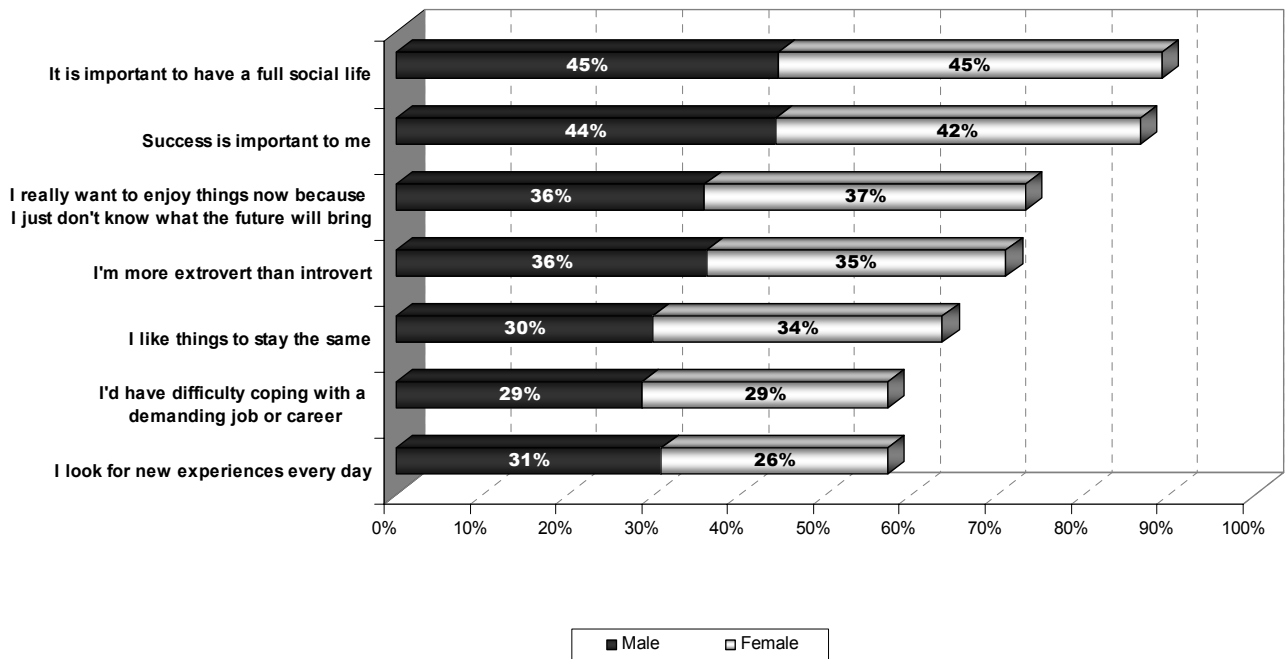


Does the fairer sex really want to get fairer?

While half the women in the country would like to lose some weight, only 13 per cent of Indonesian women have bought a skin whitening product in the last six months. On the other hand, 17 per cent of the ladies look for whitening agents in the personal products they like to use. In a country the size of Indonesia, even those in the minority add up to a major market opportunity. The information is based on Roy Morgan Single Source, the country's largest syndicated survey with over 25,000 respondents annually, covering 90% of Indonesia's population over the age of 14.

Stereo-typing by gender is a reflex action for many people. While most would agree that appearance and good grooming boost self-confidence, the survey also shatters some old myths. As the chart on Attitudes illustrate, Indonesian men and women in fact have very similar views on several aspects of life that reflect their personalities rather than their gender.

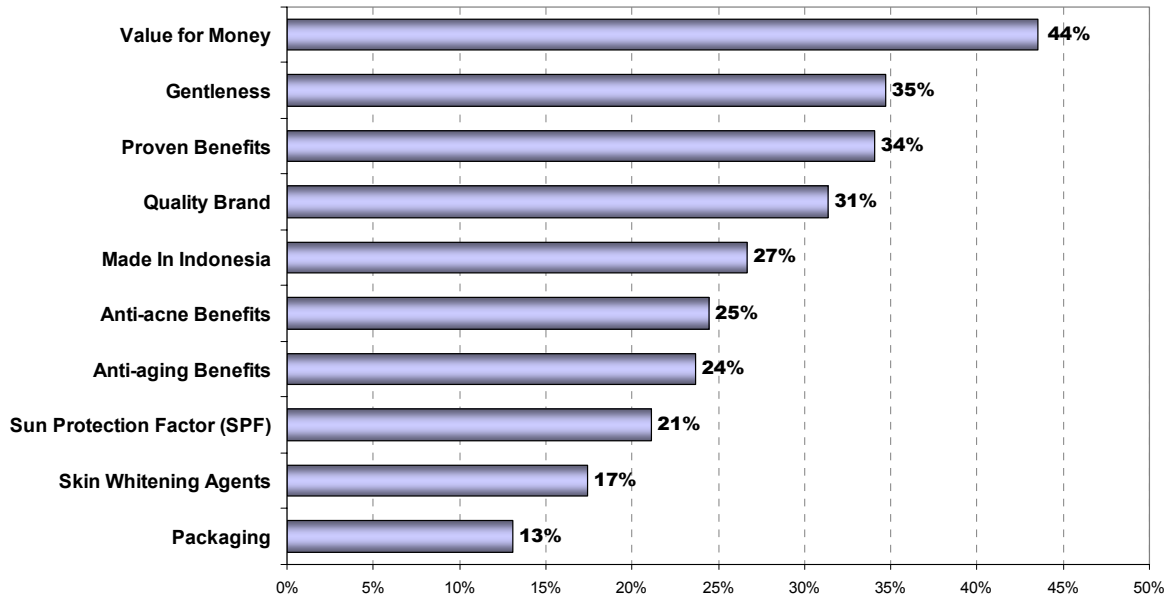
Self Attitudes



Indonesian men and women are equally sociable, equally confident, or equally shy. This is true both at home and in the workplace. Almost 90% of the people want a “full social life”, a view shared equally by men and women alike. That should come as a surprise to many, both Indonesians and Indonesia-watchers. If anything's different, the men are just a little bit more eager than the women to ‘look for new experiences every day’. Boys will be boys?

But when it comes to looking good and buying personal products, men and women have different priorities. Perhaps reconfirming popular belief is the fact that more women regard ‘value for money’ as the leading attribute than men do when buying such products. With 44% of women agreeing, it is the No 1 factor. (What is equally obvious is that price is *not* the No 1 criterion for 56% of women). ‘Gentleness’ and ‘Proven Benefits’ come second and third, reversing the order for men buying personal care brands.

Top 10 Features - Personal Products
Women Only



Factors such as ‘recommendations by beauty professionals’, ‘reputation of the brand’ or ‘animal testing’ affect the choice of very few people (less than 7%).

Of the broad Personal Care categories, more people (76% of the population) bought Shampoo more than any other product in the last six months. That’s easily explained by the inexpensive sachet. Of the people who buy personal care products, 83 per cent buy shampoo monthly or more often, followed by soap (80%) and toothpaste (76%). What does come as a surprise is that 62% of the population also bought a toothbrush during that time, testimony perhaps to the practice of brushing after meals, popular among many Indonesians. Another growing trend is the purchase of deodorants (18%), followed by facial moisturisers (17%), two inflation-affected categories recovering again in the last six months. Across the board, *tokos* and *warungs* are overwhelmingly the most popular places to buy such products even today, though convenience stores and supermarkets continue to expand their franchise. Perhaps the most significant of all changes that have taken place in the last decade are in the rankings of personal care brands bought by Indonesian consumers.

BRANDS USED MOST OFTEN		
Product	Brand	%
Bar Soap	Lifebuoy	40%
	Giv	18%
	Lux	15%
	Nuvo	12%
	Other Bar Soap	6%
Shampoo	Sunsilk	27%
	Clear	26%
	Lifebuoy	14%
	Pantene	13%
	Rejoice	7%
Toothpaste	Pepsodent	46%
	Ciptadent	18%
	Close Up	9%
	Formula	6%
	Ritadent	4%
Deodorant	Rexona	15%
	Other Deodorant	8%
	Gatsby	3%
	She	3%
	Axe	3%

Most of the giant brands continue to lead their categories but several new players have emerged and many a shift in market-share has also taken place. As more choices present themselves, even the most loyal of consumers will stop to take notice. If marketers learn and respect consumer preferences, if they position their brands to meet those expectations, we will see more changes in market rankings and further fragmentation of market share. With the power of the 'organised sector' like supermarkets on the increase, the retailer's own assurances to their consumers will have even greater effect on 'Brands Used Most Often' in the years ahead.

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The contributor is an advertising professional turned researcher and consultant, based in Melbourne. He has lived and worked across the Asia Pacific region, including Indonesia. He remains a regular visitor.

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