

Emerging Demands for Personal Care by Men in Indochina



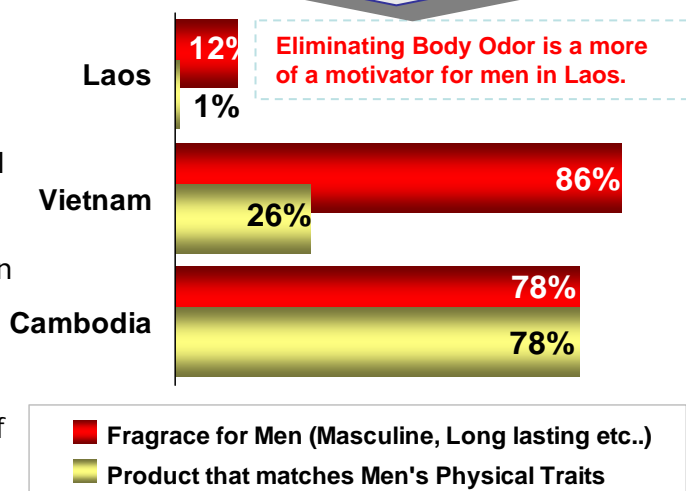
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An observed increase in demand for personal care products specifically tailored to meet the needs of men has prompted further investigation of this issue as part of Indochina Research's I-TRAK™ survey that monitors changing consumer trends across the region.

I-TRAK™ Research Design: Random street intercept with 600 males aged 25-45 in key urban areas of the 3 countries – HCMC (Vietnam), Phnom Penh (Cambodia) & Vientiane (Laos) in July '06.

- ☐ Males 25-45 represent 14m or 14% of the 100m people across the 3 markets of Indochina.
- ☐ 92% of males surveyed have monthly income of less than < US\$300.
- ☐ Shampoo use is universal among men.
- ☐ Bar Soap is the most common personal wash product used by men & Cambodian men also have more substantial use of Shower Gel than men in Laos or Vietnam.
- ☐ Global brands such as Sunsilk, Rejoice, Lux are currently the most preferred brands. However, perhaps as a sign of things to come, a local brand "X-Men", is preferred by 75% of Vietnamese men.

Key Purchase Motivators For Men's Personal Care



| Preferred | Shampoo | Bar Soap |
|---------------|---------|----------|
| Sunsilk | 54% | - |
| Rejoice | 38% | - |
| Pantene | 27% | - |
| Clear | 25% | - |
| Lux | - | 75% |
| Protex | - | 36% |
| X-men | 24% | 13% |
| TOM Awareness | Shampoo | Bar Soap |
| Rejoice | 38% | - |
| Sunsilk | 22% | - |
| X-men | 16% | - |
| Lux | - | 54% |
| Main Brand | Shampoo | Bar Soap |
| Sunsilk | 21% | - |
| Lux | - | 57% |
| X-men | 16% | - |

- ☐ A products' **Fragrance** is integral in the delivery of the elements desired by men (has a "masculine" scent, is long lasting & builds confidence) and plays a key role in motivating purchase. But the influence of this factor varies across the 3 markets.
- ☐ Product segmentation is becoming more apparent as men across the region now expect that personal care products "have a formulation to suit to our physical traits"
- ☐ Significant market opportunities exist for personal care products that address men's needs. This is shown by the fact that men already use at least 1 personal care product, 2 in 3 men intend to buy by themselves and the average monthly spend on personal care (US\$6) equates to annual sales of US\$90 m in these 3 cities alone.