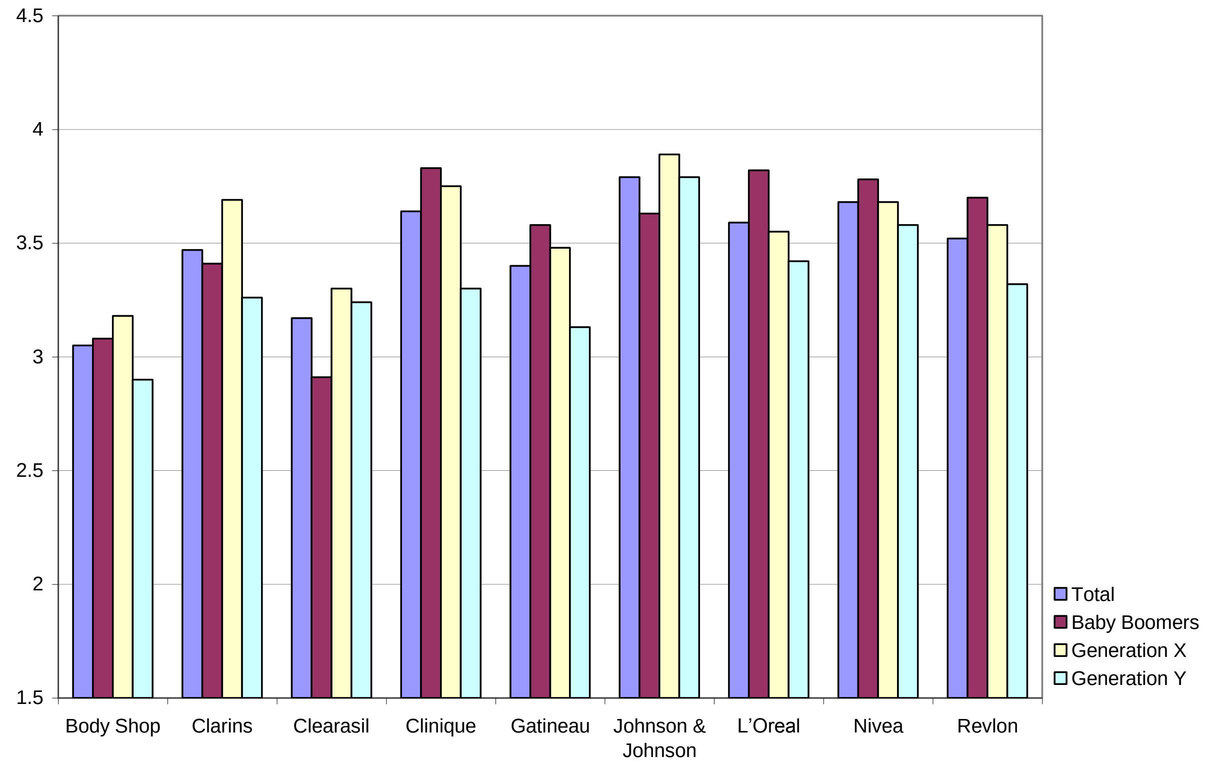


Table 7.15 Perception of the Mild Fragrance attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.05	9	3.08	8	3.18	9	2.90	9
Clarins	3.47	6	3.41	7	3.69	3	3.26	6
Clearasil	3.17	8	2.91	9	3.30	8	3.24	7
Clinique	3.64	3	3.83	1	3.75	2	3.30	5
Gatineau	3.40	7	3.58	6	3.48	7	3.13	8
Johnson & Johnson	3.79	1	3.63	5	3.89	1	3.79	1
L'Oreal	3.59	4	3.82	2	3.55	6	3.42	3
Nivea	3.68	2	3.78	3	3.68	4	3.58	2
Revlon	3.52	5	3.70	4	3.58	5	3.32	4

Table 7.15 indicates that when it comes to *Mild Fragrance*, all products scored a mean of more than 3 but less than 4. This indicates that all brands scored either an average or a good rating. Overall, Johnson and Johnson (3.79) was perceived as

the brand with the mildest fragrance, whilst Body Shop (3.05) was perceived as the brand with the strongest fragrance. When looking at the ranking per generation Baby Boomers ratings indicated Clinique (3.83) to have the mildest fragrance, Xers rated Johnson and Johnson (3.89) as the brand with the mildest fragrance, as did Generation Y (3.79). Baby Boomers ratings show that the brand they perceived to have the strongest fragrance was Clearasil (2.91), whilst Body Shop was perceived as having the strongest fragrance by both Xers (3.18) and Yers (2.90).

Significant testing was done using the Kruskal-Wallis test to see if the differences across generations were significant. The hypothesis below was tested.
Ho: There is no significant difference in Brand Perception (on the *Mild Fragrance A*ttribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Mild Fragrance* Attribute) by the different generations.

The Kruskal-Wallis tests (refer to Appendix 9, section 9.7) showed that on the *Mild Fragrance* attribute, the following Brands; namely Clarins (.021), Clinique (.002), Gatineau (.032), L'Oreal (.005) and Revlon (.044) were rated significantly differently by the generations. In order to investigate between which generations the significant differences occurred the Mann-Whitney U test was applied which revealed that L'Oreal (.037) was rated significantly differently by Boomers and Xers with Boomers (3.82) scoring L'Oreal higher than Xers (3.55). Thus, Boomers perceived L'Oreal as having a milder fragrance than Xers did. Since L'Oreal appeared in the top 5 brands used and preferred by Boomers and they regard mild fragrance as an important attribute may help explain why Boomers use and rate this brand so highly.

Clinique (.001), Gatineau (.015) L'Oreal (.001) and Revlon (.016) were perceived to be statistically different by Baby Boomers and Millenials. All brands were rated significantly higher by Baby Boomers. The ratings were as follows: Clinique (3.83 vs 3.30), Gatineau (3.58 vs 3.18), L'Oreal (3.82 vs 3.42) and Revlon (3.70 vs 3.32). Boomers and Millenials differed significantly on the importance of the *mild fragrance* attribute, with Boomers regarding it as significantly more important than Millenials, which may have influenced the higher ratings of the relevant brands by Boomers. L'Oreal and Clinique were brands which appeared in the Boomers top 5 brands mentioned and the top 5 brands used. Since Boomers regard the *mild fragrance* attribute as significantly more important than Millenials, the fact that they rate these brands higher on the attribute may provide some explanation as to why Boomers choose to use L'Oreal and Clinique and regard these brands as superior. Finally there were also significant differences for Clarins (.008), Clinique (.003), and Gatineau (.034) as perceived by the Xers and Millenials, however detailed analysis is beyond the scope of this research.

7.4.5.3 Quality Packaging

Figure 7.10 Perception of the Quality Packaging attribute by respondents

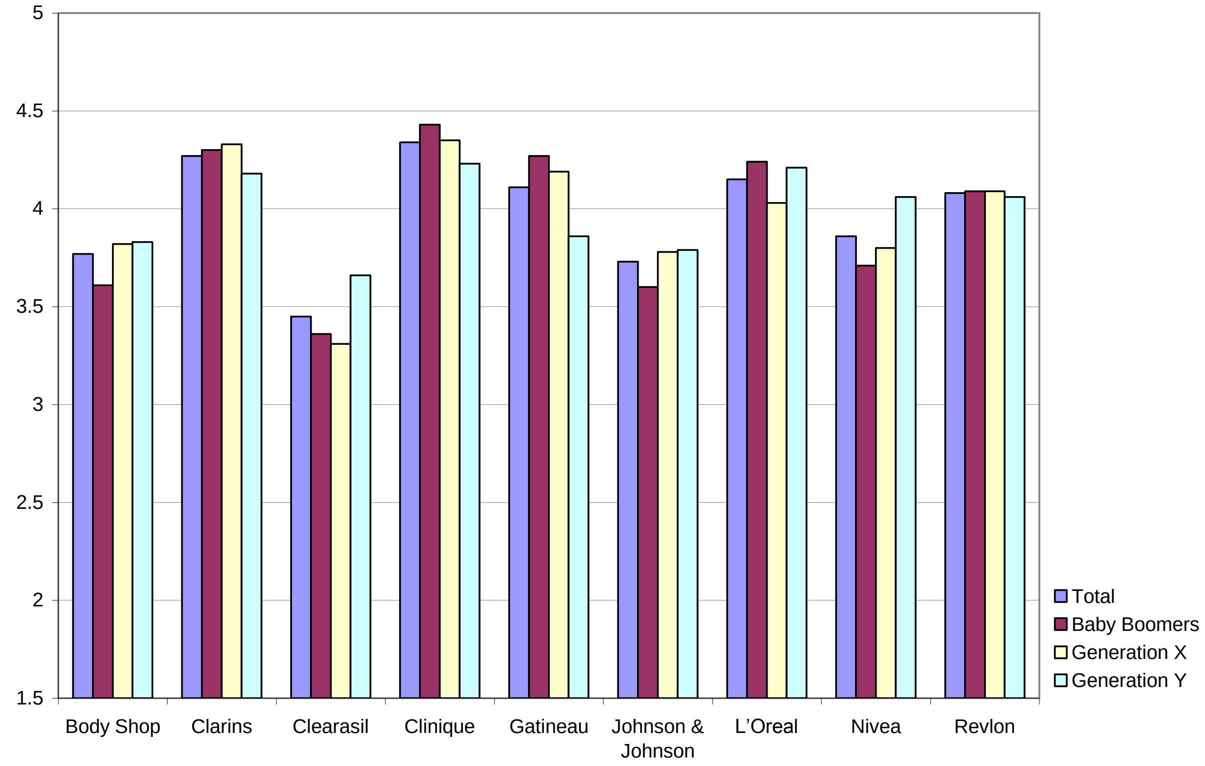


Table 7.16 Perception of the Quality Packaging attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.77	7	3.61	7	3.82	6	3.83	7
Clarins	4.27	2	4.30	2	4.33	2	4.18	3
Clearasil	3.45	9	3.36	9	3.31	9	3.66	9
Clinique	4.34	1	4.43	1	4.35	1	4.23	1
Gatineau	4.11	4	4.27	3	4.19	3	3.86	6
Johnson & Johnson	3.73	8	3.60	8	3.78	8	3.79	8
L'Oreal	4.15	3	4.24	4	4.09	4	4.21	2
Nivea	3.86	6	3.71	6	3.80	7	4.06	4
Revlon	4.08	5	4.09	5	4.09	4	4.06	4

Clinique, took the number 1 position overall, and by all generations, in terms of the way respondents perceived and rated the packaging of the various brands. Similarly, Clearasil's packaging was considered to be the worst, as ranked overall, and by all generations. However, despite having the worst rating on the *quality packaging attribute* Clearasil still scored almost 3.5, which is a better than average score.

Significant testing was done using the Kruskal-Wallis test.

Ho: There is no significant difference in Brand Perception (on the *Quality Packaging* Attribute) by the different generations.

H1: There is a significant difference in Brand Perception (on the *Quality Packaging* Attribute) by the different generations.

There was only a single brand where the H0 hypotheses was rejected and was thus significantly different (available in

Appendix 9, section 9.7). With a P value of .032 the perception of the Nivea Brand (on the *Quality Packaging* Attribute) differed significantly between generations. The Mann-Whitney U test showed that Generation Y's perception of Nivea (.018 and .034) (rated on the *Quality Packaging* attribute) differed significantly from those of Baby Boomers (3.71) and Generation X (3.80), with Generation Y (4.06) rating Nivea's packaging significantly better than Baby Boomers and Xers did. Thus, it seems that the type of packaging used by Nivea was more appealing to Generation Y than it was to both Boomers and Xers. The *quality packaging* attribute was rated as significantly more important by Generation Y compared to Boomers. The fact that Millenials placed more importance on the quality packaging attribute and rated Nivea significantly higher on this attribute may help explain why Nivea appeared in the top 5 brands as listed by Generation Y, but was not included in the Boomers top 5 brands, and Nivea was used by a higher percentage of Millenials compared to Boomers.

7.4.5.4 Moisturising Ability

Figure 7.11 Perception of the Moisturising Ability attribute by respondents

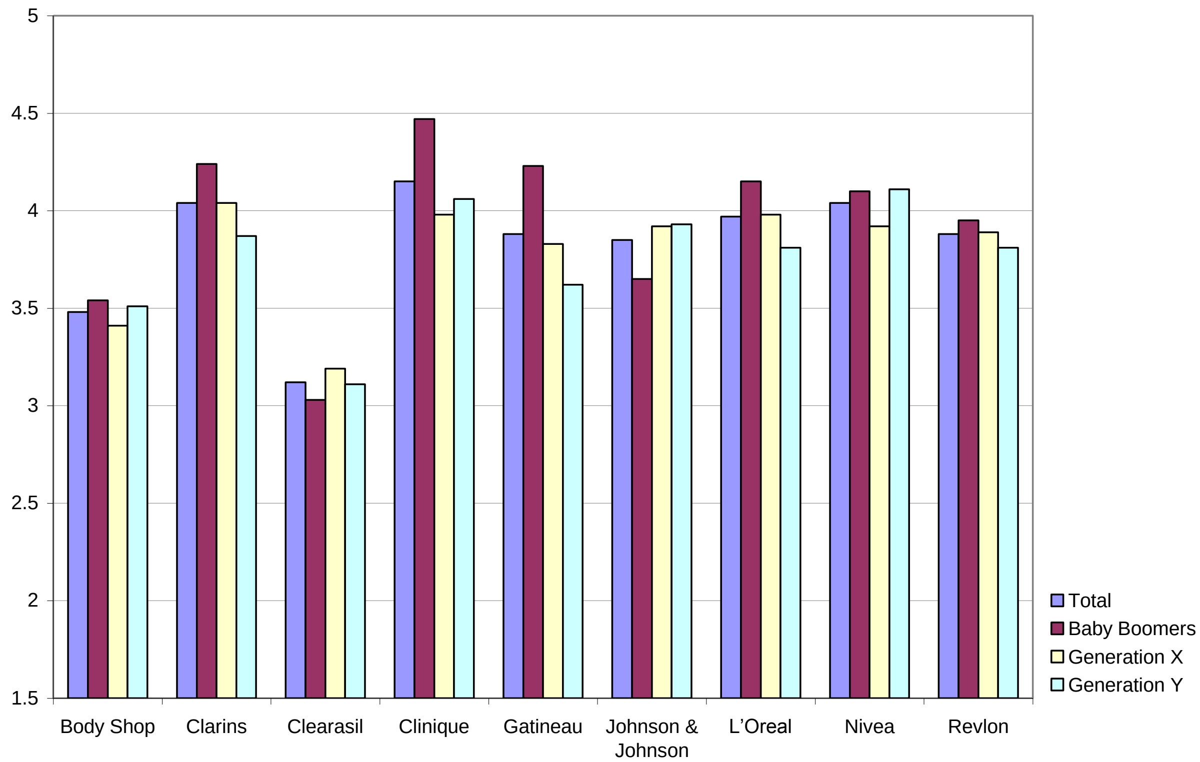


Table 7.17 Perception of the Moisturising Ability attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.48	8	3.54	8	3.41	8	3.51	8
Clarins	4.04	2	4.24	2	4.04	1	3.87	4
Clearasil	3.12	9	3.03	9	3.19	9	3.11	9
Clinique	4.15	1	4.47	1	3.98	2	4.06	2
Gatineau	3.88	6	4.23	3	3.83	7	3.62	7
Johnson & Johnson	3.85	7	3.65	7	3.92	4	3.93	3
L'Oreal	3.97	4	4.15	4	3.98	3	3.81	5
Nivea	4.04	3	4.10	5	3.92	4	4.11	1
Revlon	3.88	5	3.95	6	3.89	6	3.81	5

Table 7.17 indicates that according to the perception of all respondents Clinique was rated highest on the *moisturising ability* attribute. Looking at the mean scores of this attribute for the generations, Clinique was also rated highest by the Baby Boomers. Generation X respondents rated Clarins highest on the *moisturising ability* attribute, whilst Generation Yers ratings showed this generation perceived Nivea to have the best on the *moisturising ability* attribute. Overall and based on each generations mean scores Clearasil was rated lowest and least effective on the *moisturising ability* attribute. When looking at the mean scores per generation it is interesting to note that Clearasil is the only brand which scored less than 3.5 on this attribute as rated by each of the generations. When considering that the Clearasil range consists of mainly cleansers, scrubs and treatment gels and they focus on these products in their websites (Reckitt Benckiser Inc., 2008a: Para 2) this is not surprising.

Significant testing was done using the Kruskal-Wallis test. The following hypothesis was tested.
Ho: There is no significant difference in Brand Perception (on the *Moisturising Ability* Attribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Moisturising Ability* Attribute) by the different generations.

The Kruskal-Wallis test (available in Appendix 9, section 9.7) showed that the Ho hypothesis was rejected for Clinique (.000), Gatineau (.013), Johnson and Johnson (.040), and L'Oreal (.025). The Mann-Whitney U tests were performed to investigate between which generations this significant difference occurred. The Baby Boomers and Generation Xers perceived Clinique (.000), Gatineau (.017) and Johnson and Johnson (.024) to be significantly different, with Baby Boomers rating Clinique (4.47 vs. 3.98) and Gatineau (4.23 vs. 3.83) significantly higher on *moisturising ability* than Generation X did, but Xers rating Johnson and Johnson (3.92 vs. 3.65) significantly higher than Baby Boomers.

Clinique (.000), Gatineau (.007), Johnson and Johnson (.026) and L'Oreal (.007) brands were rated as significantly different by the Boomers and the Millenials. Clinique (4.47 vs. 4.06), Gatineau (4.23 vs. 3.62) and L'Oreal (4.15 vs. 3.81) were rated significantly higher by Boomers, whilst Johnson and Johnson (3.93 vs. 3.83) was rated significantly higher by Millenials. It is interesting to note that the more expensive brands were rated higher by Boomers than they were by Xers and Millenials. In the list of top five brands used by each generation, Johnson and Johnson featured in both Xers and Millenials top five brands used, but did not appear in the Boomers top five brands used list. Thus this indicates that because Generation X and Y perceived Johnson as Johnson to be a better moisturiser they use it more. There were no significant differences between Generation X and Generation Y in terms of their ratings of the various brands on the *moisturising ability* attribute.

7.4.5.5 Makes skin feel smooth & soft

Figure 7.12 Perception of the Makes skin feel smooth & soft attribute by respondents

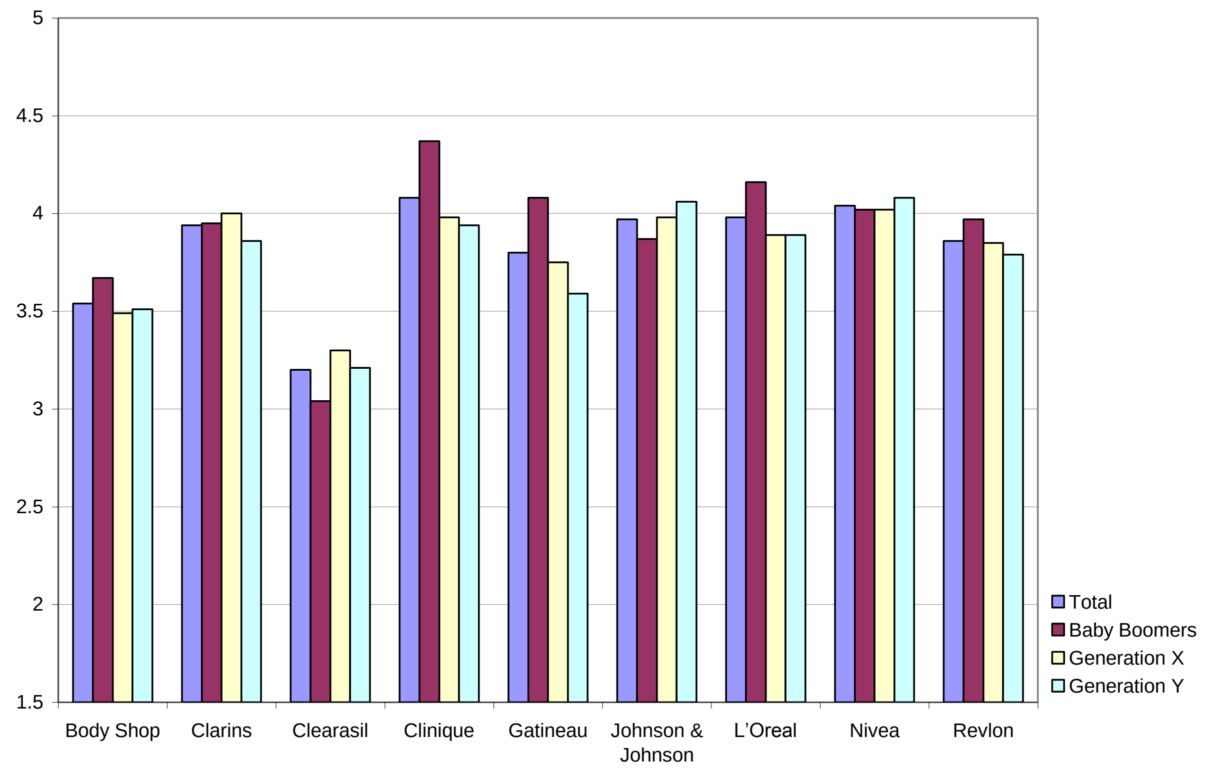


Table 7.18 Perception of the Makes skin feel smooth & soft attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.54	8	3.67	8	3.49	8	3.51	8
Clarins	3.94	5	3.95	6	4.00	2	3.86	5
Clearasil	3.20	9	3.04	9	3.30	9	3.21	9
Clinique	4.08	1	4.37	1	3.98	3	3.94	3
Gatineau	3.80	7	4.08	3	3.75	7	3.59	7
Johnson & Johnson	3.97	4	3.87	7	3.98	3	4.06	2
L'Oreal	3.98	3	4.16	2	3.89	5	3.89	4
Nivea	4.04	2	4.02	4	4.02	1	4.08	1
Revlon	3.86	6	3.97	5	3.85	6	3.79	6

As Table 7.18 indicates Clinique (4.08) was perceived as being most effective and was rated highest overall on the *makes your skin feel soft & smooth* attribute, whilst Clearasil (3.20), scored the lowest overall on this attribute. Baby Boomers responses were the same as they rated Clinique highest and Clearasil lowest on this attribute. Similarly both Generation X and Generation Y perceived Clearasil to be the least effective in terms of the *makes your skin feel soft & smooth* attribute. It should be noted that Clearasil scored lowest on this attribute and was the only brand with a mean score of less than 3.5. However when it came to the brand they rated highest on this attribute their perceptions differed from those of Baby Boomers, with both Generation X and Y rating Nivea highest in terms of the *makes your skin soft and smooth* attribute. Furthermore, it's interesting to note that whilst Gatineau was rated in the top 3 by Baby Boomers, it appeared in the lowest 3 based on the perception of Generation X and Generation Y respondents. Similarly Johnson and Johnson appeared in the worst three brands according to Baby Boomers, whilst it was perceived to be in the top three by Generation Y respondents, thus indicating that rankings of brands on this attribute based on various generations responses varied considerably.

In order to test whether the differences were significant between generations the Kruskal-Wallis test was run.
Ho: There is no significant difference in Brand Perception (on the *Makes Skin feel smooth and soft* Attribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Makes Skin feel smooth and soft* Attribute) by the different generations.

The results of the significance test can be found in Appendix 9, section 9.7. The Ho hypothesis was rejected for the Clinique (.003), Gatineau (.047) and L'Oreal (.031) brands. The Mann-Whitney U tests showed that for Clinique (.005) and L'Oreal (.040) there was a significant difference between Boomers and Xers. Baby Boomers rated both Clinique (4.37 vs. 3.98) and L'Oreal (4.16 vs. 3.89) as significantly higher i.e. better at making skin feel smooth and soft. Boomers and Millenials rated Clinique (.001), Gatineau (.015) and L'Oreal (.012) as significantly different, with Boomers rating Clinique (4.37 vs. 3.94) Gatineau (4.08 vs. 3.59) and L'Oreal (4.16 vs. 3.89) as significantly higher or more effective in making skin smooth and soft. L'Oreal is a brand which was used by a higher percentage of Boomers and it was perceived by Boomers to be one of the top 3 brands. This perception may be a reason why Boomers rated L'Oreal as significantly higher as compared to the other two generations, which aligns with positioning theory which states that perceptions determine behaviour i.e. Boomers perception of the efficacy of the brand influences their use of it. Results showed that there were no significant differences between the brand ratings on the *makes skin feel smooth and soft* attribute between Generation X and Millenials.

7.4.5.6 Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc

Figure 7.13 Perception of the Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc attribute by respondents

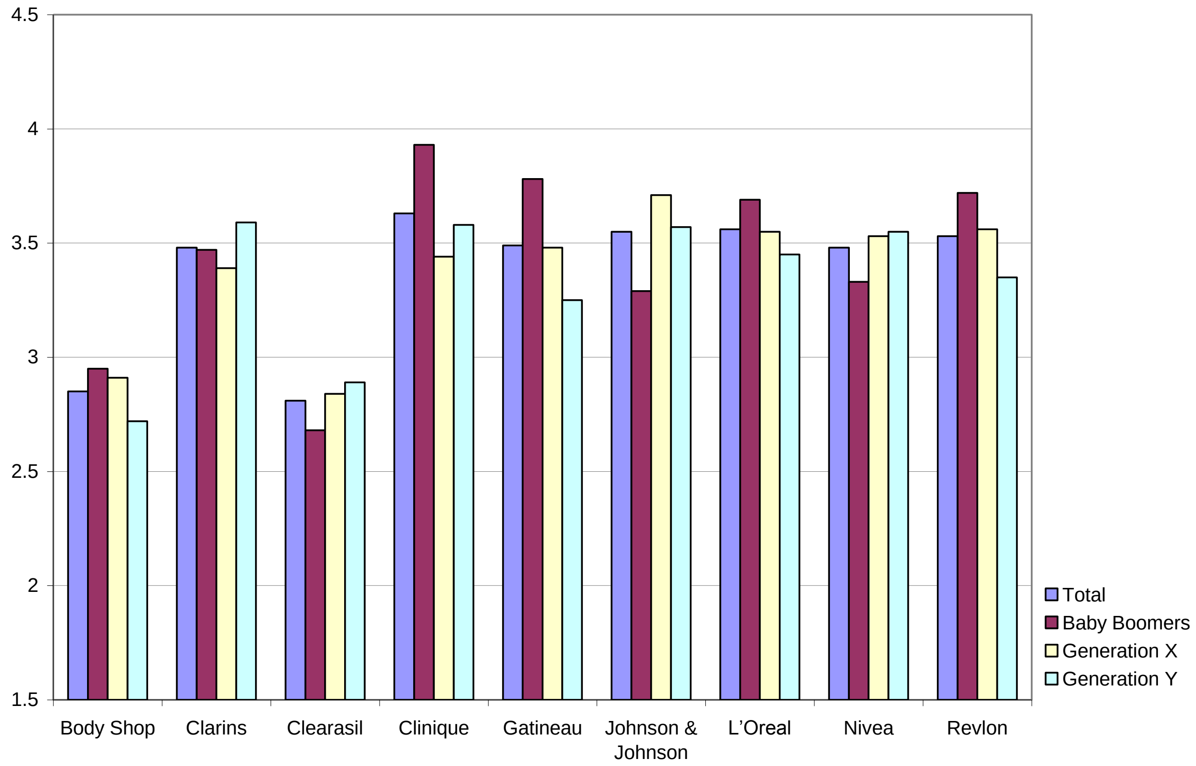


Table 7.19 Perception of the Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	2.85	8	2.95	8	2.91	8	2.72	9
Clarins	3.48	6	3.47	5	3.39	7	3.59	1
Clearasil	2.81	9	2.68	9	2.84	9	2.89	8
Clinique	3.63	1	3.93	1	3.44	6	3.58	2
Gatineau	3.49	7	3.78	2	3.48	5	3.25	7
Johnson & Johnson	3.55	3	3.29	7	3.71	1	3.57	3
L'Oreal	3.56	2	3.69	4	3.55	3	3.45	5
Nivea	3.48	5	3.33	6	3.53	4	3.55	4
Revlon	3.53	4	3.72	3	3.56	2	3.35	6

Table 7.19 indicates that Johnson and Johnson in terms of overall ratings was perceived to be the highest scoring brand on the *multi-purpose* attribute, whilst Clearasil was rated lowest overall on this attribute. When comparing mean scores across the generations, all generations had different perceptions of which brand they rated highest on the *multi-purpose* attribute, with Baby Boomers indicating Clinique (3.93), Xers Johnson and Johnson (3.71) and Yers rating Clarins (3.59) highest. Both the Baby Boomers and Generation Xers perceived Clearasil to score the worst on the *multi-purpose* attribute, whilst Yers indicated that the Body Shop rated lowest on this attribute. With the exception of Clearasil and the Body Shop all brands had mean scores of more than 3 but less than 4, thus overall, consumers didn't perceive brands to fair well on the multi-purpose attribute. A possible reason for this could be that since the multi-purpose products are quiet new consumers are not confident that they work. Some brands such as Clarins, Johnson and Johnson and Gatineau feature in both the top three and the worst three lists of the generations indicating that the rankings vary considerably between generations.

Significance was tested for using the Kruskal-Wallis test.
Ho: There is no significant difference in Brand Perception (on the *Multi-purpose* Attribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Multi-purpose* Attribute) by the different generations.

The results which are available in Appendix 9, section 9.7 show that Clinique (.004), Gatineau (.025), and Johnson and Johnson (.016) were the three brands where the Ho hypothesis was rejected, indicating that a significant difference occurred in the ratings (on the *Multi-purpose* attribute) between the generations. The Mann-Whitney U tests showed that for Clinique (.001 and .020) and Johnson and Johnson (.004 and .044) there were significant differences amongst the Boomers and Generation Xers and between Boomers and Millenials. Boomers rated Clinique significantly higher (3.93) than both Xers (3.44) and Millenials (3.58). Thus they perceived these products to be better on the multi-purpose attribute. Since Boomers rated Clinique higher on this attribute and a larger percentage of Boomers used and rated Clinique in the list of top five brands it appears that Boomers act on their perceptions. Johnson and Johnson was rated significantly lower by Boomers (3.29) when compared to both Xers (3.71) and Yers (3.57). Johnson and Johnson appeared in the top five brands used by both Xers and Yers and as a result of this, they may be more familiar with the brand and the fact that Johnson and Johnson offers numerous 3-in-1 products.

Gatineau (.009) was significantly different as rated by Baby Boomers and Millenials, with Boomers (3.78) rating Gatineau as significantly higher than Millenials (3.25). Since Gatineau is a fairly expensive product and Millenials may have less disposable income, the reason for Boomer rating Gatineau significantly higher may be because few Millenials are familiar with the product. Generation X and Generation Y's perceptions of brands appear to be similar and results found that there were no significant differences amongst these generations on the *multi-purpose* attribute.

7.4.5.7 Widely Available

Figure 7.14 Perception of the Widely Available attribute by respondents

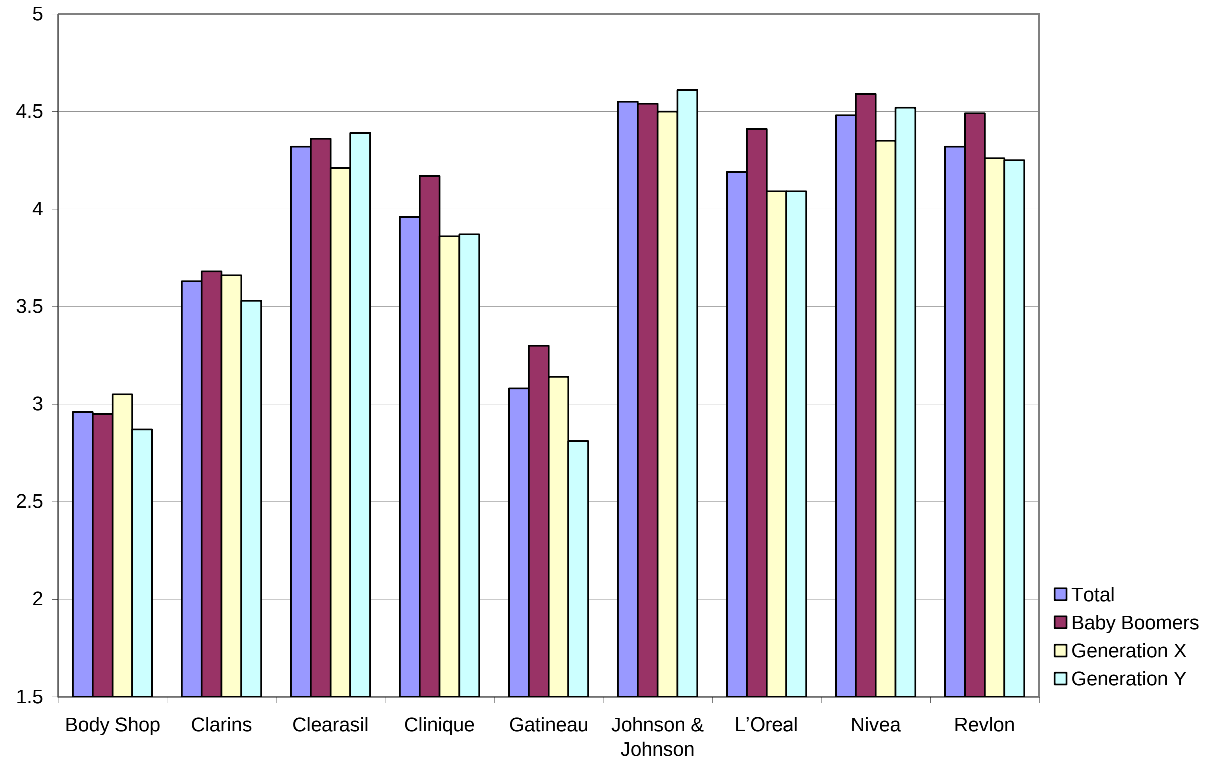


Table 7.20 Perception of the Widely Available attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	2.96	9	2.95	9	3.05	9	2.87	8
Clarins	3.63	7	3.68	7	3.66	7	3.53	7
Clearasil	4.32	4	4.36	5	4.21	4	4.39	3
Clinique	3.96	6	4.17	6	3.86	6	3.87	6
Gatineau	3.08	8	3.30	8	3.14	8	2.81	9
Johnson & Johnson	4.55	1	4.54	2	4.50	1	4.61	1
L'Oreal	4.19	5	4.41	4	4.09	5	4.09	5
Nivea	4.48	2	4.59	1	4.35	2	4.52	2
Revlon	4.32	3	4.49	3	4.26	3	4.25	4

Table 7.20 shows that whilst Johnson and Johnson scored highest on the *widely available* attribute, overall and by Generation X and Generation Y respondents, Baby Boomers rated Nivea highest on the *widely available* attribute. Body Shop scored lowest on the *widely available* attribute as rated overall and by Baby Boomers and Generation X. Generation Y perceived Gatineau as being least available. With the exception of the Body Shop and Gatineau all brands had a mean score of more than 3.5. These results show that although some similarities occurred in the rank order of the generations under study generally perceptions varied.

In order to determine if the differences were significant the Kruskal-Wallis test was applied.

Ho: There is no significant difference in Brand Perception (on the *Widely Available* Attribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Widely Available* Attribute) by the different generations.

Based on the Kruskal-Wallis tests, available in Appendix 9, section 9.7, Clinique (.035), Gatineau (.035), and L'Oreal (.032) differed significantly. The Mann-Whitney U tests showed that for Clinique (.015 and .38) and L'Oreal (.025 and .018) the significant difference occurred between Boomers and Generation X as well as Boomers and Generation Y. Clinique was significantly different when comparing Baby Boomers (4.17) and Generation X (3.86) respondents, with Boomers rating Clinique as significantly higher. Baby Boomers rated L'Oreal (4.41 vs. 4.09) as significantly higher than Generation Xers did, thus they perceived them to be more widely available. Furthermore Gatineau (.013) was significantly different between Boomers and Generation Y. When comparing Baby Boomers and Millenials, Boomers rated Clinique (4.17 vs. 3.87), Gatineau (3.30 vs. 2.81) and L'Oreal (4.41 vs. 4.09) as significantly higher or more widely available. A possible reason for this may be due to the fact that because these consumers are likely to have more disposable income their shopping habits, relating specifically to where they shop differs from Xers and Millenials, making these products seem more widely available. There were no significant differences regarding brand perception on the *widely available* attribute between Xers and Yers.

7.4.5.8 Contains SPF

Figure 7.15 Perception of the Contains SPF attribute by respondents

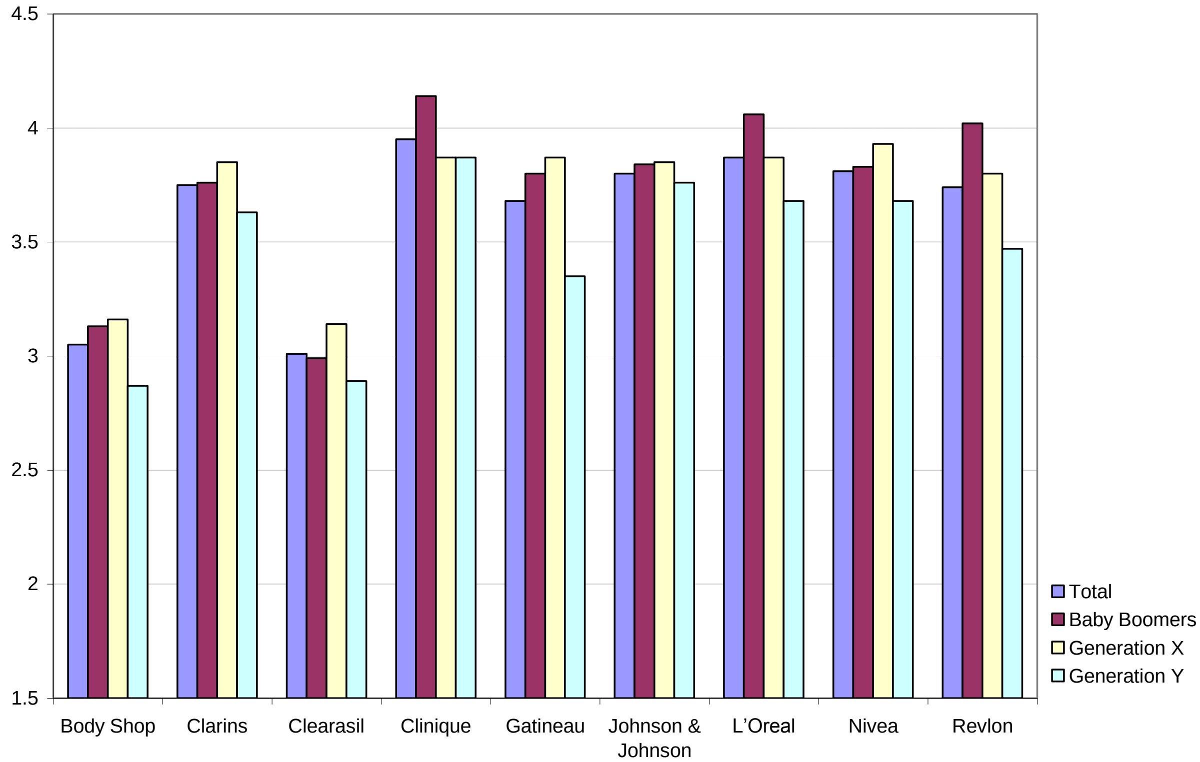


Table 7.21 Perception of the Contains SPF attribute by respondents

	Total		**Baby Boomers**		**Generation X**		**Generation Y**	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.05	8	3.13	8	3.16	8	2.87	9
Clarins	3.75	6	3.76	7	3.85	5	3.63	5
Clearasil	3.01	9	2.99	9	3.14	9	2.89	8
Clinique	3.95	1	4.14	2	3.87	2	3.87	1
Gatineau	3.68	7	3.80	5	3.87	2	3.35	7
Johnson & Johnson	3.80	4	3.80	5	3.84	6	3.76	2
L'Oreal	3.87	2	4.06	1	3.87	4	3.68	3
Nivea	3.81	3	3.83	4	3.93	1	3.68	3
Revlon	3.74	5	4.02	3	3.80	7	3.47	6

Overall, in terms of the *contains SPF* attribute Clinique took the top position, with a mean score of 3.95, whilst Clearasil had the lowest rating, with a mean score of 3.01. Baby boomers perceived L'Oreal to be the best in terms of the *contains SPF* attribute, whilst Generation X indicated that they perceived Nivea to score highest on this attribute, with Generation Y rating Clinique highest. Overall and as perceived by Generation Y respondents, Body Shop was rated lowest in terms of the *contains SPF* attribute. Baby Boomers and Generation X respondents indicated that they were of the perception that Clearasil rated worst on this attribute. Whilst Clearasil had mean scores of less than 3, all other brands had mean scores between 3 and 4.

Significance testing was performed using the Kruskal-Wallis test.
Ho: There is no significant difference in Brand Perception (on the *Contains SPF* Attribute) by the different generations.
H1: There is a significant difference in Brand Perception (on the *Contains SPF* Attribute) by the different generations.

For Clinique (.049), Gatineau (.008), L'Oreal (.007) and Revlon (.000) there were significant differences between the generations (refer to Appendix 9, section 9.7 for details). Boomers and Xers rating of Clinique (.048) differed significantly, with Boomers rating Clinique (4.14 vs. 3.87) significantly higher on the *contains SPF* attribute than Xers did. Between Boomers and Millenials there were significant differences on the *contains SPF* attribute for Clinique (.020), Gatineau (.019), L'Oreal (.002) and Revlon (.000). Boomers rated all of the four brands significantly higher on the *contains SPF* attribute than Millenials did. The mean score of each of the four brands as rated by Boomers and Millenials were 4.14 and 3.87 for Clinique, 3.80 and 3.35 for Gatineau, 4.06 and 3.68 for L'Oreal and 4.02 vs. 3.47 for Revlon. The fact that Boomers rated the *contains SPF* attribute as more important may be aligned with the realisation that the sun is the main driver in premature skin aging (Meisel, 2008: Para 22). As a result these consumers may take more notice of the SPF content and thus tended to rate the brands higher on the SPF content than the Generation Xers and Millenials. With the exception of L'Oreal all other brands which were rated significantly higher by Boomers contained SPF or a UV filter. Furthermore it has been observed that moisturisers developed for older skin contain a higher SPF than those developed for younger skin, which may be why Boomers rated these brands higher than the other two generations. Lastly there was a significant difference between Xers and Yers for Gatineau (.003) and Revlon (.010), however detailed analysis is beyond the scope of this research.

7.4.5.9 Contains Natural Ingredients

Figure 7.16 Perception of the Contains Natural Ingredients attribute by respondents

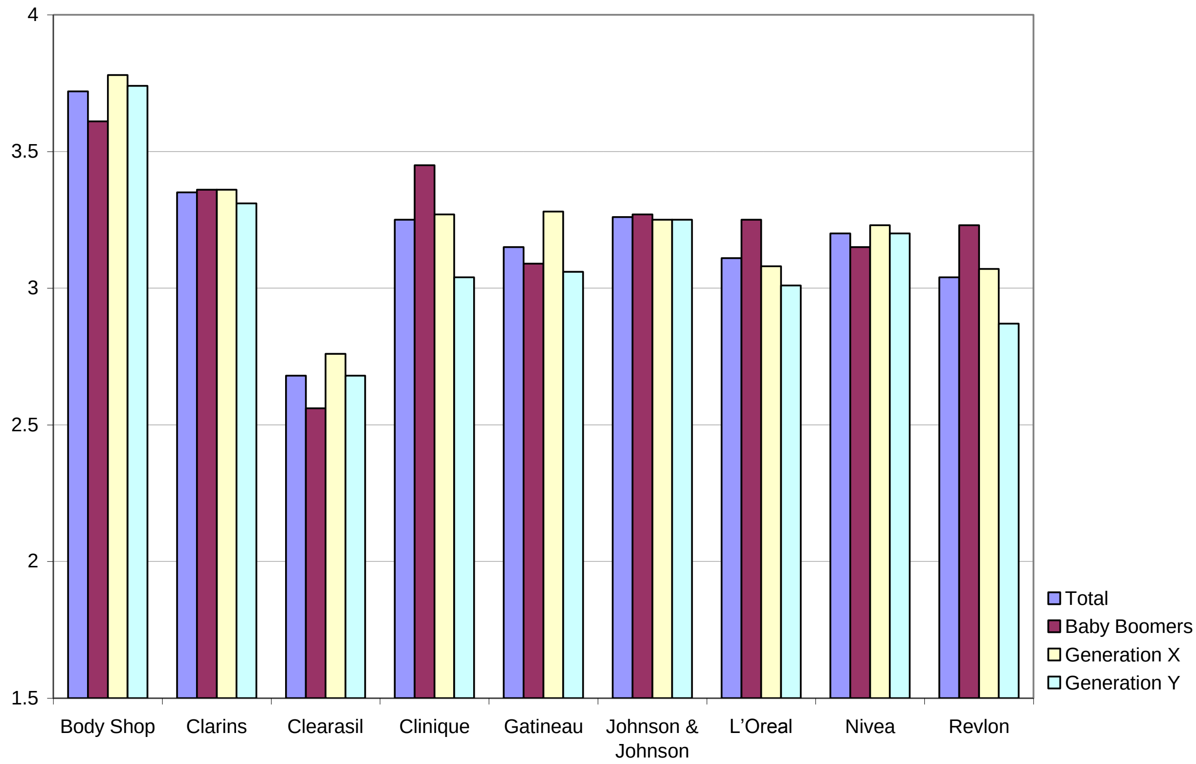


Table 7.22 Perception of the Contains Natural Ingredients attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.72	1	3.61	1	3.78	1	3.74	1
Clarins	3.35	2	3.36	3	3.36	2	3.31	2
Clearasil	2.68	9	2.56	9	2.76	9	2.68	8
Clinique	3.25	4	3.45	2	3.27	4	3.04	6
Gatineau	3.15	6	3.09	8	3.28	3	3.06	5
Johnson & Johnson	3.26	3	3.27	4	3.25	5	3.25	3
L'Oreal	3.11	7	3.25	5	3.08	7	3.01	7
Nivea	3.20	5	3.15	7	3.23	6	3.20	4
Revlon	3.04	8	3.23	6	3.07	8	2.87	9

As can be seen from the Table 7.22 Body Shop took 1st place on the attribute *contains natural ingredients* based on all responses. This was expected as the Body Shop brand stresses the fact that their products are natural in all their communications. Since their positioning seems to be one which offers customers a shopping experience with excellent service, combined with a range of good quality, naturally inspired products (Unknown, 2007c:10), one can conclude that consumers are aware of their positioning. Furthermore, it was also the only brand with a mean score above 3.5, thus it was the only brand which was rated above average on the *contains natural ingredients* attribute. On the *contains natural ingredients* attribute, Clearasil had the lowest mean scores overall and as perceived by Baby Boomers and Generation Xers. Generation Yers perceived Revlon as the brand scoring lowest on this attribute. Whilst the top three results were similar based on the responses of the various generations, the bottom three results indicated differences in opinion across the generations.

The Kruskal Wallis test was run in order to test if there were any significant differences and no significant differences were found, thus, indicating that the generations perceptions of the attribute *contains natural ingredients* for each brand were not significantly different.

7.4.5.10 Contains anti-aging properties

Figure 7.17 Perception of the contains anti-aging properties attribute by respondents

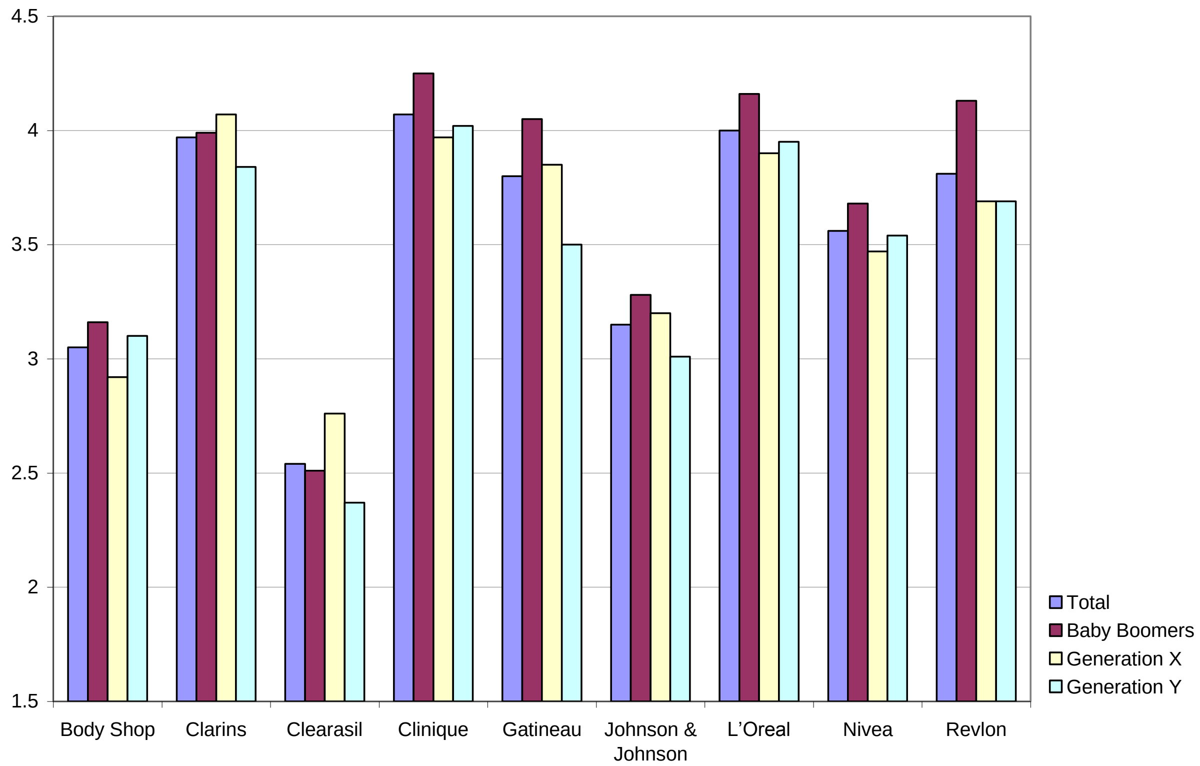


Table 7.23 Perception of the contains anti-aging properties attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.05	8	3.16	8	2.92	8	3.10	7
Clarins	3.97	3	3.99	5	4.07	1	3.84	3
Clearasil	2.54	9	2.51	9	2.76	9	2.37	9
Clinique	4.07	1	4.25	1	3.97	2	4.02	1
Gatineau	3.80	5	4.05	4	3.85	4	3.50	6
Johnson & Johnson	3.15	7	3.28	7	3.20	7	3.01	8
L'Oreal	4.00	2	4.16	2	3.90	3	3.95	2
Nivea	3.56	6	3.68	6	3.47	6	3.54	5
Revlon	3.81	4	4.13	3	3.69	5	3.69	4

Table 7.23 indicates that in terms of the *contains anti-aging properties* attribute Clinique was rated highest overall and by both the Baby Boomers and the Generation Y respondents. Generation X respondents rated Clarins highest on the *contains anti-aging properties* attribute. Overall and as rated by each generation Clearasil attained the lowest rating on the *contains anti-aging properties* attribute.

All the generations ranked Clinique and L'Oreal in the top three brands on the *contains anti-aging properties* attribute, whilst Clarins appeared in the top 3 list for both Generation X and Generation Y rankings. Clearasil, Body Shop and Johnson and

Johnson appeared in all respondents bottom three lists. Thus, similar perceptions occurred across the generations.

In order to test for significant differences the Kruskal-Wallis test was run.

Ho: There is no significant difference in Brand Perception (on the *Contains anti-aging Properties* Attribute) by the different generations.

H1: There is a significant difference in Brand Perception (on the *Contains anti-aging Properties* Attribute) by the different generations.

The Kruskal Wallis test showed that amongst generations there were significant differences for the following brands Clearasil (.042), Clinique (.050), Gatineau (.048) and Revlon (.027). Baby Boomers and Generation X respondents rated Revlon (.013) as significantly different, with Boomers rating Revlon (4.13 vs. 3.69) as significantly higher. Thus, Revlon was perceived by Baby Boomers to score better in terms of containing anti-aging properties than it was by Xers. Boomers and Generation Y rankings for Clinique (.015), Gatineau (.016) and Revlon (.022) were significantly different. Boomers rated all three brands as significantly higher, mean scores for Clinique were 4.25 and 4.02, for Gatineau mean scores were 4.05 and 3.50 and for Revlon the mean scores were 4.13 and 3.69. Thus, in general when comparing Boomers to the other two generations, Boomers perception of the brands containing anti-aging attributes was significantly higher. This may be due to the fact that Baby Boomers are more likely to look for anti-aging properties in brands than the other two generations. Generation X and Generation Y respondents varied significantly on their perceptions of Clearasil (.011) based on *contains anti-aging properties* attribute, with Xers (2.76) rating Clearasil significantly higher than Millenials (2.37), however this is beyond the scope of the research.

7.4.5.11 Removes Impurities

Figure 7.18 Perception of the Removes Impurities attribute by respondents

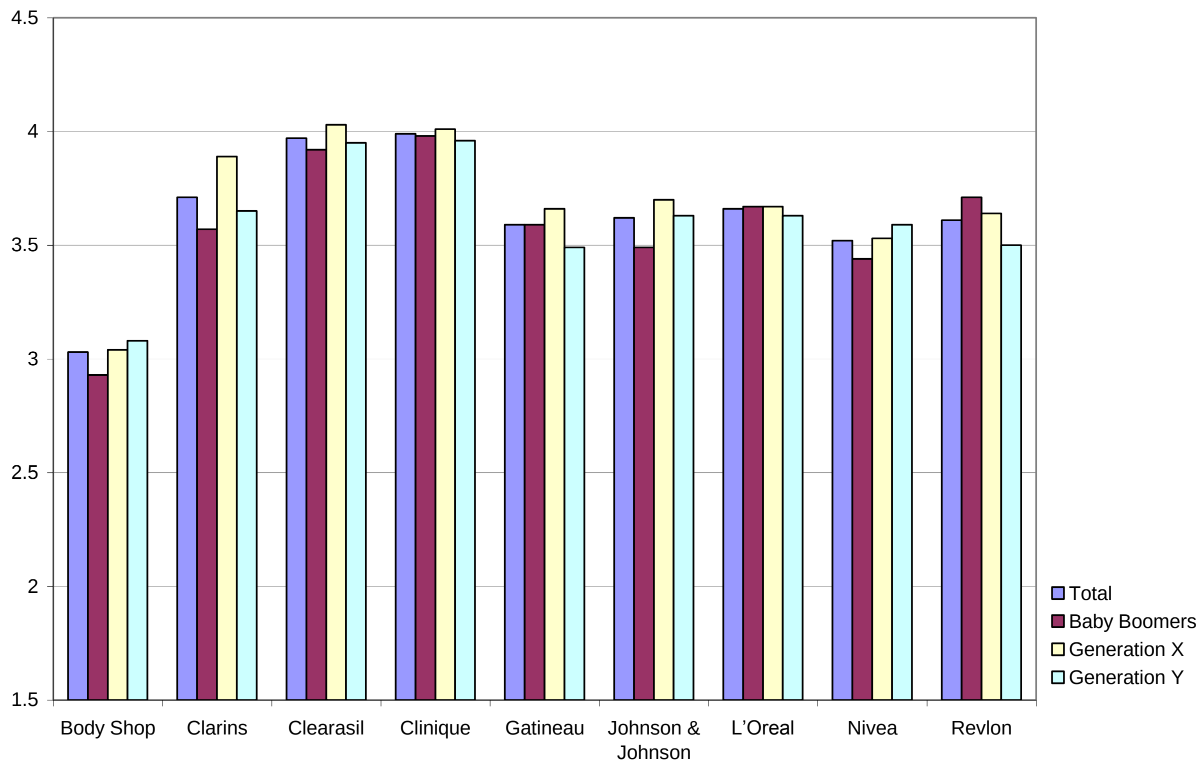


Table 7.24 Perception of the Removes Impurities attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.03	9	2.93	9	3.04	9	3.08	9
Clarins	3.71	3	3.57	6	3.89	3	3.65	3
Clearasil	3.97	2	3.92	2	4.03	1	3.95	2
Clinique	3.99	1	3.98	1	4.01	2	3.96	1
Gatineau	3.59	7	3.59	5	3.66	6	3.49	7
Johnson & Johnson	3.62	5	3.49	7	3.70	4	3.63	4
L'Oreal	3.66	4	3.67	4	3.67	5	3.63	4
Nivea	3.52	8	3.44	8	3.53	8	3.59	6
Revlon	3.61	6	3.71	3	3.64	7	3.50	8

Table 7.24 indicates that on the *removes impurities* attribute Clinique was rated highest based on overall responses, similarly Baby Boomers and Generation Yers rated Clinique highest on this attribute, whilst Generation X respondents indicated they perceived Clearasil as the best on this attribute. The Body Shop, as rated overall and by each of the generations was rated as performing poorest on the *removes impurities* attribute. It's interesting to note that mean scores were all between 3 and 4 – indicating that in general, consumers perceived that facial care products would help to remove impurities.

The Kruskal-Wallis test was run to determine if any significant differences between generations occurred. The test showed that in terms of the *Removes Impurities* attribute no significant differences occurred. Thus, generations perceptions and rating of each brand on the *Removes Impurities* attribute were not significantly different.

7.4.5.12 Lasts all day (no need to reapply)

Figure 7.19 Perception of the Lasts all day attribute by respondents

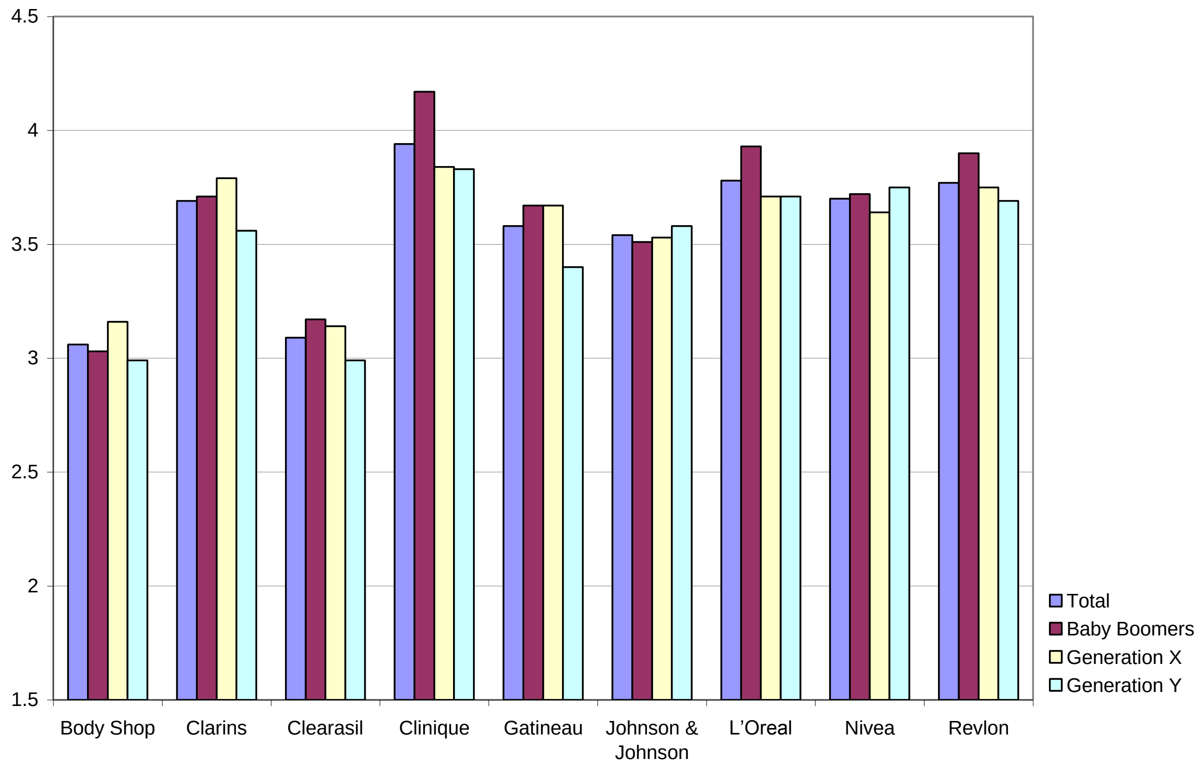


Table 7.25 Perception of the Lasts all day attribute by respondents

	Total		Baby Boomers		Generation X		Generation Y	
Brand	Mean	Ranking	Mean	Ranking	Mean	Ranking	Mean	Ranking
Body Shop	3.06	9	3.03	9	3.16	8	2.99	8
Clarins	3.69	5	3.71	5	3.79	2	3.56	6
Clearasil	3.09	8	3.17	8	3.14	9	2.99	8
Clinique	3.94	1	4.17	1	3.84	1	3.83	1
Gatineau	3.58	6	3.67	6	3.67	5	3.40	7
Johnson & Johnson	3.54	7	3.51	7	3.53	7	3.58	5
L'Oreal	3.78	2	3.93	2	3.71	4	3.71	3
Nivea	3.70	4	3.72	4	3.64	6	3.75	2
Revlon	3.77	3	3.90	3	3.75	3	3.69	4

On the *lasts all day* attribute, Clarins took the 1st position and was perceived as scoring highest on this attribute, overall and by each of the generations. Body Shop was rated worst on this attribute overall and by Baby Boomers and Millenials, whilst Generation Xers rated Clearasil as the worst with regards to the *lasts all day* attribute. It's interesting to note that all mean scores were between 3 and 4.

Significant testing, using the Kruskal-Wallis test was done, to determine for which brands the generations perception's of the *Lasts all day (no need to reapply)* attribute were significantly different.

Ho: There is no significant difference in Brand Perception (on the *Lasts all day (no need to reapply)* Attribute) by the different generations.

H1: There is a significant difference in Brand Perception (on the *Lasts all day (no need to reapply)* Attribute) by the different generations.

The Kruskal-Wallis test (refer to Appendix 9, section 9.7) showed that there was only a significant difference for Clinique (.029) between generations. The Mann-Whitney U test indicated that the difference was significant between Boomers and Xers (.029) as well as Boomers and Millenials (.013). Boomers rated Clinique as significantly higher on the *lasts all day (no need to reapply)* attribute, than Xers and Millenials, with mean ratings of 4.17, 3.84 and 3.83 respectively. Thus Boomers perceived Clinique to be more effective on this attribute than the other two generations did. Since a higher percentage of Boomers used this product and considered it in the top five this may have attributed to the significantly higher mean score. Furthermore Boomers rated this attribute as more important when choosing facial care products. The fact that Clinique was rated significantly higher on the *lasts all day (no need to reapply)* attribute may explain why Clinique was a popular brand choice amongst Boomers.

To summarise, when it comes to brand perceptions it seems there are more differences amongst Boomers and the other two generations than there are between Generation X and Generation Y. Looking at significant differences, it's clear that the most differences occurred between Boomers and Generation Y.

The next section will look at the main brand associations of each of the brands per generation. This is useful information for Objective 2: To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women.

Table 7.26 Perception of The Body Shop on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	**Mean**	**Ranking**	**Mean**	**Ranking**	**Mean**	**Ranking**
Low Price	2.46	12	2.84	12	2.61	12
Mild Fragrance	3.08	7	3.18	5	2.90	8
Quality Packaging	3.61	2	3.82	1	3.83	1
Moisturising Ability	3.54	4	3.41	4	3.51	3
Makes skin feel smooth & soft	3.67	1	3.49	3	3.51	3
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	2.95	9	2.91	11	2.72	11
Widely Available	2.95	9	3.05	8	2.87	9
Contains SPF	3.13	6	3.16	6	2.87	9
Contains Natural Ingredients	3.61	2	3.78	2	3.74	2
Contains anti-aging Ingredients	3.16	5	2.92	10	3.10	5
Removes Impurities	2.93	11	3.04	9	3.08	6
Lasts all day (no need to reapply)	3.03	8	3.16	6	2.99	7

Table 7.26 shows which brand associations the various generations had of the Body Shop. Whilst the *makes your skin soft and smooth* attribute was given the highest rating by Baby Boomers, both Generation X and Y respondents rated the *quality packaging* highest. In their communications the Body Shop indicate that their products are made of natural ingredients, the attribute *contains natural ingredients* was rated 2nd highest by all the generations, thus implying that respondents were aware of the fact that Body Shop products are natural. It may be their USP but isn't the strongest brand association. The *low price* attribute was given the worst rating, with all respondents rating it between 2 and 3, thus they perceived the Body Shop to be poor on the *low price* attribute. This is not aligned with how the brand wants to communicate its products, as they position the brand as producing products which are of high quality at an affordable price (Eyers, 2006 cited in European Cosmetic Market, 2006: Para 21), however this research suggests that while respondents find the products effective in keeping skin smooth and soft they are perceived to be expensive.

Table 7.27 Perception of Clarins on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	**Mean**	**Ranking**	**Mean**	**Ranking**	**Mean**	**Ranking**
Low Price	1.99	12	2.18	12	2.38	12
Mild Fragrance	3.41	10	3.69	8	3.26	11
Quality Packaging	4.30	1	4.33	1	4.18	1
Moisturising Ability	4.24	2	4.04	3	3.87	2
Makes skin feel smooth & soft	3.94	4	4.00	4	3.86	3
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.47	9	3.39	10	3.59	7
Widely Available	3.68	7	3.66	9	3.53	9
Contains SPF	3.76	5	3.85	5	3.63	6
Contains Natural Ingredients	3.36	11	3.36	11	3.31	10
Contains anti-aging Ingredients	3.99	3	4.07	2	3.84	4
Removes Impurities	3.57	8	3.89	6	3.65	5
Lasts all day (no need to reapply)	3.71	6	3.79	7	3.56	8

From Table 7.27 it can be seen that each of the generations rated the *quality packaging* attribute highest for Clarins, thus the brand was associated with having excellent packaging. Clarins targets the middle to high end of the market, and aims to sell products which are of a high quality, high efficacy but still affordable to the market (Lindsell Train Limited, 2006:2). The fact that they want to portray an image of high quality products means developing marketing cues which communicate this. Since each of the generations associated them with quality packaging means that their communications in terms of packaging are aligned with their positioning. It is also interesting to note that Clarins scored fairly high scores overall e.g. for *moisturising ability, makes skin smooth and soft, contains anti-aging and contains SPF.* This indicates that the overall perception is that Clarins is a good, high quality product. However, Clarins was also considered to be expensive and was rated poorly on the *low price* attribute. However this may not be negative as Clarins may be viewed as a brand that is expensive in comparison to other brands, but in terms of the quality provided it's affordable. Clarins is a natural product and demonstrates a strong preference for natural vegetal complexes (Clarins, 2010b: Para 1&2), however based on the results consumers do not seem to be aware of this fact, as they have rated Clarins poorly on the *contains natural ingredients* attribute.

Table 7.28 Perception of Clearasil on Attributes as rated per generation

	Baby Boomers		**Generation X**		**Generation Y**	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low Price	3.76	3	3.70	3	3.49	4
Mild Fragrance	2.91	9	3.30	5	3.24	5
Quality Packaging	3.36	4	3.31	4	3.66	3
Moisturising Ability	3.03	7	3.19	7	3.11	7
Makes skin feel smooth & soft	3.04	5	3.30	5	3.21	6
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	2.68	10	2.84	10	2.89	9
Widely Available	4.36	1	4.21	1	4.39	1
Contains SPF	2.99	8	3.14	9	2.89	9
Contains Natural Ingredients	2.56	11	2.76	11	2.68	11
Contains anti-aging Ingredients	2.51	12	2.76	11	2.37	12
Removes Impurities	3.92	2	4.03	2	3.95	2
Lasts all day (no need to reapply)	3.17	6	3.14	8	2.99	8

The brand associations for Clearasil i.e. attributes which were rated highest by each generation, were the *widely available* and *removes impurities* attributes. Clearasil's positioning stresses that Clearasil specifically targets pimples and blemishes (Reckitt Benckiser Inc., 2008a: Para 1), i.e. removes impurities, thus it seems that consumer perception is aligned with their positioning. Clearasil is available in most supermarkets and pharmacies and therefore it's not surprising that Clearasil was rated highly on the *widely available* attribute. Another attribute which Clearasil performed well on is *low price*, since Clearasil products are priced between R 38 and R 65, this is anticipated. There may be an opportunity for Clearasil to take advantage of these perceptions. The *contains natural ingredients* and the *contains anti-aging ingredients* were rated poorly. Since Clearasil does not have an anti-aging range nor stresses that it contains natural ingredients. This is expected.

Table 7.29 Perception of Clinique on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low Price	2.25	12	2.31	12	2.34	12
Mild Fragrance	3.83	10	3.75	9	3.30	10
Quality Packaging	4.43	2	4.35	1	4.23	1
Moisturising Ability	4.47	1	3.98	4	4.06	2
Makes skin feel smooth & soft	4.37	3	3.98	4	3.94	5
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.93	9	3.44	10	3.58	9
Widely Available	4.17	5	3.86	6	3.87	6
Contains SPF	4.14	7	3.87	7	3.87	6
Contains Natural Ingredients	3.45	11	3.27	11	3.04	11
Contains anti-aging Ingredients	4.25	4	3.97	3	4.02	3
Removes Impurities	3.98	8	4.01	2	3.96	4
Lasts all day (no need to reapply)	4.17	5	3.84	8	3.83	8

Baby Boomers strongest association with Clinique was to the brands *moisturising ability*. Clinique's last step in the 3-Step approach which they communicate, is moisturise (Clinique Laboratories llc., 2009m: Para 5). In addition, their moisturisers are called 'Dramatically Different Moisturising Lotion or Gel' and thus seem to emphasise the importance of moisturising (Clinique Laboratories llc., 2009m: Para 5). It seems that Boomers especially take note of this. This is not surprising since Boomers considered this attribute to be one of the most important when choosing facial care. Thus it seems from the research that since their strongest association to the brand is in terms of *moisturising ability,* Clinique is effectively communicating with Boomers. Furthermore Clinique has fairly high scores for *makes skin smooth and soft, contains anti-aging* and *lasts all* day as rated by Boomers, which may indicate that overall Boomers perceive Clinique as a high quality product. Generation X and Y respondents associated Clinique with *quality packaging.* This may indicate that packaging is a cue which is used by both generations to judge the quality of a brand. Clinique's price was perceived as being expensive and it rated poorly on the *low price* attribute by each of the generations. This may be as a result of Clinique's positioning; Clinique is positioned as rather expensive with perfect quality products (SYL, 2005: Para 2). Furthermore it needs to be mentioned that the 3 generations seem to have very different view of the Clinique brand.

Table 7.30 Perception of Gatineau on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	**Mean**	**Ranking**	**Mean**	**Ranking**	**Mean**	**Ranking**
Low Price	2.22	12	2.21	12	2.10	12
Mild Fragrance	3.58	9	3.48	8	3.13	9
Quality Packaging	4.27	1	4.19	1	3.86	1
Moisturising Ability	4.23	2	3.83	4	3.62	2
Makes skin feel smooth & soft	4.08	3	3.75	5	3.59	3
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.78	6	3.48	8	3.25	8
Widely Available	3.30	10	3.14	10	2.81	11
Contains SPF	3.80	5	3.87	2	3.35	7
Contains Natural Ingredients	3.09	11	3.28	11	3.06	10
Contains anti-aging Ingredients	4.05	4	3.85	3	3.50	4
Removes Impurities	3.59	8	3.66	7	3.49	5
Lasts all day (no need to reapply)	3.67	7	3.67	6	3.40	6

The brand association which stood out for Gatineau, as rated by each of the generations was *quality packaging*, whilst it received a poor rating on the *low price* attribute and was perceived as expensive. Gatineau aims to be at the forefront of modernity, which is communicated through attractive and convenient packaging designs (Gatineau Paris, 2010p: Para 8), and the fact that the strongest brand association is in term of *quality packaging* indicates they are effectively communicating with the respondents. It was also rated highly in terms of *moisturising ability, makes skin smooth and soft* and *contains anti-aging ingredients.* Thus overall, Gatineau is perceived as a quality brand. Since Gatineau is positioned as 'THE' expert in cutaneous aging (Gatineau Paris, 2010a: Para 5), one would expect them to rate highly on the *contains anti-aging attribute*. In addition, the following brands, Clinique, L'Oreal, Clarins and Revlon were rated higher than Gatineau on this attribute. Considering Gatineau's positioning these results are concerning, as one would expect the strongest brand association to be in terms of the *contains anti-aging properties* and one would expect consumers to perceive Gatineau as being better on this attribute. Hence there seems to be room for improvement regarding communicating their positioning. The fact that they are rated poorly on the low price attribute is aligned with their positioning strategy as in order to be at the forefront of innovation and professionalism one would anticipate these products to be expensive and exclusive.

Table 7.31 Perception of Johnson & Johnson on Attributes as rated per generation

	Baby Bboomers		**Generation X**		**Generation Y**	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low Price	3.99	2	3.91	4	3.84	4
Mild Fragrance	3.63	6	3.89	5	3.79	5
Quality Packaging	3.60	7	3.78	7	3.79	5
Moisturising Ability	3.65	5	3.92	3	3.93	3
Makes skin feel smooth & soft	3.87	3	3.98	2	4.06	2
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.29	10	3.71	8	3.57	10
Widely Available	4.54	1	4.50	1	4.61	1
Contains SPF	3.80	4	3.84	6	3.76	7
Contains Natural Ingredients	3.27	12	3.25	11	3.25	11
Contains anti-aging Ingredients	3.28	11	3.20	12	3.01	12
Removes Impurities	3.49	9	3.70	9	3.63	8
Lasts all day (no need to reapply)	3.51	8	3.53	10	3.58	9

The attribute which stands out for each generation for the Johnson and Johnson brand was that it was perceived as being widely available. The other attribute which stands out and was associated with the Johnson's Brand was the *makes your skin feel soft and smooth.* This may be as a result of their slogan which is 'For softness. For beauty. For life' and may also be because consumers perceive a connection with the Johnson and Johnson baby products. Furthermore they claim to "understand the difference between baby skin and adult skin, and what it takes to keep your skin beautifully baby soft" (Johnson and Johnson Limited, 2010a: Para 1). The two attributes that were rated lowest by the generations were the *contains natural ingredients* and the *contains anti-aging ingredients* attributes. The fact that Johnson and Johnson was rated poorly on the contains anti-aging ingredients could be because many consumers think of the Johnson and Johnson baby products when they think of this brand, and as a result don't perceive it as a brand which also caters for the more mature consumers. At the same time though, none of the facial care products claim to contain anti-aging properties so this result is not surprising. The Johnson's cleansing wipes for example contain natural ingredients such as Vitamin E, moonflower and aloe; however this research shows that Johnson and Johnson scored an average score on this attribute. Since natural ingredients are becoming more important to consumers better communicating this could be an opportunity for Johnson and Johnson.

Table 7.32 Perception of L'Oreal on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low Price	2.94	12	2.93	12	2.82	12
Mild Fragrance	3.82	8	3.55	9	3.42	10
Quality Packaging	4.24	2	4.03	2	4.21	1
Moisturising Ability	4.15	5	3.98	3	3.81	5
Makes skin feel smooth & soft	4.16	4	3.89	5	3.89	4
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.69	9	3.55	9	3.45	9
Widely Available	4.41	1	4.09	1	4.09	2
Contains SPF	4.06	6	3.87	6	3.68	7
Contains Natural Ingredients	3.25	11	3.08	11	3.01	11
Contains anti-aging Ingredients	4.16	3	3.90	4	3.95	3
Removes Impurities	3.67	10	3.67	8	3.63	8
Lasts all day (no need to reapply)	3.93	7	3.71	7	3.71	6

The fact that L'Oreal was *widely available* was the attribute which stood out for Boomers and Xers, whilst Millenials association with the brand related to the *quality packaging* attribute. The *low price* attribute was rated poorly by each of the generations. However, looking at the mean score indicates that whilst L'Oreal wasn't perceived as offering a low price it was rated as average on the *low price* attribute. Furthermore, with the exception of the *low price* and *contains natural ingredients* attributes L'Oreal scores were rated above average on all other attributes thus it seems that L'Oreal's commitment to offering affordable luxury (L'Oreal Paris, 2010a: Para 1) is being effectively communicated.

Table 7.33 Perception of Nivea on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low *Price*	3.91	4	3.65	7	3.49	11
Mild Fragrance	3.78	6	3.68	6	3.58	9
Quality Packaging	3.71	7	3.80	5	4.06	4
Moisturising Ability	4.10	2	3.92	4	4.11	2
Makes skin feel smooth & soft	4.02	3	4.02	2	4.08	3
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.33	11	3.53	9	3.55	8
Widely Available	4.59	1	4.35	1	4.52	1
Contains SPF	3.83	5	3.93	3	3.68	6
Contains Natural Ingredients	3.15	12	3.23	12	3.20	12
Contains anti-aging Ingredients	3.68	9	3.47	11	3.54	10
Removes Impurities	3.44	10	3.53	9	3.59	7
Lasts all day (no need to reapply)	3.72	7	3.64	8	3.75	5

Baby Boomers, Generation Xers and Millenials perceived Nivea as being *widely available* and rated Nivea highest on this attribute. One of the company's aims is to offer the broadest possible distribution (The Times Newspaper Limited, 2008:111), and the fact that the strongest association is in terms of the *widely available* attribute indicates that Nivea is successful in implementing broad distribution. Nivea also generally had high ratings on the *moisturising ability* and the *makes skin feel soft and smooth* attributes. As both of these attributes were important to respondents it appears that Nivea is perceived as a good quality brand. The Nivea brand got the poorest rating on the *contains natural ingredients* attribute by each generation.

Table 7.34 Perception of Revlon on Attributes as rated per generation

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Low Price	3.30	11	3.13	11	3.18	11
Mild Fragrance	3.70	10	3.58	9	3.32	10
Quality Packaging	4.09	3	4.09	2	4.06	2
Moisturising Ability	3.95	6	3.89	3	3.81	3
Makes skin feel smooth & soft	3.97	5	3.85	4	3.79	4
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.72	8	3.56	10	3.35	9
Widely Available	4.49	1	4.26	1	4.25	1
Contains SPF	4.02	4	3.80	5	3.47	8
Contains Natural Ingredients	3.23	12	3.07	12	2.87	12
Contains anti-aging Ingredients	4.13	2	3.69	7	3.69	5
Removes Impurities	3.71	9	3.64	8	3.50	7
Revlon Lasts all day (no need to reapply)	3.90	7	3.75	6	3.69	5

Revlon highest rating by each of the generations was on the *widely available* attribute, thus indicating that the generations perceived the brand to be widely available and easily attainable. Revlon products are sold through mass-market channels (Demetrakakes, 2005: Para 4), which may be the reason attributed to the fact that the strongest association with the Revlon brand is that it is widely available. *Quality packaging* is interesting for this product as it is the 2nd highest score. Thus it seems Revlon is successful in communicating this to consumers, as Demetrakakes (2005:Para 13) states, Revlon strives for an elegant, upscale feel to its packaging". Revlon was rated lowest by each generation on the *contains natural ingredients*. The respondents' perception of whether Revlon contained natural ingredients was an average. The growth in the importance of natural ingredients and the fact the Revlon facial care products do contain natural ingredients could be an area where Revlon needs to focus on.

The above section was useful in order to determine what brand associations were strongest for each brand as perceived by respondents, which was helpful in determining whether respondents' perception of each brand aligns with the brands positioning.

Finally, in order to observe whether brands are perceived differently by women who use facial care products versus those that don't a Mann-Whitney U test was run.

Ho: There is no significant difference in Brand Perception between users and non-users of facial care brands.

H1: There is a significant difference in Brand Perception between users and non-users of facial care brands.

Table 7.35 Significant differences observed between users and non-users of facial care brands

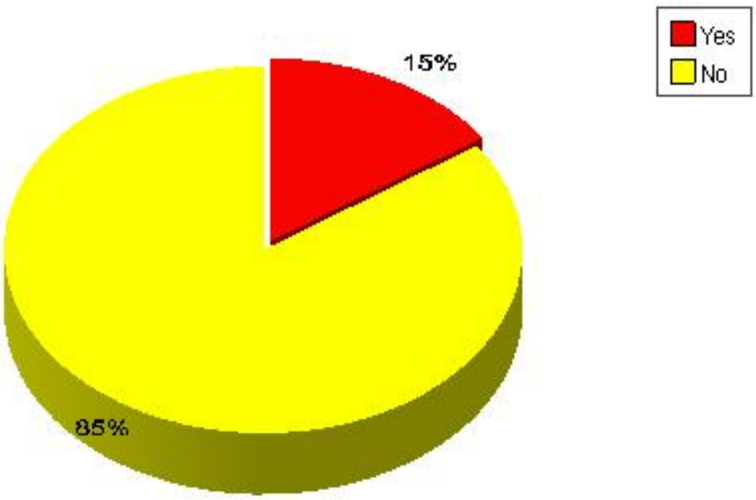
	Significance (Mann-Whitney U Test)
Brand & attribute	**Users versus Non-users**
Clarins: Moisturising Ability	.002
Clarins: Makes Skin Soft & Smooth	.045
Clarins: Multi-purpose	.024
Clarins: Lasts all day (no need to reapply)	.014
Clearasil: Mild Fragrance	.035
Clearasil: Quality Packaging	.002
Gatineau: Quality Packaging	.024
Gatineau: Moisturising Ability	.001
Gatineau: Makes Skin Soft & Smooth	.001
Gatineau: Multi-purpose	.019
Gatineau: Contains SPF	.040
Gatineau: Contains Anti-Aging	.029
Gatineau: Removes Impurities	.030
Gatineau: Lasts all day (no need to reapply)	.003
Johnson & Johnson: Quality Packaging	.000
Johnson & Johnson: Moisturising Ability	.004
Johnson & Johnson: Lasts all day (no need to reapply)	.010
L'Oreal: Low Price	.007
Nivea: Quality Packaging	.043
Nivea: Lasts all day (no need to reapply)	.025
Revlon:	.011

A number of significant differences were found which are depicted in Table 7.35. Thus it appears that brands are perceived differently by users and non-users of facial care brands however due to the small sample of non-users this needs more research.

7.4.6 Question 6: Do you feel marginalised / ignored by the facial care industry? If you answered yes, why?

This question determined if Baby Boomer females feel marginalised by the skin care industry and provided insight into why respondents felt marginalised.

Figure 7.8 Respondents who felt Marginalised



The above graph indicates that the majority (85%) of respondents didn't feel marginalised by the facial care industry.

Table 7.36 Respondents who felt Marginalised according to different Generations

	Total		Baby Boomers		Generation X		Generation Y	
Answer	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**	**Frequency**	**%**
Yes	73	15.4	21	14.2	28	15.7	24	16.2
No	401	84.5	127	85.8	150	84.3	124	83.8

A total of 21 (14.2%) Baby Boomer, 28 (15.7%) Generation X and 24 (16.2%) Generation Y respondents indicated that they felt marginalised by the facial care industry. In terms of marginalisation only a minimal percentage of respondents felt marginalised. Respondents that answered *yes* to the question were asked to elaborate and answer why they felt marginalised.

Table 7.37 Reasons given as to why respondents felt marginalised

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not enough products	2	.4	2.9	2.9
	Misleading Advertising	5	1.0	7.2	10.1
	Not enough products to control of skin problems	1	.2	1.4	11.6
	Products don't work	8	1.7	11.6	23.2
	No products for Indian/ Asian skin	12	2.5	17.4	40.6
	Not enough products for coloured skin	1	.2	1.4	42.0
	Too Expensive	15	3.1	21.7	63.8
	Lack of promotions and information	3	.6	4.3	68.1
	Not enough products for sensitive skin	3	.6	4.3	72.5
	No products last all day	1	.2	1.4	73.9
	Not enough products for dry skin	1	.2	1.4	75.4
	No follow-ups/ communication post buying	4	.8	5.8	81.2
	Not enough products for 60+ age groups	1	.2	1.4	82.6
	No products developed especiallly for the SA Climate	2	.4	2.9	85.5
	No assistance and sales staff to provide advice	2	.4	2.9	88.4
	Not all products are easily accessible	1	.2	1.4	89.9
	Products are damaging	1	.2	1.4	91.3
	Most products contain alcohol	1	.2	1.4	92.8
	Not enough products for black skin	3	.6	4.3	97.1
	No samples available	1	.2	1.4	98.6
	Focus is on anti-aging	1	.2	1.4	100.0
	Total	69	14.3	100.0	
Missing	0	415	85.7		
Total		484	100.0		

Table 7.37 indicates the reasons given by respondents as to why they felt marginalised. The most popular reason given for respondents feeling marginalised was because *they felt products were too expensive* (21.7%). 17.4% of respondents that felt marginalised cited the reason as *not enough products for Indian / Asian skin*. The 3rd most common reason cited by 11.6% of respondents, was *products don't work*.

7.4.7 Question 7: In your opinion are any of the following individuals marginalised or ignored by the facial care industry?

The respondents were given a list of groups and asked to tick those groups that they felt were marginalised. The results are presented in Table 7.36.

Table 7.38 Marginalisation of Groups

	Total			
Groups	**Yes**	**Percentage**	**No**	**Percentage**
Teenagers	59	12.2%	425	87.8%
20-29 age bracket	59	12.2%	425	87.8%
30-39 age bracket	29	6.0%	455	94.0%
40-49 age bracket	26	5.4%	458	94.6%
50-59 age bracket	24	5.0%	460	95.0%
60-69 age bracket	61	12.6%	423	87.4%
70+ age bracket	101	20.9%	383	79.1%
Black Females	59	12.2%	425	87.8%
Coloured Females	72	14.9%	412	85.1%
Indian Females	151	31.2%	333	68.8%
White Females	14	2.9%	470	97.1%
Other	5	1.0%	479	99.0%

Table 7.38 shows the respondents opinion of which groups were marginalised. Since Boomers fall into the 40-49, 50-59 and 60-69 age groups we can conclude that 111 (22.9%) of all the respondents thought Boomers were marginalised. More than half (54%) of this percentage was distributed in the 60-69 age groups which includes mainly individuals from the Silent Generation, thus it appears that in general respondent's did not perceive this generation as being marginalised by the facial care industry. Furthermore, in the opinion of respondents, the group that was most marginalised were Indian Females, as 31% of respondents felt this group was marginalised by the facial care industry. The 70+ age group got the 2nd highest *yes* responses with 21% of respondents being of the opinion that this age bracket was marginalised. The group that got the 3rd highest *yes* responses were Coloured females with 15%.

Table 7.39 Marginalisation of Groups according to different generations

	Baby Boomers		Generation X		Generation Y	
Groups	**yes**	**no**	**yes**	**no**	**yes**	**no**
Teenagers	17	134	25	158	17	133
20-29 age bracket	8	143	17	166	34	116
30-39 age bracket	1	150	18	165	10	140
40-49 age bracket	7	144	10	173	9	141
50-59 age bracket	8	143	10	173	6	144
60-69 age bracket	21	130	20	163	20	130
70+ age bracket	34	117	33	150	34	116
Black Females	9	142	27	156	23	127
Coloured Females	18	133	26	157	28	122
Indian Females	36	115	63	120	52	98
White Females	7	144	6	177	1	149
Other	4	147	1	182	0	150

Table 7.39 shows that roughly 36 (23.8%) of Boomers (who fall into the 40-49, 50-59 and 60-69 age groups) felt their age group was marginalised. Of the Generation X respondents 28 (15.3%) indicated they thought women in the Generation X age group categories (i.e. 30-39 and 40-49 age groups) were marginalised. When looking at the Generation Y age brackets (i.e. teenagers and the 20-29 age bracket), it becomes clear that 51 (34%) Generation Y respondents indicated that they thought their age brackets were marginalised. In the Generation Y focus groups the teenagers specifically voiced that they felt marginalised. These findings in Table 7.38 show that a larger percentage of Generation Y respondents felt the 20-29 age bracket was marginalised, hence there may be an opportunity for marketers to target Generation Y more effectively.

A Kruskal-Wallis significance test was run, which showed that there were significant differences of the generations perceptions of the marginalisation of the 20-29 and 30-39 age groups, and Black ladies. Detailed analysis is beyond the scope of this research.

7.4.8 Question 8: Rate the following marketing media according to how effective they are to you when advertising facial care products. On a scale of 1 – 10 where 1 is totally ineffective and 10 is very effective.

This question was included to investigate whether one method of advertising was preferred and if there were differences regarding the preferred media or most effective media between the generations. The mean scores and ranking of the effectiveness of the various marketing media are presented using a table, followed by the mean scores and rankings of the results based on each generation of respondents. Refer to Appendix 9, section 9.8 for detailed frequencies and means.

Table 7.40 Effectiveness of Marketing Media

Marketing Media	Mean	Ranking
TV Adverts	7.81	1
Endorsed by experts e.g. dermatologist, doctor, beautician	7.24	2
Samples	7.03	3
Word-of-mouth	6.78	4
Store Displays	6.78	4
Print Adverts	6.71	6
Endorsed by celebrities	5.48	7
Sponsorships	4.59	8
Radio Adverts	4.49	9
Websites	3.52	10
Web Campaigns	2.95	11
Blogs	2.81	12

Table 7.40 indicates that the top three most effective methods of media when it comes to advertising facial care products were believed to be *TV Adverts* (mean of 7.81), *endorsed by experts* (mean of 7.24) and *samples* (mean of 7.05). *Sponsorships, Radio Adverts, Websites, Web campaigns* and *Blogs* all had mean scores below 5 and were thus perceived to be relatively ineffective for promoting facial care products.

Marketing Media Effectiveness – generational split

The following section details the effectiveness of media depending on the respondents' generation and investigates whether there are differences amongst the three generations forming part of the study. Please refer to Appendix 9, section 9.9 for detailed frequencies and means tables.

Table 7.41 Effectiveness of Marketing Media as per generation

	Baby Boomers		Generation X		Generation Y	
Marketing Media	Mean	Ranking	Mean	Ranking	Mean	Ranking
TV Adverts	7.10	1	8.14	1	8.13	1
Endorsed by experts e.g. dermatologist, doctor, beautician	6.80	2	7.57	2	7.30	3
Print Adverts	6.61	4	6.91	5	6.58	6
Word-of-mouth	6.74	3	6.79	6	6.81	5
Samples	6.51	5	7.18	4	7.37	2
Store Displays	6.11	6	7.20	3	6.95	4
Endorsed by celebrities	4.14	7	5.84	7	6.36	7
Sponsorships	4.07	8	4.57	9	5.11	8
Radio Adverts	3.82	9	5.02	8	4.54	9
Websites	2.68	10	4.09	10	3.65	10
Web Campaigns	2.31	11	3.19	11	3.27	12
Blogs	2.24	12	2.97	12	3.53	11

All of the generations rated *TV Adverts* as the most effective form of advertising when it comes to advertising facial care products. *Endorsed by experts* were rated second most effective by both the Baby Boomers and the Generation X respondents, whilst Generation Y respondents were of the opinion that *samples* were the second most effective form of advertising. Baby Boomers rated *word-of-mouth* in third place, whilst Generation X rated *Store displays* as the third most effective form of media, and Generation Y rated *endorsed by expert*s in third place. Again, although there is some overlapping one can see that the generations had different perceptions of the effectiveness of media.

A Kruskal-Wallis significance test was run, to see if there were any significant differences amongst the generations regarding the effectiveness of media. Thus the following hypothesis was tested and results are shown in Table 7.11 (refer to Appendix 9, section 9.10 for more details).

Ho: There is no significant difference in the effectiveness of media amongst generations

H1: The is a significant difference in the effectiveness of media amongst generations

Table 7.42 Kruskal-Wallis Significance Testing of the effectiveness of media between Generations

Criteria	**Significance**
TV Adverts	.001
Endorsed by experts e.g. dermatologist, doctor, beautician	.028
Samples	.050
Word-of-mouth	.935
Store Displays	.001
Print Adverts	.367
Endorsed by celebrities	.000
Sponsorships	.007
Radio Adverts	.001
Websites	.000
Web Campaigns	.000
Blogs	.003

Table 7.42 shows there were significant differences amongst generations regarding the effectiveness of the following media, *TV adverts*, *endorsed by experts*, *store displays*, *endorsed by celebrities*, *sponsorships*, *radio adverts*, *websites*, *web campaigns* and *blogs*.

Whilst the Kruskal-Wallis significance test determines whether there were significant differences in terms of importance of attributes between all three generations, the Mann-Whiney U test compares two unpaired groups. Thus, the Mann-Whitney U test was useful in order to determine between which two generations the significant differences occurred.

Table 7.43 Mann-Whitney U Significance testing of the effectiveness of media between the Generations

	Significance (Mann-Whitney U Test)		
Criteria	**Baby Boomers & Generation X**	**Baby Boomers & Generation Y**	**Generation X & Generation Y**
TV Adverts	.001	.001	.996
Endorsed by experts e.g. dermatologist, doctor, beautician	.009	.058	.603
Samples	.063	.020	.563
Store Displays	.000	.012	.246
Endorsed by celebrities	.000	.000	.104
Sponsorships	.089	.002	.113
Radio Adverts	.000	.019	.163
Websites	.000	.002	.427
Web Campaigns	.002	.000	.509
Blogs	.011	.001	.422

Table 7.43 shows that regarding the effectiveness of media there were significant differences between Boomers and the other two generations, and no significant differences between Generation Xers and Yers. *TV adverts* were rated lower by Boomers (7.10) compared to Generations Xers (8.14) and Yers (8.13). A possible reason for this may be that Boomers are busy and hence have less time to watch television thus exposure to and the influence of TV Adverts is less. *Endorsed by experts* was rated significantly lower by Boomers (6.80) compared to Xers (7.57). According to Codrington and Grant-Marshall (2004:186), Boomers are suspicious of authority, which may have impacted Boomers rating of *endorsed by experts*. *Samples* were significantly different (.020) as rated by Boomers and Yers and rated significantly higher by Generation Y (7.37) as opposed to Boomers (6.51). This may be because Generation Yers have less disposable income and thus prefer to sample a product prior to spending money on buying a product which might not work. Boomers (6.11) rated *store displays* significantly lower than both Xers (7.20) and Millenials (6.95). Considering that Xers and Millenials also rated the quality packing attribute as significantly more important than Boomers indicates that Xers and Millenials seem take more notice of the way products are presented.

Endorsed by celebrities was rated significantly lower by Boomers (4.14) compared to both Xers (5.84) and Millenials (6.36). Boomers being more sceptical of celebrity endorsers could be attributed to Boomers opinion that celebrities used in adverts have been airbrushed or possibly that they believe many of the celebrities, due to the heavy reliance on their appearance; have had botox or plastic surgery. *Sponsorships* were rated significantly less effective by Boomers (4.07) compared to Millenials (5.11). *Radio adverts* were perceived by Xers (5.02) and Yers (4.54) to be significantly more effective than they were perceived to be by Boomers (3.8). Previous research showed that due to the fact that music is a potent connector with Boomers, radio is particularly effective (Mills, 2008, cited in Moore, 2008:42), thus the fact that Boomers didn't consider radio as an effective medium is unexpected and shows that when advertising facial care products Boomers specifically may not consider radio effective. Boomers rated the following mediums, *websites* (2.68), *web campaigns* (2.31) and *blogs* (2.24) as significantly less effective than both Generation X (4.09, 3.19 and 2.97) and Generation Y (3.65, 3.27 and 3.53). Since Xers and Millenials grew up with the computer, the results may be expected.

Thus, when comparing means of the media which were significantly different it becomes obvious that Baby Boomers rated them significantly lower than the other two generations. There could be numerous possible reasons for this; Boomers being older and wiser may have caused these consumers to be more sceptical of advertising. Since, these consumers may have used many brands they may have discovered it's better to rely on their own experience than any form of advertising. Boomers rating the various mediums of communications to be less useful than the other two generations could also be an area for more research.

7.4.9 Question 9: Please indicate your extent of agreement/ disagreement with the following statements

Participants were required to indicate their level of agreement with each statement using a Likert scale where: 1-Strongly Agree, 2-Agree, 3-Neutral, 4-Disagree, and 5-Strongly Disagree. The statements were useful in order to test agreement with various statements made in the literature review and the focus groups. Furthermore, they were useful in accessing whether there were differences amongst generations regarding their level of agreement to the statements.

For analysis purposes ranges for each description have been developed in order to aid discussion. Thus means of 0 – 1.49 = *strongly agree*, 1.5 – 2.49 = *agree*, 2.5 – 3.49 = *neutral*, 3.5 – 4.49 = *disagree* and 4.5 – 5.00 = *strongly disagree*. The statements are each presented, using a table to indicate overall results of the respondents' extent of agreement and the extent of agreement of each generation.

Table 7.44 Importance of Statements

	Total	Baby Boomers	Generation X	Generation Y
I am more likely to use facial care products that…	**Mean**	**Mean**	**Mean**	**Mean**
…are designed for my age group.	1.68	1.53	1.78	1.69
… are designed for my skin type.	1.43	1.41	1.48	1.39
…use entertaining adverts.	3.45	3.58	3.33	3.47
…use the music from my era in their advertising.	3.54	3.55	3.51	3.57
…use endorsers from my age group.	2.59	2.53	2.58	2.65
...are effective.	1.38	1.35	1.46	1.32
…are recommended by my friends.	2.54	2.59	2.48	2.55
… educate me about facial care routines in their communications	2.06	2.14	2.02	2.03
I consider myself to be brand loyal when it comes to facial care products.	2.32	2.36	2.16	2.47

The mean scores in Table 7.44 indicate that respondents *strongly agreed* with the following two statements, *I am more likely to use facial care products that are designed for my skin type* (mean of 1.43) and *facial care products that are effective* (1.38). This indicates that skin type and effectiveness of the products have a large impact on choice of facial care products.

In general, respondents agreed with the statement *I am more likely to use facial care products that are designed for my age group* (1.68) as well as the statement *that educate me about facial care routines in their communications* (2.06), indicating that respondents do consider their age, as well as their knowledge of how the product will benefit them when they choose facial care products. In addition, respondents also indicated that they agreed with the statement *I consider myself to be brand loyal when it comes to facial care products.* It's interesting to note that when comparing the generations, Generation Y consumers had a higher mean score compared to the other generation i.e. they agreed less with this statement. With the teenage segment growing, there may be an opportunity for marketers to communicate and educate this market, utilise aggressive relationship marketing to ensure that they will continue to remain brand loyal.

Respondents were *neutral* to the following statements *I am more likely to use facial care products that are recommended by my friends* (2.54), *that use endorsers from my age group* (2.59) and *that use entertaining adverts* (3.45). All of these three statements relate to various methods of communications. Beyer (2008: Para 2) says that women recommended beauty brands to friends on a regular basis. This is supported by Beer (2004: Para 1) who states that "understanding the power of women listening to recommendations from girlfriends and also making their own recommendations is gaining importance for all beauty marketers. This neutral response to the power of peer word-of-mouth shown in this survey however reveals that whilst friends may make recommendations it appears that respondents do not always listen to friends. The fact that respondents were neutral towards the statement *I am more likely to use facial care products that use entertaining adverts*, indicate that entertaining adverts don't have a major impact on facial care purchases.

Lastly the statement *I am more likely to use facial care products that use the music from my era in their advertising* was *disagreed* with. The literature review indicated that music was a potent connector with Boomers and that the adverts using music from their era were better received by Boomers than those using music from a different era. However these respondents didn't perceive music as having an impact.

Significance testing was performed on all of the above statements to assess if there were significant differences between the generations. First a Kruskal-Wallis test was run, and then a Mann-Whitney U test was used on the statement which were significantly different, in order to determine between which generations the differences were significant.

There were only two statements which showed significant differences between the generations (scoring below .05). The statements showing a significant difference were: *I am more likely to buy facial care products that are designed for my age group* (.003), and *I am more likely to buy facial care products that are effective* (.046). A Mann-Whitney U test was performed in order to determine between which generations the significant difference occurred. For the statement *I am more likely to buy facial care products that are designed for my age group*, there was a significant difference between Baby Boomers and Generation X (.001), with Boomers (1.53) agreeing with this statement significantly more than Xers (1.78). Although there is a significant difference, both generations still agree with the statement. Generation X and Generation Y results for the statement *I am more likely to buy facial care products that are effective* differed significantly (.017), however further analysis is beyond the scope of this research.

7.5 Reliability Testing – Cronbach's Alpha

In order to test the reliability of the questionnaire the Cronbach's alpha test was performed on Question 4 (importance of attributes), 8 (effectiveness of marketing media) and 9 (statements). Cronbach's alpha is the most common method of estimating reliability (Hardy and Bryman, 2004:23). Cronbach's alpha assesses the extent to which all items are measuring the same thing (Sapsford and Jupp, 2006:111). In interpreting Cronbach's alpha, it is generally accepted by researchers that a .70 coefficient is generally acceptable but indicates low reliability, a .80 coefficient indicates moderate reliability and a .90 coefficient indicates high reliability (Maree, 2007:216). Refer to Appendix 9, section 9.11 for detailed analysis.

7.5.1 Question 4:

Table 7.45 Cronbach's Alpha of Question 4

Reliability Statistics

Cronbach's Alpha	N of Items
.782	12

Table 7.45 shows that in terms of reliability with a Cronbach's alpha score of .782, Question 4 is regarded as acceptable, but with low reliability.

7.5.2 Question 8:

Table 7.46 Cronbach's Alpha of Question 8

Reliability Statistics

Cronbach's Alpha	N of Items
.825	12

Table 7.46 shows that in terms of reliability with a Cronbach's alpha score of .825, Question 8 is regarded as acceptable, and with moderate reliability.

7.5.3 Question 9:

Table 7.47 Cronbach's Alpha of Question 9

Reliability Statistics

Cronbach's Alpha	N of Items
.605	9

Table 7.47 shows that in terms of reliability with a Cronbach's alpha score of .605, Question 9 is unreliable.

7.6 CONCLUSION

This chapter has covered the questionnaire design and discussion of the findings from this questionnaire. It included the sample profile as well as the findings of the mall-intercept survey. The rationale of including all the questions were given and results were summarised using various frequency tables, cross-tabulation tables, and pie and bar charts, which were used in order to give a clear picture of the research findings. Since this chapter focused only on the questionnaire design and the presentation of results, a discussion of these findings in conjunction with those from stage 1 of the research, the focus group in relation to previously presented literature and objectives will follow in the next chapter. Conclusions will also be drawn.

8.1 INTRODUCTION

This chapter deals with the discussion and conclusions of the research. A triangulation methodology was used for this research and the discussion includes both stage 1, the focus group research and stage 2 the mall intercept research. One of the biggest advantages of triangulation is that qualitative and quantitative styles have complimentary strengths, as a result research tends to be more comprehensive (Neuman, 2006:150). Another advantage of triangulation is that the results from one method could be used to elaborate on results from the other method (Hanson *et al.,* 2005:226), hence it is important to discuss the findings simultaneously. This chapter puts the research into context by looking at the results of both stages in relation to the research objectives and the literature review. The chapter begins with discussing each of the four research objectives which were set, and conclusions will be drawn based on the information extracted. Finally some general observations are discussed.

1) To determine what factors/ attributes female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products
2) To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women
3) To determine if Baby Boomer females feel marginalised by the skin care industry
4) To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products

8.2 RESEARCH OBJECTIVE 1:

This section deals specifically with the following research objective: To determine what factors female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products.

Aaker and Shansby (1982 cited in Cravens, 2000:190) state that positioning is important as it is central to consumers' perception and choice decisions. Furthermore, in order to achieve a successful position it is imperative that customers perceive the product or service as sharing important attributes with other brands in the product category and at the same time being superior on differentiating attributes (Bearden *et al.*, 2001:170). "Developing a positioning strategy entails gaining a clear understanding of the criteria target customers use to evaluate competing products and then convincing them that your product will meet those needs" (Solomon *et al.*, 2006:212). Since positioning is the place a product occupies in the consumer's mind based on important attributes in relation to competing products (Kerin *et al.,* 2004:201), it is critical to gain an understanding of what attributes are important to consumer's. Hence, this objective was necessary in order to determine, what attributes were most important to respondents and which were necessary in order to entice them to purchase facial care products.

Furthermore, since positioning assumes that consumers compare products on the basis of important features, marketing communications emphasising these features are more likely to succeed (Lamb *et al.*, 2006:249). Therefore this objective would be useful to marketers as it would give them the basis on which to develop a positioning strategy. In order to ensure successful positioning it is imperative that the benefit which a company chooses to communicate distinguishes the brand or product from competitors in a way that is important to the target market, so as to impact consumers purchase behaviour (Percy and Elliot, 2005:121). Therefore knowing which attributes are important would help marketers develop a positioning strategy which aligns with the needs and wants of each of the generations.

The three focus groups were used in order to determine which attributes were deemed important by each of the generations, furthermore the discussion was useful in order to gain a clearer understanding of what participants meant by the attributes as well as to determine why these attributes were important. From the Baby Boomer focus group the discussion was around four main attributes, these were the *makes skin feel smooth and soft, moisturising ability, lasts all day (no need to reapply)* and *low price* attributes. In terms of skin texture Boomers stressed that *they felt it was critical that facial care products made your skin feel smooth and soft,* and related this to efficacy of a product. Avon's Vice President of Global product development, Gail Boyle, states the sensorial experience is of lead importance when it comes to skin care (Meisel, 2008: Para 13), these findings support this statement.

Boomer participants discussed the *moisturising ability* and the *lasts all day* attribute simultaneously, and discussed that *with the hormonal changes they were going through, their skin needed far more moisture now than it did when they were younger*. Furthermore *moisturising ability* was critical *because they did not like their skin feeling tight and dry*. The importance placed on *moisturising ability* is not surprising if you consider the current size of facial moisturiser sales in South African. In addition, Clinique's Global Truth in Beauty survey, found that the majority of US women ranked moisturisers as a product they couldn't live without (Meisel, 2008: para 26), hence it appears that South African women are of a similar opinion. Although the moisturiser in itself was important, Boomers also stressed that *the moisturiser they use must be effective and keep their skin comfortable throughout the day*. Furthermore, the Boomer participants indicated that *they do not have the time to constantly reapply products*; this aligns with the literature which states that this generation lives life in the fast lane and as a result have little disposable leisure time (Lancaster and Stillman, 2003:11 and Strategic Edge, 1996: Para 2).

Despite the fact that the literature review indicated that Boomers are a generation with a lot of disposable income love to spend money on themselves (Beasty, 2006:34) and are big spenders (Strategic Edge, 1996: Para 4), the *low price* attribute was deemed important by Boomer participants during focus groups. The fact that the *low price* attribute was discussed indicates that whilst Boomers may have more disposable income they still look for products offering value for money. The literature review also stressed that Boomers are smart and knowledgeable consumers with high expectations, that aren't going to waste money (Beasty, 2006:35). In other words marketers can not assume that Boomers will spend a lot of money on products without asking questions. Whilst they may have the money to spend they will only pay a high price for products that they perceive as offering good quality for the price, as Alexander (2007:104) states, Boomers are renowned for researching the products they use to maximise the returns on their expenditures.

Whilst accepting the fact that they're getting older, Boomers place a great deal of value on health, beauty, and an active lifestyle, and Boomer women especially want to look and feel younger (Beasty, 2006:34-35). Furthermore given the current 'pursuit of agelessness' trend which according to Alexander (2007:104) and Euromonitor International (2008:13) is driven by aging consumers, particularly female Baby Boomers, it was anticipated that the *contains anti-aging properties* attribute would be discussed at length during the Boomer focus group discussion, however it was not brought up by any of the Boomer participants. The reason for this could be attributed to the fact that Boomers view themselves as perpetually young (Finn, 2005, cited in Unknown, 2005:70). In addition, Beasty (2006:32) stresses that this group does not want to hear about growing old. Since they don't consider themselves as being old, and don't like being referred to as old may have contributed to their reluctance to discussing this attribute. However, when probed, participants admitted to using products which contain anti-aging properties, but did not wish to admit that they placed value on this attribute. Instead they discussed the fact that *beauty* *came from the inside* and *growing old was a natural process*.

During the Generation X focus group the focus of the discussion of which attributes were most important to participants was on the following three attributes, *makes your skin feel smooth and soft*, *contains anti-aging properties,* and *contains natural ingredients.* A large part of the discussion was also on the effectiveness of a product, and effectiveness as viewed by the participants were related to making the skin feel smooth and soft and preventing or slowing the signs of aging i.e. wrinkles.

On discussing the *makes your skin feel soft and smooth* attribute participants stressed *there is nothing worse than products which make your skin feel dry or oily*. One participant stressed that *if any product made her skin feel oily, there was no way she could use it*. The importance of how a product makes your skin feel aligns with the current trend of consumers expecting efficacy and Meisel (2008:18) states, before even considering adding a new product into their skin care ritual, consumers expect to see and feel the results. This view is supported by Avon's Vice President of Global product development, Gail Boyle, who states the sensorial experience is of lead importance when it comes to skin care (Meisel, 2008: Para 13).

There was a long discussion on the long term effects i.e. slowing, preventing or hiding the effects of aging. Participants stressed that *they would like to still look good at the age of 50 and 60*. Furthermore, it was important to one participant in particular *that in a few years time she herself and people around her would be able to see that she had put an effort into looking after her skin*. This belief could be aligned with the current growth of anti-aging products. Another interesting comment in terms of aging skin was made during this discussion. One respondent observed and voiced that *the white ladies in the focus groups tended to look older than the Black, Indian and Coloured ladies.* She attributed this mainly to the fact that *the white ladies, especially when they were younger, always wanted to be tanned and as a consequence spent a lot of time exposing their skins to sun, which in the long run was damaging and resulted in wrinkles*. This is an interesting observation and aligns with what Avon's Senior Manager of Research and Development, Anthony Gonzalez says, which is that the consumer is finally accepting the sun as the main driver in premature skin aging (Meisel, 2008: Para 22). At the same time however, it is important to note that not all participants believe in anti-aging products, one of the participants was of the opinion that *anti-aging was just a gimmick*, whilst one voiced that *age didn't bother her as it was a natural process*.

The next discussion revolved around natural versus scientific and it was interesting to see that Generation X participants *felt it was important to use products which were natural, environment and animal friendly*. There was a lengthy discussion of the harmful effects of chemicals as two participants had recently attended a talk on this topic. Another participant was busy reading a book written on the harmful effects of chemicals and the participants came to the conclusion that it was better to go natural. This discussion was interesting and it appears to align with what Euromonitor International (2008:Para 10) found which is that consumers have become increasingly aware of the harmful effects of chemicals which has led to a desire to avoid pesticides, growth hormones, preservatives and artificial colours, and has resulted in an interest in natural and organic products. Furthermore participants felt that lifestyle, what you eat and drink, and exercise were also critical to the appearance of your skin. Hence it appears that participants are concerned with health and wellness. Tait (2005: Para 3) is of the opinion that one of the main drivers of growth in natural products has been the consumer trend towards healthier lifestyle, which is often associated with all things natural.

When discussing important attributes in the Generation Y focus group the main attributes which were discussed and considered of key importance included the *low price, removes impurities* and *quality packaging* attributes. *Low price* was considered a very important attribute and participants stressed that *this was due to the fact that they were scholars or students* *and they relied on their allowances, which were low and in addition to buying facial care there were other expenses which their allowance was used for*.

Participants felt that the effectiveness of a product was of key importance. When probed, participants explained effectiveness in terms of the product's ability to *remove impurities* and *prevent impurities*. This is not surprising as participants generally start getting pimples during their teenage years. Various elements of packaging were discussed and participants mentioned they looked for products which *used classy packaging*. They described 'classy' in terms of the type and shape of the bottle, and the colours used. Furthermore they placed importance on what was written on the product in terms of what it does and indicated diagrams were useful in explaining how the product worked.

From the focus group sessions it is obvious that in terms of which attributes are considered important there are both similarities and differences amongst the generations. Thus it was important to make sure that the attributes which were carried through to the questionnaire for the mall-intercept survey represented each of the generations' most important attributes. Twelve of the most important attributes were selected based on a combination of the literature review and the results of each of the focus group sessions.

In terms of the qualitative data collected in the mall-intercept survey the following was found (see Table 8.1 which gives the mean scores of each attribute as rated by each generation). All of the mean scores, with the exception of the *Quality Packaging* attribute as rated by Boomers were above 5, which indicate that the attributes included in the study were a good selection.

Table 8.1 Respondents mean ranking of attribute importance according to the different generations

	Baby Boomers		**Generation X**		**Generation Y**	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Lasts all day (no need to reapply)	9.42	1	9.26	3	8.91	3
Moisturising Ability	9.41	2	9.23	4	8.60	4
Makes skin feel smooth & soft	9.32	3	9.55	1	9.08	1
Contains anti-aging properties	8.98	4	8.96	6	7.06	9
Contains SPF	8.93	5	9.27	2	8.56	5
Removes Impurities	8.68	6	9.09	5	8.94	2
Contains Natural Ingredients	8.67	7	8.70	8	7.90	7
Widely Available	8.54	8	8.73	7	8.17	6
Multi-purpose e.g. 3-in-1 Product, Moisturiser with SPF, etc	7.98	9	8.12	9	7.49	8
Low Price	6.39	10	6.25	12	5.80	11
Mild Fragrance	6.26	11	6.68	10	5.49	12
Quality Packaging	4.88	12	6.38	11	6.33	10

Since the objective was to determine what factors female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products, the following section will include a discussion of the attributes deemed most important to Boomers versus the attributes deemed most important to the other two generations. Possible reasons as to why these attributes were rated, by each of the generations are also discussed briefly.

From Table 8.1 it can be concluded that whilst Baby Boomers most important attribute when choosing facial care products, is the *lasts all day (no need to reapply)* attribute, the other two generations rated the *makes skin feel smooth and soft* attribute as most important when choosing facial care products. Hence Boomers most important attribute differs from the other two generations. A possible reason why Boomers rated the *lasts all day (no need to reapply)* attribute as most important can be related back to focus group findings where Boomers stressed that *products must keep skin comfortable throughout the day as they don't have time to constantly reapply products*. As has been mentioned previously this also aligns with the literature review.

The other two generations rated the *makes skin feel smooth and soft* attribute as most important, whilst this attribute was discussed at length during the Generation X focus group, it was mentioned only briefly in the Generation Y focus group and didn't appear to be as important as the other attributes which were discussed, hence this attribute being mentioned as most important wasn't anticipated. However, at the same time it's not surprising that Generation X and Generation Y deemed this attribute as most important as it aligns with the current trend of consumers expecting efficacy which Meisel (2008:18) relates to consumers expecting to see and feel results, before even considering adding a new product into their skin care ritual. Furthermore Avon's Vice President of Global product development, Gail Boyle, agrees stating that when it comes to skin care the way the product makes the skin feel i.e. the sensorial experience is of lead importance to consumers (Meisel, 2008: Para 13).

Boomers rated *moisturising ability* as the 2nd most important attribute, Generation X were of the opinion that the *contains SPF* attribute was 2nd most important and the *removes impurities* attributes was rated the 2nd most important by Millenials. Hence in terms of the attributes which were considered 2nd most important by each of the generations, results differed. The fact that the moisturising ability attribute was deemed 2nd most important by Boomers aligns with focus group findings which indicated that the hormonal changes which Boomers are experiencing and the fact that less supple skin requires effective moisturising are reasons why the *moisturising ability* attribute is deemed so important by this generation. Whilst *the contains SPF* attribute was not discussed at length during the Generation X focus group a connection between aging and sun damage was made, in addition the literature review indicates that consumers are becoming more aware of the sun's role in premature aging (Meisel, 2008: Para 22), hence this can be attributed to the reason why the *contains SPF* attribute was deemed 2nd most important by Xers. Finally since the discussion in the Generation Y focus group focussed on the *removes impurities* attribute, these results align with the focus group results. Furthermore this attribute, in terms of importance, was rated 5th by Generation X respondents, and 6th by Boomers, thus it can be concluded that when you're younger the products ability to remove impurities, such as pimple and blackheads, is more important and possibly that you'll have a harder time controlling impurities at this stage.

From the discussion above it is apparent that when it comes to attributes deemed most important by the three generations central to the study there are differences. However, there also appear to be similarities because the *lasts all day (no need to reapply)* attribute was considered most important by Boomers and 3rd most important by Generation X and Y. Furthermore, the *makes skin smooth and soft* attribute which was deemed most important by Xers and Millenials was deemed 3rd most important by Baby Boomers.

In order to access whether differences between the generations were significant, both a Kruskal-Wallis and a Mann-Whitney U test was run. The results of the Mann-Whitney U test which focus on differences between two groups are displayed in Table 8.2, and focus only on the differences between Boomers and Xers, and Boomers and Millenials.

Table 8.2 Mann-Whitney U Significance testing of the importance of Attributes between Boomers and Generation X and Boomers and Generation Y.

	Significance (Mann-Whitney U Test)	
Criteria	**Baby boomers & Generation X**	**Baby Boomers & Generation Y**
Lasts all day (no need to reapply)	.270	.006
Moisturising Ability	.274	.000
Contains anti-aging ingredients	.943	.000
Contains SPF	.621	.009
Contains Natural Ingredients	.882	.005
Mild Fragrance	.355	.043
Quality Packaging	.000	.000

The Mann-Whitney U test showed that there were significant differences between Boomers and Generation Xers on a single attribute (*quality packaging)* only, whilst there were significant differences between Boomers and Generation Y on seven attributes. Thus in terms of the attributes which are important to Baby Boomers compared to the other generations it seems that Baby Boomers and Generation Xers are more similar than Baby Boomers and Millenials.

Looking at Table 8.2 shows that there were significant differences between Boomers and Generation Y in terms of the importance of the *lasts all day (no need to reapply)* and the *moisturising ability* attributes, with Boomers rating both attributes as significantly more important than Millenials. Based on the focus group discussion and these results it seems that in terms of older skin versus younger skin, younger skin requires less moisture, which may be because younger skin which is supple retains moisture better than the less supple older skin.

Table 8.2 indicates that Boomers rated the *contains anti-aging properties* (8.98 versus 7.06) and the *contains SPF* (8.93 versus 8.56) as significantly more important than Millenials did. These results are anticipated since one would expect older women who have started getting wrinkles etc. to be more concerned about aging and since consumers are accepting the sun's role in aging these two attributes go hand in hand. It is interesting however that both Generation X and Millenials rated the *contains SPF* attribute higher than the *contains anti-aging properties* attribute. This may indicate that these generations are aware of the sun's role in aging, and are taking a pro-active approach in order to minimize aging by using products with a sun protection factor. Furthermore, whilst Baby Boomers rated *the contains anti-aging properties* in their top 5, Generation X respondents rated it 6th and Generation Y respondents rated it 9th, therefore it appears that as a person ages, they start placing more value on the *contains anti-aging properties* attribute.

Other attributes which were significantly different are the *contains natural ingredients*, *mild fragrance* and *quality packaging attributes*. In terms of the first two attributes these were significantly different between Boomers and Generation Y, whilst the *quality packaging* attribute was also significantly different between Boomers and Xers. The *contains natural ingredients* attribute was rated significantly higher by Boomers (8.67) when compared to Millenials (7.90). However both generations rated this attribute highly in terms of importance. This was aligned with the literature review which indicated that whilst all of the generations are concerned about the environment and look for products which are natural, Boomers are most committed to being green (Raymond, 2009:42). Boomers (6.3) rated *mild fragrance* as significantly more important compared to Millenials (5.5) which is an important result and indicates that products developed for and targeted at Boomers need to have a milder fragrance than those developed for Millenials.

The *quality packaging* attribute was deemed significantly more important by Xers (6.38) when compared to Boomers (4.88) and Yers (6.33). This contradicts Codrington and Grant-Marshall (2004:189) who state that since Boomers enjoy displaying their conspicuous consumption, it is important that the product packaging is elegant and stylish and conveys a message of quality. Thus, despite the literature review indicating that packaging is more important to Boomers, both the focus groups and the mall intercept survey showed that Generation X and Y respondents were more concerned with *quality packaging* of facial care. A possible reason for this result could be that since facial care products are usually kept in a bathroom cabinet, they are not prominently displayed, and hence the packaging of this product is not as important as something which is displayed prominently. It is also interesting to note, that during focus groups the Boomers discussion indicated that they believed the younger generations were more affected by packaging, which aligns with the findings of the mall-intercept survey.

The results discussed indicate that when it comes to the attributes deemed important when purchasing facial care products, there are similarities, for example each of the generations rated the *lasts all day (no need to reapply)* and the *makes skin feel smooth and soft* attribute in their top 3 most important attributes when choosing facial care. Whilst there are similarities significant differences were apparent, particularly between Boomers and Millenials. It can be concluded that each of the generations opinions differ in terms of which attributes they rate as most important, hence the factors which Boomers look for when purchasing skin care differ from those of non-Boomer women. This is an important discovery which illustrates the importance of segmenting the women's market and then developing a targeted marketing strategy.

8.3 RESEARCH OBJECTIVE 2:

This section deals specifically with the following research objective: To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women. The place brands occupy in the minds of the respondents, is critical to effective positioning because competitors provide the benchmark within the minds of consumers (Schewe, 1991:60). Whilst the first objective dealt with determining which attributes are important, this objective aims to gain insight into how each of the brands included in this study are positioned according to the three generations. The objectives are related since positioning theory states that in addition to gaining an understanding of which attributes are important, it is necessary to know competitor profiles, as weaknesses of competitors on relevant attributes or personality traits can represent an opportunity to differentiate and develop an advantage (Aaker, 2008:46). On the other hand the strengths of competitors on important attributes may represent challenges, in terms of how your positioning can exceed or outflank the competition (Aaker, 2008:46).

Identifying the positions occupied by facial care brands is an important step in positioning as it will help marketers identify their strengths and weaknesses in comparison to competitors as perceived by customers, ultimately allowing them to differentiate their brand. In order for an advantage to be differential it must provide value to the target market, which competitors find hard to copy (Hooley *et al.*, 2004:49). In order to identify possible competitive advantages it is imperative to analyse the competitors' positions in the marketplace (Solomon *et al.*, 2006:213). Consequently in order for marketers to develop an effective positioning strategy they must understand their competitors and how they are perceived by the target market. According to Solomon *et al.* (2006:213) marketers need to consider direct competitors in the product category as well as indirect competitors i.e. other products or services that provide the same benefits people are seeking.

Focus groups were used in order to establish the competitive set, i.e. the most popular brands mentioned. Based on the focus group results 9 Brands were selected and carried through to the mall-intercept questionnaire. These were *The Body Shop*, *Clarins*, *Clearasil*, *Clinique, Gatineau*, *Johnson and Johnson*, *L'Oreal, Nivea* and *Revlon.* Question 5 of the mall-intercept questionnaire asked respondents to rate each of the specified facial care brands on 12 attributes provided and thought to influence purchase choice, on a scale from 1 to 5. Where 1=Does not meet the criterion/ possess the feature at all, 2=Poor, 3=Average, 4=Good and 5=Excellent. The purpose of this question was to establish how the different brands are positioned in the minds of Boomer women versus non-Boomer women in terms of attributes found to be of most importance. Two dimensional perceptual maps were created. A perceptual (positioning) map is a graphic representation of consumer perceptions' of a brand or product relative to competing products or brands in the market (Monger, 2007:333) and is a useful analysis tool which assist marketers to determine how consumers perceive and evaluate a product or brand in a particular market (Arnould *et al.*, 2002:60). In addition to being useful for determining consumer perceptions about a brand and competing brands, a perceptual map can also be valuable in identifying strengths and weaknesses (Jobber, 2007:308).

Table 8.3 Means of the key attributes used to create perceptual maps

	Baby Boomers		Generation X		Generation Y	
Criteria	Mean	Ranking	Mean	Ranking	Mean	Ranking
Lasts all day (no need to reapply)	9.42	1	9.26	3	8.91	3
Moisturising Ability	9.41	2	9.23	4	8.60	4
Makes skin feel smooth & soft	9.32	3	9.55	1	9.08	1
Contains anti-aging properties	8.98	4	-	-	-	-
Contains SPF	-	-	9.27	2		
Removes Impurities	-	-	-	-	8.94	2

The 9 perceptual maps which are presented, were created using the top 4 most important attributes (presented in Table 8.1) as rated by Boomers and the 2 most important attributes as rated by Generation X and Generation Y.

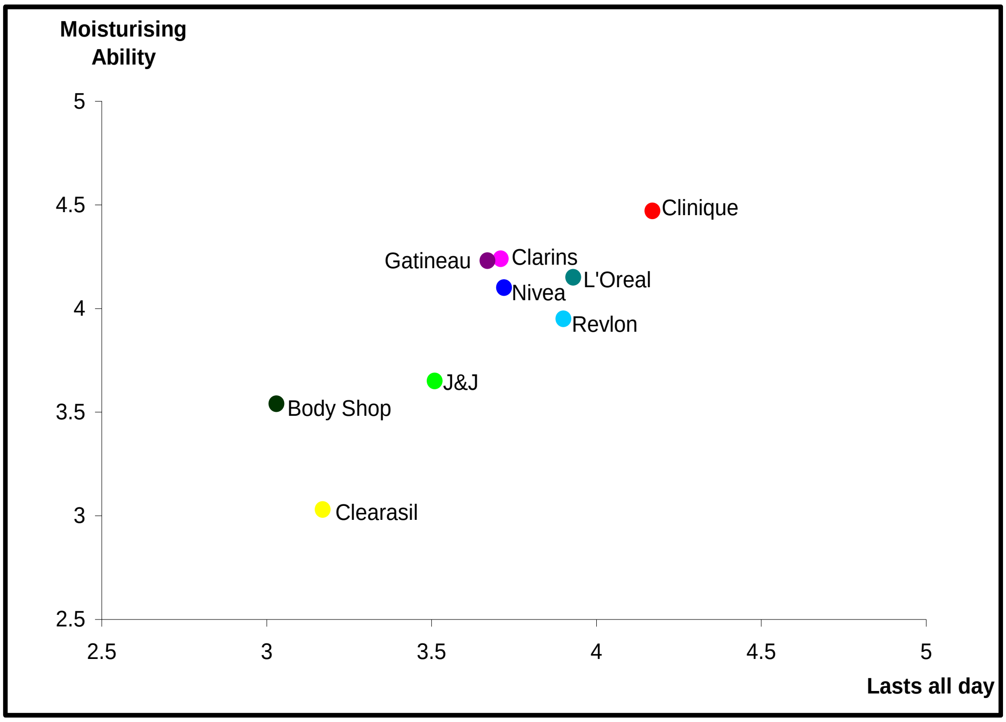
The first three perceptual maps (Figure 8.1, 8.2 and 8.3) were created using the means of each brand rated on the two most important attributes as perceived by Boomers i.e. the *lasts all day (no need to reapply)* and *moisturising ability* attributes. These two attributes were rated by Generation X and Generation Y as third and fourth most important.

Table 8.4 Means of Brands rated on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes

	Baby Boomers		Generation X		Generation Y	
Brand	Lasts all day	Moisturising Ability	Lasts all day	Moisturising Ability	Lasts all day	Moisturising Ability
Body Shop	3.03	3.54	3.16	3.41	2.99	3.51
Clarins	3.71	4.24	3.79	4.04	3.56	3.87
Clearasil	3.17	3.03	3.14	3.19	2.99	3.11
Clinique	4.17	4.47	3.84	3.98	3.83	4.06
Gatineau	3.67	4.23	3.67	3.83	3.40	3.62
J&J	3.51	3.65	3.53	3.92	3.58	3.93
L'Oreal	3.93	4.15	3.71	3.98	3.71	3.81
Nivea	3.72	4.10	3.64	3.92	3.75	4.11
Revlon	3.90	3.95	3.75	3.89	3.69	3.82

The mean scores as rated per generation on the *lasts all day (no need to reapply)* and *moisturising ability* attributes are presented in Table 8.4.

Figure 8.1 Perceptual Map A – Baby Boomers



From the perceptual map (Figure 8.1), it can be concluded that on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes, which were deemed most important by Boomers, Clinique is clearly the top brand. The fact that Boomers rated Clinique best o the *lasts all day (no need to reapply)* attribute, which is the attribute they rated to be most important when choosing facial care may be attributed to Clinique's communication of the 3-Step approach, which stresses that it's a twice-a-day routine of cleanse, exfoliate and moisturise (Clinique Laboratories llc., 2009c: Para 5). Basically Clinique communicates that application is required in the morning and again at night, i.e. it lasts all day.

Such high perceptions of the Clinique brand on the *moisturising ability* attribute may be explained in terms of the fact that Clinique moisturisers are given the name "Dramatically Different Moisturising Lotion", and that moisturisation is stressed in their 3-Step approach (Clinique Laboratories llc., 2009m: Para 5). Relating this back to Boomers brand use and the top brand as perceived by Boomers shows that, whilst only 12.6% of Boomers used Clinique, 39.7% of Boomers, mentioned Clinique as a top brand. In terms of brand use by Boomers, L'Oreal was the most popular brand used, with Clinique and Nivea being the 2nd most popular brands used. Clinique was the most popular choice in terms of which brands were perceived as the top brand. Since buying behaviour is influenced by the way in which consumers perceive their world and successful products are those which are positioned favourably in the minds of the target market (Brennan *et al.*, 2008:23), one would expect customers to act on their perception. This discrepancy between perceptions and use may be attributed to affordability. Clinique is a premium product, which is priced relatively higher than L'Oreal and since the majority of respondents fell into lower income brackets, they may not have been able to afford Clinique. The fact that Baby Boomers rated Clinique highest on both of the attributes they consider as being most important, indicates that they consider Clinique products to be of exceptional quality. This aligns with Clinique's positioning of providing consumers with products which are both allergy tested and fragrance free, backed by years of research and providing exceptional quality (Clinique Confidential, 2007:18).

Clarins and Gatineau are brands which overlap on the positioning map, suggesting that these brands, with regards to both attributes, are perceived in a similar manner and thus may be regarded as close substitutes. Whilst not overlapping L'Oreal, Nivea and Revlon are also fairly similar to Clarins and Gatineau. It also needs to be mentioned that Baby Boomers rated the premium brands higher on the *moisturising ability* attribute than mass market brands. Hence it appears as if Boomers believe that premium brands are more effective than mass market brands.

The Body Shop and Clearasil were perceived as being the worst on the *lasts all day (no need to reapply)* and *moisturising ability* attribute respectively. The fact the Clearasil was rated the worst on the *moisturising ability* may well be attributed to the fact that the Clearasil range does not focus on moisturisers and does the Clearasil range includes only a single moisturiser. It may also possibly be related to the fact that Clearasil is considered as a product targeting blemishes and acne prone skin, which is cause by excess oil and hence may be perceived as drying oily skin as opposed to moisturising the skin.

Figure 8.2 Perceptual Map A - Generation X

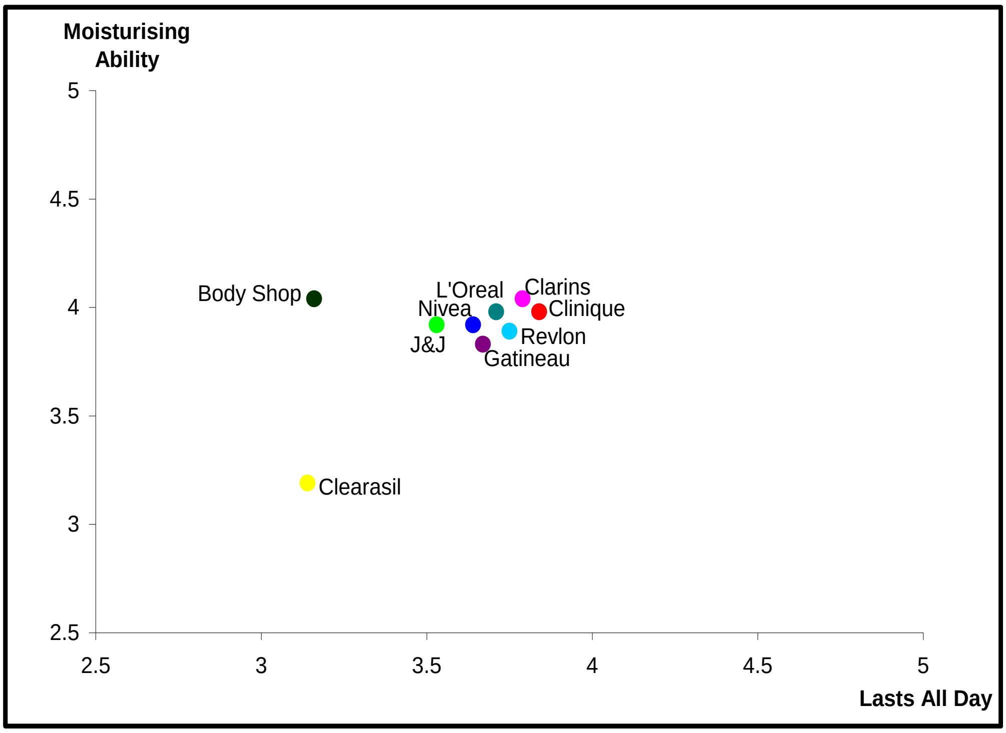
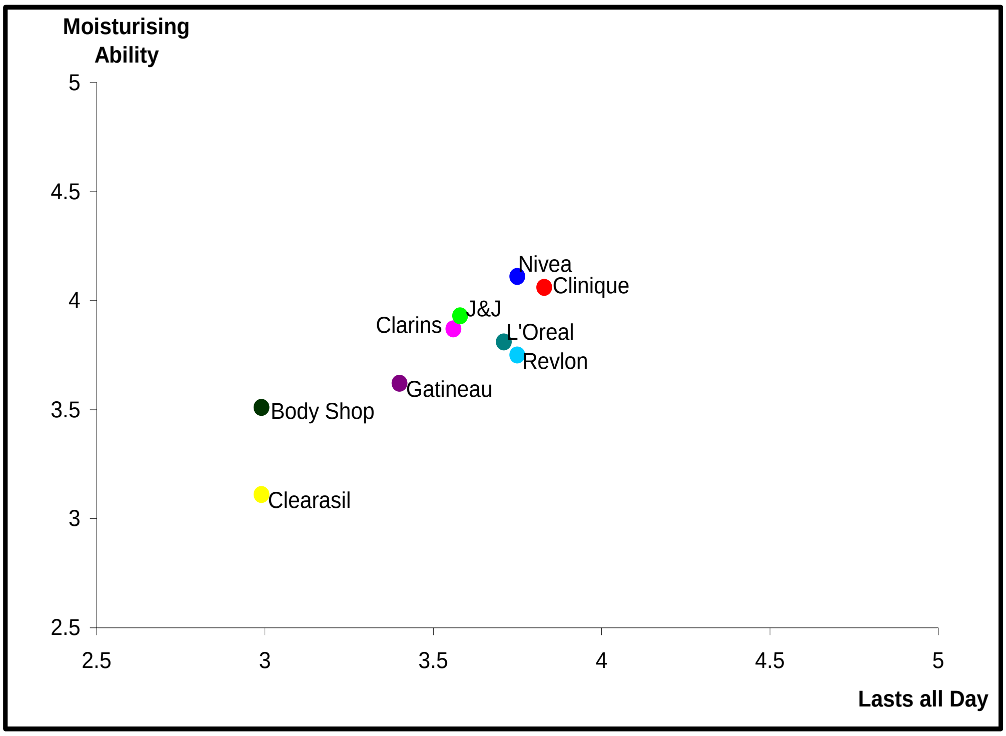


Figure 8.2, represents Generation Xers perception of each brand on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes. This perceptual map shows that on the *lasts all day* and the *moisturising ability* attributes, with the exception of Body Shop and Clearasil most of the brands were perceived as similar on these two attributes and are thus perceived as direct competitors. Hence Xers were fairly undecided as to which brands were the best on these attributes, as there is no clear number 1 brand on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes, we can conclude that neither of these attributes are determining dimensions or factors and thus are not used to differentiate between facial care products by Generation X women. This is supported by the findings of the previous objective which found the two most important attributes for Xers to be the *makes skin feel smooth and soft* and the *contains SPF* attributes.

Figure 8.3 Perceptual Map A - Generation Y



The perceptual map above shows how Millenials rated the brands on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes. On the *lasts all day (no need to reapply)* and the *moisturising ability* attributes, Generation Y perceived Clinique and Nivea to be the top brands on these attributes, with Nivea actually being rated slightly higher on the *moisturising ability* attribute. This high perception of Nivea on the *moisturising ability* attribute could be attributed to the fact that Nivea has such a strong presence in the skin care industry and develops numerous moisturising products. The reasons for Yers rating Clinique highly would more than likely be similar to the reasons discussed previously relating to why Boomers rated Clinique highly on the *moisturising ability* attribute.

Since Nivea and Clinique occupy similar positions on the map and hence are perceived to compete directly. These two brands are also perceived to be marginally better than the others on these two attributes. From the map it can be concluded that Clarins and Johnson and Johnson; and L'Oreal and Revlon respectively were also perceived as similar, and thus compete directly, whilst Gatineau, Body Shop and Clearasil occupied a distinctive but less favourable place on the map.

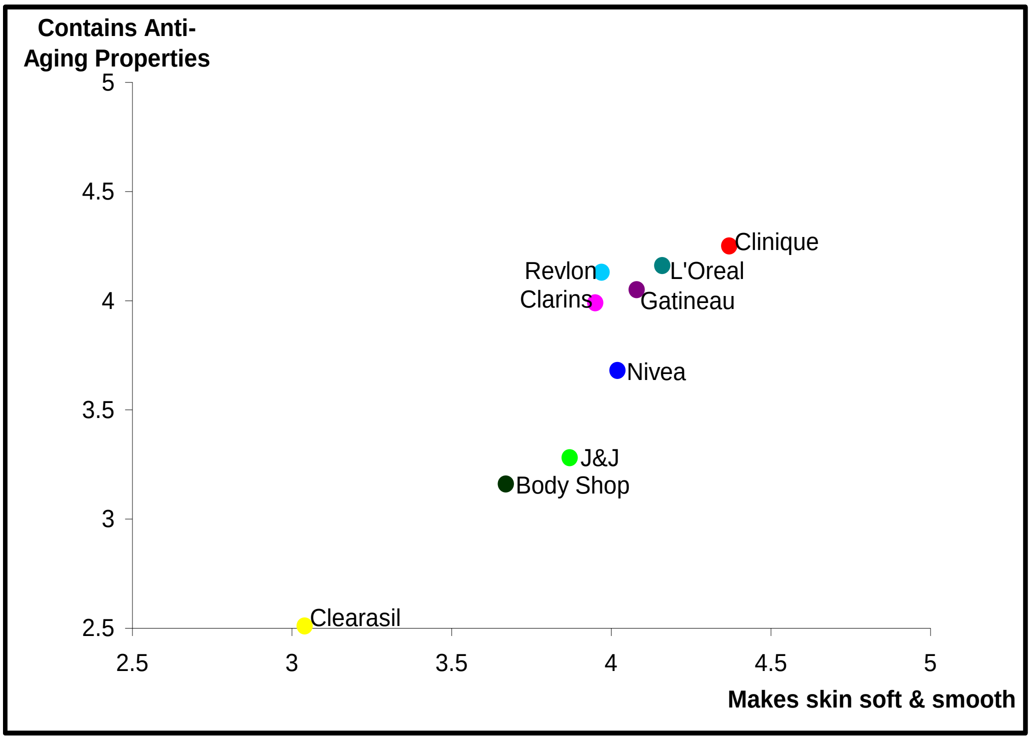
From the three perceptual maps it can be concluded that because the *lasts all day (no need to reapply)* and the *moisturising ability* attributes are the most important two attributes for Baby Boomers, there is far greater distinction between the brands than is evident for the other two generations, particularly Xers. In addition the perceptual maps show that Clinique is perceived as the top brand by all generations. Particularly for Baby Boomers, where it stands out clearly from the rest of the brands, whereas for Xers it is part of a group of brands perceived similarly and Yers perceive Clinique and Nivea similarly. Relating this back to usage shows that Clinique (14.0%) and Nivea (14.9%) are used by a similar percentage of Millenials, with a slightly higher percentage using Nivea i.e. Millenials believe Nivea is as good as Clinique on these attributes but at a lower, more affordable price. The perceptual maps also show that whilst there are similarities of some of the brands positions as perceived by each of the generations on the *lasts all day (no need to reapply)* and the *moisturising ability* attributes, overall the brands were perceived differently by each of the generations.

The next set of perceptual maps (Figure 8.4, 8.5 and 8.6) were created using the means of each brand rated on the attributes which were perceived by Boomers as being third and fourth most important i.e. the *makes skin feel soft and smooth* and the *contains anti-aging properties* attributes. Each perceptual map indicates how a specific generation positions the brands, the mean scores as rated per Generation on these two attributes are presented in Table 8.5. It should be noted that the *makes your skin feel soft and smooth* was rated the most important attribute by both Generation X and Generation Y.

Table 8.5 Means of Brands rated on the *makes skin feel soft & smooth* and the *contains anti-aging properties* attributes

	Baby Boomers		Generation X		Generation Y	
Brand	Makes skin feel soft & smooth	Contains anti-aging properties	Makes skin feel soft & smooth	Contains anti-aging properties	Makes skin feel soft & smooth	Contains anti-aging properties
Body Shop	3.67	3.16	3.49	2.92	3.51	3.10
Clarins	3.95	3.99	4.00	4.07	3.86	3.84
Clearasil	3.04	2.51	3.30	2.76	3.21	2.37
Clinique	4.37	4.25	3.98	3.97	3.94	4.02
Gatineau	4.08	4.05	3.75	3.85	3.59	3.50
J&J	3.87	3.28	3.98	3.20	4.06	3.01
L'Oreal	4.16	4.16	3.89	3.90	3.89	3.95
Nivea	4.02	3.68	4.02	3.47	4.08	3.54
Revlon	3.97	4.13	3.85	3.69	3.79	3.69

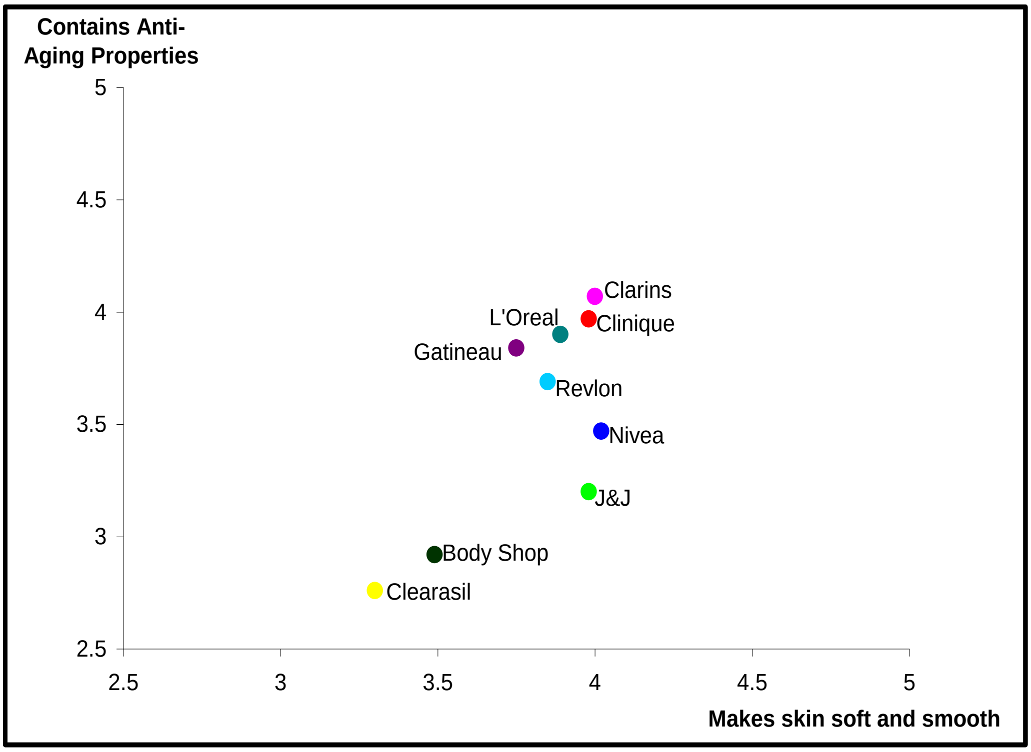
Figure 8.4 Perceptual Map B – Baby Boomers



The perceptual map indicates that Clinique was rated the best on both attributes. The reason for Clinique being rated highly on the *makes skin feel soft and smooth* attribute may be as a result of their communications which stress a 3-step solution to facial care, the third step being moisturise which softens and smoothes, maintaining skin's optimal moisture balance (Clinique Laboratories llc., 2009m: Para 5). The high rating of Clinique on the *contains anti-aging properties* attribute is more than likely attributed to the fact that Clinique develops a wide range of products which combat aging, these include the Superdefense, Super Rescue (Clinique Laboratories llc., 2009d: Para 3), Youth Surge, Repairwear (Clinique Laboratories llc., 2009e: Para 3) and Zero Gravity (Clinique Laboratories llc., 2009f: Para 3) ranges.

Whilst Revlon and Clarins seemed to be perceived as similar so are L'Oreal and Gatineau. Hence Revlon and Clarins are perceived to compete directly as are L'Oreal and Gatineau. Clearasil is rated the worst on both attributes as perceived by Boomers.

Figure 8.5 Perceptual Map B – Generation X

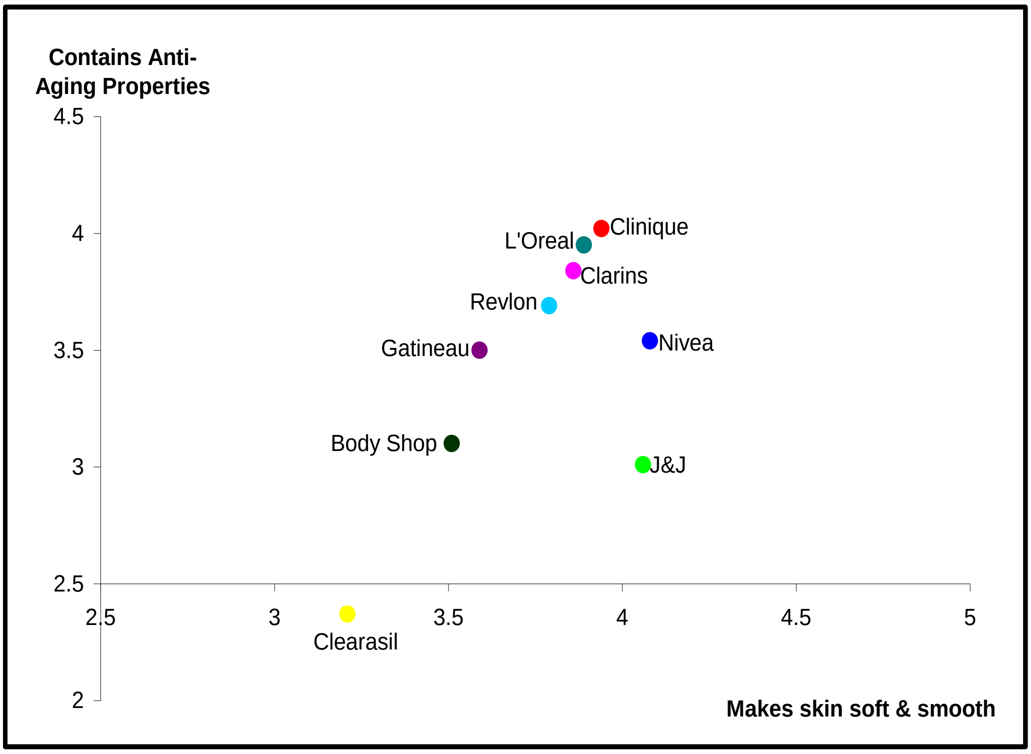


Generation X perceived Clarins to be best on the *contains anti-aging properties* attribute. The high perception of Clarins on the *contains anti-aging properties* may be attributed to their extensive range of anti-aging products which include, the multi-active range (Clarins, 2010i: Para 1), the extra firming range (Clarins, 2010j: Para 1), and the super restorative range (Clarins, 2010k: Para 1).

Nivea was rated highest on the *makes skin feel soft and smooth* attribute, but was only slightly higher than Clarins. A possible reason why Nivea was perceived as the best brand on the *makes skin feel soft and smooth* attribute could be attributed to the fact that samples play a key role in Nivea's communication mix, as Nivea believes it's important to engage the consumer through touch (Fry, 2008a: Para 3). Thus many of the respondents may have had experience with the way Nivea products make the skin feel as samples are widely available. Despite Nivea rating high on the *makes skin feel soft and smooth*, it is not seen as containing equivalent anti-aging.

It's interesting to note that whilst Nivea is top brand on the *makes skin feel soft and smooth* attribute the perceptual map clearly shows that on the *makes skin feel soft and smooth* attribute, Nivea, Clarins, Clinique and Johnson and Johnson scored very similar means. Thus the *makes skin feel soft and smooth* attribute, whilst being rated as the most important attribute by Generation X, it is not a good differentiator.

Figure 8.6 Perceptual Map B – Generation Y



The perceptual map indicates that Generation Y perceives Clinique, L'Oreal and Clarins similarly on the two attributes, rating Clinique highest on the *contains anti-aging properties* attribute. Nivea was rated highest on the *makes skin soft and smooth* attribute, followed closely by Johnson and Johnson. Furthermore, both of these brands were perceived as being as good as the more expensive brands on the *makes skin feel soft and smooth* attribute but without anti-aging. Clearasil was perceived as worst on both attributes.

Generation Y rated Clinique most effective in terms of the *contains anti-aging properties*, again this may be attributed to Clinique's extensive anti-aging products. Nivea and Johnson and Johnson were considered to be best on the *makes skin smooth and soft* attribute. This is interesting as these brands are relatively less expensive yet still deemed effective by Yers on the attribute which they rated as most important. This could however be explained in terms of their experience with the products. Since both products are affordable and a large percentage of the Generation Y respondents were scholars or students who earned low incomes or relied on an allowance they may currently be using these products or recently had previous experience with them. A possible reason why Johnson and Johnson was rated highly on this attribute may also be attributed to the slogan used with is 'For softness. For Beauty. For Life', furthermore the Generation Y consumers may have perceived Johnson's as creating soft skin due to the brands association with baby products . In addition Johnson's communicates that Johnson's products are tailored to meet individual needs, leaving skin baby soft (Johnson & Johnson Limited, 2010a: Para 1). The similarity of the means scores of Nivea and Johnson and Johnson on the *makes skin smooth and soft* attribute indicate that they are close substitutes for each other.

From the three perceptual maps it is evident that Clinique is perceived to be the top brand on both attributes, by Baby Boomers, with L'Oreal, Gatineau, Revlon and Clarins being considered as relatively close substitutes. Generation X and Generation Y did not have a brand which they perceived to be best on both attributes. On the *contains anti-aging properties* attribute, Clarins is followed closely by Clinique, L'Oreal and Gatineau as perceived by Generation X. Where as for

Generation Y Clinique was followed closely by L'Oreal and Clarins on the *contains anti-aging properties* attribute. Particularily worth considering though is that the *makes skin feel soft and smooth* attribute was most important to both Xers and Yers yet there isn't a clear brand leader for either of the generations on this attribute shows that this attribute is not differentiating attribute. As a result it can be concluded that this is an attribute which Xers and Yers expect to find in facial care products and not one which will sway brand choice.

From Figure 8.1 and Figure 8.4 it is interesting to note that Clinique was perceived as the top brand by Boomers, on each of the Boomers top four most important attributes, this shows that Boomers perceive Clinique as being extremely effective and of high quality. Thus it appears that Clinique has managed to achieve a sustainable competitive advantage by effectively communicating that Clinique creates great skin (Chilton, 2009 cited in Primall Media, 2009: Para 5), and provides exceptional quality (Clinique Confidential, 2007:18).

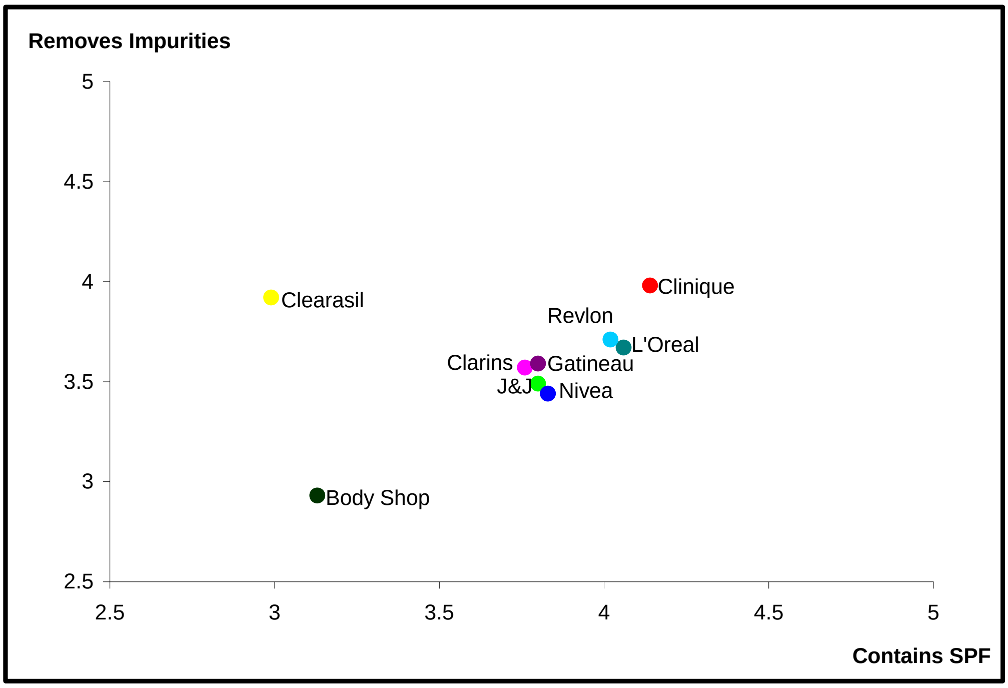
The previous three maps were created using the most important attribute for Generation Xers and Millenials i.e. the *makes skin feel soft and smooth* attribute, thus the three perceptual maps (Figure 8.7, 8.8 and 8.9) which follow will focus on the second most important attribute as rated by each of the generations. The three perceptual maps which follow, were created using the means of each brand rated on the *contains SPF* and the *removes impurities* attributes.

Table 8.6 Means of Brands rated on the *contains SPF* and the *removes impurities* attributes

	Baby Boomers		Generation X		Generation Y	
Brand	Contains SPF	Removes Impurities	Contains SPF	Removes Impurities	Contains SPF	Removes Impurities
Body Shop	3.13	2.93	3.16	3.04	2.87	3.08
Clarins	3.76	3.57	3.85	3.89	3.63	3.65
Clearasil	2.99	3.92	3.14	4.03	2.89	3.95
Clinique	4.14	3.98	3.87	4.01	3.87	3.96
Gatineau	3.80	3.59	3.87	3.66	3.35	3.49
J&J	3.80	3.49	3.85	3.70	3.76	3.63
L'Oreal	4.06	3.67	3.87	3.67	3.68	3.63
Nivea	3.83	3.44	3.93	3.53	4.03	3.58
Revlon	4.02	3.71	3.80	3.64	3.47	3.50

The mean scores as rated per Generation on the *contains SPF* and the *removes impurities* attributes are presented in Table 8.6, and each perceptual map presents the brands as positioned per generation.

Figure 8.7 Perceptual Map C – Baby Boomers

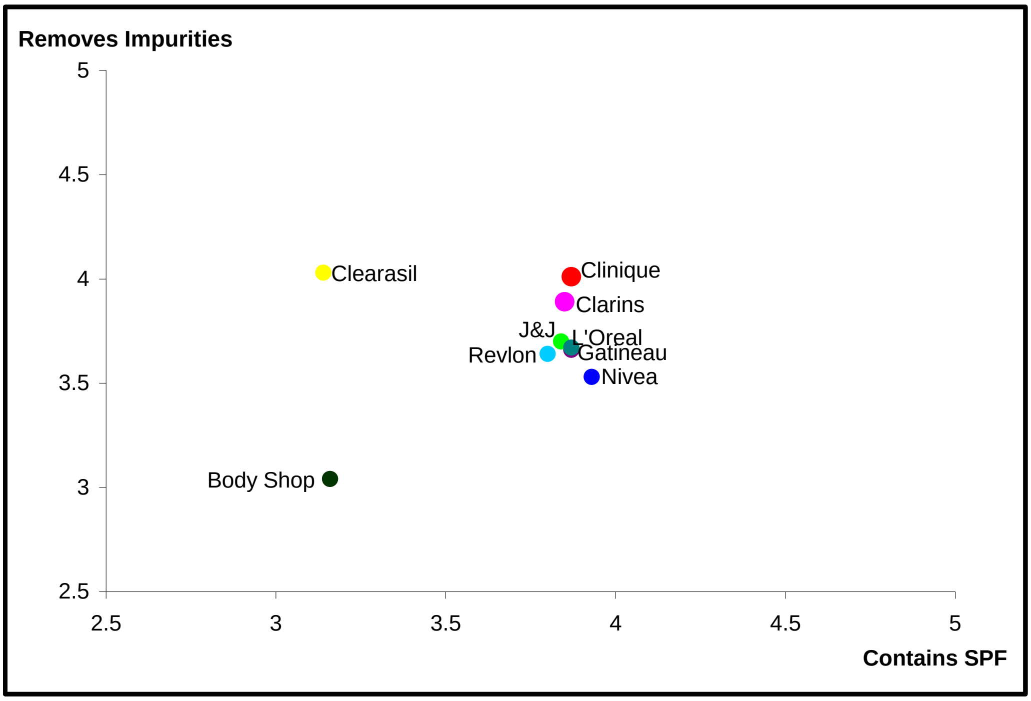


The perceptual map clearly shows that Clinique is perceived as the best brand when it comes to both the *contains SPF* and the *removes impurities* attributes. It's interesting to note that whilst some Clinique moisturisers contained no SPF, there are some moisturisers that have a SPF of 15 and others with a SPF of 25. Furthermore, the moisturisers developed for mature skin contain a higher SPF, since Boomers are likely to be using products for mature skin this may have impacted the high ranking of Clinique on the *contains SPF* attribute. In addition Clinique also has a sun protection range which may also have attributed to the Boomers perception of Clinique products containing SPF. If Boomers perceive bad skin as meaning blemished or acne prone skin and good skin as being skin which is flawless i.e. blemish free, then the Boomers high rating of Clinique on the *removes impurities* attribute could possibly be aligned with Clinique's philosophy that great skin can be created (Clinique Laboratories llc., 2009a: Para 1). Furthermore, the fact that a relatively large percentage of Boomers indicated that they were of the opinion that Clinique was one of the top facial care brands may have impacted Clinique's high ranking on this attribute as one might expect a good quality brand to be effective in removing impurities.

It also needs to be mentioned that whilst Clinique was the top brand on the removes impurities attribute, Clearasil was also rated highly on this attribute. The perception that Clearasil is efficient with regards to the *removes impurities* attribute may be attributed to the fact that both the Clearasil ranges imply that they remove impurities; the one range is called 'Stay Clear', whilst their Ultra Range is specially formulated to target blemishes, acne and occasional break-outs (Reckitt Benckiser Inc., 2008c: Para 1&3). Furthermore, this aligns with Clearasil's positioning which appears to be to provide products which have been developed scientifically and are effective in removing impurities such as pimples and blackheads.

The close proximity of Revlon and L'Oreal on the positioning map indicates that these brands are close substitutes and positioned very similarly by Boomers on these two attributes. Furthermore, Gatineau, Clarins, Johnson and Johnson and Nivea are also clustered in the same area of the positioning map and are very close in proximity, thus these four brands are also close substitutes. Whilst Clarins and Gatineau are premium brands, Johnson and Johnson and Nivea are mass market brands which in terms of pricing are affordable. Thus Boomers perceive these brands as effective but for a lower price, this suggests that Boomers don't judge quality in terms of pricing. Body Shop was rated poorest on both attributes.

Figure 8.8 Perceptual Map C – Generation X



Nivea was rated best on the *contains SPF* attribute. Looking at the Nivea Visage range this is interesting as none of their facial care products communicate that they contain SPF, but despite this Xers rated them highly on the *contains SPF* attribute. It should be noted though that not all of the Nivea moisturisers contain an SPF, but they do have a UVA/UVB filter system. In addition those products developed for mature skin i.e. the DNAge and the Expert Lift day creams, contain SPF 15. The fact that Xers perceived Nivea to contain SPF may indicate that consumers assume that facial care products have some sort of SPF, or possibly they may rate Nivea highly on this attribute because Nivea has a range of sun care products.

Generation Xers perceived Clearasil to be best on the *removes impurities* attribute, this aligns with Clearasil's positioning. However it is worth mentioning that Clinique had almost the same score on this attribute. The similar mean scores indicate that Clearasil and Clinique are perceived similarily and thus are considered close substitutes. It is interesting to note that these two brands were also rated highest by Boomers i.e. they were the Boomers top brands on the *removes impurities* attribute. The reason for the high ratings by Xers would thus be similar to the reasons indicated in the previous discussion for Boomers.

Finally, Figure 8.8 also shows that on the *contains SPF* attribute, which is rated as Xers 2nd most important attribute when choosing facial care products, the following brands Clinique, Clarins, Johnson and Johnson, L'Oreal, Gatineau, Nivea and Revlon are all positioned in close proximity of each other and thus are close substitutes. The fact that there appears to be no clear top brand on this attribute suggests that Xers expect brands to contain SPF and thus this attribute is not differentiating i.e. it's not a choice attribute.

Figure 8.9 Perceptual Map C – Generation Y

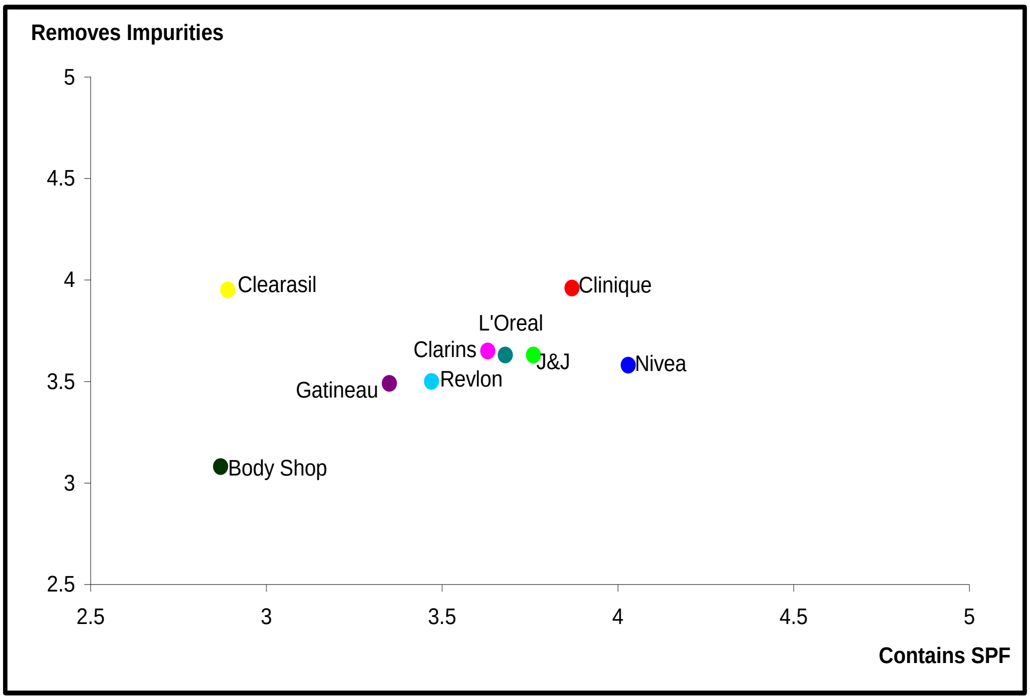


Figure 8.9 shows that Nivea takes 1st position on the *contains SPF* attribute. It is clear from the previous perceptual map (Figure 8.8) that on the *contains SPF* attribute Nivea is perceived similarly by Xers and Millenials, with both generations rating Nivea as the top brand on the *contains SPF* attribute. Thus, reasons for Nivea being rated highly on the *contains SPF* attribute are probably similar to the reasons provided in the previous discussion. Clearasil and Body Shop were perceived to be poorest on *contains SPF* attribute.

Clinique is the top Brand on the *removes impurities* attribute and followed closely by Clearasil. Again Yers perception of these brands on the *removes impurities* attribute aligns with the perception of the other two generations. On the *removes impurities* attribute the following brands Clarins, Gatineau, Johnson and Johnson, L'Oreal, Nivea and Revlon hold similar positions. Hence they are perceived to be similar and are close substitutes.

In close proximity of each other Clarins, L'Oreal and Johnson and Johnson are quiet similar on both attributes and thus are close substitutes. It's interesting to observe that whilst Johnson and Johnson is priced lower than the other two brands it is deemed to be just as effective on these attributes.

From the three perceptual maps presented we can conclude that Clinique again stands out as the best brand as perceived by Boomers. For Xers Clearasil and Clinique are best for removing impurities, however there is no clear top brand on the *contains SPF* attribute. Hence the *contains SPF* attribute is not a determining attribute. Millenials also perceived Clinique and Clearasil as the best brands for removing impurities, furthermore with the exception of Body Shop all other remaining brands were perceived similarly on the *removes impurities* attribute and are therefore close substitutes. Nivea was rated highest on the *contains SPF* attribute by Millenials.

From all the perceptual maps presented it's obvious that Clinique is rated the best brand on all attributes by Boomers, hence there appears to be a halo effect. Thus it appears that the Boomer generation is of the opinion that Clinique products are of exceptional quality. It's also interesting to note that whilst the *makes skin soft and smooth* and the *contains SPF* attribute are the most important attributes as rated by Xers neither of these attributes are determining attributes indicating that these are minimum criteria which Xers expect every facial care product to have. Hence marketers need to communicate that the product has these attributes so that Xers perceive the product as sharing these important attributes with other brands in the product category, but should not base their positioning strategy on these attributes as they are not differentiating attributes and hence will not create a superior image (Bearden, Ingram and LaForge, 2001:170).

8.4 RESEARCH OBJECTIVE 3:

This section deals specifically with the following research objective: To determine if Baby Boomer females feel marginalised by the skin care industry. This question was included based on the fact that the UCT Unilever Institute of Strategic Marketing and Synovate suggests that South African marketers are largely ignoring the Baby Boomer generation (Scher, 2008:Para 1). However if one looks at the facial care industry they appear to target these consumers and hence it was interesting to determine whether they still felt marginalised, despite the fact that there are products developed for this generation. Since this question deals specifically with whether the Baby Boomers felt marginalised by the facial care Industry, the focus will be on the Baby Boomers. Comment is also provided however on the other groups feeling marginalised.

During the Boomer focus group discussion, the participants indicated that they didn't feel marginalised, saying *that there are too many products.* However two of the participants felt that *in South Africa they don't cater for skin colour variations, and most of the premium products like Estee Lauder and Lamer, were targeted at white ladies*. It's interesting that this point came up, as the literature review showed that based on the population dynamics of the South African population there is an opportunity for manufacturers to address the more premium skin care requirements of the ethnic population (Euromonitor International, 2009:1).

Despite not feeling marginalised, these participants mentioned that *the older ladies over 65 are most certainly marginalised, and discussed that whilst some of their mothers were older they didn't stop using or needing facial care*. There was also a discussion around teenagers being marginalised; *one participant mentioned how she really struggled to find a product for her teenage daughter and that despite asking for advice no-one could tell her what was good for teenage skin and even though there are products available, they're not exposed, they aren't marketed directly as teenage products*.

With the exception of one participant in the Generation X focus group, participants voiced that they did not feel marginalised. The participant who felt marginalised was Indian and voiced that *there are no products for Indian skin specifically,* she also pointed out that *amongst Indians there were vast colour variations and felt there should be products to address each of these*. Hence it seems there may well be an opportunity for a range of products aimed specifically at Indian women. Generation X participants further voiced they felt *the teenagers were marginalised* and discussed this in terms of there *not being enough products or education about what is available* and furthermore that they were of the opinion that *the products aimed at teenagers were far too harsh on their skin*. Hence it can be concluded in terms of the groups that were marginalised opinions of Boomers and Xers were similar.

The teenagers in the Generation Y focus groups indicated that they felt marginalised, and indicated that *most facial care advertising focussed on anti-wrinkle creams, so it could be that they were just not aware of the products for teenagers*. Furthermore they felt that *when searching for products nothing stood out as being developed for their age group, with the exception of Young Solutions.* They felt *a company who actually put something on the label which indicated it was designed* *for teenagers could make a lot of money*. Thus it appears that whilst both Boomers and Generation X felt teenagers were marginalised, the teenagers themselves also felt marginalised.

Question 6 of the survey questionnaire asked respondents to indicate if they were marginalised; in the event that they felt marginalised they were asked to indicate why they felt marginalised. A total of 148 Baby boomers answered this question of these 21(14.2%) Baby Boomers indicated that they felt marginalised by the facial care industry. This was in fact a smaller percentage than the Xers (15.7%) and Yers (16.2%) who felt marginalised.
When investigating why Boomer respondents felt marginalised, the most popular reason given by 7 of the respondents indicated that they felt products were too expensive. Other reasons given to why Boomers felt marginalised was 1) due to a lack of information and promotions, 2) no assistance and sales staff that offered advice. Thus, it can be concluded that overall Baby Boomers don't feel marginalised by the facial care industry.

Question 7 of the survey questionnaire asked respondents to indicate whether they felt a particular age group or race group was marginalised. Since Baby Boomers fall into the following three groups, the 40–49, 50-59 and 60-69 a cross tabulation was run to investigate whether Baby Boomers indicated that these age groups were marginalised. Baby Boomers were born between (and including) 1946-1964 (Musico, 2008:35), hence their ages range from 45 – 64 years.

Based on the findings, 23.8% of Boomers indicated that the age groups which Boomers fall into were marginalised, which is higher than the actual 14.2% who themselves indicated that they felt marginalised. This is attributed to the fact that the biggest group was the 60 – 69 age bracket, which also includes individuals from the silent generation i.e. not Baby Boomers. Overall Boomer respondents indicated that they weren't marginalised by the facial care industry. However there were other age groups and race groups which Boomers felt were marginalised and deserve comment, these are Teenagers (11.6%), the 70+ age bracket (22.5%), Coloured (11.9%) and Indian ladies (23.8%). It is interesting to note that these results are the same as the Boomer focus group findings, and hence we can conclude that there may very well be an opportunity for marketers to target the 70+ age group and the Indian race group better.

In terms of Generation X findings, 18 (9.8%) of Xers felt the 30-39 age bracket was marginalised and 10 (5.5%) were of the opinion the 40-49 age bracket was marginalised, individuals falling into these groups are largely Generation X and hence the total of Generation X respondents that indicated Xers were marginalised is 28 (15.3%), this aligns with Question 6 in which 15.7% of Xers indicated that they themselves felt marginalised. Other groups which Xers felt were marginalised and deserve comment are teenagers (13.6%), the 70+ age bracket (18%), Black (14.8%), Coloured (14.2%) and Indian (34.4%) ladies. Again these results are similar to focus group results, and we can conclude that in terms of teenagers, the older ladies i.e. members of the silent generation, and ethnic skin these consumers perceive that there aren't enough facial care products.

Of the Generation Yers, a total of 51(34%) Yers indicated they thought the age group comprising Generation Y were marginalised, this is much higher than the (16.2%) of Yers who themselves felt marginalised. What's interesting is that the percentage of Yers that indicated the 20-29 age group was marginalised was much bigger than the percentage of generation Yers that were of the opinion that teenagers were marginalised. This differs from focus group results where participants were of the opinion that teenagers mainly were marginalised. In terms of the other age and race groups which deserve comment in terms of Generation Y perceiving them as being marginalised the following deserve comment, the 60-69 age group (13.3%), the 70+ age bracket (22.7%), Black (15.3%), Coloured (18.7%) and Indian (34.7%) ladies. The age groups mentioned here, were not mentioned in the Generation Y focus group, however it is interesting to see that in terms of groups most of the generations indicated similar groups.

Thus it can be conclude that a relatively small percentage of Baby Boomers felt marginalised by the facial care market, which contradicts the Unilever Institute of Strategic Marketing and Synnovate findings, which indicated that Boomers were marginalised (Scher, 2008:Para 1). Furthermore, it appears as if the facial care industry is one industry which has managed to effectively target Boomers, by developing products for this lucrative market and have successfully implemented marketing communications which are well received by Boomers. An interesting observation which was made in this research is that in terms of the age and race groups which are perceived as being marginalised, there is general consensus by all the generations that the older ladies, i.e. members of the silent generation and ladies with ethnic skin particularly Indian ladies are marginalised, thus this is an opportunity which should be addressed by facial care companies.

8.5 RESEARCH OBJECTIVE 4:

This section deals specifically with the following research objective: To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products. The intention of the positioning strategy is to favourably influence consumer perception, whilst the product, distribution, price, and promotion strategy components make up a bundle of actions that are used to influence buyers' perceptions (Cravens, 2000:36). This objective ties into the promotion strategy and will give marketers valuable clues as to specifically what media vehicles to use.

During the Boomer focus group, participants indicated that the following media vehicles were effective: *Television and Print Adverts (specifically in the form of magazines and pamphlets*). Boomers indicated that they preferred print to TV, the reason given for this was that *TV was just a flash and then it was gone, where as Print one could take home, read it when one has time and refer back to it.* The literature emphasises that when marketing to Baby Boomers, web, advert, brochures and word-of-mouth are important communication tools (Hart, 2007:34). Whilst some Boomers said *the use of celebrities was effective,* others regarded this method as less effective. These participants liked the idea of samples, *due mainly to the fact that using samples was cost effective and less risky*. Furthermore, participants indicated that *websites were especially useful for obtaining more information that might be lacking in a TV advert*. This aligns with the literature in that Harmon *et al.* (1999:31), state that when it comes to Boomers, these consumers like to be in control of the buying process, and the information search is very important. The use of celebrities was believed to be convincing by some of the Boomer participants who stressed though that *they were only convincing if the celebrity was* their age. Other participants indicated that they were very sceptical of adverts using celebrities, and believed that *all models used in adverts were airbrushed*.

Generation X respondents indicated that *they tended to buy more based on print than they did based on TV, however TV was still effective.* These results show that Generation X still maintains an affinity for certain traditional channels (Lager, 2006:31) which is aligned with the literature. Participants indicated that *samples definitely worked* and the reason given was that *they liked to touch and feel a product before buying it and putting it on their face.* The literature review indicates that when addressing the Xers generation, marketers should offer these consumers lots of information and allow them to interact with displays as well as sample products (Fried, 1996: Para 11). Similarly to the Boomers focus group, some Xers thought celebrities could most definitely impact purchase choice, whilst others were sceptical about the use of celebrities, hence it isn't clear whether the use of celebrities work with this generation and thus the quantitative survey would be useful to establish if there is truth in what Codrington and Grant-Marshall (2004:189) say, "they have no heroes – only celebrities".

Generation Y focus groups indicated that participants found *the use of celebrities was effective*. This is not surprising as Codrington and Grant-Marshall (2004:192) state, “endorsements will work with them as they look up to heroes”. This Generation was also of the opinion *that print was more effective than TV advertising, as the minute the advert disappears it's gone until the next time you see it, as opposed to a print advert can be kept and referred back to*. These participants also thought *word-of-mouth was a very effective form of advertising,* the reason given was that *friends won't lie to you*. Furthermore participants stated *they would believe an expert e.g. beautician or dermatologist too*. Brief mention was made of things like *online forums and blogs, with participants agreeing these were both more believable and effective*. Hence it appears that there is some truth in what Matthew said (2006, cited in Segger, 2006:16) which is that due to the fact that Millenials are less trusting of mainstream media, sources such as word-of-mouth, viral and experiential marketing are well received by this market.

Question 8 of the survey questionnaire required respondents to rate a list of media types in terms of effectiveness. They were required to use a scale of 1-10, where 1=totally ineffective and 10=very effective. The media types which respondents had to rate were, TV Adverts, Print Adverts, Radio Adverts, Blogs, Websites, Samples, Sponsorships, Web-Campaigns, Word-of-Mouth, Store Displays, Endorsed by celebrities and Endorsed by experts, e.g. dermatologist, doctor or beautician.

Table 8.7 Effectiveness of Marketing Media as per generation

	Baby boomers		**Generation X**		**Generation Y**	
Marketing Media	Mean	Ranking	Mean	Ranking	Mean	Ranking
TV Adverts	7.10	1	8.14	1	8.13	1
Endorsed by experts e.g. dermatologist, doctor, beautician	6.80	2	7.57	2	7.30	3
Word-of-mouth	6.74	3	6.79	6	6.81	5
Print Adverts	6.61	4	6.91	5	6.58	6
Samples	6.51	5	7.18	4	7.37	2
Store Displays	6.11	6	7.20	3	6.95	4
Endorsed by celebrities	4.14	7	5.84	7	6.36	7
Sponsorships	4.07	8	4.57	9	5.11	8
Radio Adverts	3.82	9	5.02	8	4.54	9
Websites	2.68	10	4.09	10	3.65	10
Web Campaigns	2.31	11	3.19	11	3.27	12
Blogs	2.24	12	2.97	12	3.53	11

Table 8.7 shows the mean scores of the media effectiveness as rated by each generation. From the table it can be concluded that with the exception of Radio, the traditional media vehicles scored higher means and were thus perceived as being more effective than newer forms of media such as websites, web-campaigns and blogs, particularly as rated by Boomers. To determine whether differences between the generations were significant Kruskal-Wallis and Mann-Whitney U tests were run. The discussion focuses on the significant differences which occurred between Boomers and Xers, and Boomers and Millenials only.

It can be concluded that although all groups felt TV was the most effective medium, *TV adverts* were considered as significantly less effective by Boomers (7.10) than both Xers (8.14) and Yers (8.13). The fact that each generation perceived TV Adverts as being most effective indicates that when it comes to advertising facial care TV is still one of the most effective media vehicles.

Baby Boomers and Generation Xers, rated *endorsed by experts* as 2nd most effective form of media when it comes to advertising facial care products, whilst Generation Y rated this as the 3rd most effective form of media. There was a significant difference between Boomers and Xers with Xers (7.57) rating *endorsed by experts* as significantly higher than Boomers (6.80). Thus it appears that when it comes to buying facial care, brands which substantiate claims using experts can have an advantage. This aligns with the findings of the study conducted by the NPD Group which found that 28% of consumers prefer brands that have a physician/ doctor endorsement (Meisel, 2008: Para 4). Furthermore, this is supported by Beyer (2009: Para 28) who states that consumers are impressed with founders who have medical, dermatological or other clinical credentials and having impressive credentials will get consumers to try a premium priced product.

Yers rated *samples* as their 2nd most effective form of media. There was a significant difference between Boomers and Yers relating to the effectiveness of *samples*, with Yers (7.37) rating it as significantly more effective than Boomers (6.51). The importance of samples to Generation Y also came up in the literature review with Gronbach (2000, cited in Unknown, 2000: Para 7) suggesting that when targeting this generation marketers should use street marketing, or guerrilla marketing, a form of localised and personalised, non-conventional marketing that includes things like giveaways, samples and special events. Although samples were not discussed in the Generation Y focus groups, this was mentioned in both Boomer and Generation X focus groups, this is an important finding. Furthermore, it can however be related to Meisel (2008:18) who says that consumers expect to see and feel the results before even considering adding a new product into their skin care ritual. This shows that when it comes to trying new facial care brands Generation Y consumers appear to be hesitant and would prefer a sample than committing to a months supply of facial care product, which may not work.

Xers rated as their 3rd most effective type of media, *store displays*. *Store displays* were rated as significantly more effective by both Generation X (7.20) and Y (6.95) when compared to Boomers (6.11). Thus it can be concluded that appearance or aesthetically pleasing displays have more of an effect on Generation X and Y than they do on Boomers. This aligns with the previous results of Boomers rating the *quality packaging* attribute as less important than the other two generations.

Other media types which were significantly different between Boomers and one or both of the generations included *endorsed by celebrities, sponsorships, radio, websites, web-campaigns* and *blogs.* Both Generation X (5.84) and Generation Y (6.36) rated *endorsed by celebrities* significantly more effective than Boomers (4.11). The fact that Boomers scored *endorsed by celebrities* below average indicates that it may not be viable for facial care industries to incorporate this into their advertising. This may be because Boomers are older and wiser and hence are more sceptical or possibly more attuned to things like airbrushing; another reason for this may be that Boomers are of the opinion that celebrities look young as they have invested in things like plastic surgery or botox.

Generation Y (5.11) respondents considered *sponsorships* as being significantly more effective than Boomers (4.07), however these scored just above average and thus it appears that in terms of using sponsorships to communicate with consumers, there are other more effective media that facial care companies could utilise. Surprisingly Boomers (3.82) rated *radio* as significantly less effective compared to Generation X (5.02) and Y (4.54). Thus, although radio is considered as particularly effective as research shows that music is a potent connector with Boomers, especially the music which Boomers love and can relate to (Mills, 2008, cited in Moore, 2008:42), it appears that in terms of the advertising of facial care, radio appears to be relatively ineffective.

Websites, web-campaigns and blogs were rated as significantly more effective by both Generation X (4.07, 3.19, 2.97) and Y

(3.65, 3.27, 3.53), compared to Boomers (2.68, 2.31, 2.24), since both Generation X and Y were brought up with computers from an early age these results were anticipated. The literature review shows a different picture. Hart (2007:34) for example says when marketing to Baby Boomers the web is an important communication tool. Lager (2006:31) says Generation Xers preference for active engagement, has resulted in a preference for online interactions, and Henon (2006:32) says that because Generation Y has been exposed to the internet from an early age, sophisticated web applications are a necessary media for these consumers. Thus, when relating these results back to the literature, these results particularly that *websites* were considered below average by each generation in terms of effectiveness, are surprising. This is most likely due to the product type, i.e. consumers don't use these mediums in relation to facial care products.

From these results we can conclude that in terms of the media vehicles deemed effective the generations had different views. It's interesting to not that in terms of the effectiveness of the various media vehicles, Boomers appear to be most sceptical of advertising and rated each of the media vehicles as less than Generation X and Generation Y. Whilst the above section has focused mainly on the effectiveness of media vehicles the following section looks at the type of advertising campaigns which appeal to each generation. Most of this data was gathered during focus group discussions, in addition, some of the statements in Question 9 of the survey questionnaire also need to be considered. Question 9 of the survey questionnaire included statements relating to things which should be incorporated into marketing communications and respondents were required to indicate their extent of agreement to these statements.

Bearden *et al.* (2001:169) state that "positioning a product or service involves designing a marketing program, including the product mix, which is consistent with how the company wants its products or services to be perceived". "The marketing mix - product, price, place and promotion - is essentially the working out of the tactical details of the positioning strategy" (Kotler, 1997:298). Percy and Elliot (2005:109) recommend that promotion will alert the consumer to potential benefits. According to Foxall *et al.* (1998:60), "the selective nature of perception restricts the efforts of any given advertisement no matter how prominently it is positioned or whatever stimuli it incorporates". Thus, marketers need to recognise that the stimuli may not be perceived and interpreted by consumers and the selective processes described above help explain why some people are affected by certain marketing communications and others are not. Since selectivity limit's a consumer's perception, it is imperative that the stimuli provided through marketing communications are special, to ensure that a product stands out and is memorable (Monger, 2007:276). Thus, an important part of the positioning strategy involves making sure that the advertising you use is designed in such a way that it captures the attention of the target market and effectively communicate with consumers.

During focus groups participants discussed the kinds of adverts which appeal and those that don't. From this some useful insight was gained. In terms of the types of advertising campaigns which Boomers found appealing the following important findings were extracted. The adverts which incorporated a sense of humour were very well liked and remembered by these participants. Boomer participants also indicated that *the adverts which blended South African cultures and incorporated fun in them, focusing on the positive were well received.* They reacted more positively to these types of adverts *because the different cultures were unique to the country they loved,* and they believed that there *was a lot of opportunity for South Africa if we all learnt to stand together, learning from each other*. These consumers also indicated that *adverts which looked at aging positively were appealing*. This comment aligns with the literature which states that Baby Boomers will not respond well to messages that refer to them as either old or as seniors, however there is a tremendous opportunity for marketers to speak to this generation playing on ways of how the product can help this generation stay active (Musico, 2008:37). In addition they indicated that they were *distrustful of adverts that showed them a person with wrinkles and after using a product these* *wrinkles disappeared.* Thus, it appears Boomers are sceptical of advertising that illustrates elements which they find hard to believe.

Boomers liked television adverts which *were nostalgic and brought them back the 70's, using 'their' music*. 'Their' music was explained as *the music which we listened to when we were younger*. Boomers viewed this period *as particularly fun, colourful and optimistic*. This is aligned with the findings by Codrington and Grant-Marshall (2004:186), when they say, "use 1960s and 70s music – Boomers were the first to put music into adverts and they like their 'music' the best. In order to test whether Boomers would agree to these findings the following statement was included in the mall-intercept survey questionnaire: *I am more likely to use facial care products that use the music from my era in their advertising.* All of the generation indicated that they disagreed with the statement. Based on the literature and the fact that the participants in the Boomer focus groups indicated an affinity to adverts using 'their' music the fact that Boomers specifically disagreed with this statement was surprising and unexpected. This however could be attributed to the fact that facial care, specifically anti-aging is extremely important to Boomers and thus they value information and benefits more than any other elements. This aligns with the literature which indicated that Baby Boomers are smart and vague messages will not work with this generation; instead they want to know the benefits and want information, marketers need to communicate benefits and value in a clear-cut way, making it relevant to the targeted consumers (Beasty, 2006:35).

Some Boomers were very sceptical of adverts that used celebrities to advertise facial care products. They distrusted these types of adverts because they felt *the celebrities were airbrushed*. This contradicts Codrington and Grant-Marshall (2004:186), who said they are attracted by celebrity endorsements and image. Whilst celebrity endorsers may work for other products, it appears from these findings that when it comes to facial care products not all Boomers are not attracted by celebrities. At the same time consideration needs to be given to the remaining participants who were of the opinion that celebrities were effective. The participants did however have strong views on the choice of celebrities stressing that celebrity endorsements only work if the celebrities are '*their' age*, for example the *use of Jane Fonda or Penny Coelen (former Miss World) was effective*. Thus, aligning with what Codrington and Grant-Marshall (2004:186) say, "they believe they know better than anybody else, so forget products endorsed by any generation other than Boomers. In order to test whether Boomers react more positively to adverts that use endorsers from their age group respondents were required to indicate the extent of agreement to the following statement: *I am more likely to use facial care products that use endorsers from my age group*. Based on the literature and the focus group findings it was anticipated that Boomers would agree with the statement, however all generations were neutral to the statement. Hence it appears that in terms of advertising facial care products this is not very important.

Generation X participants felt that *with the facial care communications focussing on anti-aging, they were very much developed and targeted at their age group*. These participants admitted that *the use of celebrities was both appealing and effective in persuading them to buy a product,* they did feel though that *the selection of the celebrities used was critical,* and preferred adverts that used celebrities which they could *aspire to, celebrities with good value systems who were beautiful inside and out*. At the same time though these participants argued that *at the back of their mind they're thinking that the celebrity endorser doesn't really use the product, but despite this they still appeal and draw them in*. Adverts which they found especially appealing were those that *were truthful, in a sentimental way and touched a soft spot*. Based on the literature this is not surprising as Fishman (2004:5) says, Xers will see through hype and value an honest, straight-forward approach. The example used by the Generation X participants was the Allan Gray advert, where the father tries to teach his son to look into the future, the advert shows *this little boy looking at the mother of a pretty little girl that he likes, to see whether she will stay as pretty as she is now.*

Generation X participants also indicated that the adverts which could be related to their own every day lives were remembered. For example the KFC advert, where the father takes away a milkshake that he has been told was stolen from his daughter when in fact the child never had a milkshake. They also indicated that adverts *which were fun with a sense of humour were more likely to catch their attention, like the Vodacom advert with the song 'if you liked it, you should have put a ring on it'*. This illustrates the importance of Lager's (2006:30) advice which is, in advertising it is important to engage this generation, empowering them to make the choice and focusing on keeping the tone of marketing communications light and humorous. Participants indicated that there was *nothing which made them remember an advert more than a catchy slogan.* An example given was *the 'nothing sux like electrolux'* slogan. Other adverts which appealed to Xers were adverts that *were different from the norm, unexpected.* The example used was the Bidvest advert *which uses nude dancers to create various different shapes*. Codrington and Grant-Marshall's (2004:188-189) research showed similar results and they offer the following advice to marketers when targeting Xers, "they are easily bored so they enjoy clever tricks and the unexpected".

The types of adverts that were disliked by the Generation X participants were *any adverts that were crude,* for example they found the Nando's adverts crude. They didn't like the L'Oreal adverts, they found the slogan 'because you're worth it' *cheesy.* Furthermore, they felt these adverts were *just too unrealistic*.

Generation Y participants, remembered adverts *often based on the slogans used, for example, L'Oreal which is 'beacause you're worth it', Maybelline, 'maybe you're born with it, maybe it's Maybelline'* and *'Garnier, takes care '*. They also mentioned *the effectiveness using celebrity endorsers,* however mentioned that these *needed to be selected carefully and it needed to be a celebrity that they looked up to, but most importantly that the celebrity chosen did have clear skin*. As Codrington and Grant-Marshall (2004:191) state that for Generation Y, "endorsements will work with them as they look up to heroes." The use of *natural elements in adverts such as plants and water* were considered particularly effective when advertising facial care *as it implied in the message a sense of natural and pure making them think it was good and not harmful and full of chemicals*. Participants indicated that when it came to print adverts *they were fond of the Body Shop Adverts as they were simple and to the point*. Thus it appears that the Generation Y consumers are aware of 'green' products and have a certain affinity to these types of products. Another topic which was discussed by Yers, particularly by the teenagers, was that they thought friends and experts were credible sources of word-of-mouth, but distrusted promoters.

Generation Y participants *didn't relate to unrealistic adverts.* The examples given were *the oxy advert where a teenager asks his teacher to the prom.* Participants were of the opinion that this was *far fetched and would never happen in real life*. They also didn't like the L'Oreal adverts as in their mind they conveyed *a too perfect picture, they used beautiful and perfect women, in a perfect house and appearing to have a perfect life.* They disliked these adverts as they realised that *life was not perfect* and in their opinion it was *very unlikely that it would ever be*.

There were two further statements which dealt with the content of adverts. Results showed that Boomers disagreed with the statement, *I am more likely to use facial care products that use entertaining adverts*, this aligns with the literature which stated that an advert that is information intensive is more likely to be received by Boomers (Hodges and DeCoursey, 1996, cited in Harmon *et al.*, 1999:31). Both Generation X and Generation Y were neutral to the statement, thus it appears that when it comes to advertising facial care products, the entertainment element for Generation X and Generation Y, is not as critical as it appears to be with other products, this contradicts the literature. Codrington and Grant-Marshall (2004:188) gave the following advice, for reaching Generation X consumers, "entertain them. The advert must be an art form in itself". Similarly the literature suggests that Generation Yers like to be entertained in the adverts directed at them (Unknown, 2000: Para 6). The neutral response by both these generations may be because when it comes to facial care they want products which will really work and thus the information element is more important than the entertainment element.

Whilst Boomers and Generation Y were neutral to the statement *I am more likely to use facial care products that are recommended by my friends,* Xers agreed with the statement. Since Codrington and Grant-Marshall (2004:188) state, "Xers value friends – don't go for the 'lone ranger' image" the fact that Xers showed a more positive response to the statement was expected and aligns with other research findings. Lager (2006:30) states that Xers like to talk and share, valuing relationships and opinions of friends and family, and making purchasing decisions with thought for and input from family and friends. In addition Xers have a tendency to buy brands that have been recommended to them (Lager, 2006:30).

Finally, each of the generations agreed with the statement I am more likely to use facial care products that educate me about facial care routines in their communications. Thus, this indicates the importance of Beyer's (2009: Para 12) findings, that, another important trend which can't be ignored is that women demand to be educated about the products they are purchasing (Beyer, 2009: Para 12).

Thus, it can be concluded that in terms of the marketing messages and campaigns which are deemed effective, generations appear to have different needs. Furthermore, this research indicates that the needs of each generation appear to differ depending on the products which are advertised thus marketers can not assume that because Boomers like cell phone adverts that bring in a sense of fun, this may not apply to adverts for facial care.

8.6 General Observations:

A few valuable observations, which don't relate to any of the four objectives set, were found and will be discussed in the next section. These observations are interesting and could indicate areas for future research.

Of the respondents using facial care products the majority (69.7%) of them indicated that they used a single brand only. These findings indicate that when it comes to using facial care it seems women tend to stick to using a single brand, this may be because once they've found a brand which works for them and they are happy with, they find the risk and expense of trying a new brand too high. It's also interesting to observe that the percentage of Boomers (75.6%) and Xers (73.3%) using a single brand was relatively higher than the percentage of Generation Y (58.7%) respondents. This could be because Generation Y respondents are much younger and hence have not yet found products which they are completely happy with and which really work for their skin.

Another interesting observation which was made was that of the 402 respondents using facial care products, 77.1% mentioned the brands they used in the list of brands which they perceived to be in the top three. Since positioning theory is based on the assumption that consumers act on perceptions and this research indicates that there is a positive relationship between brand use and perception, it appears to strengthen the rationale behind positioning theory. However since causality wasn't measured further research is required to check if respondents used brands because they perceived them as the best.

8.7 CONCLUSIONS

The findings clearly indicate that there are differences in terms of the attributes each of the generations deem as important when purchasing facial care products. In terms of the way in which each of the brands are perceived on important attributes by the generations, the positioning maps indicate that the brands are positioned differently in the minds of the generation's central to this research. Whilst Baby Boomers did not feel marginalised by the facial care industry, there seems to be an opportunity for facial care companies to target the silent generation and the Indian ladies more effectively. In terms of the types of media each generation found effective, there were differences amongst Baby Boomers and the other two generations. Finally, in terms of what type of advertising campaigns that were most effective, differences in terms of what appealed to each of the generations were apparent. Hence the next chapter focuses on some recommendations which relate to the conclusions which were made in this chapter.

9.1 INTRODUCTION

This chapter presents the recommendations which have been made based on the conclusions drawn from the primary and secondary research conducted. It includes insights into the facial care market in general and relating specifically to the generations included in the study. Recommendations are made to marketers in terms of how they could tailor their communication strategy in order to target Baby Boomers or Generation X or Generation Y more effectively. Finally recommendations in terms of the positioning of each brand are made.

9.2 MARKETERS CAN TAKE ADVANTAGE OF THE BABY BOOMER MARKET

Research conducted by the UCT Unilever Institute of Strategic Marketing has indicated that the Baby Boomers, in South Africa, believe marketing messages are aimed at persons in their 20s and 30s, and feel alienated from marketing communications, overlooked by product developers and are displeased with customer service (Mitchell, 2008: Para 10). Hart (2007:34) agrees, stating that "marketing campaigns today too often address younger consumers, blithely ignoring the Baby Boomer women born between 1946 – 1964".

According to Osborn (cited in Vence, 2007:28), Baby Boomers are a market which is largely untapped and that marketers across many fields are just beginning to realise the value of this market. Marketers abroad are rapidly waking up to the fact that the Baby Boomers comprise not only the largest generation, but are also the single most lucrative segment (Hart, 2007:34, Vence, 2007:28, Unknown, 2007a:120 and Blake, 2006:85). In addition, there are various research studies which support the fact that the individuals making up the Boomer generation can be treated as one segment i.e. are a distinct group with similar value requirements concerning specific brand or product attributes who will react similarly to marketing activities (Cravens, 2000:112 and Monger, 2007:307). Thus it makes sense to target Baby Boomers, not only because they feel marginalised by most industries, but also because they are a large and lucrative market and any marketer who chooses to ignore this generation is likely to lose out on sales and lucrative business. It is therefore recommended that marketers implement measures which will enable them to target Baby Boomers.

"Market targeting consists of evaluating and selecting one or more segments whose value requirements provide a good match with the organisations capabilities" (Cravens, 2000:113). Thus targeting is a selection process that allows companies to select one or more segments where there is a close match between buyer preferences and organisation's capabilities, which will enable marketers to better understand the customer and meet their needs more effectively than competitors. This being said companies must be cautious when targeting Boomers. Whilst the Baby Boomer market is lucrative, companies should target this generation only if their capabilities allow them to effectively communicate with and target Baby Boomers. This means ensuring that they can capitalise on their capabilities and differentiate themselves, and establish a distinct position in the minds of boomers. If they do not have the capability to do this then the Baby Boomer market is unlikely to be lucrative and it would not make sense to target this market.

Whilst research showed that Baby Boomers in South Africa felt marginalised, it appeared as though the facial care industry was targeting this market, as they have products specifically targeted at Baby Boomer women. Hence, one of the objectives of this research was to determine whether Boomers felt marginalised by the facial care industry. The findings indicated that the majority of Baby Boomer women did not feel marginalised by this industry. This was an important finding and indicates that whilst Boomers feel marginalised by most industries, their feelings of marginalisation are not reflected to the facial care industry. Thus, it appears that facial care companies have acknowledged that different generations have different needs and have successfully developed products and marketing communications which appeal specifically and effectively to Baby Boomers. Thus, there is an opportunity for marketers to look at the facial care industry in order to gain insight as to how they themselves can implement strategies which will target and appeal to Baby Boomers specifically. Hence the recommendation is that marketers use the facial care industry as a benchmark to develop positioning strategies which will successfully target Baby Boomers.

9.3 Importance of Segmentation and Targeting

The research found that when it comes to choosing facial care, Baby Boomer women's needs differ from the needs of Generation X and Generation Y. Hence the research is aligned with generational theory, which is based on the notion that, "members of a generation are linked through their shared life experiences, and because of these experiences, each generation develops and retains its own values and life skills that differentiate one generation from another" (Smith and Clurman,1997, cited in Norum, 2003:56). Whilst proving that generations differ, the research also stresses the importance of segmentation.

According to Evans (2003:246) "the basic principle of market segmentation is that markets are not homogenous and that it makes commercial sense to differentiate marketing offerings for different customer groups". Furthermore, segmentation and targeting are important in positioning because it is during these processes that insights about the consumer are gained, which may give a company important competitive advantages by identifying buyer groups that will respond favourably to the firms marketing efforts as well as giving marketers clues about ways they can achieve favourable responses (Cravens, 2000:114). What is apparent is that marketers cannot ignore the fact that there are different needs amongst women from the different generations and can not treat the women's market as a single segment. Thus, it is recommended that marketers segment and target generations differently. Furthermore, they need to focus on implementing positioning strategies which target one particular generation, which entails creating a marketing mix which focuses on communicating specifically with one generation.

This research shows that whilst many of the facial care brands are developing products aimed at women of different ages; there are still brands which seem to believe they can target all women of different ages with one or two ranges. L'Oreal is a good example of a brand which has various ranges developed for, and aimed specifically at women in a particular age group. Whilst Clearasil and Johnson and Johnson are examples of brands which appear to target all ages i.e. do not aim their products specifically at a particular age or generational group. Such companies should reassess their marketing plan and either develop more ranges, with each range developed for and targeting one specific generation only or look at the strengths and weaknesses of their brands and based on these, develop a marketing strategy which is aimed and specifically targeted, at one of the generations.

The research showed that in terms of the facial care industry there were two groups of women, which were regarded as marginalised by respondents of the mall-intercept survey. These were Indian women and women from the silent generation. Thus, it is recommended that facial care companies look into the viability of targeting these women. With regards to targeting the Indian women there appears to be great potential, as research done by Euromonitor International (2009:1) indicates that based on the population dynamics of the South African population there is an opportunity for manufacturers to address premium skin care requirements of the ethnic population.

9.3 Favourably Positioning Brands in the minds of Baby Boomers, Generation X and Generation Y.

Solomon *et al.* (2006:212) state, "developing a positioning strategy entails gaining a clear understanding of the criteria target customers use to evaluate competing products and then convincing them that your product will meet those needs". Since insights about the consumer are gained during segmentation and targeting these steps are critical and will allow a company to identify buyer groups that will respond favourably to the firms marketing efforts as well as giving marketers clues about ways they can achieve favourable responses (Cravens, 2000:114). Since positioning affects all elements of the marketing strategy, positioning should be used as the focus in development of the marketing strategy to ensure that all elements of the marketing strategy are consistent and supportive (Aaker and Shansby, 1982, cited in Cravens, 2000:190). Thus, the research aimed to determine which attributes were deemed important by each of the generations when purchasing facial care products as well as focusing on which communication tools were deemed most effective by each generation. Furthermore the literature review and focus groups extracted some important information in terms of what type of content was appealing to each of the generations. The next section focuses on the attributes deemed important by each of the generations and important recommendations are made as to how facial care companies can target and effectively communicate with each of the generations.

9.3.1 How to target and effectively communicate with Baby Boomer women

Boomer women are a market which is extremely attractive to facial care companies as this market is one which is accepting the fact that they're getting older, but place a great deal of value on health, beauty, and an active lifestyle, furthermore Boomer women especially want to look and feel younger (Beasty, 2006:34-35). In addition, anti-aging now represents both the largest and fastest growing segment of the facial skin care category (Rowinski, 2008, cited in Leathers, 2008:58). This growth can be attributed to the increased demand from aging Baby Boomers (Euromonitor International, 2008:13), hence the Boomer market is one which should not be ignored by facial care companies. Furthermore, "Baby Boomers love to spend money on themselves" (Beasty, 2006:34) and "are typically big spenders" (Strategic Edge, 1996: Para 4) making them an attractive segment for marketers. It is therefore recommended that facial care companies target this lucrative market, if their strengths and capabilities allow them to successfully address this market. Based on the research further recommendations are made relating to ways in which they could implement a positioning strategy to reach this market successfully. These are discussed below.

Product: Since it is important that customers perceive a product or service as sharing important attributes with other brands (Bearden *et al.*, 2001:170), the research aimed to establish which attributes were important to Boomers, and would ultimately impact brand choice. From this study it can therefore be recommended that, in order to reach Baby Boomer women, products which are aligned with the needs of Boomers must be developed. The top seven most important attributes that exert the strongest influence on facial care purchases, by Baby Boomer women, are the *lasts all day (no need to reapply)*, *moisturising ability*, *makes skin feel smooth and soft*, *contains anti-aging properties, contains SPF, removes impurities,* and *contains natural ingredients* attributes. The fact that all the mentioned attributes had mean scores which were above 8.5, shows that these attributes have a strong impact on brand choice. It is therefore recommended that facial care brands targeting Boomers specifically, should base their positioning strategy on one or more of these eight attributes in order to be perceived more positively by this target market.

At the same time facial care companies need to remember that in order to occupy a distinct position, it is necessary to communicate that, compared to competitors, they are superior on the attribute(s) used as a base for their positioning. This can be done by creating a differential advantage, or competitive edge. Kotler *et al.* (2004:367) define competitive advantage as, "an advantage over competitors gained by offering consumers greater value, either through lower prices or by providing more benefits that justify higher prices." Thus, it would not make sense for each of the companies to choose the same attribute(s) to base their positioning strategy on, and thus it is recommended that the facial care companies determine where their strengths are and then align their strengths with the attributes which Boomers consider to be important and desirable. Thus it is imperative that companies determine where their strengths lie in relation to competitors and choose their position based on one or more attributes which will give them a unique and distinctive position and one they can effectively communicate to the target customers.

- **Price:** Research showed that whilst the *low price* attribute wasn't deemed extremely important by Boomers, it scored a mean of 6.39 indicating that although not critically important, it still scored above average. Boomers are smart and knowledgeable consumers with high expectations, that aren't going to waste money (Beasty, 2006:35). In addition female Baby Boomers who wield substantial spending power are notorious for researching products they use to maximise the returns on their expenditures **(**Alexander, 2007:104). Hence it is recommended that facial care companies ensure that benefits are clearly communicated and aligned with pricing. This will ensure that Boomers regard the pricing as fair for the benefits the products offer. Since Baby Boomers will pay extra for convenience and quality (Underwood, 2006:42), products which are priced highly will sell, provided that Boomers perceive them as offering high quality.

- **Distribution:** Research showed that with a mean ranking of 8.54 and a rank of 8, the *widely available* attribute was deemed to be of extreme importance to Baby Boomers. This makes sense as Boomers are strapped for time (Harwood**,** 2002:30), and want everything faster and more convenient (Codrington and Grant-Marshall, 2004:186). Thus, the recommendation is that facial care companies who wish to appeal to this market must ensure that products are easily attainable and distribute products in the locations which are frequented by Boomers.

- **Promotion:** In terms of the effectiveness of media Baby Boomers didn't rate any of the given media very highly (means of above 8.5). Boomers being older and wiser may have caused these consumers to be more sceptical of advertising or alternatively experience may have taught them that it is better to rely on experience than any form of advertising. In terms of effectiveness the following media vehicles, *TV adverts, Endorsed by experts, word-of-mouth, print adverts, samples* and *store displays* scored above average means in terms of effectiveness. The literature review suggests that when marketing to Baby Boomers web, advert, brochures and word-of-mouth are important communication tools (Hart, 2007:34). Furthermore, Hart (2007:34) emphasises that all of these media vehicles are important as Boomers will consult each one whilst reaching a decision. Results show that whilst *TV adverts* are favoured by Boomers, the other media vehicles which were rated above average had similar scores. Based on these results and the statement from Hart (2007:34) that Boomers will consult numerous media vehicles it is recommended that marketers use numerous vehicles to reach these consumers, the main focus being on *TV adverts,* which are supported by communication vehicles such as *endorsed by experts, word-of-mouth, print adverts, samples* and *store displays*. Whilst the literature review suggests using radio as it is particularly effective due to the fact that music is a potent connector with Boomers, especially the music which Boomers love and can relate to (Mills, 2008, cited in Moore, 2008:42), these findings differed, and show that in terms of the media which is effective for promoting facial care, visual vehicles, such as *TV, print and samples* were far more effective. As a result the recommendation is made to advertise facial care products using visual media. Utilising endorsements by experts is also highly recommended as a study found that 28% of consumers prefer facial care brands that have a physician/ doctor endorsement (Meisel, 2008: Para 4) and are impressed with founders who have medical, dermatological or other clinical credentials (Beyer, 2009: Para 28). Finally these consumers put value into expertise and education and like data (Gjertsen, 1999:13).

In terms of content and type of adverts which appealed to Boomers, some interesting recommendations can be made based on a combination of the focus group findings and the literature review. Baby Boomers respond to marketing messages that focus on how the product or service can make their lives easier, and ones that are easy to grasp (Fishman, 2004:4). This view is supported by Beasty (2006:35) who says Boomers want to know the benefits and want information. Marketers need to communicate benefits and value in a clear-cut way, making it relevant to the targeted consumers (Beasty, 2006:35). Hence it is recommended that facial care companies develop adverts which educate the consumer, and focus on the benefits. Furthermore, any form of communication should use emotionally meaningful concepts, words and images (Musico, 2006:38), words and phrases such as activity, contribute, experienced, grace, growth, independence, direction, health, love, mature, new, options, passion, start now, staying involved, time for yourself, well-being and wise (Freeman, 2008:23). Focus groups showed that Boomers react favourably to adverts which are nostalgic, fun, optimistic and humorous, thus facial care companies should think about ways of incorporating one or all of these concepts into their communications. Furthermore, adverts which blended the different South African cultures and focused on creating a united South Africa in a positive way were well received, thus this may be an opportunity for marketers to reach South African women more effectively.

In addition to extracting what type of advertising appealed to Boomers focus groups also extracted important information in terms of their dislikes or adverts which they didn't trust. Boomers were very sceptical of adverts that used celebrities to advertise facial care products. They distrusted these types of adverts because they felt the celebrities were airbrushed. Furthermore, they indicated they were distrustful of adverts that showed them a person with wrinkles and after using a product these wrinkles disappeared. Thus, it is recommended that these types of adverts are used with extreme caution.

9.3.2 How to target and effectively communicate with Generation X women

"The more senior members of Generation X are about to enter their primary earning years" (Mitchell *et al.*, 2005:28). Buying brands they believe in, services that are tailored to their needs or items that are recommended to them, a straight-forward marketing approach works best with this generation (Lager, 2006:30). This suggests that Generation X is a market with money and since they prefer products which are tailored to their needs it is recommended that facial care companies develop a targeted positioning strategy, which clearly communicates how products have been developed specifically for them. As Codrington and Grant-Marshall (2004:189) stress Xers are highly individualistic valuing choice, customer options and personalisation, and as a result the 'one size fits all' route simply will not work with this market.

- **Product:** This research established which attributes Generation Xers look for when making facial care purchases, and which attributes are important, these are depicted in the table below. **T**he top seven most important attributes that exert the strongest influence on facial care purchases, by Generation X women, are product attributes such as *makes skin feel smooth & soft*, *contains SPF*, *lasts all day (no need to reapply), moisturising ability, removes impurities, contains ant-aging properties,* and *contains natural ingredients* attributes. A facial care company wanting to target Generation X consumers needs to be aware that there are eight attributes which strongly influence brand choice, hence positioning strategies should be developed using one or more of these attributes as bases. However, in order to ensure that their position is distinctive they need to select attributes cautiously and make sure that the attributes on which their position is based are superior and distinctive from competitors.

- **Price:** With a mean score of 6.25, the *low price* attribute was deemed the least important by Generation X, however low price was still considered important. As a group, this generation places less value on product prestige and symbolism; they want products that function well and offer affordable quality (Mitchell *et al.*, 2005:28). Hence in terms of pricing, the recommendation is for facial care companies to communicate that they have quality products which are affordable. As Barrow (1994: Para 26) states when marketing to Generation X, marketers should emphasise price, reliability, durability, and genuine value that lasts.

- **Distribution:** The research shows that Generation Xers rated the *widely available* attribute as very important, with a mean score of 8.73. This is not surprising as Van Someren (2006, cited in Lager, 2006:30) suggests convenience is essential for engaging this generation. As a result it is recommended that in order to effectively target this generation it is critical to ensure products are available at locations which are deemed convenient by Xers.

- **Promotion:** In an attempt to determine what promotion strategy should be used to target Generation X women this research investigated which media vehicles were deemed most effective by Generation X women. In terms of effectiveness Generation Xers didn't rate any of the given media very highly (means of above 8.5). According to DeBaugh (2003:53), "this group grew up being inundated with advertising and can smell a marketing campaign a mile away", which has resulted in them being cynical when it comes to advertising, hence this result was anticipated. However the following media vehicles, *TV adverts, endorsed by experts, store displays, samples, print adverts, word-of-mouth, endorsed by celebrities* and *radio adverts,* were rated above average in terms of effectiveness. Again research findings indicated that the more visual type of media vehicles made more of an impact, thus it is recommended that marketers focus on these.

  Because Generation Xers are known to be both sceptical and careful consumers, Xers tend to research and try many products before committing to them (Fried, 1996: Para 7). Hence there is an opportunity for marketers to make use of samples, which were rated above average in terms of their effectiveness. Furthermore, marketers should offer these consumers lots of information and allow them to interact with displays as well as sample products (Fried, 1996: Para 11). As a result it is recommended that marketers ensure that Xers can try products in the retail environment, hence testers should be available, and in addition sales staff should be knowledgeable, and communicate the benefits of the products. Xers scepticism of advertising means Generation X's purchasing behaviour is often based on recommendations by friends and family (Lager, 2006:30), this is depicted in their above average rating of the effectiveness of word-of-mouth. Although this is difficult to control, it is also true that Xers have an affinity to companies that live up to their claims (Mitchell *et al.*, 2005:28), thus facial care companies should never make promises which they are unable to deliver on. Expert endorsements were rated second most effective and based on the fact that previous research shows that consumers prefer facial care brands that have a physician/ doctor endorsement (Meisel, 2008: Para 4) and are impressed with founders who have medical, dermatological or other clinical credentials (Beyer, 2009: Para 28), it is recommended that facial care companies invest in the use of expert endorser to substantiate product claims.

  In terms of what type of content Xers enjoy, recommendations are based on the literature review and focus group findings. Xers resent being lumped together with other consumers, which has resulted in Xers demanding communications which speak directly to them; they do not want to be seen merely as participants in a mass market (Mitchell *et al.*, 2005:29). Thus, the first recommendation to facial care marketers is that communication messages must be developed targeting this generation in a way that they can recognise that the advert is aimed specifically at them.

Fishman (2004:5) states that way to target practical Xers is to point out pragmatic reasons why they should buy your product. The literature review as well as the focus group findings indicate that one way to appeal to Xers is to develop adverts which are truthful as Xers will see through hype and value an honest, straight-forward approach (Fishman, 2004:5), thus it is recommended that facial care companies develop adverts which are honest. Furthermore these companies should develop communication material which is fun and can be related to their everyday lives. This can be done by keeping the tone of marketing communications light and humorous (Lager, 2006:30). Another recommendation is to create communications which are different from the norm, unexpected, which can be done through the use of clever tricks (Codrington and Grant-Marshall, 2004:188-189). At the same time though marketers must be warned against using adverts which are either crude or unrealistic as Generation X focus groups stressed that these types of adverts were not well received.

9.3.2 How to target and effectively communicate with Generation Y women

New research indicates that Generation Y are showing power with retail sales that surpasses all previous generations (O'Donnell, 2006: Para 1). Furthermore this generation is the most influential, as these consumers have spending power and strong opinions at an earlier age (Mooney, 2006, cited in O'Donnell, 2006: Para 2). It is obvious that this generation should not be ignored. Generation Y is both media-soaked and technologically advanced and marketers are finding that catching the eye of this generation is becoming increasingly difficult (Sebor, 2006:26). Thus it is recommended that facial care companies address ways in which they can appeal to this market.

- **Product:** The research looked into the attributes deemed most important by Generation Y, in order to access which attributes had an impact on brand choice, the attributes and the mean ratings are depicted in the table below. It is apparent that the top five most important attributes that exert the strongest influence on facial care purchases, by Generation Y women, are the *makes skin feel smooth & soft*, *removes impurities*, *lasts all day (no need to reapply), moisturising ability* and *contains SPF* attributes. A facial care brand that wishes to target Millenials should develop a positioning strategy which aligns with these needs, particularly the ones exerting the most influence on brand choice, but only if their capabilities match and they can create and communicate a competitive advantage.

- **Price:** This research shows that Millenials didn't place a lot of importance on the *low price* attribute, with a mean score of 5.80; it was deemed the 2nd least important attribute. This result varied from the results of focus groups where Generation Y participants placed a lot of importance on *low price*. However the fact that *low price* was deemed less important by respondents may be attributed to the fact that "they're extremely brand aware and know if you are 'hot' or not" (Codrington and Grant-Marshall, 2004:191). Thus, these consumers appear to be more concerned about the image of the brand than the price. Since these consumers were born between 1982 and 2000, it can be concluded that a large percentage of this generation is still at university, college, or school and will have limited income. Mooney (2006, cited in O'Donnell, 2006: Para 5) say Generation Y want either cheap or elite products and retailers in the middle are unlikely to perform, thus it is recommended that facial care companies carefully consider their pricing strategy and ensure that they implement a pricing that is either very affordable for this generation, or one which is premium and communicates that it is a desirable or elite brand.

- **Distribution:** The *widely available* attribute was rated as important by Millenials, with a mean score of 8.17, whilst it may not be critical it is very important. This may be attributed to the fact that many Generation Y consumers rely on their parents for transport, hence they need products to be accessible at those locations which they frequent, for example, supermarkets or malls. Hence the recommendation is that facial care companies make sure products are accessible and easily attainable.

- **Promotion:** This research determined which types of media vehicles were most effective in the Generation Y women's opinions and interesting recommendations are made based on the results. In terms of effectiveness none of the media vehicles were rated highly in terms of effectiveness and all scored means which were below 8.5. Despite the fact that no media vehicle was rated highly, eight of the media vehicles mentioned on the questionnaire were rated as above average in terms of effectiveness and it would thus make sense for marketers to focus on these media vehicle when communicating with Generation Y. The media vehicles which had mean scores of above 5, were *TV adverts, samples, endorsed by experts, store displays, word-of-mouth, print adverts, endorsed by celebrities* and *sponsorships.* It is interesting to note that the literature review indicated that marketers need to look for new and innovative ways to reach these elusive consumers (Hughes, 2008:16), as being tech-savvy means this generation will more likely ignore traditional media channels (Hughes, 2008:16). However, based on these findings it appears that when it comes to advertising facial care, traditional channels still play a role and are regarded as effective. Thus it is recommended that facial care companies select their media vehicles carefully, and are not too quick in disregarding traditional channels.

  Many marketers believe that because Millenials tend to be reliant on friends recommendations (Raymond, 2009:41) grassroots marketing is unmistakably the way to go (Sebor, 2006:26). Both the focus groups and the mall-intercept research showed that Generation Y rated word-of-mouth, samples and sponsorship as effective communication tools and it is therefore recommended that facial care companies use approaches such as street marketing, or guerrilla marketing, a form of localised and personalised, non-conventional marketing that includes things like giveaways, samples and special events (Gronbach, 2000, cited in Unknown, 2000: Para 7).

  In terms of the content of adverts it is recommended that since Millenials respond and react strongly to real-life examples (Fishman, 2004:5) marketers, must know what their lives are like, understand the issues and experiences that these consumers are facing and adapt the advertising to address the challenges and experiences they are faced with. This is appropriate since focus groups stressed that they did not like adverts which portrayed a perfect woman, in her perfect house, perfect skin and perfect life as they knew that life was not perfect and they face challenges such as pimples and blemishes and this should be addressed in advertising. Since Generation Yers are especially fond of adverts that make them laugh (Unknown, 2000: Para 6), it is recommended that companies try to incorporate humour into their advertising. Furthermore, Generation Yers tended to remember slogans, especially those which were used consistently and thus it is recommended that marketers use slogans which will appeal to Generation Y and are consistent with their slogan and utilise all various forms of communications to repeat it. The use of natural elements like plants and water in adverts were considered particularly effective when advertising facial care as it implied in the message a sense of natural and pure which was important, thus facial care companies are recommended to incorporate some natural elements into the communications. Finally when it came to print adverts participants want information which is simple and to the point.

The most important recommendation for facial care brands is that it is obvious that the three generations differ and thus they need to target each generation separately. Furthermore in order to appeal to their target customers they need to determine where their strengths lie and target the consumers in such a way that they will perceive the brand as meeting their needs on the attributes which they find important, better than those of competitors. Furthermore, once they have chosen their position it is critical that they develop a marketing mix which communicates their positioning distinctively and without ambiguity, therefore positioning must be managed at every point where the customer comes into contact with the company (Malik, 2007: Para 3).

9.4 Brand Specific Recommendations: Focusing on Positioning Elements

The following section looks at the specific brands which were included in the research and some recommendations are made. Since positioning a brand involves distinguishing it from competing brands this section relates specifically to ways in which the brands can be differentiated. This is imperative for successful positioning and according to Kotler and Armstrong (2003:261) "positioning begins with actually differentiating the company's marketing offer so that it will give consumers more value than competitors offers do". Furthermore, in order for an advantage to be differential it must provide value to the target market, which competitors find hard to copy (Hooley *et al.*, 2004:49). Thus recommendations are based on the findings of the positions occupied by each of the brands.

According to the literature a full understanding of competitors is critical to effective positioning because competitors provide the benchmark within the minds of consumers (Schewe, 2001:60). Furthermore an understanding of competitor profiles is useful, because weaknesses of competitors on relevant attributes can represent an opportunity to differentiate and develop an advantage whilst the strengths of competitors on important dimensions may represent challenges for exceeding or outflanking the competition (Aaker, 2008:46). Consequently in order for marketers to develop an effective positioning strategy they must understand their competitors and how they are perceived by the target market. Hence these recommendations are based on specific strengths and weaknesses of each brand as perceived by customers. Furthermore this section addresses how these strengths and weaknesses can be used to confirm or create a strong position in the facial care market.

Another important aspect to consider is the fact that positioning affects all elements of the marketing strategy, therefore positioning should be used as the focus in development of the marketing strategy to ensure that all elements of the marketing strategy are consistent and supportive (Aaker and Shansby, 1982, cited in Cravens, 2000:190). This view is supported by Blankson *et al*. (2008:106) who state that "how a firm chooses to position itself and/or its offerings is central to the creation of marketing strategy and dictates the implementation of advertising and marketing communications in the short, medium and long term". Positioning has implications for the design of goods and services as well as the development of the other elements of marketing strategy - pricing, promotion, and distribution decisions follow from and contribute to the effectiveness of positioning (Walker *et al.*, 2003:172). Thus, positioning affects all elements of the marketing mix and the implementation of a clear positioning strategy will enable the marketer to create a consistent and clear marketing message where all elements of the marketing mix are contributing towards the creation of a clear and consistent image. Hence these recommendations will also look into how brands can ensure that their marketing strategy supports their positioning.

9.4.1 Recommendations for the Body Shop

This research determined how customers currently perceive and rate the Body Shop on the attributes provided, the mean scores and comparative ranking as per each generation is presented in the table below. The comparative ranking shows how Body Shop was ranked in comparison to the other brands rated in the study, i.e. Clarins, Clearasil, Clinique, Gatineau, Johnson and Johnson, L'Oreal, Nivea and Revlon. The means and comparative rankings will be used to determine whether the brand associations of respondents i.e. their perception of the brand, align with the current positioning of the brand.

Table 9.1 Perception of the Body Shop attributes as rated per generation

Criteria	Baby boomers Mean	Baby boomers Ranking	Comparative Rank	Generation X Mean	Generation X Ranking	Comparative Rank	Generation Y Mean	Generation Y Ranking	Comparative Rank
Low Price	2.46	12	6	2.84	12	6	2.61	12	6
Mild Fragrance	3.08	7	8	3.18	5	6	2.90	8	9
Quality Packaging	3.61	2	7	3.82	1	6	3.83	1	7
Moisturising Ability	3.54	4	8	3.41	4	8	3.51	3	8
Makes skin feel smooth & soft	3.67	1	8	3.49	3	8	3.51	3	8
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	2.95	9	8	2.91	11	8	2.72	11	9
Widely Available	2.95	9	9	3.05	8	9	2.87	9	8
Contains SPF	3.13	6	8	3.16	6	8	2.87	9	9
Contains Natural Ingredients	3.61	2	1	3.78	2	1	3.74	2	1
Contains anti-aging Ingredients	3.16	5	8	2.92	10	8	3.10	5	7
Removes Impurities	2.93	11	9	3.04	9	9	3.08	6	9
Lasts all day (no need to reapply)	3.03	8	9	3.16	6	8	2.99	7	8

The top attribute as rated by Baby Boomers was *makes skin feel soft and smooth.* Whilst Generation X and Y rated the *quality packaging* attribute. Considering that the Body Shop is positioned as a product containing natural ingredients, it is somewhat concerning that the *contains natural ingredients* was not the highest rating. However, it was the second highest mean rating for the Body Shop as perceived by each of the generations. This indicates that in terms of communicating that the Body Shop products contain natural ingredients there is room for improvement. However it needs to be noted that compared to other brands Body Shop was rated highest on this attribute. This may be attributed to the fact that the Body Shop believes there is only one way to beautiful and that's nature's way (The Body Shop International plc., 2009b: Para 2). Furthermore, the positioning of Body Shop seems to be one which offers customers a shopping experience with excellent service, combined with a range of good quality, naturally inspired products (Unknown, 2007c:10). Thus it can be concluded that the Body Shop seems to have done well in communicating their commitment to producing natural products as all their marketing communications make use of the dark green colour which aims to emphasise their commitment to using natural ingredients, and being a 'green' company. Thus, it appears as if Body Shop is effectively communicating their positioning and this attribute differentiates it from competitors. However the score on the *contains natural ingredients* is average, indicating that whilst consumers seem to be aware of the fact that the Body Shop products are natural, there is an opportunity for the brand to educate consumers better on this attribute. According to Poolton (2009, cited in Clicks Group Ltd, 2009: Para 4), the Body Shop brand continues to enjoy a loyal following on South Africa, owing to its heritage as the original 'green' brand with a social conscience. Natural, organic and eco-friendly beauty products are gaining popularity in South Africa and as the market leader in this area The Body Shop is well positioned to capitalise on this trend. Hence the recommendation is made to create a stronger association to this attribute, which will enable the brand to capitalise on the trend of organic and eco-friendly products.

All three of the generations according to previous research are committed to 'green' products. It is widely reported that Xers are concerned about the environment and that environmental concerns often guide their selection of products (Richie, 1995: Para 20), whilst Millenials love things that are 'green' (Unknown, 2000: Para 6). However, according to Raymond (2009:42), Boomers are the most committed to environmentalism and therefore there is an opportunity for the Body Shop to target Boomers more effectively. A further reason why it is recommended that Body Shop should target Boomers is because of the 'wise women' range which is especially formulated for mature skin (The Body Shop International plc., 2009i: Para 1). An inherent strength of this product is the name – it's called 'wise women' and although this indicates that it is for the more mature women it does so in a positive light which is especially critical to Boomer women. Furthermore, Freeman (2008:23) indicated that the word ‘wise’ was one which resonates with Boomers. In order to target Boomers effectively the company needs to focus on creating a better perception on the *lasts all day (no need to reapply), moisturising ability, makes skin soft and smooth* and *contains anti-aging properties* attributes. Since the strongest brand association by Boomers is on the *makes skin feel soft and smooth* attribute it is recommended that this attribute specifically is stressed. It is recommended that in order to create a better perception of the brands capabilities the Body Shop should actively engage in giving away samples of their wise women range to Boomers. Samples are recommended due to the fact that in relation to other brands Body Shop scored poorly on most of the attributes, hence one way to create a better perception on all these attributes would be to encourage individuals to actually try the product.

On most of the positioning maps Body Shop had a distinctive but unfavourable position, thus Body Shop has some work to do in order to create a more favourable position. It is obvious that there is a lot of opportunity for the Body Shop owing to the fact that all of the generations are committed to environmentalism and want products which contain natural ingredients. At the same time though it is recommended that whilst Body Shop is in a good position to target all generations it is imperative that they use a differentiated marketing mix. In targeting Generation X it is recommended that marketers offer these consumers lots of information and allow them to interact with displays as well as sample products (Fried, 1996: Para 11). Hence, in order to ensure that Xers can try products in the retail environment, testers should be available, and in addition sales staff should be knowledgeable, and communicate the benefits of the products. When targeting Generation Y the Body Shop should focus on making these consumers believe that Body Shop is an elite and ‘hot’ brand, since “they’re extremely brand aware and know if you are ‘hot’ or not” (Codrington and Grant-Marshall, 2004:191), demanding brands which are ‘hot’. It is recommended that Body Shop creates this image by utilising street marketing, or guerrilla marketing, a form of localised and personalised, non-conventional marketing that includes things like giveaways, samples and special events (Gronbach, 2000, cited in Unknown, 2000: Para 7).

9.4.2 Recommendations for Clarins

Table 9.2 below presents the mean score of Clarins on the attributes which were rated by respondents, as well as Clarins’ comparative ranking on these attributes, which is useful in order to access Clarins’ current position in relation to competitors.

Table 9.2 Perception of Clarins attributes as rated per generation

Criteria	Baby boomers Mean	Baby boomers Ranking	Comparative Rank	Generation X Mean	Generation X Ranking	Comparative Rank	Generation Y Mean	Generation Y Ranking	Comparative Rank
Low Price	1.99	12	9	2.18	12	9	2.38	12	7
Mild Fragrance	3.41	10	7	3.69	8	3	3.26	11	6
Quality Packaging	4.30	1	2	4.33	1	2	4.18	1	3
Moisturising Ability	4.24	2	2	4.04	3	1	3.87	2	4
Makes skin feel smooth & soft	3.94	4	6	4.00	4	2	3.86	3	5
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.47	9	5	3.39	10	7	3.59	7	1
Widely Available	3.68	7	7	3.66	9	7	3.53	9	7
Contains SPF	3.76	5	7	3.85	5	5	3.63	6	5
Contains Natural Ingredients	3.36	11	3	3.36	11	2	3.31	10	2
Contains anti-aging Ingredients	3.99	3	5	4.07	2	1	3.84	4	3
Removes Impurities	3.57	8	6	3.89	6	3	3.65	5	3
Lasts all day (no need to reapply)	3.71	6	5	3.79	7	2	3.56	8	6

The positioning of Clarins appears to be to sell products which are of a high quality, high efficacy but still affordable to the market (Lindsell Train Limited, 2006:2). This research showed that the strongest brand association was in terms of the *quality packaging* attribute. The fact that respondents were under the impression that the packaging was of a high quality indicates that in terms of positioning they are effectively using their packaging to communicate the quality of Clarins. At the same time though respondents rated Clarins poor on the *low price* attribute. Although this seems negative, high price does align with the position of high quality.

Clarins was rated favourably on most attributes, thus it can be concluded that in general it is perceived as a high quality brand. However, with the exception of the *moisturising ability* attribute for Xers and the *multi-purpose* attribute for Yers, compared to other brands Clarins was rarely perceived as being the top brand on any attribute. Relating this back to usage shows that only 2.7% of respondents used Clarins, hence the fact that Clarins was rarely rated as a top brand could be attributed to the fact that Clarins is a premium product and although respondents were aware of the brand, their experience with the brand was limited. Since majority of the sample size earned less than R 8000 per month the low usage may be attributed to respondent's not being able to afford the product due to low income. Thus the recommendation for Clarins is to invest in research which focuses on respondents who fall into higher income brackets.

Based on this research however the biggest opportunity for Clarins when it comes to targeting each of the generations, appears to be relating to their commitment to the use of natural ingredients. Clarins' concern for 'natural' beauty goes well beyond the quest for effective natural extracts and since the launch of the 100% pure plant extract oils in 1954, Clarins has demonstrated a strong preference for natural vegetal complexes (Clarins, 2010b: Para 1&2). However based on these results, in terms of brand associations respondents did not associate this brand highly with the use of natural ingredients, but at the same time compared to other brands it was rated more effective on this attribute. Furthermore considering that each of the generations place importance on the use of natural ingredients there is an opportunity for Clarins to create a stronger association to this attribute in particular. Hence it is recommended that Clarins makes consumers aware of the fact that they are dedicated to design products that produce visible results and therefore use ingredients that are 100% natural, cultivated exclusively for its formulations using plants from around the world (Clarins, 2010p: Para 1).

9.4.3 Recommendations for Clearasil

The table below presents the mean scores of the respondents perception of the Clearasil brand on each of the attributes included in the study. Furthermore the table shows how Clearasil is ranked compared to the other brands included in the study.

Table 9.3 Perception of Clearasil attributes as rated per generation

Criteria	Baby boomers Mean	Baby boomers Ranking	Comparative Rank	Generation X Mean	Generation X Ranking	Comparative Rank	Generation Y Mean	Generation Y Ranking	Comparative Rank
Low Price	3.76	3	3	3.70	3	2	3.49	4	2
Mild Fragrance	2.91	9	9	3.30	5	8	3.24	5	7
Quality Packaging	3.36	4	9	3.31	4	9	3.66	3	9
Moisturising Ability	3.03	7	9	3.19	7	9	3.11	7	9
Makes skin feel smooth & soft	3.04	5	9	3.30	5	9	3.21	6	9
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	2.68	10	9	2.84	10	9	2.89	9	8
Widely Available	4.36	1	5	4.21	1	4	4.39	1	3
Contains SPF	2.99	8	9	3.14	9	9	2.89	9	8
Contains Natural Ingredients	2.56	11	9	2.76	11	9	2.68	11	8
Contains anti-aging Ingredients	2.51	12	9	2.76	11	9	2.37	12	9
Removes Impurities	3.92	2	2	4.03	2	1	3.95	2	2
Lasts all day (no need to reapply)	3.17	6	8	3.14	8	9	2.99	8	8

Clearasil's positioning appears to be aligned with removing impurities and keeping skin clear of pimples, blackheads etc. This brand has only two ranges and doesn't seem to target anyone in particular. However they were rated highly by both Xers and Millenials on the *removes impurities* attribute, thus in terms of communicating their positioning they are effective. In terms of brand use Clearasil was used by 11.6% of respondents, making it one of the top brands used by this generation. The *removes impurities* attribute was considered far more important to Generation Y than any of the other generations and hence it seems to make sense for Clearasil to specifically target Generation Y. Furthermore, Clearasil's biggest weaknesses were in terms of the *contains natural ingredients* and *contains anti-aging properties,* there are numerous brands who were rated highly on these attributes and seem to have much better capabilities in terms of these attributes and since the *contains anti-aging ingredients* is not important to Generation Y, it is recommended that Clearasil focuses on targeting Millenials.

In terms of what is important to Millenials one of Clearasil's biggest weaknesses seems to be on the *moisturising ability* attribute. This is anticipated as Clearasil doesn't communicate that the Stay Clear range which aims to prevent pimples and blemishes includes a moisturiser, it is recommended that this is addressed. In terms of the Ultra range which doesn't include a moisturiser probably due to the fact that this range targets pimples and blemishes and one of the main contributors to blemishes is caused by excess oil it is recommended that Clearasil communicates that whilst the Ultra Range will help control blemishes it will not make skin feel dry and uncomfortable.

Another opportunity for Clearasil may be to develop a specific range for teenagers. The teenagers who participated in the Generation Y focus groups indicated that there were not enough products for teenagers or at least they weren't aware of any, as none of the products, with exception of the Innoxa Young Solutions range indicated in their marketing messages or in the name of the product that the product was developed for teenagers specifically. Thus there may be an opportunity to target teenagers, however the importance of incorporating into all their marketing communications a message that the range is designed for teenagers seems to be critical. It is therefore recommended that education is a key theme; Clearasil South Africa could look at the UK and introduce an education programme in schools, which helps to educate teenagers on skin care and the Clearasil brand and how the products work.

9.4.4 Recommendations for Clinique

Table 9.4 shows how respondents perceived Clinique and how Clinique was ranked compared to other brands included in the study.

Table 9.4 Perception of Clinique attributes as rated per generation

Criteria	Baby boomers		Comparative Rank	Generation X		Comparative Rank	Generation Y		Comparative Rank
	Mean	Ranking		Mean	Ranking		Mean	Ranking	
Low Price	2.25	12	7	2.31	12	7	2.34	12	8
Mild Fragrance	3.83	10	1	3.75	9	2	3.30	10	5
Quality Packaging	4.43	2	1	4.35	1	1	4.23	1	1
Moisturising Ability	4.47	1	1	3.98	4	2	4.06	2	2
Makes skin feel smooth & soft	4.37	3	1	3.98	4	3	3.94	5	3
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.93	9	1	3.44	10	6	3.58	9	2
Widely Available	4.17	5	6	3.86	6	6	3.87	6	6
Contains SPF	4.14	7	2	3.87	7	2	3.87	6	1
Contains Natural Ingredients	3.45	11	2	3.27	11	4	3.04	11	6
Contains anti-aging Ingredients	4.25	4	1	3.97	3	2	4.02	3	1
Removes Impurities	3.98	8	1	4.01	2	2	3.96	4	1
Lasts all day (no need to reapply)	4.17	5	1	3.84	8	1	3.83	8	1

Clinique is positioned as rather expensive with perfect quality products (SYL, 2005: Para 2). Looking at the rating of Clinique on all the attributes shows that with the exception of the *low price* and the *contains natural ingredients*, Clinique was rated *good* or *excellent* on all the other attributes. Furthermore, Clinique was rated as the top brand by Boomers on all four of the attributes which they rated as most important. On the *removes impurities* attribute they were rated the most effective brand by Generation Y. Yers rate this attribute as the 2nd most important attribute. Whilst not the top brand on the most important attributes rated by Generation X, Clinique was one of the top three brands. Thus it seems that Clinique is effectively communicating their positioning with all the generations, and was perceived as a high quality product. This is also evident as results show that Clinique was one of the most used brands by each of the generations as well as being rated as the top brand by respondents from each generation.

Clinique was rated as the best brand on most attributes as perceived by Baby Boomers, thus it is highly recommended that Clinique targets these consumers. It should be noted that currently Clinique targets female consumers between the ages of 18 and 45 (Primall Media, 2009: Para 4), thus they are not targeting Boomers. Despite this they are favoured by Boomers, thus Clinique should ensure that they do not ignore this market, as it is a lucrative market and furthermore these consumers favour Clinique and positioned the brand as a top brand.

9.4.5 Recommendations for Gatineau

Gatineau was rated on various attributes and the results of the way each generation perceives the brand is presented in Table 9.5, furthermore a comparative ranking is included which depicts how Gatineau performed in terms of the other brands included in the study.

Table 9.5 Perception of Gatineau attributes as rated per generation

Criteria	Baby boomers		Comparative Rank	Generation X		Comparative Rank	Generation Y		Comparative Rank
	Mean	Ranking		Mean	Ranking		Mean	Ranking	
Low Price	2.22	12	8	2.21	12	8	2.10	12	9
Mild Fragrance	3.58	9	6	3.48	8	7	3.13	9	8
Quality Packaging	4.27	1	3	4.19	1	3	3.86	1	6
Moisturising Ability	4.23	2	3	3.83	4	7	3.62	2	7
Makes skin feel smooth & soft	4.08	3	3	3.75	5	7	3.59	3	7
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.78	6	2	3.48	8	5	3.25	8	7
Widely Available	3.30	10	8	3.14	10	8	2.81	11	9
Contains SPF	3.80	5	5	3.87	2	2	3.35	7	7
Contains Natural Ingredients	3.09	11	8	3.28	11	3	3.06	10	5
Contains anti-aging Ingredients	4.05	4	4	3.85	3	4	3.50	4	6
Removes Impurities	3.59	8	5	3.66	7	6	3.49	5	7
Lasts all day (no need to reapply)	3.67	7	6	3.67	6	5	3.40	6	7

Gatineau believes beauty has no age, a pioneer in the development of products that draw their inspiration from cosmetic surgery and medicine, they consider themselves to be age-defence experts (Gatineau Paris, 2010a: Para 1&5). Based on the results presented in Table 9.5 it is evident that whilst Gatineau was rated above average on the *contains anti-aging* attributes, none of the generations associated this brand strongly with this attribute, furthermore it was not seen as superior on this attribute in comparison to other brands. Hence Gatineau is not communicating their positioning well. However, since Gatineau is a premium product and so many of the respondents earned low incomes it is recommended that Gatineau conduct further research and investigate how women in the target group (in terms of income) view this product, as this would give a better indication of how it is positioned.

In terms of its position in relation to other brands it was not rated as the top brand on any attribute by any of the generations. Whilst Baby Boomers and Generation X consumers rated this brand highly on some attributes and considered it as the top 3 in comparison to other brands, Gatineau did not rate well in comparison to the other brands in the minds of Generation Y. Hence it is recommended that Gatineau focus on targeting Baby Boomers and Generation X. Furthermore, these generations are more influenced by anti-aging properties and thus based on Gatineau's positioning it makes sense to focus on and target these two generations.

9.4.6 Recommendations for Johnson and Johnson

The table below presents the mean scores of the respondents perception of the Johnson and Johnson brand on each of the attributes included in the study. Furthermore the table shows how Johnson and Johnson is ranked compared to the other brands included in the study.

Table 9.6 Perception of Johnson and Johnson attributes as rated per generation

Criteria	Baby boomers Mean	Baby boomers Ranking	Comparative Rank	Generation X Mean	Generation X Ranking	Comparative Rank	Generation Y Mean	Generation Y Ranking	Comparative Rank
Low Price	3.99	2	1	3.91	4	1	3.84	4	1
Mild Fragrance	3.63	6	5	3.89	5	1	3.79	5	1
Quality Packaging	3.60	7	8	3.78	7	8	3.79	5	8
Moisturising Ability	3.65	5	7	3.92	3	4	3.93	3	3
Makes skin feel smooth & soft	3.87	3	7	3.98	2	3	4.06	2	2
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.29	10	7	3.71	8	1	3.57	10	3
Widely Available	4.54	1	4	4.50	1	1	4.61	1	1
Contains SPF	3.80	4	5	3.84	6	6	3.76	7	2
Contains Natural Ingredients	3.27	12	4	3.25	11	5	3.25	11	3
Contains anti-aging Ingredients	3.28	11	7	3.20	12	7	3.01	12	8
Removes Impurities	3.49	9	7	3.70	9	4	3.63	8	4
Lasts all day (no need to reapply)	3.51	8	7	3.53	10	7	3.58	9	5

The strongest brand associations for Johnson and Johnson are in terms of the *widely available* and *low price* attributes. Since both the Clean and Clear and the Johnson's range target the mass-market and offer low prices it appears as though consumer perception is aligned with the positioning of both Johnson and Johnson ranges. Although these ranges are similar on some attributes they are quiet distinct on others. With the Clean and Clear range targeting teenagers, with problem skin and the Johnson's range targeting adult women who want baby soft skin. This research showed the importance of segmenting the women's market and developing targeted strategies for the different generations as a result it is recommended that Johnson and Johnson implement a targeted strategy for their Johnson's range.

Johnson's positioning appears to be to offer consumers a wide range of products enhancing natural beauty and leaving skin baby soft which can be used throughout the consumer's life. Results presented in Table 9.6 show that comparatively as perceived by Xers Johnson's is ranked most effective on four attributes. Furthermore, it is also ranked highly by Xers on the *makes skin feel soft and smooth* which is Xers most important attribute, thus there is an opportunity for Johnson and Johnson to target Xers specifically with their Johnson's range. It is recommended that Johnson's adjust their positioning slightly and focus on targeting and communicating specifically with Xers. There appears to be an opportunity to communicate with this Generation that Johnson's is a product which will make the skin feel smooth and soft, is widely available and an affordable alternative to premium brands.

The results presented in Table 9.6 above show that comparatively Johnson's is rated in the top three brands by Generation Y on eight of the twelve attributes rated. In addition usage figures show that Johnson and Johnson is the 3rd most popular brand used, by this generation. Since the teenager demographic fits into the Generation Y age group it appears as though Clean and Clear is effectively targeting these consumers. At the same time however focus group findings showed that teenagers are of the opinion that there are not enough products which clearly communicate that their products are targeted at teenagers, and it is recommended that Clean and Clear address this, and ensure that their marketing communications specify that the Clean and Clear range is specifically formulated for teenagers.

9.4.7 Recommendations for L'Oreal

Table 9.7 below presents the mean score of L'Oreal on the attributes which were rated by respondents, in order to access their current position in relation to competitors.

Table 9.7 Perception of L'Oreal attributes as rated per generation

Criteria	Baby boomers		Comparative Rank	Generation X		Comparative Rank	Generation Y		Comparative Rank
	Mean	Ranking		Mean	Ranking		Mean	Ranking	
Low Price	2.94	12	5	2.93	12	5	2.82	12	5
Mild Fragrance	3.82	8	2	3.55	9	6	3.42	10	3
Quality Packaging	4.24	2	4	4.03	2	4	4.21	1	2
Moisturising Ability	4.15	5	4	3.98	3	3	3.81	5	5
Makes skin feel smooth & soft	4.16	4	2	3.89	5	5	3.89	4	4
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.69	9	4	3.55	9	3	3.45	9	5
Widely Available	4.41	1	4	4.09	1	5	4.09	2	5
Contains SPF	4.06	6	1	3.87	6	4	3.68	7	3
Contains Natural Ingredients	3.25	11	5	3.08	11	7	3.01	11	7
Contains anti-aging Ingredients	4.16	3	2	3.90	4	3	3.95	3	2
Removes Impurities	3.67	10	4	3.67	8	5	3.63	8	4
Lasts all day (no need to reapply)	3.93	7	2	3.71	7	4	3.71	6	3

Both Baby Boomers and Generation X's strongest brand association to L'Oreal was in terms of the *widely available* attribute, whilst this attribute was the 2nd strongest brand association for Generation Y. Furthermore, L'Oreal was rated as one of the top brands in terms of the *contains anti-aging properties* attribute, by each of the brands. Since L'Oreal Paris prides themselves as being a brand which provides women who demand excellence in beauty with accessible luxury (L'Oreal Paris, 2010a: Para 1), it appears as though they are effectively communicating their position to all three generations. Furthermore, L'Oreal Paris' positioning seems to be to provide a great number of consumers with innovative products at a great price, which will allow them to grow old gracefully maintaining their confidence in the way they look. In terms of brand use L'Oreal was used by a high percentage of Boomers and was amongst the Boomers most popular used brands, furthermore it was also amongst the top five top brands as rated by Boomers. Thus in terms of targeting Boomers, L'Oreal is effective.

In terms of targeting Xers and Yers L'Oreal is positioned as average compared to the other brands of this study, hence L'Oreal should address how they can better target these two generations. It's interesting that in both focus groups Xers and Yers mentioned the L'Oreal adverts as being ineffective, due to their adverts portraying an image which is just too unrealistic, thus it is recommended that L'Oreal address their current adverting campaigns and incorporate elements that appeal to each of the generations better.

In an attempt to target Xers, L'Oreal should focus for example on developing advertising campaigns that are truthful, related to their everyday life and touched a 'soft spot'. Focus group discussion indicated that using children or pets in advertising campaigns for example was effective as Xers could relate to these types of adverts. Advertising campaigns targeting Millenials should incorporate celebrities, however these should be carefully selected ensuring that they were well liked and had flawless skin.

9.4.8 Recommendations for Nivea

This research determined how customers currently perceive and rate the Body Shop on the attributes provided, the mean scores and comparative ranking as per each generation is presented in the table below.

Table 9.8 Perception of Nivea attributes as rated per generation

Criteria	Baby boomers Mean	Baby boomers Ranking	Comparative Rank	Generation X Mean	Generation X Ranking	Comparative Rank	Generation Y Mean	Generation Y Ranking	Comparative Rank
Low Price	3.91	4	2	3.65	7	3	3.49	11	3
Mild Fragrance	3.78	6	3	3.68	6	4	3.58	9	2
Quality Packaging	3.71	7	6	3.80	5	7	4.06	4	4
Moisturising Ability	4.10	2	5	3.92	4	4	4.11	2	1
Makes skin feel smooth & soft	4.02	3	4	4.02	2	5	4.08	3	1
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.33	11	5	3.53	9	4	3.55	8	4
Widely Available	4.59	1	1	4.35	1	2	4.52	1	2
Contains SPF	3.83	5	4	3.93	3	1	3.68	6	3
Contains Natural Ingredients	3.15	12	7	3.23	12	6	3.20	12	4
Contains anti-aging Ingredients	3.68	9	6	3.47	11	6	3.54	10	5
Removes Impurities	3.44	10	8	3.53	9	8	3.59	7	6
Lasts all day (no need to reapply)	3.72	7	4	3.64	8	6	3.75	5	2

A brand born of dermological expertise, consumers continue to associate Nivea with trust, reliability, care, gentleness, accessibility and value for money for all the family (Manning-Schaffel, 2005: Para 2 and The Irish Times, 2000:1). Thus Nivea Visage's positioning seems to be a trusted product which is caring and gentle and offers value for money for all women. Based on the fact that there was a strong brand association with the *widely available* attribute indicates that in terms of distribution their positioning effective. Furthermore in terms of the *low price* attribute, although there wasn't a strong brand association, this brand was rated better than most of the other brands included in this research, so compared to other brands Nivea is effectively communicating their low prices.

Whilst Nivea was one of the top five most popular brands used by each of the generations, Nivea was not considered a top brand by the Baby Boomers. Thus, there may be an opportunity to better target these consumers. It's interesting that Nivea has recently included the Nivea Visage Expert Lift Range to their facial care ranges, which is aimed at the 50+ consumer. Based on the fact that many of the Boomers are 50+, the inclusion of the Expert Lift range in South Africa may enable Nivea to better target the slightly older Baby Boomers.

On two out of the four attributes rated most important by Generation Yers, Nivea was rated as the top brand. Nivea was also used by the largest percentage of Generation Yers and was rated amongst one of the top three brands. Thus it appears as though Nivea is targeting this generation effectively and is perceived by this generation as a quality brand. Despite this apparently effective position there is an opportunity for Nivea to target a sub-segment of Generation Y. In the Generation Y focus groups discussion, the teenagers amongst the group indicated that they felt marginalised by the facial care industry and one reason for this was that there were no products which clearly indicated that they were for teenagers. Currently, in the UK Nivea market the Nivea Visage Young range which is marketed at girls aged 13-19. It is recommended that Nivea invest in further research and look into the opportunity of launching this range in South Africa, as according to these results there appears to be a gap in the market.

9.4.9 Recommendations for Revlon

Revlon was rated on various attributes and the results of the way each generation perceives the brand is presented in Table 9.9, furthermore a comparative ranking is included which depicts how Revlon performed in terms of the other brands included in the study.

Table 9.9 Perception of Revlon attributes as rated per generation

Criteria	Baby boomers		Comparative Rank	Generation X		Comparative Rank	Generation Y		Comparative Rank
	Mean	Ranking		Mean	Ranking		Mean	Ranking	
Low Price	3.30	11	4	3.13	11	4	3.18	11	4
Mild Fragrance	3.70	10	4	3.58	9	5	3.32	10	4
Quality Packaging	4.09	3	5	4.09	2	4	4.06	2	4
Moisturising Ability	3.95	6	6	3.89	3	6	3.81	3	5
Makes skin feel smooth & soft	3.97	5	5	3.85	4	6	3.79	4	6
Multi-Purpose e.g. 3-in-1 product, moisturiser with SPF etc	3.72	8	3	3.56	10	2	3.35	9	6
Widely Available	4.49	1	3	4.26	1	3	4.25	1	4
Contains SPF	4.02	4	3	3.80	5	7	3.47	8	6
Contains Natural Ingredients	3.23	12	6	3.07	12	8	2.87	12	9
Contains anti-aging Ingredients	4.13	2	3	3.69	7	5	3.69	5	4
Removes Impurities	3.71	9	3	3.64	8	7	3.50	7	8
Lasts all day (no need to reapply)	3.90	7	3	3.75	6	3	3.69	5	4

Revlon's positioning seems to be to provide women with premium products which are easily attainable and will allow them to feel confident and sexy. It's interesting that Revlon's strongest brand association for each of the generations was in terms of it being widely available; hence it appears as though Revlon is communicating this element effectively. However comparative to other brands Revlon wasn't the top brand on this attribute. From Table 9.9 it can be concluded that the generations have quiet different perceptions. Baby Boomers second strongest brand association with Revlon was on the *contains anti-aging properties*, comparatively Revlon was third on this attribute, hence there appears to be a possibility to communicate better with Boomers by stressing this attribute.

For Generation X and Generation Y, Revlon was also strongly associated with the *quality packaging* and *moisturising ability* attribute, but comparatively we not superior. Considering that "the company's vision is to provide glamour, excitement and innovation to consumers through high-quality products at affordable prices" (Revlon, 2010: Para 2), the fact that Revlon was strongly associated with quality packaging, may link to glamour and excitement. There may also be an opportunity for Revlon to pursue this. However since the foundation of Revlon's positioning i.e. glamour and excitement didn't feature in the attributes sought by generations it can't be concluded if Revlon has or hasn't achieved this. Thus, it is recommended that Revlon conducts further research to access whether each of the generations' perceptions aligns with their positioning.

However what is apparent is that Revlon is effectively communicating that it is widely available. Revlon was however not strongly associated with the *low price* attribute and comparatively achieved an average position, which indicates the need to address this aspect in order that the perception aligns with the element of providing glamour and excitement through high quality products at affordable prices (Revlon, 2010: Para 2).

9.8 Conclusion

Some useful recommendations were made. Based on the fact that whilst Boomers generally felt marginalised, the feelings of marginalisation were not applicable to the facial care industry, this implies that there is an opportunity for marketers to use the facial care industry as a benchmark in an attempt to target Boomers better. Furthermore, recommendations were made to facial care companies which included all elements of the marketing mix and how these could be utilised to better target each of the generations. Finally some brand specific recommendations were made. Whilst the research was comprehensive, resulting in ample recommendations, there were limitations of the research. These limitations along with some useful recommendations for future research will be discussed in the chapter which follows.

CHAPTER 10 – RESEARCH LIMITATIONS & RECOMMENDATIONS FOR FUTURE RESEARCH

10.1 INTRODUCTION

The chapter discusses the problems that were encountered during this research and subsequent limitations are considered. Based on the limitations and other interesting observations which were evident from this research, recommendations for future research are made.

10.2 RESEARCH LIMITATIONS

Various research limitations were encountered during the research, and are discussed in the section which follows.

10.1.1 Secondary Research

In terms of the secondary research there were limitations in terms of the availability of research pertaining to both the Global and the South African Facial Care Industry and the researcher was unable to get hold of the latest findings and thus was only able to comment on research which was conducted in 2008.

10.1.2 Sampling

Another limitation of the study was that non-probability sampling was used. "In non-probability sampling, the probability of selecting each sampling unit is not known" (Shiu *et al.*, 2009:470). Therefore the sampling error is also unknown, which means strictly speaking the results cannot be generalised to the population (Shiu *et al.*, 2009:470). Thus, the research findings are limited in relation to being able to generalise it to the population as a whole. Probability sampling would have been the preferred method of sampling due to the fact that "each population element is given a known nonzero chance of selection" (Cooper and Schindler 2006:760) and for this reason would have been more representative. Furthermore probability sampling is more accurate than non-probability sampling.

It wasn't possible to obtain a listing of females in KwaZulu-Natal and therefore probability sampling wasn't possible. Furthermore, due to cost and time constraints non-probability sampling method was appropriate. In an attempt to overcome the shortcomings of non-probability sampling, the malls at which the research was conducted were carefully selected in order that the different races, different income groups and different levels of education would be reflected. Finally, as the focus was on generational differences attempts were made to ensure more-or-less even groups of the 3 generations. The following percentage of representation was achieved, 31% of the respondents were Baby Boomers, 38% of respondents were classified as Generation X and 30% of respondents were Millenials.

10.1.3 Questionnaire Mall-intercept Survey

Due to the fact that the mall-intercept method was selected, the number of facial care brands which were included were limited to the following: the Body Shop, Clarins, Clearasil, Clinique, Gatineau, Johnson and Johnson, L'Oreal, Nivea and Revlon. Only these brands were included as otherwise the questionnaire would have been too long and the response rate would have been impacted. Although the research does not include all the facial care brands, steps were implemented in order to ensure that the brands which were included were amongst the most popular brands. A triangulation research method was used, and one of the advantages of this research is that the results from one method can be used to help develop or inform the other method (Hanson *et al.,* 2005:226). As a result the brands were selected based on a combination of the literature review and the focus group findings.

10.3 RECOMMENDATIONS FOR FUTURE RESEARCH

Probability sampling would be ideal in order to be able to generalise the research to the South African population as a whole, and would make the research more representative. However since no listing of the South African women could be obtained this can not be recommended. It is however recommended that in an attempt to make the research more representative of the South African population, future research should be conducted, using a bigger sample size and conducting research in all geographical areas of South Africa and not limited only to KwaZulu-Natal. Furthermore, it is imperative that the sample is representative of the South African population in terms of age, income and race groups.

Another recommendation which would be useful is to perform factor analysis on the attributes used in this research. Factor analysis is a multivariate statistical technique which is able to uncover underlying factors by summarising information of a number of variables into a smaller number of factors (Shiu *et al.*, 2009:630). This is useful as "there is no distinction between dependant and independent variables; rather, all variables under investigation are analysed together in order to determine underlying factors" (*et al.*, 2009:630), thus, allowing for recommendations relating to the positioning of certain facial care brands to be made that incorporate a combination of attributes desired by consumers.

The findings have suggested that there may be certain demographic factors, specifically race and income, which may affect the perceptions of skin care brands. Although beyond the scope of this research, significance testing of various demographic variables against the whole sample was done. The results showed that both income and race appear to affect the importance of attributes and brands ratings on different attributes. Thus, it would be interesting to conduct in-depth research to determine which differences occur amongst different race and income groups relating specifically to the importance of attributes when purchasing facial care and the perceptions of facial care brands. Detailed analysis using an income stratified sample and a race stratified sample would need to be done.

Furthermore, according to experts the ethnic market is one which is perceived as having the most growth potential, especially given the population dynamics of South Africa (Euromonitor International, 2009:1). This indicates that the facial care industry is under the impression that people of different races have different skin care needs. This would be interesting to investigate.

Although this research touched on the effectiveness of media as perceived by the generations, it may be useful to do more qualitative research which focuses specifically on the reasoning behind certain media vehicles being perceived as more effective and further delves into why some adverts appeal and others don't in order to gain more insights into the type of messages that appeal to the different generations. Thus, a cross generational study of the effectiveness of media relating specifically to facial care products as perceived by women could be an interesting future research topic.

Despite there being numerous studies which suggest markets can be divided based on generational theory, there are some researchers that believe there are further differences within the different generational groups. Musico (2008:36) for example states that Baby Boomers are not homogenous, and for marketers trying to attract this segment it is necessary to segment the Boomer market. The research has shown that there are definite differences amongst the various generations, however further research could be conducted to investigate the extent of differences which may occur within each generation.

Also a further recommendation could be to focus on a specific brand of facial care to determine the position occupied in the minds of women in general or women of a specific generation. It may also be interesting to conduct similar research but instead of doing a cross generational study of the positioning of skin care brands, focus on a single generation.

10.3 Conclusion

Whilst this study was faced with certain research limitations steps were implemented to ensure that the limitations were minimal. Furthermore, this research produced some interesting observations which could be used to develop future research studies, which were discussed. The chapter which follows gives an overall conclusion of the study.

Since "positioning is the fundamental starting point for all your marketing efforts - the DNA of marketing" (Chapin, 2009: Para 5), and affects all elements of the marketing strategy, positioning should be used as the focus in development of the marketing strategy to ensure that all elements of the marketing strategy are consistent and supportive (Aaker and Shansby, 1982, cited in Cravens, 2000:190). It is not surprising therefore that positioning is often viewed as being the single most important aspect of marketing in the globally competitive market place (Malik, 2007: Para 1). As a result it can be concluded that the importance of positioning should not be underestimated.

The research study, a cross-generational study of the positioning of skin care products based on female perceptions, set out to achieve the following four objectives:

1) To determine what factors/ attributes female Baby Boomers versus non-Baby Boomers look for when purchasing skin care products
2) To establish the positions occupied by skin care products in the minds of Baby Boomer women versus non-Baby Boomer women
3) To determine if Baby Boomer females feel marginalised by the skin care industry
4) To measure to what extent the needs of Baby Boomer women differ from the needs of non-Baby Boomer women (i.e. Generation X and Y women) when it comes to marketing of skin care products

The results clearly showed that the factors/ attributes female Baby Boomers look for when purchasing skin care products, differ from those which are most important to the other two generations. Boomers rated the *lasts all day (no need to reapply)* and the *moisturising ability* attributes as most important when purchasing facial care products. Generation X and Generation Y rated the *makes skin feel smooth and soft* attribute as most important. As second most important attribute Generation X rated *contains SPF,* whilst Generation Y rated the *removes impurities* attribute. This shows the importance of segmentation and targeting, followed by a positioning strategy which has been carefully crafted and developed for the target market selected.

In terms of the positions occupied by skin care brands the various different positioning maps show that each of the brands occupy a slightly different position in the minds of each of the generations. Clinique is clearly the top brand as perceived by Baby Boomers on the attributes they rated as being most important. Generation Xers appear to be largely undecided in terms of a preferred brand, with brands being perceived similarly. Nivea and Clinique appear to be the brands of choice in the minds of Generation Y consumers.

Only a low percentage of Baby Boomers felt marginalised by the facial care industry, which is an interesting finding as a recent study found that South African Baby Boomers generally felt marketing messages are aimed at persons in their 20s and 30s, and feel alienated from marketing communications, overlooked by product developers and are displeased with customer service (Mitchell, 2008: Para 10). Thus, it appears that the facial care industry, has recognised the importance of targeting and developing messages for a specific generation and have successfully created products and communication messages which appeal to Baby Boomers.

Finally in terms of the most effective communication medium, it is clear that *TV adverts* are still the preferred media as it was deemed most effective by each of the generations. However differences in which media vehicles were perceived to be effective were also evident and thus it can concluded that in terms of the communication tools to use, a different combination of communication tools should be used for each of the generations.

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15 JULY 2009

MS. N DREWS (201501230)
MANAGEMENT

Dear Ms. Drews

ETHICAL CLEARANCE APPROVAL NUMBER: HSS/0388/09M

I wish to confirm that ethical clearance has been approved for the following project:

"A cross-generational study of the positioning of skin care products based on female perceptions"

PLEASE NOTE: Research data should be securely stored in the school/department for a period of 5 years

Yours faithfully

....

MS. PHUMELELE XIMBA
ADMINISTRATOR
HUMANITIES & SOCIAL SCIENCES ETHICS COMMITTEE

cc. Supervisor (Prof. D Vigar-Ellis)
cc. Mrs. G Ponsford

APPENDIX 2 – FOCUS GROUP DISCUSSION GUIDE

Discussion Guide for: "A cross-generational study of the positioning of skin care products based on female perceptions."

Opening (± 10 minutes): Explanation of Focus Group and Rules
Firstly I would like to thank each and every one of you for attending and participating in this research. We call this a focus group – let me explain how it works, and then please let me know if something isn't clear. This is a discussion, and we are interested in and we value your opinion. What you think and feel is important and if you don't know much about some of the things we'll be talking about please don't feel bad – it's alright and important for us to know. There are no right or wrong answers - you can disagree with one another or just comment - so please don't be afraid to be different, we aren't expecting everyone to agree on all the things that will be discussed. So please relax and express any thoughts and opinions which you might have.

We'd like to hear from everyone, but we do ask that only one person speaks at a time, because we record the session to save me from having to take notes. We also ask that no side discussions take place – as some important and relevant comments may be overlooked. We need to cover a series of topics, so there may be times when I'll need to move the discussion along – please don't be offended.

The purpose of this focus group is to discover how each of you perceive the facial care industry and certain issues pertaining to the facial care industry. Just to clarify, facial care products include anti-agers, day & night creams, toners, face masks, moisturisers, eye creams, cleansing wipes, exfoliating scrubs, pore strips, and fade cream. Before we start are there any questions?

Issues (±25 minutes per topic):

1. *Establishing the competitive set:*
   a. When you think of facial care products which five brand names come to mind? Please answer the question on the questionnaire provided. Why do these brands stick out?
   b. On the questionnaire provided please answer the following question: which facial care products each of you use? We ask that you be brand specific. If you use more than one brand, we're interested in knowing this information.
   c. Do you stick to one brand or do you chop and change? Why?
   d. How long have you been using the brand(s) that you currently use? Please use the questionnaire to answer.
   e. If one of the brands you currently use are taken off the shelves or discontinued which alternatives would you consider? Why?

2. *Establishing the most important attributes*
   a. Can you tell me why you use the brand(s) that you use?
   b. What attributes do you consider when choosing facial care products? We ask that you list all the attributes which you consider. Please use the questionnaire to answer this question
   c. What attributes are most important? Use the column on the questionnaire and rate the attributes you have listed. Why?

3. *Establishing whether these women feel marginalised by the skin care Industry*
   a. Do you feel marginalised/ ignored by the facial care industry? Is there an age group that you believe is being ignored by the facial care industry?
   b. In terms of the marketing communications which skin care companies develop, would you say that their messages are developed with you in mind and do marketers target your age group? Please elaborate.
   c. Do the marketing messages appeal to you? Please specify which particular companies appeal to you and which don't.
   d. Can you elaborate why some adverts appeal to you and why some don't? What do you like about their communications and what don't you like?

Close (± 5 minutes)
Summarize what has been discussed. Do any of you have any last comments or thoughts about the skin care brands in South Africa? The way these brands are marketed or possibly how marketers could improve their marketing messages to aim in particular at your age group?

I'd like to thank you all for the time you've taken to participate in this research and for your co-operation and valuable input. Before you go could you please hand in the questionnaires and we'll do the lucky draw. Please each take one rose on your way out. Thanks and please drive home carefully.

Informed Consent Document

I, Nydia Drews, am a student currently registered for a Masters of Commerce (Marketing) Degree on the Pietermaritzburg campus of the University of KwaZulu-Natal (UKZN). A requirement for the degree is a dissertation and I have chosen the following topic:

"A cross-generational study of the positioning of skin care products based on female perceptions"

Please note that this investigation is being conducted in my personal capacity. I can be reached on 082 607 1346 or nydiadrews@googlemail.com

My academic supervisor is Professor Debbie Vigar-Ellis, based in the school of Marketing on the Pietermaritzburg campus of the University of KwaZulu-Natal. She can be contacted on vigard@ukzn.ac.za

The purpose of this research is to discover whether females from different generations have different needs, and if positions occupied by skin care products vary across generations. Information gathered in this study will include data retrieved from the focus group that you are participating in. Please note that your name will not be included in the report as only summary data will be included. The information will be seen only by me, my supervisor and my examiner. Your anonymity and confidentiality is of utmost importance and will be maintained throughout the study.

I appreciate the time and effort it will take to participate in this study. I would be very grateful for your participation, as it would enable me to complete my dissertation and degree.

Please complete the section below:

I…………………………………………………………………………(Full names of participant) hereby confirm that I understand the contents of this document and the nature of the research project, and consent to participating in the research project. I understand that I am at liberty to withdraw from the project at any time, should I so desire.

Signature of Participant ……………………………………………………………………………….
Date ……………………………………………………………………………………………………….

Questionnaire

1. When you think of facial care products which five brands come to mind? **Please use column 1 to answer the question.**

Question 1	Question 2	Question 3
1.		
2.		
3.		
4.		
5.		

2. Which facial care products do you currently use? We ask that you be brand specific. If you use more than one brand, we're interested in knowing this information. **Please use column 2 above to answer the question.**

3. How long have you been using the brand (s) you currently use? **Please use column 3 above to answer the question.**

4. If one of the brands you currently use are taken off the shelves or discontinued which alternatives would you consider?

____
____
____

5. What attributes do you consider when choosing facial care products? We ask that you list all the attributes which you consider. Please rate the attributes listed in the column provided (1 = most important)

Attribute	**Importance (1 = most important)**
a. ________________	______
b. ________________	______
c. ________________	______
d. ________________	______
e. ________________	______
f. ________________	______
g. ________________	______
h. ________________	______
i. ________________	______
j. ________________	______
k. ________________	______
l. ________________	______

Demographics:
In what year where you born? ____

Please specify your race:
Asian ☐ *Black* ☐ *Coloured* ☐ *Indian* ☐ *White* ☐

Net Salary per month
R0 - R3999 ☐ *R4000- R7999* ☐ *R 8000- R11999* ☐ *R 12000- R15999* ☐
R15999 – R19999 ☐ *R20 000 – R30000* ☐ *R30 000 +* ☐

On average how much do you spend on facial care products per month?
R0 – R149 ☐ *R150 – R349* ☐ *R350 - R699* ☐ *R700 – R999* ☐
R1000 – R 1499 ☐ *R1500- R1999* ☐ *R2000 – R2999* ☐ *R3000+* ☐
Home Language ____

Marital Status
Single ☐ Single with children ☐ Married no children ☐ Married with children ☐
Divorced no children ☐ Divorced with children ☐ Married children have left home ☐
Divorced children have left home ☐

Notes:

5.1 LIST OF BRANDS LISTED IN PARTICIPANTS TOP 5

5.1.1 Almay in Top 5

Almay in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.2 Avon in Top 5

Avon in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	17.4	17.4	17.4
	No	19	82.6	82.6	100.0
	Total	23	100.0	100.0	

5.1.3 Avroy Shalain in Top 5

Avroy Shalain in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.4 Body Shop in Top 5

Body Shop in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.5 Camphor Cream in Top 5

Camphor Cream in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.6 Clarins in Top 5

Clarins in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	17.4	17.4	17.4
	No	19	82.6	82.6	100.0
	Total	23	100.0	100.0	

5.1.7 Clean & Clear in Top 5

Clean & Clear in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	13.0	13.0	13.0
	No	20	87.0	87.0	100.0
	Total	23	100.0	100.0	

5.1.8 Clearasil in Top 5

Clearasil in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	5	21.7	21.7	21.7
	No	18	78.3	78.3	100.0
	Total	23	100.0	100.0	

5.1.9 Clicks in Top 5

Clicks in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.10 Clinique in Top 5

Clinique in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	7	30.4	30.4	30.4
	No	16	69.6	69.6	100.0
	Total	23	100.0	100.0	

5.1.11 Dove in Top 5

Dove in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.12 Environ in Top 5

Environ in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	17.4	17.4	17.4
	No	19	82.6	82.6	100.0
	Total	23	100.0	100.0	

5.1.13 Estee Lauder in Top 5

Estee Lauder in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	13.0	13.0	13.0
	No	20	87.0	87.0	100.0
	Total	23	100.0	100.0	

5.1.14 Garnier in Top 5

Garnier in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	13.0	13.0	13.0
	No	20	87.0	87.0	100.0
	Total	23	100.0	100.0	

5.1.15 Gatineau in Top 5

Gatineau in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	4	17.4	17.4	17.4
	No	19	82.6	82.6	100.0
	Total	23	100.0	100.0	

5.1.16 Guinot in Top 5

Guinot in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	3	13.0	13.0	13.0
	No	20	87.0	87.0	100.0
	Total	23	100.0	100.0	

5.1.17 Innoxa in Top 5

Innoxa in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.18 Johnson and Johnson in Top 5

J&J in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	5	21.7	21.7	21.7
	No	18	78.3	78.3	100.0
	Total	23	100.0	100.0	

5.1.19 Justine in Top 5

Justine in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.20 Lamer in Top 5

Lamer in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.21 Like Silk in Top 5

Like Silk in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	2	8.7	8.7	8.7
	No	21	91.3	91.3	100.0
	Total	23	100.0	100.0	

5.1.22 L'Oreal in Top 5

L'Oreal in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	9	39.1	39.1	39.1
	No	14	60.9	60.9	100.0
	Total	23	100.0	100.0	

5.1.23 Neutrogena in Top 5

Neutrogena in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	2	8.7	8.7	8.7
	No	21	91.3	91.3	100.0
	Total	23	100.0	100.0	

5.1.24 Nivea in Top 5

Nivea in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	9	39.1	39.1	39.1
	No	14	60.9	60.9	100.0
	Total	23	100.0	100.0	

5.1.25 Oil of Olay in Top 5

Oil of Olay in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	6	26.1	26.1	26.1
	No	17	73.9	73.9	100.0
	Total	23	100.0	100.0	

5.1.26 Oxy in Top 5

Oxy in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.27 Regima in Top 5

Regima in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.28 Revlon in Top 5

Revlon in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	7	30.4	30.4	30.4
	No	16	69.6	69.6	100.0
	Total	23	100.0	100.0	

5.1.29 Ponds in Top 5

Ponds in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	2	8.7	8.7	8.7
	No	21	91.3	91.3	100.0
	Total	23	100.0	100.0	

5.1.30 Payot in Top 5

Payot in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.31 Sensai in Top 5

Sensai in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.32 Tahlita in Top 5

Tahlita in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.33 Vaseline in Top 5

Vaseline in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

5.1.34 Yardley in Top 5

Yardley in top 5

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	1	4.3	4.3	4.3
	No	22	95.7	95.7	100.0
	Total	23	100.0	100.0	

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5 MAY 2010

MS. N DREWS
School of Management
PIETERMARITZBURG CAMPUS

Dear Ms. Drews

ETHICAL APPROVAL NUMBER: HSS/0388/09M
PROJECT TITLE: "A cross-generational study of the positioning of skin care products based on female perceptions"

In response to your application dated 29 April 2010, Student Number: **201501230,** the Humanities & Social Sciences Ethics Committee has considered the abovementioned application and has been granted **FULL APPROVAL** for:

- "Survey" Second part of the research protocol

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment /modification prior to its implementation. In case you have further queries, please quote the above reference number.
PLEASE NOTE: Research data should be securely stored in the school/department for a period of 5 years.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

Professor Steven Collings (Chair)
HUMANITIES & SOCIAL SCIENCES RESEARCH ETHICS COMMITTEE

cc. Supervisor (Professor Debbie Vigar-Ellis)
cc. Mrs. G Ponsford

Founding Campuses: Edgewood Howard College Medical School Pietermaritzburg Westville

Informed Consent Document

I, Nydia Drews, am a student currently registered for a Masters of Commerce (Marketing) degree on the Pietermaritzburg campus of the University of KwaZulu-Natal (UKZN). A requirement for the degree is a dissertation and I have chosen the following topic:

"A cross-generational study of the positioning of skin care products based on female perceptions"

Please note that this investigation is being conducted in my personal capacity. I can be reached on 082 607 1346 or nydiadrews@googlemail.com

My academic supervisor is Professor Debbie Vigar-Ellis, based in the School of Management on the Pietermaritzburg campus of the University of KwaZulu-Natal. She can be contacted on 033 260 5899 or vigard@ukzn.ac.za

The purpose of this research is to discover whether females from different generations have different needs, and if positions occupied by skin care products vary across generations. Information gathered in this study will include data retrieved from the survey that you are participating in. Please note that your name will not be included in the report as only summary data will be included. The information will be seen only by me, my supervisor and my examiner. Your anonymity and confidentiality is of utmost importance and will be maintained throughout the study.

I appreciate the time and effort it will take to participate in this study. I would be very grateful for your participation, as it would enable me to complete my dissertation and degree.

Please complete the section below:

I………………………………………………………………………….(Full names of participant) hereby confirm that I understand the contents of this document and the nature of the research project, and consent to participating in the research project. I understand that I am at liberty to withdraw from the project at any time, should I so desire.

Signature of Participant ………………………………………………………………………………
Date ……………………………………………………………………………………………….

Questionnaire

Please note: facial care products include anti-agers, day & night creams, toners, face masks, moisturisers, eye creams, cleansing wipes, exfoliating scrubs, pore strips, and fade cream.

1. Do you use facial care products? Yes ☐ (Answer question 2-9) No ☐ (Answer question 3,5-9)

2. Which brand(s) of facial care products do you currently use?

3. In your opinion what are the top 3 facial care brands?

4. What attributes are most important to you when choosing facial care products? (Please rate on a scale of 1 to 10. Where 1 is totally unimportant and 10 is very important)

Low Price	1	2	3	4	5	6	7	8	9	10
Mild Fragrance	1	2	3	4	5	6	7	8	9	10
Quality Packaging	1	2	3	4	5	6	7	8	9	10
Moisturising ability	1	2	3	4	5	6	7	8	9	10
Makes skin feel smooth & soft	1	2	3	4	5	6	7	8	9	10
Multi-purpose e.g. 3-in-1 product, Moisturiser with SPF, etc	1	2	3	4	5	6	7	8	9	10
Widely available	1	2	3	4	5	6	7	8	9	10
Contains SPF (Sun Protection Factor)	1	2	3	4	5	6	7	8	9	10
Contains Natural ingredients	1	2	3	4	5	6	7	8	9	10
Contains anti-aging properties	1	2	3	4	5	6	7	8	9	10
Removes impurities	1	2	3	4	5	6	7	8	9	10
Lasts all day (no need to reapply)	1	2	3	4	5	6	7	8	9	10

5. The following questions relate specifically to your perception/ opinion. Please rate all of the following brands on the following attributes using this scale: 1–Does not meet the criterion/ possess the feature at all, 2-Poor, 3-Average, 4-Good and 5-Excellent. Please note that even if you're not familiar with the brand its your perception that is important.

	Body Shop	Clarins	Clearasil	Clinique	Gatineau	Johnson& Johnson	L'Oreal	Nivea	Revlon
Low Price									
Mild Fragrance									
Quality Packaging									
Moisturising ability									
Makes skin feel smooth & soft									
Multi-purpose e.g. 3-in-1 product, Moisturiser with SPF, etc									
Widely available									
Contains SPF (Sun Protection Factor)									
Contains Natural ingredients									
Contains anti-aging properties									
Removes impurities									
Lasts all day (no need to reapply)									

Please turn over…

6. Do you feel marginalised/ ignored by the facial care industry? Yes☐ No ☐
   If you answered yes, why?____

7. In your opinion are any of the following individuals' marginilised or ignored by the facial care industry? (Please tick, more than one option can be selected)

Teenagers	20 - 29	30 - 39	40 - 49	50 - 59	60 - 69	70+
Black ladies	Coloured ladies	Indian ladies	White ladies	Other: please specify		

8. Rate the following Marketing media according to how effective they are to you when advertising facial care products (Please rate on a scale of 1 to 10. Where 1 is totally ineffective and 10 is very effective)

a) TV Adverts ☐ b) Print Adverts ☐ c) Radio Adverts ☐ d) Blogs ☐ e) Websites ☐ f) Samples ☐

g) Sponsorships ☐ h) Web Campaign ☐ i) Word-of-mouth ☐ j) Store Displays ☐ k) Endorsed by celebrities ☐

l) Endorsed by Experts e.g. Dermatologist, Doctor, Beautician ☐

9. Please indicate your extent of agreement/ disagreement with the following statements

	I am more likely to use facial care products that…	1-Strongly Agree	2-Agree	3-Neutral	4-Disagree	5-Strongly Disagree
1.	…are designed for my age group.	1	2	3	4	5
2.	…are designed for my skin type.	1	2	3	4	5
3.	…use entertaining adverts.	1	2	3	4	5
4.	…use the music from my era in their advertising.	1	2	3	4	5
5.	…use endorsers from my age group.	1	2	3	4	5
6.	…are effective.	1	2	3	4	5
7.	…are recommended by my friends.	1	2	3	4	5
8.	…educate me about facial care routines in their communications.	1	2	3	4	5

9.	I consider myself to be brand loyal when it comes to facial care products.	1	2	3	4	5

Demographics

1. When were you born (YYYY)? ____

2. Please specify your race:
Black ☐ Coloured ☐ Indian ☐ White ☐ Other: please specify__________________

3. What is your Net Salary per month?
R 0 – R 3,999 ☐ R 4,000 - R 7,999 ☐ R 8,000 – R 11,999 ☐ R 12,000 – R 15,999 ☐
R 16 000 – R 19,999 ☐ R 20, 000 – R 29,999 ☐ R 30, 000 + ☐

4. On average how much do you spend on facial care products per month?
R 0 – R 149 ☐ R 150 – R 349 ☐ R 350 – R 699 ☐ R 700 – R 999 ☐
R 1,000 – R 1,499 ☐ R 1,500- R 1,999 ☐ R 2,000 – R 2,999 ☐ R 3,000+ ☐

5. Marital Status
Single ☐Married ☐ Divorced ☐ Widowed ☐

6. Do you have financially dependant children? Yes☐ No ☐

Thank-you for your time and participation

9.1 BRANDS USED BY RESPONDENTS

		Responses		Percent of Cases
		N	Percent	
Brand Use[a]	Yardley	15	2.7%	3.7%
	Clarins	11	2.0%	2.7%
	Revlon	14	2.5%	3.5%
	Ponds	44	7.9%	10.9%
	Neutrogena	14	2.5%	3.5%
	Innoxa	17	3.0%	4.2%
	Nivea	47	8.4%	11.6%
	Oil of Olay	18	3.2%	4.4%
	L'Oreal	32	5.7%	7.9%
	Johnson & Johnsons	34	6.1%	8.4%
	Garnier	21	3.8%	5.2%
	Clearasil	20	3.6%	4.9%
	Oxy	2	.4%	.5%
	Avon	31	5.6%	7.7%
	Estee Lauder	22	3.9%	5.4%
	Gallia	3	.5%	.7%
	Dermalogica	7	1.3%	1.7%
	Clinique	49	8.8%	12.1%
	Justine	18	3.2%	4.4%
	Elizabeth Arden	4	.7%	1.0%
	Gatineau	5	.9%	1.2%
	Environ	14	2.5%	3.5%
	Placecol	2	.4%	.5%
	Body Shop	4	.7%	1.0%
	Woolworths	4	.7%	1.0%
	Clean & Clear	2	.4%	.5%
	Gentle Magic	2	.4%	.5%
	Lemon Lite	3	.5%	.7%
	Vichy	5	.9%	1.2%
	Annique	4	.7%	1.0%
	Kanebo	3	.5%	.7%
	Almay	5	.9%	1.2%
	ROC	2	.4%	.5%
	Vaseline	2	.4%	.5%
	Dove	4	.7%	1.0%
	Like Silk	7	1.3%	1.7%
	Clicks	6	1.1%	1.5%
	Rooibos	3	.5%	.7%
	Valuer	2	.4%	.5%
	Avroy Shlain	8	1.4%	2.0%
	Esse	2	.4%	.5%
	Artistry	4	.7%	1.0%
	Bionike	2	.4%	.5%
	Rival De Loop	3	.5%	.7%
	Maybelline	2	.4%	.5%
	Other	35	6.3%	8.6%
Total		558	100.0%	137.8%

a. Group

9.2 Top Brands as Perceived by Respondents

		Responses		Percent of Cases
		N	Percent	
Top Brand[a]	Yardley	16	1.2%	3.5%
	Clarins	77	5.9%	16.6%
	Revlon	73	5.6%	15.8%
	Ponds	75	5.8%	16.2%
	Neutrogena	20	1.5%	4.3%
	Innoxa	18	1.4%	3.9%
	Nivea	93	7.1%	20.1%
	Oil of Olay	52	4.0%	11.2%
	L'Oreal	97	7.5%	21.0%
	Johnson & Johnsons	59	4.5%	12.7%
	Garnier	54	4.2%	11.7%
	Clearasil	34	2.6%	7.3%
	Oxy	3	.2%	.6%
	Avon	29	2.2%	6.3%
	Skin Free	2	.2%	.4%
	Lancome	10	.8%	2.2%
	Estee Lauder	89	6.8%	19.2%
	Gallia	3	.2%	.6%
	Dermalogica	27	2.1%	5.8%
	Clinique	174	13.4%	37.6%
	Guinot	6	.5%	1.3%
	Justine	29	2.2%	6.3%
	Elizabeth Arden	23	1.8%	5.0%
	Gatineau	21	1.6%	4.5%
	Lamer	9	.7%	1.9%
	Environ	28	2.2%	6.0%
	Dior	2	.2%	.4%
	Placecol	3	.2%	.6%
	Body Shop	6	.5%	1.3%
	Clean & Clear	3	.2%	.6%
	Gentle Magic	9	.7%	1.9%
	Lemon Lite	16	1.2%	3.5%
	Vichy	6	.5%	1.3%
	MAC	4	.3%	.9%
	Annique	2	.2%	.4%
	LaPriarie	5	.4%	1.1%
	Kanebo	13	1.0%	2.8%
	Bobbi Brown	2	.2%	.4%
	Almay	9	.7%	1.9%
	ROC	11	.8%	2.4%
	Payot	4	.3%	.9%
	Vaseline	2	.2%	.4%
	Dove	4	.3%	.9%
	Jean Guthrie	3	.2%	.6%
	Guerlain	2	.2%	.4%
	Like Silk	2	.2%	.4%
	Clicks	4	.3%	.9%
	Valuer	2	.2%	.4%
	Avroy Shlain	10	.8%	2.2%
	Matis	2	.2%	.4%
	She'zen	2	.2%	.4%
	Esse	4	.3%	.9%
	Artistry	5	.4%	1.1%
	Bionike	3	.2%	.6%
	Amway	2	.2%	.4%
	Maybelline	3	.2%	.6%
	Other	35	2.7%	7.6%
Total		1301	100.0%	281.0%

a. Group

9.3 IMPORTANCE OF ATTRIBUTES – MEAN SCORES AND FREQUENCIES

9.3.1 Mean scores for attributes 1 – 6

Statistics

		Attributes: Low Price	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Makes skin feel smooth & soft	Attributes: Multi-purpose
N	Valid	406	404	405	412	412	409
	Missing	78	80	79	72	72	75
Mean		6.15	6.17	5.88	9.09	9.33	7.88

9.3.2 Frequencies: Attributes 1-6

Attributes: Low Price

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	34	7.0	8.4	8.4
	2	11	2.3	2.7	11.1
	3	31	6.4	7.6	18.7
	4	22	4.5	5.4	24.1
	5	91	18.8	22.4	46.6
	6	44	9.1	10.8	57.4
	7	32	6.6	7.9	65.3
	8	37	7.6	9.1	74.4
	9	20	4.1	4.9	79.3
	10	84	17.4	20.7	100.0
	Total	406	83.9	100.0	
Missing	0	78	16.1		
Total		484	100.0		

Attributes: Mild Fragrance

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	53	11.0	13.1	13.1
	2	14	2.9	3.5	16.6
	3	22	4.5	5.4	22.0
	4	28	5.8	6.9	29.0
	5	48	9.9	11.9	40.8
	6	32	6.6	7.9	48.8
	7	40	8.3	9.9	58.7
	8	59	12.2	14.6	73.3
	9	29	6.0	7.2	80.4
	10	79	16.3	19.6	100.0
	Total	404	83.5	100.0	
Missing	0	80	16.5		
Total		484	100.0		

Attributes: Quality Packaging

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	63	13.0	15.6	15.6
	2	27	5.6	6.7	22.2
	3	25	5.2	6.2	28.4
	4	23	4.8	5.7	34.1
	5	50	10.3	12.3	46.4
	6	30	6.2	7.4	53.8
	7	30	6.2	7.4	61.2
	8	44	9.1	10.9	72.1
	9	26	5.4	6.4	78.5
	10	87	18.0	21.5	100.0
	Total	405	83.7	100.0	
Missing	0	79	16.3		
Total		484	100.0		

Attributes: Moisturising Effect

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	.2	.2	.2
	2	3	.6	.7	1.0
	3	1	.2	.2	1.2
	4	1	.2	.2	1.5
	5	10	2.1	2.4	3.9
	6	9	1.9	2.2	6.1
	7	24	5.0	5.8	11.9
	8	55	11.4	13.3	25.2
	9	59	12.2	14.3	39.6
	10	249	51.4	60.4	100.0
	Total	412	85.1	100.0	
Missing	0	72	14.9		
Total		484	100.0		

Attributes: Makes skin feel smooth & soft

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	1	.2	.2	.2
	2	2	.4	.5	.7
	3	1	.2	.2	1.0
	5	6	1.2	1.5	2.4
	6	5	1.0	1.2	3.6
	7	12	2.5	2.9	6.6
	8	49	10.1	11.9	18.4
	9	59	12.2	14.3	32.8
	10	277	57.2	67.2	100.0
	Total	412	85.1	100.0	
Missing	0	72	14.9		
Total		484	100.0		

Attributes: Multi-purpose

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	12	2.5	2.9	2.9
	2	13	2.7	3.2	6.1
	3	16	3.3	3.9	10.0
	4	10	2.1	2.4	12.5
	5	26	5.4	6.4	18.8
	6	20	4.1	4.9	23.7
	7	41	8.5	10.0	33.7
	8	49	10.1	12.0	45.7
	9	51	10.5	12.5	58.2
	10	171	35.3	41.8	100.0
	Total	409	84.5	100.0	
Missing	0	74	15.3		
	System	1	.2		
	Total	75	15.5		
Total		484	100.0		

9.3.3 Mean scores for attributes 7 – 12

Statistics

		Attributes: Widely available	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Removes Impurities	Attributes: Lasts all day
N	Valid	411	411	408	410	410	413
	Missing	73	73	76	74	74	71
Mean		8.50	8.94	8.45	8.38	8.91	9.21

9.3.4 Frequencies: Attribute 7-12

Attributes: Widely available

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	9	1.9	2.2	2.2
	2	2	.4	.5	2.7
	3	5	1.0	1.2	3.9
	4	11	2.3	2.7	6.6
	5	16	3.3	3.9	10.5
	6	17	3.5	4.1	14.6
	7	28	5.8	6.8	21.4
	8	63	13.0	15.3	36.7
	9	62	12.8	15.1	51.8
	10	198	40.9	48.2	100.0
	Total	411	84.9	100.0	
Missing	0	73	15.1		
Total		484	100.0		

Attributes: Contains SPF

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	.6	.7	.7
	2	2	.4	.5	1.2
	3	2	.4	.5	1.7
	4	11	2.3	2.7	4.4
	5	16	3.3	3.9	8.3
	6	6	1.2	1.5	9.7
	7	20	4.1	4.9	14.6
	8	45	9.3	10.9	25.5
	9	58	12.0	14.1	39.7
	10	248	51.2	60.3	100.0
	Total	411	84.9	100.0	
Missing	0	73	15.1		
Total		484	100.0		

Attributes: Contains Natural Ingredients

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	5	1.0	1.2	1.2
	2	3	.6	.7	2.0
	3	5	1.0	1.2	3.2
	4	7	1.4	1.7	4.9
	5	31	6.4	7.6	12.5
	6	24	5.0	5.9	18.4
	7	26	5.4	6.4	24.8
	8	59	12.2	14.5	39.2
	9	41	8.5	10.0	49.3
	10	207	42.8	50.7	100.0
	Total	408	84.3	100.0	
Missing	0	76	15.7		
Total		484	100.0		

Attributes: Contains anti-aging properties

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	15	3.1	3.7	3.7
	2	4	.8	1.0	4.6
	3	4	.8	1.0	5.6
	4	8	1.7	2.0	7.6
	5	31	6.4	7.6	15.1
	6	15	3.1	3.7	18.8
	7	19	3.9	4.6	23.4
	8	50	10.3	12.2	35.6
	9	49	10.1	12.0	47.6
	10	215	44.4	52.4	100.0
	Total	410	84.7	100.0	
Missing	0	74	15.3		
Total		484	100.0		

Attributes: Removes Impurities

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	.6	.7	.7
	2	1	.2	.2	1.0
	3	3	.6	.7	1.7
	4	3	.6	.7	2.4
	5	24	5.0	5.9	8.3
	6	9	1.9	2.2	10.5
	7	19	3.9	4.6	15.1
	8	50	10.3	12.2	27.3
	9	61	12.6	14.9	42.2
	10	237	49.0	57.8	100.0
	Total	410	84.7	100.0	
Missing	0	74	15.3		
Total		484	100.0		

Attributes: Lasts all day

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	3	.6	.7	.7
	2	1	.2	.2	1.0
	3	2	.4	.5	1.5
	4	1	.2	.2	1.7
	5	12	2.5	2.9	4.6
	6	8	1.7	1.9	6.5
	7	15	3.1	3.6	10.2
	8	43	8.9	10.4	20.6
	9	49	10.1	11.9	32.4
	10	279	57.6	67.6	100.0
	Total	413	85.3	100.0	
Missing	0	71	14.7		
Total		484	100.0		

9.4 Importance of Attributes per Generation – Mean Scores and Frequencies

9.4.1 Mean scores as per Generation – Attributes 1-6

Report

Generation		Attributes: Low Price	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Makes skin feel smooth & soft	Attributes: Multi-purpose
Baby Boomer	Mean	6.39	6.26	4.88	9.41	9.32	7.98
	N	134	132	131	135	136	136
	Std. Deviation	2.836	3.105	3.379	1.060	1.287	2.634
Generation X	Mean	6.25	6.68	6.38	9.23	9.55	8.12
	N	146	146	148	151	152	149
	Std. Deviation	2.796	2.803	3.148	1.354	.875	2.419
Generation Y	Mean	5.77	5.49	6.33	8.60	9.08	7.49
	N	126	126	126	126	124	124
	Std. Deviation	2.754	3.093	2.920	1.868	1.596	2.658
Total	Mean	6.15	6.17	5.88	9.09	9.33	7.88
	N	406	404	405	412	412	409
	Std. Deviation	2.802	3.028	3.224	1.487	1.274	2.573

9.4.2 Frequencies as per Generation: Attributes 1 - 6

Attributes: Low Price * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Low Price	1	11	11	12	34
	2	2	4	5	11
	3	8	12	11	31
	4	8	7	7	22
	5	32	30	29	91
	6	11	17	16	44
	7	10	11	11	32
	8	11	18	8	37
	9	9	3	8	20
	10	32	33	19	84
Total		134	146	126	406

Attributes: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Mild Fragrance	1	17	14	22	53
	2	6	1	7	14
	3	7	8	7	22
	4	9	8	11	28
	5	12	17	19	48
	6	13	9	10	32
	7	9	21	10	40
	8	22	23	14	59
	9	7	16	6	29
	10	30	29	20	79
Total		132	146	126	404

Attributes: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Quality Packaging	1	34	19	10	63
	2	13	5	9	27
	3	9	8	8	25
	4	8	8	7	23
	5	16	22	12	50
	6	8	6	16	30
	7	3	16	11	30
	8	11	15	18	44
	9	7	9	10	26
	10	22	40	25	87
Total		131	148	126	405

Attributes: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Moisturising Effect	1	0	0	1	1
	2	0	1	2	3
	3	0	0	1	1
	4	0	0	1	1
	5	1	4	5	10
	6	2	3	4	9
	7	6	8	10	24
	8	19	14	22	55
	9	11	24	24	59
	10	96	97	56	249
Total		135	151	126	412

Attributes: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Makes skin feel smooth & soft	1	0	0	1	1
	2	1	0	1	2
	3	1	0	0	1
	5	1	1	4	6
	6	1	1	3	5
	7	3	4	5	12
	8	23	11	15	49
	9	13	26	20	59
	10	93	109	75	277
Total		136	152	124	412

Attributes: Multi-purpose * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Multi-purpose	1	6	5	1	12
	2	4	2	7	13
	3	4	3	9	16
	4	5	4	1	10
	5	5	7	14	26
	6	2	11	7	20
	7	12	15	14	41
	8	24	16	9	49
	9	14	18	19	51
	10	60	68	43	171
Total		136	149	124	409

9.4.3 Mean scores as per Generation – Attributes 7-12

Report

Generation		Attributes: Widely available	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Removes Impurities	Attributes: Lasts all day
Baby Boomer	Mean	8.54	8.93	8.67	8.98	8.68	9.42
	N	134	135	134	133	133	136
	Std. Deviation	1.934	2.043	2.044	1.743	1.857	1.256
Generation X	Mean	8.73	9.27	8.70	8.96	9.09	9.26
	N	151	151	149	151	152	151
	Std. Deviation	1.963	1.316	1.799	1.732	1.552	1.365
Generation Y	Mean	8.17	8.56	7.90	7.06	8.94	8.91
	N	126	125	125	126	125	126
	Std. Deviation	2.384	1.936	2.358	3.026	1.835	1.910
Total	Mean	8.50	8.94	8.45	8.38	8.91	9.21
	N	411	411	408	410	410	413
	Std. Deviation	2.099	1.793	2.091	2.379	1.747	1.531

9.4.4 Frequencies as per Generation: Attributes 7 - 12

Attributes: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Widely available	1	2	3	4	9
	2	0	1	1	2
	3	1	0	4	5
	4	3	5	3	11
	5	6	2	8	16
	6	7	5	5	17
	7	11	10	7	28
	8	21	24	18	63
	9	20	19	23	62
	10	63	82	53	198
Total		134	151	126	411

Attributes: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Contains SPF	1	3	0	0	3
	2	1	1	0	2
	3	0	0	2	2
	4	5	0	6	11
	5	4	4	8	16
	6	0	1	5	6
	7	7	8	5	20
	8	13	17	15	45
	9	13	20	25	58
	10	89	100	59	248
Total		135	151	125	411

Attributes: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Attributes: Contains Natural Ingredients	1	2	1	2	5
	2	2	0	1	3
	3	1	0	4	5
	4	1	2	4	7
	5	8	10	13	31
	6	4	8	12	24
	7	7	10	9	26
	8	18	24	17	59
	9	18	12	11	41
	10	73	82	52	207
Total		134	149	125	408

Attributes: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Attributes: Contains anti-aging properties	1	1	1	13	15
	2	0	1	3	4
	3	1	1	2	4
	4	0	1	7	8
	5	11	5	15	31
	6	3	5	7	15
	7	0	10	9	19
	8	17	18	15	50
	9	19	16	14	49
	10	81	93	41	215
Total		133	151	126	410

Attributes: Removes Impurities * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Attributes: Removes Impurities	1	1	1	1	3
	2	0	0	1	1
	3	1	1	1	3
	4	2	0	1	3
	5	10	5	9	24
	6	4	4	1	9
	7	9	9	1	19
	8	18	18	14	50
	9	19	19	23	61
	10	69	95	73	237
Total		133	152	125	410

Attributes: Lasts all day * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Attributes: Lasts all day	1	0	0	3	3
	2	0	0	1	1
	3	0	1	1	2
	4	1	0	0	1
	5	5	5	2	12
	6	1	4	3	8
	7	3	4	8	15
	8	10	18	15	43
	9	15	15	19	49
	10	101	104	74	279
Total		136	151	126	413

9.5 Significance Testing on Importance of Attributes – Kruskal-Wallis & Mann-Whitney U Test

9.5.1 Attributes 1 – 6: Kruskal-Wallis

Test Statistics[a,b]

	Attributes: Low Price	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Makes skin feel smooth & soft	Attributes: Multi-purpose
Chi-Square	3.331	9.917	17.318	21.610	5.669	4.904
df	2	2	2	2	2	2
Asymp. Sig.	.189	.007	.000	.000	.059	.086

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.5.2 Attributes 7-12: Kruskal-Wallis

Test Statistics[a,b]

	Attributes: Widely available	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Removes Impurities	Attributes: Lasts all day
Chi-Square	4.452	12.701	10.672	45.399	4.245	7.639
df	2	2	2	2	2	2
Asymp. Sig.	.108	.002	.005	.000	.120	.022

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.5.3 Significance Testing – Whitney Mann U test: Boomers & Xers

Test Statistics[a]

	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Lasts all day
Mann-Whitney U	9023.000	7253.500	9558.000	9902.000	9890.000	9998.500	9652.000
Wilcoxon W	17801.000	15899.500	21034.000	19082.000	21065.000	21474.500	21128.000
Z	-.925	-3.670	-1.095	-.494	-.148	-.071	-1.102
Asymp. Sig. (2-tailed)	.355	.000	.274	.621	.882	.943	.270

a. Grouping Variable: Generation

9.5.4 Significance Testing – Whitney Mann U test : Boomers & Yers

Test Statistics[a]

	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Lasts all day
Mann-Whitney U	7114.000	6155.000	6153.500	7007.000	6780.500	5139.500	7169.000
Wilcoxon W	15115.000	14801.000	14154.500	14882.000	14655.500	13140.500	15170.000
Z	-2.024	-3.551	-4.325	-2.622	-2.817	-5.698	-2.731
Asymp. Sig. (2-tailed)	.043	.000	.000	.009	.005	.000	.006

a. Grouping Variable: Generation

9.5.5 Significance Testing – Whitney Mann U test : Xers & Yers

Test Statistics[a]

	Attributes: Mild Fragrance	Attributes: Quality Packaging	Attributes: Moisturising Effect	Attributes: Contains SPF	Attributes: Contains Natural Ingredients	Attributes: Contains anti-aging properties	Attributes: Lasts all day
Mann-Whitney U	7173.000	9134.500	7418.000	7431.000	7574.000	5869.000	8549.000
Wilcoxon W	15174.000	17135.500	15419.000	15306.000	15449.000	13870.000	16550.000
Z	-3.155	-.293	-3.477	-3.393	-2.840	-5.841	-1.698
Asymp. Sig. (2-tailed)	.002	.770	.001	.001	.005	.000	.089

a. Grouping Variable: Generation

9.6 Brand Ratings – Mean score comparisons and Frequencies per Generation

9.6.1 Brand Ratings: Low Price – Mean score comparison

Report

Generation		Body Shop: Low Price	Clarins: Low Price	Clearasil: Low Price	Clinique: Low Price	Gatineau: Low Price	Johnson & Johnson: Low Price	L'Oreal: Low Price	Nivea: Low Price	Revlon: Low Price
Baby Boomer	Mean	2.46	1.99	3.76	2.25	2.22	3.99	2.94	3.91	3.30
	N	68	81	90	104	63	99	102	108	93
	Std. Deviation	.999	1.006	1.042	1.244	1.197	.898	1.124	.912	.953
Generation X	Mean	2.84	2.18	3.70	2.31	2.21	3.91	2.93	3.65	3.13
	N	97	104	115	137	85	137	115	125	122
	Std. Deviation	1.077	1.147	.984	1.217	1.196	.959	1.168	1.002	1.091
Generation Y	Mean	2.61	2.38	3.49	2.34	2.10	3.84	2.82	3.49	3.18
	N	92	84	117	108	67	126	107	117	114
	Std. Deviation	1.222	1.211	1.064	1.355	1.245	.983	1.280	1.047	1.149
Total	Mean	2.65	2.19	3.64	2.30	2.18	3.91	2.90	3.67	3.20
	N	257	269	322	349	215	362	324	350	329
	Std. Deviation	1.118	1.134	1.033	1.266	1.207	.950	1.190	1.003	1.074

9.6.2 Brand Ratings Frequencies: Low Price

Body Shop: Low Price * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Body Shop: Low Price	1	14	12	23	49
	2	19	22	17	58
	3	26	40	32	98
	4	8	16	13	37
	5	1	7	7	15
Total		68	97	92	257

Clarins: Low Price * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clarins: Low Price	1	34	38	28	100
	2	20	27	15	62
	3	22	25	26	73
	4	4	10	11	25
	5	1	4	4	9
Total		81	104	84	269

Clearasil: Low Price * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clearasil: Low Price	1	3	3	7	13
	2	6	8	9	23
	3	26	36	42	104
	4	30	42	38	110
	5	25	26	21	72
Total		90	115	117	322

Clinique: Low Price * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clinique: Low Price	1	39	41	46	126
	2	24	45	10	79
	3	24	30	30	84
	4	10	9	13	32
	5	7	12	9	28
Total		104	137	108	349

Gatineau: Low Price * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Gatineau: Low Price	1	24	28	30	82
	2	13	29	14	56
	3	17	17	13	47
	4	6	4	6	16
	5	3	7	4	14
Total		63	85	67	215

Johnson & Johnson: Low Price * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Low Price	1	2	1	3	6
	2	1	12	6	19
	3	25	27	36	88
	4	39	55	44	138
	5	32	42	37	111
Total		99	137	126	362

L'Oreal: Low Price * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Low Price	1	13	14	21	48
	2	19	26	23	68
	3	40	43	29	112
	4	21	18	22	61
	5	9	14	12	35
Total		102	115	107	324

Nivea: Low Price * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Low Price	1	1	3	4	8
	2	5	12	15	32
	3	29	38	40	107
	4	41	45	36	122
	5	32	27	22	81
Total		108	125	117	350

Revlon: Low Price * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Low Price	1	2	10	12	24
	2	15	22	17	54
	3	40	45	36	121
	4	25	32	36	93
	5	11	13	13	37
Total		93	122	114	329

9.6.3 Brand Ratings: Mild Fragrance – Mean score comparison

Report

Generation		Body Shop: Mild Fragrance	Clarins: Mild Fragrance	Clearasil: Mild Fragrance	Clinique: Mild Fragrance	Gatineau: Mild Fragrance	Johnson & Johnson: Mild Fragrance	L'Oreal: Mild Fragrance	Nivea: Mild Fragrance	Revlon: Mild Fragrance
Baby Boomer	Mean	3.08	3.41	2.91	3.83	3.58	3.63	3.82	3.78	3.70
	N	62	76	81	101	59	95	100	105	90
	Std. Deviation	1.121	.996	1.237	1.049	.894	1.130	.947	1.092	.942
Generation X	Mean	3.18	3.69	3.30	3.75	3.48	3.89	3.55	3.68	3.58
	N	90	95	107	129	80	133	110	122	114
	Std. Deviation	1.337	1.063	1.092	1.061	.981	.963	1.010	1.031	1.096
Generation Y	Mean	2.90	3.26	3.24	3.30	3.13	3.79	3.42	3.58	3.32
	N	88	81	116	105	63	126	104	116	112
	Std. Deviation	1.278	1.070	1.132	1.194	1.085	.999	.832	1.048	1.117
Total	Mean	3.05	3.47	3.17	3.64	3.40	3.79	3.59	3.68	3.52
	N	240	252	304	335	202	354	314	343	316
	Std. Deviation	1.263	1.058	1.154	1.121	1.003	1.025	.946	1.056	1.070

9.6.4 Brand Ratings Frequencies: Mild Fragrance

Body Shop: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Mild Fragrance	1	6	17	16	39
	2	11	5	16	32
	3	24	30	29	83
	4	14	21	15	50
	5	7	17	12	36
Total		62	90	88	240

Clarins: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Mild Fragrance	1	3	2	5	10
	2	8	11	12	31
	3	31	27	32	90
	4	23	29	21	73
	5	11	26	11	48
Total		76	95	81	252

Clearasil: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Mild Fragrance	1	14	6	12	32
	2	13	17	11	41
	3	30	40	46	116
	4	14	27	31	72
	5	10	17	16	43
Total		81	107	116	304

Clinique: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Mild Fragrance	1	4	5	9	18
	2	4	10	16	30
	3	29	32	34	95
	4	32	47	26	105
	5	32	35	20	87
Total		101	129	105	335

Gatineau: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Mild Fragrance	1	1	3	5	9
	2	3	8	10	21
	3	26	28	28	82
	4	19	30	12	61
	5	10	11	8	29
Total		59	80	63	202

Johnson & Johnson: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Mild Fragrance	1	6	2	4	12
	2	6	7	4	17
	3	30	36	42	108
	4	28	46	40	114
	5	25	42	36	103
Total		95	133	126	354

L'Oreal: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Mild Fragrance	1	2	3	2	7
	2	5	11	9	25
	3	28	41	44	113
	4	39	33	41	113
	5	26	22	8	56
Total		100	110	104	314

Nivea: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Mild Fragrance	1	5	3	6	14
	2	5	11	7	23
	3	31	39	41	111
	4	31	38	38	107
	5	33	31	24	88
Total		105	122	116	343

Revlon: Mild Fragrance * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Mild Fragrance	1	3	7	9	19
	2	2	8	13	23
	3	33	36	40	109
	4	33	38	33	104
	5	19	25	17	61
Total		90	114	112	316

9.6.5 Brand Ratings: Quality Packaging – Mean score comparison

Report

Generation		Body Shop: Quality Packaging	Clarins: Quality Packaging	Clearasil: Quality Packaging	Clinique: Quality Packaging	Gatineau: Quality Packaging	Johnson & Johnson: Quality Packaging	L'Oreal: Quality Packaging	Nivea: Quality Packaging	Revlon: Quality Packaging
Baby Boomer	Mean	3.61	4.30	3.36	4.43	4.27	3.60	4.24	3.71	4.09
	N	66	79	86	104	63	97	104	105	93
	Std. Deviation	1.135	.897	1.217	.845	.827	1.133	.853	1.107	.868
Generation X	Mean	3.82	4.33	3.31	4.35	4.19	3.78	4.03	3.80	4.09
	N	92	101	113	136	85	135	114	123	121
	Std. Deviation	1.138	.861	1.173	.829	.994	1.063	.991	.997	.904
Generation Y	Mean	3.83	4.18	3.66	4.23	3.86	3.79	4.21	4.06	4.06
	N	89	82	117	106	64	125	107	116	112
	Std. Deviation	1.131	.904	1.092	.918	1.082	1.034	.786	.935	.923
Total	Mean	3.77	4.27	3.45	4.34	4.11	3.73	4.15	3.86	4.08
	N	247	262	316	346	212	357	325	344	326
	Std. Deviation	1.134	.885	1.163	.863	.986	1.073	.886	1.020	.898

9.6.6 Brand Ratings Frequencies: Quality Packaging

Body Shop: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Quality Packaging	1	5	3	5	13
	2	3	10	6	19
	3	21	21	17	59
	4	21	25	32	78
	5	16	33	29	78
Total		66	92	89	247

Clarins: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Quality Packaging	1	1	1	1	3
	2	2	2	2	6
	3	11	14	15	40
	4	23	30	27	80
	5	42	54	37	133
Total		79	101	82	262

Clearasil: Quality Packaging * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clearasil: Quality Packaging	1	8	8	4	20
	2	10	19	14	43
	3	30	38	30	98
	4	19	26	39	84
	5	19	22	30	71
Total		86	113	117	316

Clinique: Quality Packaging * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clinique: Quality Packaging	1	1	3	3	7
	2	3	1	1	5
	3	9	10	14	33
	4	28	54	39	121
	5	63	68	49	180
Total		104	136	106	346

Gatineau: Quality Packaging * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Gatineau: Quality Packaging	1	0	3	2	5
	2	1	3	6	10
	3	12	8	12	32
	4	19	32	23	74
	5	31	39	21	91
Total		63	85	64	212

Johnson & Johnson: Quality Packaging * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Johnson & Johnson: Quality Packaging	1	4	2	1	7
	2	11	15	11	37
	3	32	37	43	112
	4	23	38	28	89
	5	27	43	42	112
Total		97	135	125	357

L'Oreal: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Quality Packaging	1	1	3	0	4
	2	1	4	2	7
	3	19	24	18	61
	4	34	39	43	116
	5	49	44	44	137
Total		104	114	107	325

Nivea: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Quality Packaging	1	3	2	2	7
	2	11	9	5	25
	3	32	36	20	88
	4	26	40	46	112
	5	33	36	43	112
Total		105	123	116	344

Revlon: Quality Packaging * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Quality Packaging	1	0	3	2	5
	2	4	2	3	9
	3	19	20	23	62
	4	35	52	42	129
	5	35	44	42	121
Total		93	121	112	326

9.6.7 Brand Ratings: Moisturising Ability – Mean score comparison

Report

Generation		Body Shop: Moisturising Effect	Clarins: Moisturising Effect	Clearasil: Moisturising Effect	Clinique: Moisturising Effect	Gatineau: Moisturising Effect	Johnson & Johnson: Moisturising Effect	L'Oreal: Moisturising Effect	Nivea: Moisturising Effect	Revlon: Moisturising Effect
Baby Boomer	Mean	3.54	4.24	3.03	4.47	4.23	3.65	4.15	4.10	3.95
	N	61	72	79	99	57	94	96	104	86
	Std. Deviation	1.134	.831	1.176	.747	.926	.970	.882	.981	.969
Generation X	Mean	3.41	4.04	3.19	3.98	3.83	3.92	3.98	3.92	3.89
	N	88	95	105	128	83	130	108	120	114
	Std. Deviation	1.190	.978	1.093	1.023	1.022	.965	.957	.931	.954
Generation Y	Mean	3.51	3.87	3.11	4.06	3.62	3.93	3.81	4.11	3.81
	N	88	79	115	103	63	122	103	114	109
	Std. Deviation	1.222	.992	1.090	.906	1.263	.968	.919	.972	.938
Total	Mean	3.48	4.04	3.12	4.15	3.88	3.85	3.97	4.04	3.88
	N	237	246	299	330	203	346	307	338	309
	Std. Deviation	1.185	.949	1.113	.933	1.099	.972	.928	.962	.951

9.6.8 Brand Ratings Frequencies: Moisturising Ability

Body Shop: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Moisturising Effect	1	5	8	7	20
	2	3	7	10	20
	3	20	34	25	79
	4	20	19	23	62
	5	13	20	23	56
Total		61	88	88	237

Clarins: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Moisturising Effect	1	0	2	3	5
	2	3	3	3	9
	3	9	22	17	48
	4	28	30	34	92
	5	32	38	22	92
Total		72	95	79	246

Clearasil: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Moisturising Effect	1	9	5	8	22
	2	17	24	24	65
	3	25	37	44	106
	4	19	24	25	68
	5	9	15	14	38
Total		79	105	115	299

Clinique: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Moisturising Effect	1	0	2	1	3
	2	3	9	7	19
	3	6	29	12	47
	4	31	38	48	117
	5	59	50	35	144
Total		99	128	103	330

Gatineau: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Moisturising Effect	1	0	2	6	8
	2	4	4	4	12
	3	7	27	18	52
	4	18	23	15	56
	5	28	27	20	75
Total		57	83	63	203

Johnson & Johnson: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Moisturising Effect	1	2	4	2	8
	2	6	3	5	14
	3	36	33	34	103
	4	29	50	39	118
	5	21	40	42	103
Total		94	130	122	346

L'Oreal: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Moisturising Effect	1	1	2	2	5
	2	2	6	6	14
	3	19	20	25	64
	4	34	44	47	125
	5	40	36	23	99
Total		96	108	103	307

Nivea: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Moisturising Effect	1	2	3	4	9
	2	4	5	2	11
	3	21	24	18	63
	4	32	55	44	131
	5	45	33	46	124
Total		104	120	114	338

Revlon: Moisturising Effect * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Moisturising Effect	1	1	4	2	7
	2	7	1	5	13
	3	15	31	33	79
	4	35	45	41	121
	5	28	33	28	89
Total		86	114	109	309

9.6.9 Brand Ratings: Makes skin feel smooth & soft – Mean score comparison

Report

Generation		Body Shop: Makes skin feel smooth & soft	Clarins: Makes skin feel smooth & soft	Clearasil: Makes skin feel smooth & soft	Clinique: Makes skin feel smooth & soft	Gatineau: Makes skin feel smooth & soft	Johnson & Johnson: Makes skin feel smooth & soft	L'Oreal: Makes skin feel smooth & soft	Nivea: Makes skin feel smooth & soft	Revlon: Makes skin feel smooth & soft
Baby Boomer	Mean	3.67	3.95	3.04	4.37	4.08	3.87	4.16	4.02	3.97
	N	63	76	82	101	60	97	99	104	90
	Std. Deviation	1.150	.951	1.222	.758	.907	1.017	.889	.935	.930
Generation X	Mean	3.49	4.00	3.30	3.98	3.75	3.98	3.89	4.02	3.85
	N	88	97	106	130	83	132	109	123	115
	Std. Deviation	1.268	1.021	1.088	1.030	1.103	1.052	.985	1.024	.976
Generation Y	Mean	3.51	3.86	3.21	3.94	3.59	4.06	3.89	4.08	3.79
	N	87	81	114	104	63	121	102	114	108
	Std. Deviation	1.160	1.081	1.109	.974	1.159	.994	.819	.942	.928
Total	Mean	3.54	3.94	3.20	4.08	3.80	3.97	3.98	4.04	3.86
	N	238	254	302	335	206	350	310	341	313
	Std. Deviation	1.196	1.018	1.135	.953	1.081	1.022	.908	.968	.946

9.6.10 Brand Ratings Frequencies: Makes skin feel smooth & soft

Body Shop: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Makes skin feel smooth & soft	1	4	7	7	18
	2	5	12	5	22
	3	16	26	33	75
	4	21	17	21	59
	5	17	26	21	64
Total		63	88	87	238

Clarins: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Makes skin feel smooth & soft	1	0	1	3	4
	2	6	7	5	18
	3	18	23	20	61
	4	26	26	25	77
	5	26	40	28	94
Total		76	97	81	254

Clearasil: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Makes skin feel smooth & soft	1	9	6	9	24
	2	20	18	17	55
	3	24	35	45	104
	4	17	32	27	76
	5	12	15	16	43
Total		82	106	114	302

Clinique: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Makes skin feel smooth & soft	1	0	3	3	6
	2	1	8	4	13
	3	14	28	22	64
	4	33	41	42	116
	5	53	50	33	136
Total		101	130	104	335

Gatineau: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Makes skin feel smooth & soft	1	0	3	4	7
	2	4	6	5	15
	3	10	27	21	58
	4	23	20	16	59
	5	23	27	17	67
Total		60	83	63	206

Johnson & Johnson: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Makes skin feel smooth & soft	1	3	4	2	9
	2	4	8	7	19
	3	27	26	23	76
	4	32	43	39	114
	5	31	51	50	132
Total		97	132	121	350

L'Oreal: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Makes skin feel smooth & soft	1	1	2	0	3
	2	3	6	6	15
	3	17	29	22	68
	4	36	37	51	124
	5	42	35	23	100
Total		99	109	102	310

Nivea: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Makes skin feel smooth & soft	1	2	3	2	7
	2	1	7	5	13
	3	29	24	19	72
	4	33	40	44	117
	5	39	49	44	132
Total		104	123	114	341

Revlon: Makes skin feel smooth & soft * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Makes skin feel smooth & soft	1	1	3	2	6
	2	4	5	5	14
	3	22	31	33	86
	4	33	43	42	118
	5	30	33	26	89
Total		90	115	108	313

9.6.11 Brand Ratings: Multi-purpose – Mean score comparison

Report

Generation		Body Shop: Multi-purpose	Clarins: Multi-purpose	Clearasil: Multi-purpose	Clinique: Multi-purpose	Gatineau: Multi-purpose	Johnson & Johnson: Multi-purpose	L'Oreal: Multi-purpose	Nivea: Multi-purpose	Revlon: Multi-purpose
Baby Boomer	Mean	2.95	3.47	2.68	3.93	3.78	3.29	3.69	3.33	3.72
	N	61	74	81	97	58	93	97	100	86
	Std. Deviation	1.244	1.173	1.082	1.139	1.140	1.059	1.064	1.207	1.059
Generation X	Mean	2.91	3.39	2.84	3.44	3.48	3.71	3.55	3.53	3.56
	N	85	98	106	130	83	129	109	118	117
	Std. Deviation	1.171	1.265	1.070	1.214	1.097	1.105	1.076	1.115	1.163
Generation Y	Mean	2.72	3.59	2.89	3.58	3.25	3.57	3.45	3.55	3.35
	N	87	82	114	105	65	123	105	112	110
	Std. Deviation	1.128	1.143	1.103	1.175	1.132	1.146	1.056	1.073	1.137
Total	Mean	2.85	3.48	2.81	3.63	3.49	3.55	3.56	3.48	3.53
	N	233	254	301	332	206	345	311	330	313
	Std. Deviation	1.174	1.198	1.086	1.194	1.134	1.117	1.067	1.130	1.132

9.6.12 Brand Ratings Frequencies: Multi-Purpose

Body Shop: Multi-purpose * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Multi-purpose	1	12	10	16	38
	2	6	21	16	43
	3	22	32	37	91
	4	15	11	12	38
	5	6	11	6	23
Total		61	85	87	233

Clarins: Multi-purpose * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Multi-purpose	1	5	10	6	21
	2	8	12	4	24
	3	26	30	29	85
	4	17	22	22	61
	5	18	24	21	63
Total		74	98	82	254

Clearasil: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clearasil: Multi-purpose	1	15	13	15	43
	2	16	22	23	61
	3	33	49	44	126
	4	14	13	24	51
	5	3	9	8	20
Total		81	106	114	301

Clinique: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clinique: Multi-purpose	1	5	10	10	25
	2	6	18	5	29
	3	18	38	28	84
	4	30	33	38	101
	5	38	31	24	93
Total		97	130	105	332

Gatineau: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Gatineau: Multi-purpose	1	2	6	5	13
	2	7	6	10	23
	3	12	28	24	64
	4	18	28	16	62
	5	19	15	10	44
Total		58	83	65	206

Johnson & Johnson: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Johnson & Johnson: Multi-purpose	1	6	4	7	17
	2	11	13	14	38
	3	39	39	34	112
	4	24	33	38	95
	5	13	40	30	83
Total		93	129	123	345

L'Oreal: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
L'Oreal: Multi-purpose	1	4	7	7	18
	2	7	6	9	22
	3	29	38	34	101
	4	32	36	40	108
	5	25	22	15	62
Total		97	109	105	311

Nivea: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Nivea: Multi-purpose	1	9	5	5	19
	2	14	15	12	41
	3	32	38	34	104
	4	25	32	38	95
	5	20	28	23	71
Total		100	118	112	330

Revlon: Multi-purpose * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Revlon: Multi-purpose	1	3	10	8	21
	2	7	8	15	30
	3	24	31	37	92
	4	29	42	31	102
	5	23	26	19	68
Total		86	117	110	313

9.6.13 Brand Ratings: Widely Available – Mean score comparison

Report

Generation		Body Shop: Widely available	Clarins: Widely available	Clearasil: Widely available	Clinique: Widely available	Gatineau: Widely available	Johnson & Johnson: Widely available	L'Oreal: Widely available	Nivea: Widely available	Revlon: Widely available
Baby Boomer	Mean	2.95	3.68	4.36	4.17	3.30	4.54	4.41	4.59	4.49
	N	65	78	88	103	60	100	102	108	93
	Std. Deviation	1.363	1.157	.925	1.061	1.124	.937	.813	.724	.732
Generation X	Mean	3.05	3.66	4.21	3.86	3.14	4.50	4.09	4.35	4.26
	N	92	101	112	133	84	137	114	124	121
	Std. Deviation	1.287	1.143	.931	1.086	1.132	.815	1.044	.911	.899
Generation Y	Mean	2.87	3.53	4.39	3.87	2.81	4.61	4.09	4.52	4.25
	N	89	83	117	108	67	126	108	117	114
	Std. Deviation	1.342	1.203	.851	1.161	1.104	.692	1.000	.794	.974
Total	Mean	2.96	3.63	4.32	3.96	3.08	4.55	4.19	4.48	4.32
	N	246	262	317	344	211	363	324	349	328
	Std. Deviation	1.324	1.164	.902	1.108	1.133	.811	.970	.822	.887

9.6.14 Brand Ratings Frequencies: Widely Available

Body Shop: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Widely available	1	12	10	17	39
	2	13	24	21	58
	3	18	28	22	68
	4	10	11	15	36
	5	12	19	14	45
Total		65	92	89	246

Clarins: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Widely available	1	2	4	4	10
	2	11	12	14	37
	3	23	28	22	73
	4	16	27	20	63
	5	26	30	23	79
Total		78	101	83	262

Clearasil: Widely available * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clearasil: Widely available	1	1	2	0	3
	2	4	3	5	12
	3	9	18	13	40
	4	22	36	30	88
	5	52	53	69	174
Total		88	112	117	317

Clinique: Widely available * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clinique: Widely available	1	2	3	4	9
	2	6	13	12	31
	3	20	31	20	71
	4	19	38	30	87
	5	56	48	42	146
Total		103	133	108	344

Gatineau: Widely available * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Gatineau: Widely available	1	4	6	7	17
	2	8	17	22	47
	3	25	33	20	78
	4	12	15	13	40
	5	11	13	5	29
Total		60	84	67	211

Johnson & Johnson: Widely available * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Johnson & Johnson: Widely available	1	3	1	0	4
	2	3	4	2	9
	3	4	10	9	23
	4	17	32	25	74
	5	73	90	90	253
Total		100	137	126	363

L'Oreal: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Widely available	1	0	2	1	3
	2	3	8	8	19
	3	12	21	19	52
	4	27	30	32	89
	5	60	53	48	161
Total		102	114	108	324

Nivea: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Widely available	1	0	2	0	2
	2	2	3	4	9
	3	9	16	10	35
	4	20	32	24	76
	5	77	71	79	227
Total		108	124	117	349

Revlon: Widely available * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Widely available	1	0	1	1	2
	2	1	3	6	10
	3	10	22	19	51
	4	24	33	26	83
	5	58	62	62	182
Total		93	121	114	328

9.6.15 Brand Ratings: Contains SPF – Mean score comparison

Report

Generation		Body Shop: Contains SPF	Clarins: Contains SPF	Clearasil: Contains SPF	Clinique: Contains SPF	Gatineau: Contains SPF	Johnson & Johnson: Contains SPF	L'Oreal: Contains SPF	Nivea: Contains SPF	Revlon: Contains SPF
Baby Boomer	Mean	3.13	3.76	2.99	4.14	3.80	3.80	4.06	3.83	4.02
	N	60	75	81	98	59	92	98	100	86
	Std. Deviation	1.268	1.101	1.240	.952	.979	1.040	1.003	1.025	.982
Generation X	Mean	3.16	3.85	3.14	3.87	3.87	3.84	3.87	3.93	3.80
	N	86	98	104	130	82	132	111	117	115
	Std. Deviation	1.126	1.049	1.136	1.059	.978	1.033	.926	1.015	1.078
Generation Y	Mean	2.87	3.63	2.89	3.87	3.35	3.76	3.68	3.68	3.47
	N	87	81	114	104	66	123	104	115	112
	Std. Deviation	1.179	1.112	1.140	.935	1.074	1.058	.906	1.031	1.004
Total	Mean	3.05	3.75	3.01	3.95	3.68	3.80	3.87	3.81	3.74
	N	233	254	299	332	207	347	313	332	313
	Std. Deviation	1.186	1.084	1.167	.996	1.031	1.041	.953	1.026	1.046

9.6.16 Brand Ratings Frequencies: Contains SPF

Body Shop: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Contains SPF	1	9	6	15	30
	2	7	18	13	38
	3	21	30	35	86
	4	13	20	16	49
	5	10	12	8	30
Total		60	86	87	233

Clarins: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Contains SPF	1	1	3	4	8
	2	10	4	6	20
	3	20	32	28	80
	4	19	25	21	65
	5	25	34	22	81
Total		75	98	81	254

Clearasil: Contains SPF * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clearasil: Contains SPF	1	11	8	15	34
	2	19	21	23	63
	3	21	38	47	106
	4	20	22	17	59
	5	10	15	12	37
Total		81	104	114	299

Clinique: Contains SPF * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clinique: Contains SPF	1	1	4	2	7
	2	5	9	4	18
	3	17	31	29	77
	4	31	42	40	113
	5	44	44	29	117
Total		98	130	104	332

Gatineau: Contains SPF * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Gatineau: Contains SPF	1	0	1	3	4
	2	7	5	10	22
	3	14	24	25	63
	4	22	26	17	65
	5	16	26	11	53
Total		59	82	66	207

Johnson & Johnson: Contains SPF * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Johnson & Johnson: Contains SPF	1	2	1	3	6
	2	8	13	12	33
	3	24	37	33	94
	4	30	36	39	105
	5	28	45	36	109
Total		92	132	123	347

L'Oreal: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Contains SPF	1	2	1	0	3
	2	5	6	11	22
	3	19	31	31	81
	4	31	41	42	114
	5	41	32	20	93
Total		98	111	104	313

Nivea: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Contains SPF	1	1	2	3	6
	2	11	8	11	30
	3	23	28	34	85
	4	34	37	39	110
	5	31	42	28	101
Total		100	117	115	332

Revlon: Contains SPF * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Contains SPF	1	2	4	3	9
	2	4	9	14	27
	3	16	29	41	86
	4	32	37	35	104
	5	32	36	19	87
Total		86	115	112	313

9.6.17 Brand Ratings: Contains Natural Ingredients – Mean score comparison

Report

Generation		Body Shop: Contains Natural Ingredients	Clarins: Contains Natural Ingredients	Clearasil: Contains Natural Ingredients	Clinique: Contains Natural Ingredients	Gatineau: Contains Natural Ingredients	Johnson & Johnson: Contains Natural Ingredients	L'Oreal: Contains Natural Ingredients	Nivea: Contains Natural Ingredients	Revlon: Contains Natural Ingredients
Baby Boomer	Mean	3.61	3.36	2.56	3.45	3.09	3.27	3.25	3.15	3.23
	N	62	76	80	95	56	88	92	98	83
	Std. Deviation	1.219	1.116	1.123	1.218	.940	1.162	1.164	1.097	1.097
Generation X	Mean	3.78	3.36	2.76	3.27	3.28	3.25	3.08	3.23	3.07
	N	90	96	103	124	80	121	104	113	110
	Std. Deviation	1.216	1.162	1.089	1.185	1.079	1.220	.982	1.134	1.131
Generation Y	Mean	3.74	3.31	2.68	3.04	3.06	3.25	3.01	3.20	2.87
	N	87	80	111	102	65	118	102	111	109
	Std. Deviation	1.224	1.208	1.144	1.098	1.102	1.192	1.058	1.143	1.131
Total	Mean	3.72	3.35	2.68	3.25	3.15	3.26	3.11	3.20	3.04
	N	239	252	294	321	201	327	298	322	302
	Std. Deviation	1.217	1.159	1.118	1.176	1.049	1.191	1.068	1.123	1.127

9.6.18 Brand Ratings Frequencies: Contains Natural Ingredients

Body Shop: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Contains Natural Ingredients	1	6	5	7	18
	2	2	9	6	17
	3	20	21	19	60
	4	16	21	26	63
	5	18	34	29	81
Total		62	90	87	239

Clarins: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Contains Natural Ingredients	1	4	7	7	18
	2	11	13	11	35
	3	30	33	29	92
	4	16	24	16	56
	5	15	19	17	51
Total		76	96	80	252

Clearasil: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Contains Natural Ingredients	1	16	15	18	49
	2	23	25	34	82
	3	25	39	31	95
	4	12	18	21	51
	5	4	6	7	17
Total		80	103	111	294

Clinique: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Contains Natural Ingredients	1	5	10	11	26
	2	17	22	17	56
	3	29	38	40	107
	4	18	32	25	75
	5	26	22	9	57
Total		95	124	102	321

Gatineau: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Contains Natural Ingredients	1	4	5	6	15
	2	6	12	12	30
	3	31	30	26	87
	4	11	22	14	47
	5	4	11	7	22
Total		56	80	65	201

Johnson & Johnson: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Contains Natural Ingredients	1	8	12	13	33
	2	11	18	15	44
	3	33	43	37	113
	4	21	24	35	80
	5	15	24	18	57
Total		88	121	118	327

L'Oreal: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Contains Natural Ingredients	1	9	8	12	29
	2	10	15	13	38
	3	38	49	46	133
	4	19	25	24	68
	5	16	7	7	30
Total		92	104	102	298

Nivea: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Contains Natural Ingredients	1	7	9	12	28
	2	20	18	14	52
	3	33	41	38	112
	4	27	28	34	89
	5	11	17	13	41
Total		98	113	111	322

Revlon: Contains Natural Ingredients * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Contains Natural Ingredients	1	7	12	17	36
	2	10	18	18	46
	3	34	42	44	120
	4	21	26	22	69
	5	11	12	8	31
Total		83	110	109	302

9.6.19 Brand Ratings: Contains Anti-Aging Properties – Mean score comparison

Report

Generation		Body Shop: Contains anti-aging properties	Clarins: Contains anti-aging properties	Clearasil: Contains anti-aging properties	Clinique: Contains anti-aging properties	Gatineau: Contains anti-aging properties	Johnson & Johnson: Contains anti-aging properties	L'Oreal: Contains anti-aging properties	Nivea: Contains anti-aging properties	Revlon: Contains anti-aging properties
Baby Boomer	Mean	3.16	3.99	2.51	4.25	4.05	3.28	4.16	3.68	4.13
	N	62	77	82	101	59	90	99	101	87
	Std. Deviation	1.296	1.057	1.209	1.053	.990	1.218	1.027	1.166	.833
Generation X	Mean	2.92	4.07	2.76	3.97	3.85	3.20	3.90	3.47	3.69
	N	85	100	103	132	81	122	112	115	116
	Std. Deviation	1.126	1.103	1.107	1.185	1.085	1.155	1.115	1.165	1.175
Generation Y	Mean	3.10	3.84	2.37	4.02	3.50	3.01	3.95	3.54	3.69
	N	87	81	114	105	64	121	104	114	111
	Std. Deviation	1.258	1.101	1.107	.961	1.272	1.214	1.028	1.191	1.197
Total	Mean	3.05	3.97	2.54	4.07	3.80	3.15	4.00	3.56	3.81
	N	234	258	299	338	204	333	315	330	314
	Std. Deviation	1.221	1.089	1.144	1.083	1.138	1.195	1.062	1.174	1.113

9.6.20 Brand Ratings Frequencies: Contains Anti-Aging Properties

Body Shop: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Contains anti-aging properties	1	9	11	10	30
	2	10	16	18	44
	3	15	35	28	78
	4	18	15	15	48
	5	10	8	16	34
Total		62	85	87	234

Clarins: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Contains anti-aging properties	1	2	4	4	10
	2	6	5	5	16
	3	13	18	17	48
	4	26	26	29	81
	5	30	47	26	103
Total		77	100	81	258

Clearasil: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Contains anti-aging properties	1	22	14	30	66
	2	17	27	34	78
	3	28	41	32	101
	4	9	12	14	35
	5	6	9	4	19
Total		82	103	114	299

Clinique: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Contains anti-aging properties	1	3	7	3	13
	2	7	10	3	20
	3	7	22	20	49
	4	29	34	42	105
	5	55	59	37	151
Total		101	132	105	338

Gatineau: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Contains anti-aging properties	1	1	3	6	10
	2	3	5	8	16
	3	12	21	15	48
	4	19	24	18	61
	5	24	28	17	69
Total		59	81	64	204

Johnson & Johnson: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Contains anti-aging properties	1	9	11	14	34
	2	10	17	29	56
	3	38	52	37	127
	4	13	21	24	58
	5	20	21	17	58
Total		90	122	121	333

L'Oreal: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Contains anti-aging properties	1	3	4	2	9
	2	5	8	9	22
	3	12	27	18	57
	4	32	29	38	99
	5	47	44	37	128
Total		99	112	104	315

Nivea: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Contains anti-aging properties	1	7	9	6	22
	2	7	11	18	36
	3	26	37	29	92
	4	32	33	31	96
	5	29	25	30	84
Total		101	115	114	330

Revlon: Contains anti-aging properties * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Contains anti-aging properties	1	0	8	9	17
	2	2	7	8	17
	3	19	34	23	76
	4	32	31	39	102
	5	34	36	32	102
Total		87	116	111	314

9.6.21 Brand Ratings: Removes Impurities – Mean score comparison

Report

Generation		Body Shop: Removes Impurities	Clarins: Removes Impurities	Clearasil: Removes Impurities	Clinique: Removes Impurities	Gatineau: Removes Impurities	Johnson & Johnson: Removes Impurities	L'Oreal: Removes Impurities	Nivea: Removes Impurities	Revlon: Removes Impurities
Baby Boomer	Mean	2.93	3.57	3.92	3.98	3.59	3.49	3.67	3.44	3.71
	N	61	76	86	99	59	92	99	99	84
	Std. Deviation	1.195	1.204	1.190	1.152	1.131	1.134	1.204	1.118	1.071
Generation X	Mean	3.04	3.89	4.03	4.01	3.66	3.70	3.67	3.53	3.64
	N	82	98	112	132	80	128	110	118	114
	Std. Deviation	1.127	1.073	.991	1.037	1.090	.967	1.050	1.068	1.014
Generation Y	Mean	3.08	3.65	3.95	3.96	3.49	3.63	3.63	3.59	3.50
	N	89	82	116	106	65	123	103	114	111
	Std. Deviation	1.130	1.115	1.110	1.023	1.134	1.074	1.010	1.096	1.052
Total	Mean	3.03	3.71	3.97	3.99	3.59	3.62	3.66	3.52	3.61
	N	232	256	314	337	204	343	312	331	309
	Std. Deviation	1.143	1.131	1.090	1.065	1.113	1.053	1.085	1.091	1.044

9.6.22 Brand Ratings Frequencies: Removes Impurities

Body Shop: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Body Shop: Removes Impurities	1	10	10	8	28
	2	9	11	18	38
	3	23	36	33	92
	4	13	16	19	48
	5	6	9	11	26
Total		61	82	89	232

Clarins: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clarins: Removes Impurities	1	6	3	5	14
	2	7	6	6	19
	3	21	26	22	69
	4	22	27	29	78
	5	20	36	20	76
Total		76	98	82	256

Clearasil: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Removes Impurities	1	5	3	4	12
	2	6	3	10	19
	3	16	26	20	62
	4	23	36	36	95
	5	36	44	46	126
Total		86	112	116	314

Clinique: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Removes Impurities	1	5	4	3	12
	2	7	6	5	18
	3	15	28	24	67
	4	30	41	35	106
	5	42	53	39	134
Total		99	132	106	337

Gatineau: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Removes Impurities	1	4	4	5	13
	2	4	5	4	13
	3	18	26	24	68
	4	19	24	18	61
	5	14	21	14	49
Total		59	80	65	204

Johnson & Johnson: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Removes Impurities	1	6	2	5	13
	2	10	9	9	28
	3	28	45	45	118
	4	29	41	32	102
	5	19	31	32	82
Total		92	128	123	343

L'Oreal: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'Oreal: Removes Impurities	1	8	4	5	17
	2	8	7	5	20
	3	21	39	33	93
	4	34	31	40	105
	5	28	29	20	77
Total		99	110	103	312

Nivea: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Removes Impurities	1	7	5	6	18
	2	9	13	8	30
	3	35	39	41	115
	4	29	37	31	97
	5	19	24	28	71
Total		99	118	114	331

Revlon: Removes Impurities * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Removes Impurities	1	5	5	5	15
	2	2	6	10	18
	3	27	38	42	107
	4	28	41	32	101
	5	22	24	22	68
Total		84	114	111	309

9.6.23 Brand Ratings: Lasts all Day – Mean score comparison

Report

Generation		Body Shop: Lasts all day	Clarins: Lasts all day	Clearasil: Lasts all day	Clinique: Lasts all day	Gatineau: Lasts all day	Johnson & Johnson: Lasts all day	L'oreal: Lasts all day	Nivea: Lasts all day	Revlon: Lasts all day
Baby Boomer	Mean	3.03	3.71	3.17	4.17	3.67	3.51	3.93	3.72	3.90
	N	62	75	82	99	58	93	101	101	86
	Std. Deviation	1.130	1.124	1.215	.980	1.114	1.157	1.070	1.141	1.029
Generation X	Mean	3.16	3.79	3.14	3.84	3.67	3.53	3.71	3.64	3.75
	N	85	99	104	128	81	127	112	118	117
	Std. Deviation	1.111	1.043	1.101	1.139	.935	1.075	1.043	1.083	1.066
Generation Y	Mean	2.99	3.56	2.99	3.83	3.40	3.58	3.71	3.75	3.69
	N	89	81	115	104	65	124	103	114	111
	Std. Deviation	1.275	1.095	1.267	1.047	1.222	1.183	.956	1.079	1.025
Total	Mean	3.06	3.69	3.09	3.94	3.58	3.54	3.78	3.70	3.77
	N	236	255	301	331	204	344	316	333	314
	Std. Deviation	1.178	1.084	1.196	1.073	1.086	1.134	1.027	1.098	1.041

9.6.22 Brand Ratings Frequencies: Lasts all day (no need to reapply)

Body Shop: Lasts all day * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Body Shop: Lasts all day	1	6	7	15	28
	2	13	14	13	40
	3	23	33	33	89
	4	13	20	14	47
	5	7	11	14	32
Total		62	85	89	236

Clarins: Lasts all day * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Clarins: Lasts all day	1	3	3	4	10
	2	6	6	9	21
	3	25	30	23	78
	4	17	30	28	75
	5	24	30	17	71
Total		75	99	81	255

Clearasil: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clearasil: Lasts all day	1	8	8	17	33
	2	15	17	23	55
	3	29	46	37	112
	4	15	18	20	53
	5	15	15	18	48
Total		82	104	115	301

Clinique: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Clinique: Lasts all day	1	1	6	2	9
	2	5	10	8	23
	3	19	28	31	78
	4	25	38	28	91
	5	49	46	35	130
Total		99	128	104	331

Gatineau: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Gatineau: Lasts all day	1	2	2	5	9
	2	7	5	9	21
	3	15	26	22	63
	4	18	33	13	64
	5	16	15	16	47
Total		58	81	65	204

Johnson & Johnson: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Johnson & Johnson: Lasts all day	1	5	5	6	16
	2	12	12	18	42
	3	30	51	33	114
	4	23	29	32	84
	5	23	30	35	88
Total		93	127	124	344

L'oreal: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
L'oreal: Lasts all day	1	2	4	3	9
	2	10	7	6	23
	3	19	36	30	85
	4	32	35	43	110
	5	38	30	21	89
Total		101	112	103	316

Nivea: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Nivea: Lasts all day	1	2	5	6	13
	2	15	9	7	31
	3	26	41	27	94
	4	24	32	44	100
	5	34	31	30	95
Total		101	118	114	333

Revlon: Lasts all day * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Revlon: Lasts all day	1	1	4	3	8
	2	8	8	9	25
	3	20	36	35	91
	4	27	34	36	97
	5	30	35	28	93
Total		86	117	111	314

9.7 Significance Testing on Brand Perception Kruskal-Wallis & Mann-Whitney U Test

9.7.1 Kruskal Wallis testing on the brand perceptions of the Low Price attribute

Test Statistics[a,b]

	Body Shop: Low Price	Clarins: Low Price	Clearasil: Low Price	Clinique: Low Price	Gatineau: Low Price	Johnson & Johnson: Low Price	L'Oreal: Low Price	Nivea: Low Price	Revlon: Low Price
Chi-Square	4.596	4.214	3.866	.238	.724	1.176	.633	9.490	.938
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.100	.122	.145	.888	.696	.556	.729	.009	.625

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.2 Mann-Whitney U Test: Boomers & Xers (low price)

Test Statistics[a]

	Nivea: Low Price
Mann-Whitney U	5804.000
Wilcoxon W	13679.000
Z	-1.934
Asymp. Sig. (2-tailed)	.053

a. Grouping Variable: Generation

9.7.3 Mann-Whitney U Test: Boomers & Yers (low price)

Test Statistics[a]

	Nivea: Low Price
Mann-Whitney U	4896.500
Wilcoxon W	11799.500
Z	-3.044
Asymp. Sig. (2-tailed)	.002

a. Grouping Variable: Generation

9.7.4 Mann-Whitney U Test: Xers & Yers (low price)

Test Statistics[a]

	Nivea: Low Price
Mann-Whitney U	6672.000
Wilcoxon W	13575.000
Z	-1.228
Asymp. Sig. (2-tailed)	.220

a. Grouping Variable: Generation

9.7.5 Kruskal Wallis testing on the brand perceptions of the Mild Fragrance attribute

Test Statistics[a,b]

	Body Shop: Mild Fragrance	Clarins: Mild Fragrance	Clearasil: Mild Fragrance	Clinique: Mild Fragrance	Gatineau: Mild Fragrance	Johnson & Johnson: Mild Fragrance	L'Oreal: Mild Fragrance	Nivea: Mild Fragrance	Revlon: Mild Fragrance
Chi-Square	2.695	7.717	5.341	12.931	6.885	2.705	10.413	2.416	6.254
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.260	.021	.069	.002	.032	.259	.005	.299	.044

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.6 Mann-Whitney U Test: Boomers & Xers (mild fragrance)

Test Statistics[a]

	Clarins: Mild Fragrance	Clinique: Mild Fragrance	Gatineau: Mild Fragrance	L'Oreal: Mild Fragrance	Revlon: Mild Fragrance
Mann-Whitney U	3040.000	6256.000	2276.500	4626.000	4900.000
Wilcoxon W	5966.000	14641.000	5516.500	10731.000	11455.000
Z	-1.846	-.539	-.376	-2.081	-.576
Asymp. Sig. (2-tailed)	.065	.590	.707	.037	.564

a. Grouping Variable: Generation

9.7.7 Mann-Whitney U Test: Boomers & Yers (mild fragrance)

Test Statistics[a]

	Clarins: Mild Fragrance	Clinique: Mild Fragrance	Gatineau: Mild Fragrance	L'Oreal: Mild Fragrance	Revlon: Mild Fragrance
Mann-Whitney U	2838.500	3957.000	1409.500	3897.000	4092.500
Wilcoxon W	6159.500	9522.000	3425.500	9357.000	10420.500
Z	-.883	-3.259	-2.435	-3.275	-2.403
Asymp. Sig. (2-tailed)	.377	.001	.015	.001	.016

a. Grouping Variable: Generation

9.7.8 Mann-Whitney U Test: Xers & Yers (mild fragrance)

Test Statistics[a]

	Clarins: Mild Fragrance	Clinique: Mild Fragrance	Gatineau: Mild Fragrance	L'Oreal: Mild Fragrance	Revlon: Mild Fragrance
Mann-Whitney U	2989.500	5299.500	2021.500	5321.000	5530.000
Wilcoxon W	6310.500	10864.500	4037.500	10781.000	11858.000
Z	-2.644	-2.961	-2.125	-.933	-1.808
Asymp. Sig. (2-tailed)	.008	.003	.034	.351	.071

a. Grouping Variable: Generation

9.7.9 Kruskal Wallis testing on the brand perceptions of the Quality Packaging attribute

Test Statistics[a,b]

	Body Shop: Quality Packaging	Clarins: Quality Packaging	Clearasil: Quality Packaging	Clinique: Quality Packaging	Gatineau: Quality Packaging	Johnson & Johnson: Quality Packaging	L'Oreal: Quality Packaging	Nivea: Quality Packaging	Revlon: Quality Packaging
Chi-Square	2.182	1.604	5.945	4.089	5.777	1.687	2.528	6.883	.064
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.336	.448	.051	.129	.056	.430	.283	.032	.968

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.10 Mann-Whitney U Test: Boomers & Xers (quality packaging)

Test Statistics[a]

	Nivea: Quality Packaging
Mann-Whitney U	6209.500
Wilcoxon W	11774.500
Z	-.521
Asymp. Sig. (2-tailed)	.603

a. Grouping Variable: Generation

9.7.11 Mann-Whitney U Test: Boomers & Yers (quality packaging)

Test Statistics[a]

	Nivea: Quality Packaging
Mann-Whitney U	5015.000
Wilcoxon W	10580.000
Z	-2.372
Asymp. Sig. (2-tailed)	.018

a. Grouping Variable: Generation

9.7.12 Mann-Whitney U Test: Xers & Yers (quality packaging)

Test Statistics[a]

	Nivea: Quality Packaging
Mann-Whitney U	6056.500
Wilcoxon W	13682.500
Z	-2.121
Asymp. Sig. (2-tailed)	.034

a. Grouping Variable: Generation

9.7.13 Kruskal Wallis testing on the brand perceptions of the Moisturising Ability attribute

Test Statistics[a,b]

	Body Shop: Moisturising Effect	Clarins: Moisturising Effect	Clearasil: Moisturising Effect	Clinique: Moisturising Effect	Gatineau: Moisturising Effect	Johnson & Johnson: Moisturising Effect	L'Oreal: Moisturising Effect	Nivea: Moisturising Effect	Revlon: Moisturising Effect
Chi-Square	.695	5.333	.707	18.179	8.655	6.424	7.410	4.331	1.748
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.706	.069	.702	.000	.013	.040	.025	.115	.417

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.14 Mann-Whitney U Test: Boomers & Xers (moisturising ability)

Test Statistics[a]

	Clinique: Moisturising Effect	Gatineau: Moisturising Effect	Johnson & Johnson: Moisturising Effect	L'Oreal: Moisturising Effect
Mann-Whitney U	4593.500	1831.500	5078.000	4715.000
Wilcoxon W	12849.500	5317.500	9543.000	10601.000
Z	-3.835	-2.388	-2.264	-1.184
Asymp. Sig. (2-tailed)	.000	.017	.024	.236

a. Grouping Variable: Generation

9.7.15 Mann-Whitney U Test: Boomers & Yers (moisturising ability)

Test Statistics[a]

	Clinique: Moisturising Effect	Gatineau: Moisturising Effect	Johnson & Johnson: Moisturising Effect	L'Oreal: Moisturising Effect
Mann-Whitney U	3691.000	1303.000	4768.500	3906.500
Wilcoxon W	9047.000	3319.000	9233.500	9262.500
Z	-3.701	-2.719	-2.223	-2.709
Asymp. Sig. (2-tailed)	.000	.007	.026	.007

a. Grouping Variable: Generation

9.7.16 Mann-Whitney U Test: Xers & Yers (moisturising ability)

Test Statistics[a]

	Clinique: Moisturising Effect	Gatineau: Moisturising Effect	Johnson & Johnson: Moisturising Effect	L'Oreal: Moisturising Effect
Mann-Whitney U	6394.500	2430.500	7874.500	4902.000
Wilcoxon W	14650.500	4446.500	16389.500	10258.000
Z	-.414	-.758	-.101	-1.580
Asymp. Sig. (2-tailed)	.679	.448	.920	.114

a. Grouping Variable: Generation

9.7.17 Kruskal Wallis testing on the brand perceptions of the Makes skin feel soft and smooth attribute

Test Statistics[a,b]

	Body Shop: Makes skin feel smooth & soft	Clarins: Makes skin feel smooth & soft	Clearasil: Makes skin feel smooth & soft	Clinique: Makes skin feel smooth & soft	Gatineau: Makes skin feel smooth & soft	Johnson & Johnson: Makes skin feel smooth & soft	L'Oreal: Makes skin feel smooth & soft	Nivea: Makes skin feel smooth & soft	Revlon: Makes skin feel smooth & soft
Chi-Square	1.035	.672	2.627	11.912	6.121	2.332	6.962	.356	1.987
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.596	.715	.269	.003	.047	.312	.031	.837	.370

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.18 Mann-Whitney U Test: Boomers & Xers (makes skin feel smooth and soft)

Test Statistics[a]

	Clinique: Makes skin feel smooth & soft	Gatineau: Makes skin feel smooth & soft	L'Oreal: Makes skin feel smooth & soft
Mann-Whitney U	5244.500	2074.500	4551.500
Wilcoxon W	13759.500	5560.500	10546.500
Z	-2.806	-1.779	-2.058
Asymp. Sig. (2-tailed)	.005	.075	.040

a. Grouping Variable: Generation

9.7.19 Mann-Whitney U Test: Boomers & Yers (makes skin feel smooth and soft)

Test Statistics[a]

	Clinique: Makes skin feel smooth & soft	Gatineau: Makes skin feel smooth & soft	L'Oreal: Makes skin feel smooth & soft
Mann-Whitney U	3959.500	1431.500	4073.000
Wilcoxon W	9419.500	3447.500	9326.000
Z	-3.260	-2.422	-2.527
Asymp. Sig. (2-tailed)	.001	.015	.012

a. Grouping Variable: Generation

9.7.20 Mann-Whitney U Test: Xers & Yers (makes skin feel smooth and soft)

Test Statistics[a]

	Clinique: Makes skin feel smooth & soft	Gatineau: Makes skin feel smooth & soft	L'Oreal: Makes skin feel smooth & soft
Mann-Whitney U	6546.500	2426.000	5460.000
Wilcoxon W	12006.500	4442.000	10713.000
Z	-.437	-.776	-.236
Asymp. Sig. (2-tailed)	.662	.438	.813

a. Grouping Variable: Generation

9.7.21 Kruskal Wallis testing on the brand perceptions of the Multi-Purpose attribute

Test Statistics[a,b]

	Body Shop: Multi-purpose	Clarins: Multi-purpose	Clearasil: Multi-purpose	Clinique: Multi-purpose	Gatineau: Multi-purpose	Johnson & Johnson: Multi-purpose	L'Oreal: Multi-purpose	Nivea: Multi-purpose	Revlon: Multi-purpose
Chi-Square	1.766	1.084	1.524	10.935	7.397	8.323	2.564	2.076	5.859
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.414	.582	.467	.004	.025	.016	.277	.354	.053

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.22 Mann-Whitney U Test: Boomers & Xers (multi-purpose)

Test Statistics[a]

	Clinique: Multi-purpose	Gatineau: Multi-purpose	Johnson & Johnson: Multi-purpose
Mann-Whitney U	4799.000	2026.500	4708.000
Wilcoxon W	13314.000	5512.500	9079.000
Z	-3.183	-1.655	-2.842
Asymp. Sig. (2-tailed)	.001	.098	.004

a. Grouping Variable: Generation

9.7.23 Mann-Whitney U Test: Boomers & Yers (multi-purpose)

Test Statistics[a]

	Clinique: Multi-purpose	Gatineau: Multi-purpose	Johnson & Johnson: Multi-purpose
Mann-Whitney U	4169.000	1385.000	4837.000
Wilcoxon W	9734.000	3530.000	9208.000
Z	-2.319	-2.616	-2.014
Asymp. Sig. (2-tailed)	.020	.009	.044

a. Grouping Variable: Generation

9.7.24 Mann-Whitney U Test: Xers & Yers (multi-purpose)

Test Statistics[a]

	Clinique: Multi-purpose	Gatineau: Multi-purpose	Johnson & Johnson: Multi-purpose
Mann-Whitney U	6306.000	2348.000	7427.000
Wilcoxon W	14821.000	4493.000	15053.000
Z	-1.035	-1.405	-.908
Asymp. Sig. (2-tailed)	.300	.160	.364

a. Grouping Variable: Generation

9.7.25 Kruskal Wallis testing on the brand perceptions of the Widely Available attribute

Test Statistics[a,b]

	Body Shop: Widely available	Clarins: Widely available	Clearasil: Widely available	Clinique: Widely available	Gatineau: Widely available	Johnson & Johnson: Widely available	L'Oreal: Widely available	Nivea: Widely available	Revlon: Widely available
Chi-Square	.867	.729	3.630	6.698	6.705	1.523	6.915	5.671	3.998
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.648	.695	.163	.035	.035	.467	.032	.059	.135

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.26 Mann-Whitney U Test: Boomers & Xers (widely available)

Test Statistics[a]

	Clinique: Widely available	Gatineau: Widely available	L'Oreal: Widely available
Mann-Whitney U	5651.000	2310.000	4872.000
Wilcoxon W	14562.000	5880.000	11427.000
Z	-2.443	-.888	-2.248
Asymp. Sig. (2-tailed)	.015	.374	.025

a. Grouping Variable: Generation

9.7.27 Mann-Whitney U Test: Boomers & Yers (widely available)

Test Statistics[a]

	Clinique: Widely available	Gatineau: Widely available	L'Oreal: Widely available
Mann-Whitney U	4699.000	1511.500	4551.000
Wilcoxon W	10585.000	3789.500	10437.000
Z	-2.075	-2.493	-2.375
Asymp. Sig. (2-tailed)	.038	.013	.018

a. Grouping Variable: Generation

9.7.28 Mann-Whitney U Test: Xers & Yers (widely available)

Test Statistics[a]

	Clinique: Widely available	Gatineau: Widely available	L'Oreal: Widely available
Mann-Whitney U	7056.000	2343.000	6110.500
Wilcoxon W	15967.000	4621.000	11996.500
Z	-.245	-1.828	-.102
Asymp. Sig. (2-tailed)	.807	.067	.919

a. Grouping Variable: Generation

9.7.29 Kruskal Wallis testing on the brand perceptions of the Contains SPF attribute

Test Statistics[a,b]

	Body Shop: Contains SPF	Clarins: Contains SPF	Clearasil: Contains SPF	Clinique: Contains SPF	Gatineau: Contains SPF	Johnson & Johnson: Contains SPF	L'Oreal: Contains SPF	Nivea: Contains SPF	Revlon: Contains SPF
Chi-Square	2.694	1.638	2.393	6.042	9.610	.329	10.020	3.813	16.227
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.260	.441	.302	.049	.008	.848	.007	.149	.000

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.30 Mann-Whitney U Test: Boomers & Xers (contains SPF)

Test Statistics[a]

	Clinique: Contains SPF	Gatineau: Contains SPF	L'Oreal: Contains SPF	Revlon: Contains SPF
Mann-Whitney U	5444.000	2326.500	4721.000	4372.000
Wilcoxon W	13959.000	4096.500	10937.000	11042.000
Z	-1.979	-.404	-1.732	-1.473
Asymp. Sig. (2-tailed)	.048	.686	.083	.141

a. Grouping Variable: Generation

9.7.31 Mann-Whitney U Test: Boomers & Yers (contains SPF)

Test Statistics[a]

	Clinique: Contains SPF	Gatineau: Contains SPF	L'Oreal: Contains SPF	Revlon: Contains SPF
Mann-Whitney U	4179.500	1490.000	3854.000	3293.000
Wilcoxon W	9639.500	3701.000	9314.000	9621.000
Z	-2.330	-2.348	-3.136	-3.974
Asymp. Sig. (2-tailed)	.020	.019	.002	.000

a. Grouping Variable: Generation

9.7.32 Mann-Whitney U Test: Xers & Yers (contains SPF)

Test Statistics[a]

	Clinique: Contains SPF	Gatineau: Contains SPF	L'Oreal: Contains SPF	Revlon: Contains SPF
Mann-Whitney U	6596.500	1976.500	5098.500	5213.000
Wilcoxon W	12056.500	4187.500	10558.500	11541.000
Z	-.333	-2.930	-1.554	-2.581
Asymp. Sig. (2-tailed)	.739	.003	.120	.010

a. Grouping Variable: Generation

9.7.33 Kruskal Wallis testing on the brand perceptions of the Contains Natural Ingredients attribute

Test Statistics[a,b]

	Body Shop: Contains Natural Ingredients	Clarins: Contains Natural Ingredients	Clearasil: Contains Natural Ingredients	Clinique: Contains Natural Ingredients	Gatineau: Contains Natural Ingredients	Johnson & Johnson: Contains Natural Ingredients	L'Oreal: Contains Natural Ingredients	Nivea: Contains Natural Ingredients	Revlon: Contains Natural Ingredients
Chi-Square	.851	.096	1.505	5.508	1.882	.046	2.240	.307	4.632
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.653	.953	.471	.064	.390	.977	.326	.858	.099

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.34 Kruskal Wallis testing on the brand perceptions of the Contains Anti-Aging Properties attribute

Test Statistics[a,b]

	Body Shop: Contains anti-aging properties	Clarins: Contains anti-aging properties	Clearasil: Contains anti-aging properties	Clinique: Contains anti-aging properties	Gatineau: Contains anti-aging properties	Johnson & Johnson: Contains anti-aging properties	L'Oreal: Contains anti-aging properties	Nivea: Contains anti-aging properties	Revlon: Contains anti-aging properties
Chi-Square	1.829	2.832	6.334	5.995	6.078	3.020	4.083	2.165	7.260
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.401	.243	.042	.050	.048	.221	.130	.339	.027

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.35 Mann-Whitney U Test: Boomers & Xers (contains anti-aging properties)

Test Statistics[a]

	Clearasil: Contains anti-aging properties	Clinique: Contains anti-aging properties	Gatineau: Contains anti-aging properties	Revlon: Contains anti-aging properties
Mann-Whitney U	3726.500	5780.000	2152.000	4065.000
Wilcoxon W	7129.500	14558.000	5473.000	10851.000
Z	-1.427	-1.873	-1.053	-2.481
Asymp. Sig. (2-tailed)	.154	.061	.292	.013

a. Grouping Variable: Generation

9.7.36 Mann-Whitney U Test: Boomers & Yers (contains anti-aging properties)

Test Statistics[a]

	Clearasil: Contains anti-aging properties	Clinique: Contains anti-aging properties	Gatineau: Contains anti-aging properties	Revlon: Contains anti-aging properties
Mann-Whitney U	4380.000	4336.500	1431.000	3955.500
Wilcoxon W	10935.000	9901.500	3511.000	10171.500
Z	-.777	-2.425	-2.406	-2.290
Asymp. Sig. (2-tailed)	.437	.015	.016	.022

a. Grouping Variable: Generation

9.7.37 Mann-Whitney U Test: Xers & Yers (contains anti-aging properties)

Test Statistics[a]

	Clearasil: Contains anti-aging properties	Clinique: Contains anti-aging properties	Gatineau: Contains anti-aging properties	Revlon: Contains anti-aging properties
Mann-Whitney U	4739.000	6751.000	2207.500	6360.500
Wilcoxon W	11294.000	12316.000	4287.500	13146.500
Z	-2.542	-.361	-1.588	-.163
Asymp. Sig. (2-tailed)	.011	.718	.112	.871

a. Grouping Variable: Generation

9.7.38 Kruskal Wallis testing on the brand perceptions of the Removes Impurities attribute

Test Statistics[a,b]

	Body Shop: Removes Impurities	Clarins: Removes Impurities	Clearasil: Removes Impurities	Clinique: Removes Impurities	Gatineau: Removes Impurities	Johnson & Johnson: Removes Impurities	L'Oreal: Removes Impurities	Nivea: Removes Impurities	Revlon: Removes Impurities
Chi-Square	.377	3.552	.085	.326	.825	1.376	.464	.791	2.680
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.828	.169	.959	.850	.662	.503	.793	.673	.262

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.39 Kruskal Wallis testing on the brand perceptions of the Lasts all day (no need to reapply) attribute

Test Statistics[a,b]

	Body Shop: Lasts all day	Clarins: Lasts all day	Clearasil: Lasts all day	Clinique: Lasts all day	Gatineau: Lasts all day	Johnson & Johnson: Lasts all day	L'oreal: Lasts all day	Nivea: Lasts all day	Revlon: Lasts all day
Chi-Square	1.014	1.866	1.268	7.071	2.267	.384	4.261	.932	2.043
df	2	2	2	2	2	2	2	2	2
Asymp. Sig.	.602	.393	.530	.029	.322	.825	.119	.628	.360

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.7.40 Mann-Whitney U Test: Boomers & Xers (Lasts all day (no need to reapply))

Test Statistics[a]

	Clinique: Lasts all day
Mann-Whitney U	5324.000
Wilcoxon W	13580.000
Z	-2.179
Asymp. Sig. (2-tailed)	.029

a. Grouping Variable: Generation

9.7.41 Mann-Whitney U Test: Boomers & Yers (Lasts all day (no need to reapply))

Test Statistics[a]

	Clinique: Lasts all day
Mann-Whitney U	4167.000
Wilcoxon W	9627.000
Z	-2.477
Asymp. Sig. (2-tailed)	.013

a. Grouping Variable: Generation

9.7.42 Mann-Whitney U Test: Xers & Yers (Lasts all day (no need to reapply))

Test Statistics[a]

	Clinique: Lasts all day
Mann-Whitney U	6463.000
Wilcoxon W	11923.000
Z	-.396
Asymp. Sig. (2-tailed)	.692

a. Grouping Variable: Generation

9.8 EFFECTIVENESS OF ADVERTISING – MEAN SCORES AND FREQUENCIES

9.8.1 Mean scores for Effectiveness of advertising 1 – 6

Statistics

		Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media: Print	Effectiveness of Marketing Media:Radio	Effectiveness of Marketing Media:Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
N	Valid	455	451	446	416	431	452
	Missing	29	33	38	68	53	32
Mean		7.81	6.71	4.49	2.81	3.52	7.03
Std. Deviation		2.609	2.758	2.739	2.524	3.044	2.838

9.8.2 Frequencies: Effectiveness of Advertising 1 - 6

Effectiveness of Marketing Media: TV

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	20	4.1	4.4	4.4
	2	9	1.9	2.0	6.4
	3	17	3.5	3.7	10.1
	4	5	1.0	1.1	11.2
	5	41	8.5	9.0	20.2
	6	27	5.6	5.9	26.2
	7	30	6.2	6.6	32.7
	8	73	15.1	16.0	48.8
	9	47	9.7	10.3	59.1
	10	186	38.4	40.9	100.0
	Total	455	94.0	100.0	
Missing	0	29	6.0		
Total		484	100.0		

Effectiveness of Marketing Media: Print

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	28	5.8	6.2	6.2
	2	22	4.5	4.9	11.1
	3	24	5.0	5.3	16.4
	4	13	2.7	2.9	19.3
	5	69	14.3	15.3	34.6
	6	27	5.6	6.0	40.6
	7	53	11.0	11.8	52.3
	8	77	15.9	17.1	69.4
	9	44	9.1	9.8	79.2
	10	94	19.4	20.8	100.0
	Total	451	93.2	100.0	
Missing	0	33	6.8		
Total		484	100.0		

Effectiveness of Marketing Media:Radio

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	94	19.4	21.1	21.1
	2	44	9.1	9.9	30.9
	3	39	8.1	8.7	39.7
	4	30	6.2	6.7	46.4
	5	97	20.0	21.7	68.2
	6	37	7.6	8.3	76.5
	7	36	7.4	8.1	84.5
	8	29	6.0	6.5	91.0
	9	8	1.7	1.8	92.8
	10	32	6.6	7.2	100.0
	Total	446	92.1	100.0	
Missing	0	37	7.6		
	System	1	.2		
	Total	38	7.9		
Total		484	100.0		

Effectiveness of Marketing Media:Blogs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	235	48.6	56.5	56.5
	2	24	5.0	5.8	62.3
	3	23	4.8	5.5	67.8
	4	23	4.8	5.5	73.3
	5	41	8.5	9.9	83.2
	6	23	4.8	5.5	88.7
	7	19	3.9	4.6	93.3
	8	14	2.9	3.4	96.6
	9	3	.6	.7	97.4
	10	11	2.3	2.6	100.0
	Total	416	86.0	100.0	
Missing	0	68	14.0		
Total		484	100.0		

Effectiveness of Marketing Media:Websites

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	204	42.1	47.3	47.3
	2	30	6.2	7.0	54.3
	3	22	4.5	5.1	59.4
	4	23	4.8	5.3	64.7
	5	43	8.9	10.0	74.7
	6	26	5.4	6.0	80.7
	7	16	3.3	3.7	84.5
	8	21	4.3	4.9	89.3
	9	16	3.3	3.7	93.0
	10	30	6.2	7.0	100.0
	Total	431	89.0	100.0	
Missing	0	53	11.0		
Total		484	100.0		

Effectiveness of Marketing Media: Samples

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	35	7.2	7.7	7.7
	2	12	2.5	2.7	10.4
	3	18	3.7	4.0	14.4
	4	16	3.3	3.5	17.9
	5	50	10.3	11.1	29.0
	6	38	7.9	8.4	37.4
	7	43	8.9	9.5	46.9
	8	69	14.3	15.3	62.2
	9	41	8.5	9.1	71.2
	10	130	26.9	28.8	100.0
	Total	452	93.4	100.0	
Missing	0	31	6.4		
	System	1	.2		
	Total	32	6.6		
Total		484	100.0		

9.8.3 Mean scores for Effectiveness of advertising 7 – 12

Statistics

		Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media: Word-of-Mouth	Effectiveness of Marketing Media:Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
N	Valid	433	425	450	452	447	444
	Missing	51	59	34	32	37	40
Mean		4.59	2.95	6.78	6.78	5.48	7.24
Std. Deviation		2.864	2.480	2.796	2.606	3.204	2.665

9.8.4 Frequencies: Effectiveness of Advertising 7 - 12

Effectiveness of Marketing Media: Sponsorships

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	106	21.9	24.5	24.5
	2	18	3.7	4.2	28.6
	3	54	11.2	12.5	41.1
	4	37	7.6	8.5	49.7
	5	56	11.6	12.9	62.6
	6	31	6.4	7.2	69.7
	7	44	9.1	10.2	79.9
	8	48	9.9	11.1	91.0
	9	12	2.5	2.8	93.8
	10	27	5.6	6.2	100.0
	Total	433	89.5	100.0	
Missing	0	51	10.5		
Total		484	100.0		

Effectiveness of Marketing Media: Web Campaigns

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	207	42.8	48.7	48.7
	2	34	7.0	8.0	56.7
	3	40	8.3	9.4	66.1
	4	36	7.4	8.5	74.6
	5	42	8.7	9.9	84.5
	6	16	3.3	3.8	88.2
	7	19	3.9	4.5	92.7
	8	15	3.1	3.5	96.2
	9	5	1.0	1.2	97.4
	10	11	2.3	2.6	100.0
	Total	425	87.8	100.0	
Missing	0	59	12.2		
Total		484	100.0		

Effectiveness of Marketing Media:Word-of-Mouth

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	35	7.2	7.8	7.8
	2	12	2.5	2.7	10.4
	3	30	6.2	6.7	17.1
	4	17	3.5	3.8	20.9
	5	45	9.3	10.0	30.9
	6	38	7.9	8.4	39.3
	7	36	7.4	8.0	47.3
	8	96	19.8	21.3	68.7
	9	49	10.1	10.9	79.6
	10	92	19.0	20.4	100.0
	Total	450	93.0	100.0	
Missing	0	34	7.0		
Total		484	100.0		

Effectiveness of Marketing Media:Store Displays

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	33	6.8	7.3	7.3
	2	7	1.4	1.5	8.8
	3	18	3.7	4.0	12.8
	4	18	3.7	4.0	16.8
	5	57	11.8	12.6	29.4
	6	41	8.5	9.1	38.5
	7	70	14.5	15.5	54.0
	8	85	17.6	18.8	72.8
	9	38	7.9	8.4	81.2
	10	85	17.6	18.8	100.0
	Total	452	93.4	100.0	
Missing	0	32	6.6		
Total		484	100.0		

Effectiveness of Marketing Media: Celebrity Endorsements

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	94	19.4	21.0	21.0
	2	21	4.3	4.7	25.7
	3	30	6.2	6.7	32.4
	4	19	3.9	4.3	36.7
	5	62	12.8	13.9	50.6
	6	29	6.0	6.5	57.0
	7	38	7.9	8.5	65.5
	8	57	11.8	12.8	78.3
	9	30	6.2	6.7	85.0
	10	67	13.8	15.0	100.0
	Total	447	92.4	100.0	
Missing	0	37	7.6		
Total		484	100.0		

Effectiveness of Marketing Media: Expert Endorsements

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	27	5.6	6.1	6.1
	2	12	2.5	2.7	8.8
	3	14	2.9	3.2	11.9
	4	16	3.3	3.6	15.5
	5	42	8.7	9.5	25.0
	6	27	5.6	6.1	31.1
	7	47	9.7	10.6	41.7
	8	85	17.6	19.1	60.8
	9	63	13.0	14.2	75.0
	10	111	22.9	25.0	100.0
	Total	444	91.7	100.0	
Missing	0	40	8.3		
Total		484	100.0		

9.9 Effectiveness of advertising as per Generation – Mean Scores and Frequencies

9.9.1 Mean scores as per Generation – Effectiveness of Media 1 – 6

Report

Generation		Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media: Print	Effectiveness of Marketing Media:Radio	Effectiveness of Marketing Media:Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
Baby Boomer	Mean	7.10	6.61	3.82	2.24	2.68	6.51
	N	142	140	140	127	131	141
	Std. Deviation	2.852	2.671	2.610	2.158	2.623	3.053
Generation X	Mean	8.14	6.91	5.02	2.97	4.09	7.18
	N	170	167	164	152	158	169
	Std. Deviation	2.403	2.798	2.808	2.610	3.259	2.744
Generation Y	Mean	8.13	6.58	4.54	3.17	3.65	7.37
	N	143	144	142	137	142	142
	Std. Deviation	2.466	2.800	2.662	2.664	3.008	2.670
Total	Mean	7.81	6.71	4.49	2.81	3.52	7.03
	N	455	451	446	416	431	452
	Std. Deviation	2.609	2.758	2.739	2.524	3.044	2.838

9.9.2 Frequencies as per Generation: Effectiveness of Media 1 – 6

Effectiveness of Marketing Media: TV * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Effectiveness of Marketing Media: TV	1	10	5	5	20
	2	4	4	1	9
	3	6	4	7	17
	4	4	0	1	5
	5	20	11	10	41
	6	9	13	5	27
	7	9	11	10	30
	8	26	28	19	73
	9	9	16	22	47
	10	45	78	63	186
Total		142	170	143	455

Effectiveness of Marketing Media: Print * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media: Print	1	10	11	7	28
	2	2	9	11	22
	3	10	7	7	24
	4	4	1	8	13
	5	26	23	20	69
	6	7	11	9	27
	7	15	18	20	53
	8	31	29	17	77
	9	10	19	15	44
	10	25	39	30	94
Total		140	167	144	451

Effectiveness of Marketing Media:Radio * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media:Radio	1	43	23	28	94
	2	13	16	15	44
	3	13	16	10	39
	4	10	11	9	30
	5	27	36	34	97
	6	14	12	11	37
	7	6	16	14	36
	8	6	12	11	29
	9	2	4	2	8
	10	6	18	8	32
Total		140	164	142	446

Effectiveness of Marketing Media:Blogs * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media:Blogs	1	86	82	67	235
	2	7	9	8	24
	3	3	6	14	23
	4	8	12	3	23
	5	13	14	14	41
	6	2	10	11	23
	7	3	8	8	19
	8	2	5	7	14
	9	1	1	1	3
	10	2	5	4	11
Total		127	152	137	416

Effectiveness of Marketing Media:Websites * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Effectiveness of Marketing Media:Websites	1	79	67	58	204
	2	9	7	14	30
	3	4	5	13	22
	4	12	6	5	23
	5	7	22	14	43
	6	6	11	9	26
	7	3	8	5	16
	8	3	9	9	21
	9	2	7	7	16
	10	6	16	8	30
Total		131	158	142	431

Effectiveness of Marketing Media: Samples * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Effectiveness of Marketing Media: Samples	1	17	9	9	35
	2	3	5	4	12
	3	10	7	1	18
	4	4	8	4	16
	5	18	19	13	50
	6	11	11	16	38
	7	11	18	14	43
	8	20	26	23	69
	9	14	14	13	41
	10	33	52	45	130
Total		141	169	142	452

9.9.3 Mean scores as per Generation – Effectiveness of Media 7 – 12

Report

Generation		Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media: Word-of-Mouth	Effectiveness of Marketing Media:Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
Baby Boomer	Mean	4.07	2.31	6.74	6.11	4.14	6.80
	N	134	129	141	139	139	139
	Std. Deviation	2.938	2.091	2.817	2.731	3.044	2.740
Generation X	Mean	4.57	3.19	6.79	7.20	5.84	7.57
	N	157	155	165	168	166	164
	Std. Deviation	2.786	2.662	2.725	2.534	3.027	2.472
Generation Y	Mean	5.11	3.27	6.81	6.95	6.36	7.30
	N	142	141	144	145	142	141
	Std. Deviation	2.808	2.507	2.873	2.450	3.159	2.761
Total	Mean	4.59	2.95	6.78	6.78	5.48	7.24
	N	433	425	450	452	447	444
	Std. Deviation	2.864	2.480	2.796	2.606	3.204	2.665

9.9.4 Frequencies as per Generation: Effectiveness of Media 7 - 12

Effectiveness of Marketing Media: Sponsorships * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media: Sponsorships	1	45	37	24	106
	2	5	8	5	18
	3	17	21	16	54
	4	12	10	15	37
	5	15	18	23	56
	6	9	14	8	31
	7	8	20	16	44
	8	10	20	18	48
	9	4	2	6	12
	10	9	7	11	27
Total		134	157	142	433

Effectiveness of Marketing Media: Web Campaigns * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media: Web Campaigns	1	82	70	55	207
	2	7	13	14	34
	3	7	16	17	40
	4	11	11	14	36
	5	11	15	16	42
	6	3	9	4	16
	7	2	7	10	19
	8	4	5	6	15
	9	2	2	1	5
	10	0	7	4	11
Total		129	155	141	425

Effectiveness of Marketing Media:Word-of-Mouth * Generation Crosstabulation

Count

		Generation			
		Baby Boomer	Generation X	Generation Y	Total
Effectiveness of Marketing Media:Word-of-Mouth	1	12	12	11	35
	2	1	5	6	12
	3	11	10	9	30
	4	5	7	5	17
	5	18	12	15	45
	6	10	18	10	38
	7	13	14	9	36
	8	28	38	30	96
	9	11	20	18	49
	10	32	29	31	92
Total		141	165	144	450

Effectiveness of Marketing Media:Store Displays * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Effectiveness of Marketing Media:Store Displays	1	18	9	6	33
	2	0	3	4	7
	3	8	6	4	18
	4	9	3	6	18
	5	16	22	19	57
	6	16	8	17	41
	7	21	26	23	70
	8	27	36	22	85
	9	8	14	16	38
	10	16	41	28	85
Total		139	168	145	452

Effectiveness of Marketing Media: Celebrity Endorsements * Generation Crosstabulation

Count

		Generation			Total
		Baby Boomer	Generation X	Generation Y	
Effectiveness of Marketing Media: Celebrity Endorsements	1	49	26	19	94
	2	8	5	8	21
	3	11	13	6	30
	4	11	4	4	19
	5	14	29	19	62
	6	9	13	7	29
	7	10	14	14	38
	8	13	26	18	57
	9	5	10	15	30
	10	9	26	32	67
Total		139	166	142	447

9.10 Significance Testing – Kruskal-Wallis & Mann-Whitney U Test

9.10.1 Attributes 1 – 6: Kruskal-Wallis

Test Statistics[a,b]

	Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media: Print	Effectiveness of Marketing Media:Radio	Effectiveness of Marketing Media:Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
Chi-Square	14.624	2.006	14.345	11.302	16.048	6.011
df	2	2	2	2	2	2
Asymp. Sig.	.001	.367	.001	.004	.000	.050

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.10.2 Attributes 7 – 12: Kruskal-Wallis

Test Statistics[a,b]

	Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media: Word-of-Mouth	Effectiveness of Marketing Media: Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
Chi-Square	9.834	15.432	.134	14.057	37.534	7.143
df	2	2	2	2	2	2
Asymp. Sig.	.007	.000	.935	.001	.000	.028

a. Kruskal Wallis Test

b. Grouping Variable: Generation

9.10.3 Mann-Whitney U test : Boomer and Xers

Test Statistics[a]

	Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media: Radio	Effectiveness of Marketing Media: Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
Mann-Whitney U	9461.000	8659.500	8145.000	7852.500	10474.500
Wilcoxon W	19614.000	18529.500	16273.000	16498.500	20485.500
Z	-3.407	-3.735	-2.542	-3.787	-1.859
Asymp. Sig. (2-tailed)	.001	.000	.011	.000	.063

a. Grouping Variable: Generation

Test Statistics[a]

	Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media: Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
Mann-Whitney U	9318.500	8016.000	8869.500	7953.000	9437.000
Wilcoxon W	18363.500	16401.000	18599.500	17683.000	19167.000
Z	-1.703	-3.129	-3.666	-4.727	-2.619
Asymp. Sig. (2-tailed)	.089	.002	.000	.000	.009

a. Grouping Variable: Generation

9.10.4 Mann-Whitney U test : Boomer and Yers

Test Statistics[a]

	Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media: Radio	Effectiveness of Marketing Media: Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
Mann-Whitney U	7982.000	8353.500	6880.500	7373.000	8433.000
Wilcoxon W	18135.000	18223.500	15008.500	16019.000	18444.000
Z	-3.221	-2.352	-3.274	-3.169	-2.326
Asymp. Sig. (2-tailed)	.001	.019	.001	.002	.020

a. Grouping Variable: Generation

Test Statistics[a]

	Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media:Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
Mann-Whitney U	7479.500	6851.500	8350.500	6015.500	8530.000
Wilcoxon W	16524.500	15236.500	18080.500	15745.500	18260.000
Z	-3.106	-3.760	-2.518	-5.721	-1.897
Asymp. Sig. (2-tailed)	.002	.000	.012	.000	.058

a. Grouping Variable: Generation

9.10.5 Mann-Whitney U test : Xers and Yers

Test Statistics[a]

	Effectiveness of Marketing Media: TV	Effectiveness of Marketing Media:Radio	Effectiveness of Marketing Media:Blogs	Effectiveness of Marketing Media: Websites	Effectiveness of Marketing Media: Samples
Mann-Whitney U	12151.000	10577.500	9883.000	10645.000	11550.500
Wilcoxon W	22447.000	20730.500	21511.000	20798.000	25915.500
Z	-.005	-1.396	-.804	-.795	-.579
Asymp. Sig. (2-tailed)	.996	.163	.422	.427	.563

a. Grouping Variable: Generation

Test Statistics[a]

	Effectiveness of Marketing Media: Sponsorships	Effectiveness of Marketing Media: Web Campaigns	Effectiveness of Marketing Media:Store Displays	Effectiveness of Marketing Media: Celebrity Endorsements	Effectiveness of Marketing Media: Expert Endorsements
Mann-Whitney U	9974.500	10462.000	11265.000	10531.000	11169.500
Wilcoxon W	22377.500	22552.000	21850.000	24392.000	21180.500
Z	-1.585	-.660	-1.160	-1.626	-.520
Asymp. Sig. (2-tailed)	.113	.509	.246	.104	.603

a. Grouping Variable: Generation

9.11 CRONBACH'S ALPHA RELIABILITY TESTS

9.11.1 Cronbach Alpha - Question 4

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
Attributes: Low Price	90.80	180.522	.303	.165	.783
Attributes: Mild Fragrance	90.78	173.661	.354	.212	.779
Attributes: Quality Packaging	91.11	172.750	.325	.187	.787
Attributes: Moisturising Effect	87.82	189.551	.489	.500	.765
Attributes: Makes skin feel smooth & soft	87.61	189.285	.566	.546	.763
Attributes: Multi-purpose	89.08	173.217	.461	.297	.763
Attributes: Widely available	88.39	178.317	.536	.372	.756
Attributes: Contains SPF	87.98	184.301	.509	.433	.761
Attributes: Contains Natural Ingredients	88.45	178.369	.522	.385	.757
Attributes: Contains anti-aging properties	88.57	175.403	.475	.288	.761
Attributes: Removes Impurities	88.04	184.807	.480	.317	.763
Attributes: Lasts all day	87.74	188.654	.481	.394	.765

9.11.2 Cronbach's Alpha – Question 8

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
Effectiveness of Marketing Media: TV	58.42	324.865	.479	.420	.812
Effectiveness of Marketing Media: Print	59.54	330.011	.394	.307	.819
Effectiveness of Marketing Media:Radio	61.78	323.698	.464	.302	.813
Effectiveness of Marketing Media:Blogs	63.41	320.119	.547	.616	.807
Effectiveness of Marketing Media:Websites	62.80	307.918	.558	.596	.805
Effectiveness of Marketing Media: Samples	59.16	329.699	.383	.241	.820
Effectiveness of Marketing Media: Sponsorships	61.73	316.088	.521	.331	.808
Effectiveness of Marketing Media: Web Campaigns	63.32	316.586	.604	.601	.803
Effectiveness of Marketing Media:Word-of-Mouth	59.36	344.185	.248	.226	.830
Effectiveness of Marketing Media:Store Displays	59.49	318.189	.554	.366	.806
Effectiveness of Marketing Media: Celebrity Endorsements	60.77	303.473	.555	.418	.805
Effectiveness of Marketing Media: Expert Endorsements	59.00	325.044	.465	.299	.813

9.11.3 Cronbach's Alpha – Question 9

Item-Total Statistics

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Squared Multiple Correlation	Cronbach's Alpha if Item Deleted
...are designed for my age group	19.30	16.791	.319	.318	.571
...are designed for my skin type	19.55	17.786	.282	.421	.583
...use entertaining adverts	17.52	14.934	.396	.473	.544
...use the music from my era	17.44	15.964	.277	.457	.581
...use endorsers from my age group	18.39	14.583	.455	.269	.526
...are effective	19.60	18.201	.174	.304	.601
...are recommended by my friends	18.42	16.450	.231	.089	.593
...educate me about facial care routines in their communications	18.90	15.424	.428	.215	.539
I consider myself to be brand loyal when it comes to facial care products	18.65	17.195	.111	.051	.631