



A Branding Lab, presented as part of the requirements for the Award of a Master Degree in Management from the NOVA – School of Business and Economics

HOW CAN L'ORÉAL RELAUNCH FRUCTIS AS A DISRUPTIVE BRAND FOR MILLENNIALS IN PORTUGAL?

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A Project carried out on the Master in Management Program,
under the supervision of Professor Catherine da Silveira



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4. Additional Research: Individual Contributions to the Branding Lab
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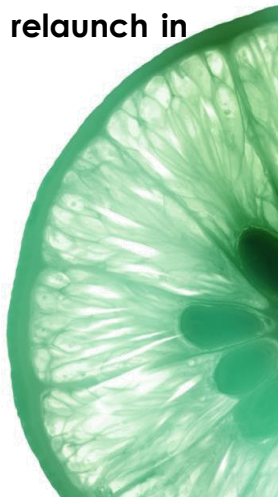
This Work Project is conducted within the scope of the Fructis* Branding Lab at Nova School of Business and Economics (Nova SBE) in the academic year of 2016/17 and is based on a collaboration with the Garnier Fructis management team of the L'Oréal Group. A confidentiality agreement was signed by Nova SBE representatives and by the five students involved in the project, as well as the L'Oréal team responsible for the relaunch of Fructis, on September 30, 2016.

Fructis is operating as a product brand, under the commercial brand Garnier which is part of the L'Oréal Group (Corporate Brand).

This Branding Lab emerges from the project of Fructis International to relaunch its brand globally. For that purpose, Portugal has been chosen to be a pilot market and our main objective is to support Fructis in implementing a new positioning to regain a high market share. This project is developed to address the following question: "How can L'Oréal relaunch Fructis as a disruptive brand for Millennials?".

The overall branding lab is divided in two phases:

- The first phase consists in a marketing research designed to build a **brand diagnostic** of the current situation of Fructis in Portugal, combined with a deep analysis of the target of the relaunch: the Millennials. Concretely the research aims at addressing two major research questions: **1) How do Millennials behave within the Portuguese hair care market?** and **2) Why has Fructis lost so much market share?** In order to address these questions, both primary and secondary research have been conducted. This first phase was presented to the Fructis management team at the L'Oréal Group Lisbon Headquarters on October 28, 2016 .
- The second phase consists in the recommendations part. In order to develop these recommendations, our advisor met the Fructis management team to define **five specifically relevant topics** within the scope of the global project, that should address the management problem from different perspectives. The insights from both branding lab phases provide the foundation for coming up with several **suggestions for the Fructis' relaunch in Portugal**. These suggestions are focused on the Portuguese market with the possibility of being adapted to other markets.



PROJECT TIMELINE

The figure below maps out the structure of the project, by allocating its different stages across time and identifying key deadlines.

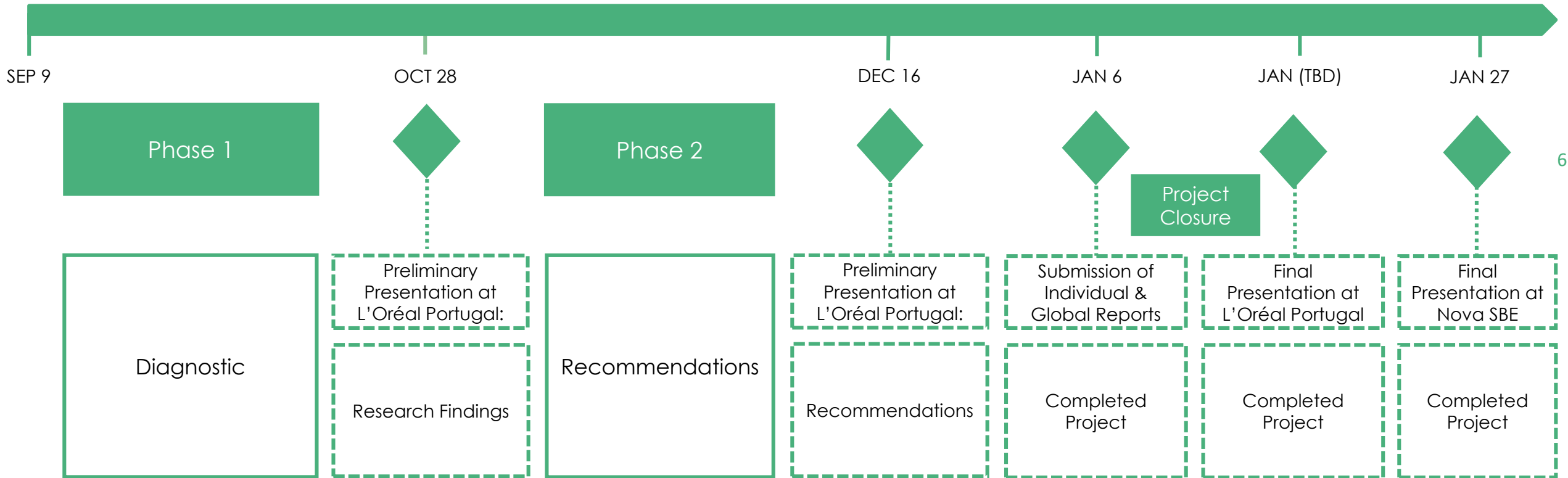


Figure 1: Project Timeline
Source: Original Content



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RELAUNCH OF FRUCTIS • WHY, WHEN AND HOW (1/3)

Fructis was launched in 1996, after a very short time of product development. **The brand entered the market as a disruptive haircare brand** characterized by its shiny green packaging and rebellious advertising. In just three months **Fructis became the number two haircare brand worldwide**. However, in recent years, the brand has been losing market share all over Europe* (L'Oréal Portugal, 2016).

In particular in Portugal, where Fructis achieved its highest market share of 14,5% in 2006, **Fructis' market share has been continuously decreasing since 2008**, reaching 8,3% in YTD August 2016 (Figure 2). This trend has not been reversed so far, even with a portfolio extension in 2009 which introduced a wider range of colourful packaging. Given this, **L'Oréal has decided to take action globally by relaunching Fructis completely**, again as a disruptive brand, fitting tightly the latest lifestyle trends of the new generation of 18-35 year olds, the so-called Millennials (L'Oréal Portugal, 2016).

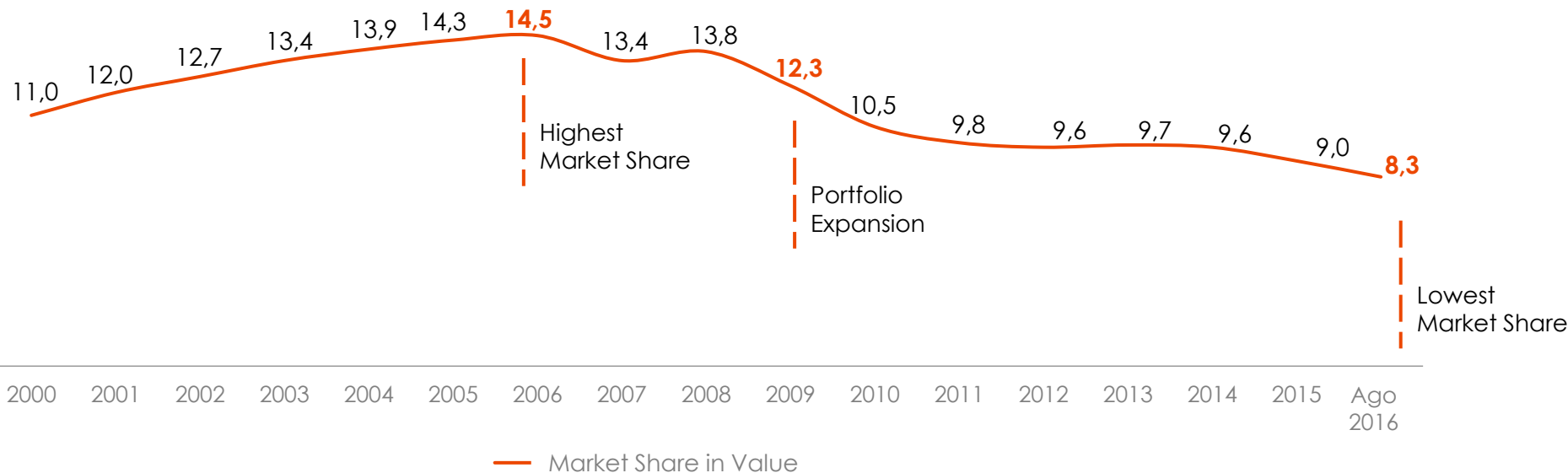


Figure 2: Market Shares (YTD) of Fructis in Portugal from 2000 to 2016
Source: L'Oréal Portugal



*Except for Germany, where the brand managers have adopted a low price strategy, which is not an option for the Portuguese market.

RELAUNCH OF FRUCTIS • WHY, WHEN AND HOW (2/3)

The relaunch of Fructis that will globally take place in April 2017 includes **changes in terms of formulas, packaging, price and communication strategy**. One objective of the relaunch is to pull market share from the market leader Pantene (Market Share in Portugal: 18,7% YTD August 2016) (L'Oréal Portugal, 2016).

Time and money were invested in order to create **new formulas* which are not only more natural and healthier but also more effective** than the current ones. This reformulation is based on the **combination of fruit extracts and technology**. Additionally, several of these new formulas were developed without silicone, parabens and/or sulfates, in order to attract health-conscious and environment-friendly consumers (L'Oréal Portugal, 2016).

NEW FORMULAS WITHOUT	
PARABEN	SILICONE
For all SKUs	For 46% of shampoos
NEW FORMULAS WITH	
NEW TRANSVERSAL FRUITS FORTIFYING ACTIVES	NEW TAILOR-MADE EXCLUSIVE COMBINATIONS
vitamins B6&B3	Oil Repair: 3 oils + 3-Glyceride
natural citric acid	Damage Eraser: Amla + Keraphyll
sugar cane	Densify: Pomegranate + Fibra-Cylane
apple extract	Grow Strong: Apple Extract + Ceramide
lemon peel	
green tea	
lemon protein	

Figure 3: Overview of ingredients of new Fructis formulas
Source: L'Oréal Portugal



*Formulas for Curls (Hidra-caracóis) and Anti-Dandruff (Anti-Caspa) will not be changed because current consumers are especially loyal to these formulas.

RELAUNCH OF FRUCTIS • WHY, WHEN AND HOW (3/3)

The new **packaging will be transparent** to better communicate the new positioning of “naturalness” and authenticity (“What you see is what you get”). As the new products better address consumer needs and are also more costly to produce, the range will be sold for a higher price. Initially, the new products will be introduced in the form of a promotion by attaching a bottle of the new formula to the current one (L’Oréal Portugal, 2016).

The relaunch will be handled as a launch, attracting both current consumers and new potential consumers, with a “disruptive go-to-market strategy”. In order to follow the current trend of more natural and health-conscious consumers, **Fructis will focus its communication strategy on the power of Superfruits, using the slogan “Superfruits for Super Hair”**. Especially the flavour Coconut is expected to receive a hype in 2017. This strategy will be communicated strongly on a digital basis, for instance, using influencers on Instagram, in order to reach the aspired millennial consumers, the “Don’t Bullshit Me Generation” (L’Oréal Portugal, 2016).

To sum up, Fructis will be relaunched as a **“modern, efficient, natural, value-[adding], [connecting], [evolutionary], stronger, healthier [and] authentic”** brand (L’Oréal Portugal, 2016).



Figure 4: Packaging of relaunched Fructis Shampoos
Source: L’Oréal Portugal

#SUPERFRUITS FOR SUPER HAIR

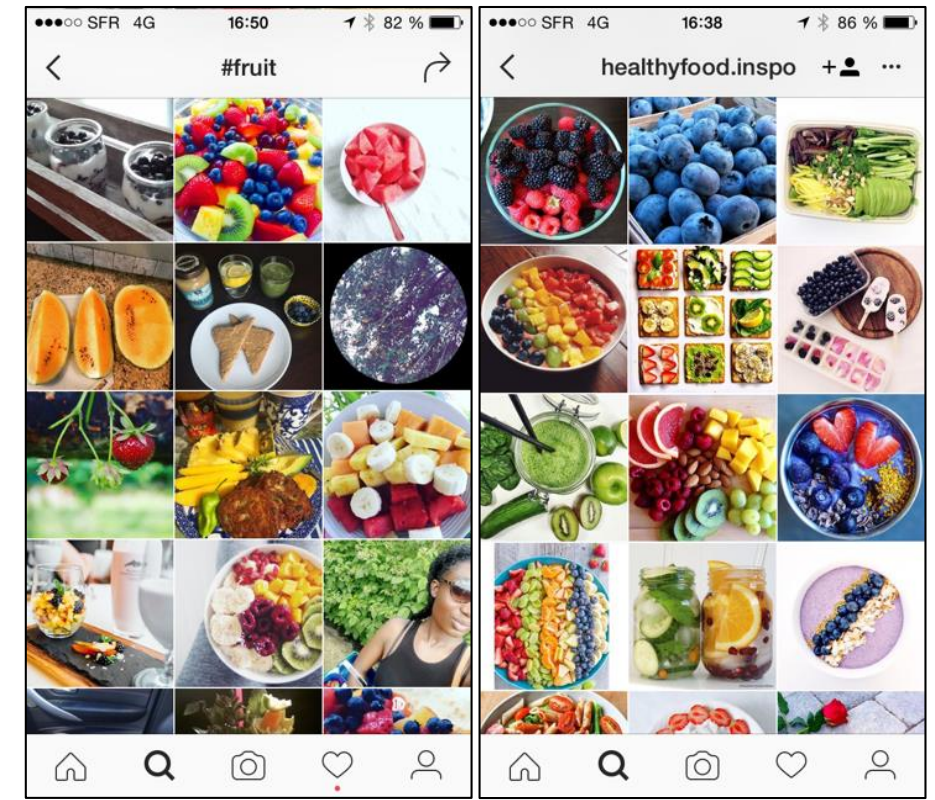


Figure 5: Superfruit trends on Instagram
Source: L’Oréal Portugal

RELAUNCH OF FRUCTIS • NEW BRAND IDENTITY

With the relaunch, a new brand identity* is suggested. In order to build Fructis' brand identity, the insights provided by the Fructis management team are translated into the Kapferer's Identity Prism model. This framework consists of six dimensions: Physical, Relationship, Customer Reflection, Personality, Culture and Self-Image. Due to the ongoing brand defining process, the components "Relationship" in terms of Intangible Assets and "Culture" in terms of Status, can not be stated at this moment, but will be shaped and defined throughout this work project.

Physical

New Hair Care Fructis Products, New Formulas, New Packaging, Revised "Garnier Fructis" Logo, Green, Superfruits, Natural Look, Recyclable Packaging, Cleaner Formulas (Free From Parabens, Limited Use Of Sulfates And Silicones)

Personality

Disruptive, "Rule Breaker", Cool, Healthy, Environment-Friendly, Sociable, Authentic, Digitally Connected, Active

Relationship

Tangible

Quality Products, Super Hair, Natural Hair Look, Environment-Friendly Products, Healthier Formulas With Higher Quality, The Power Of Superfruits

Intangible

Still To Be Defined



Culture

Garnier Values:

Natural Beauty, Sustainability

Substance:

Efficient (Better Formulas Due To High-end Technology), Natural And Powerful (Superfruits As Main Ingredient), Healthier (Free Of Parabens), More Environmentally Friendly (Mostly Free Of Sulfates And Silicone, Recyclable Packaging)

Status:

Aims To Be Modern, Disruptive, Inspirational By Adopting The New Fructis Lifestyle, Connected, **Reasons To Believe Still To Be Defined**

Customer Reflection

Young, Active/Sportsperson, Adventures, Health and Environmentally Conscious, Self-expressing Style, Sociable, Digital Oriented, Sharing New Experiences with Friends

Self-Image

"I am breaking the rules", "I have my own identity",
 "I am doing good to myself and to the environment",
 "I want the latest technology product",
 "I believe in the power of superfruits",
 "I enjoy when my hair looks natural",
 "I want to share my experiences with my friends"

*The Brand Identity is what a brand manager likes the brand to be, what it stands for and what makes it unique. For more information on Brand Identity, please check Exhibit 1.



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METHODOLOGY

Within the research approach for the brand diagnostic phase, two research questions were defined: **1) How do Millennials behave within the Portuguese hair care market?** and **2) Why has Fructis lost so much market share?.** To create a basis for answering both questions, **Primary and Secondary Data** were collected. An overview of the different data sources used is stated bellow (Figure 7).

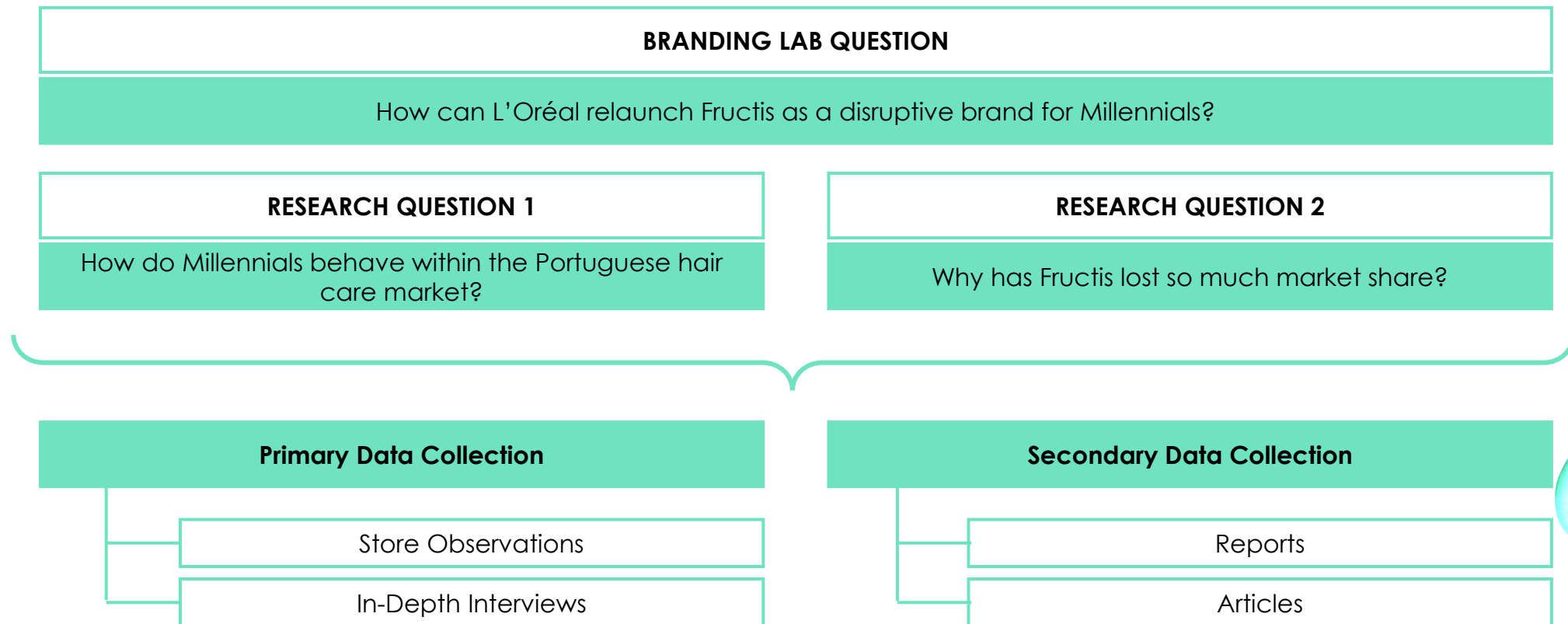
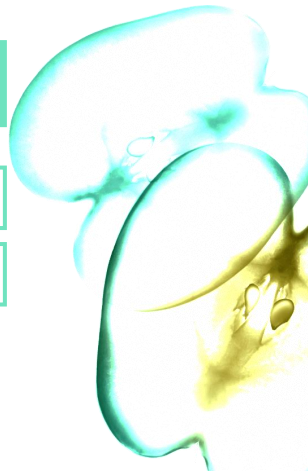


Figure 6: Research Approach for Brand Diagnostic Phase
Source: Original Content



METHODOLOGY • COLLECTED INFORMATION

Primary data was collected firstly via examination of 316 consumers during store observations*, followed by the conduction of 32 in-depth interviews with current and former Fructis consumers, and 33 in-depth interviews with Millennials. These Millennials were split into two sub-targets, 18-25 year olds and 26-35 year olds, in order to capture the differences that may occur between age intervals. The following matrix (Table 1) presents the type of **information collected** through the store observations and the in-depth interviews conducted **in order to answer each research question**.

		PRIMARY DATA SOURCES	
		STORE OBSERVATIONS	IN-DEPTH INTERVIEWS
RESEARCH QUESTIONS	1) How do Millennials behave within the Portuguese hair care market?	<ul style="list-style-type: none"> Explore the haircare consumer decision journey, in particular Millennials 	<ul style="list-style-type: none"> Millennials' behavior regarding haircare products Brand perception of Fructis and competitors
	2) Why has Fructis lost so much market share?	<ul style="list-style-type: none"> Explore the haircare consumer decision journey, in particular the one of consumers who consider and/or buy Fructis 	<ul style="list-style-type: none"> Why are current consumers using Fructis? Why have former consumers stopped using Fructis? How do current and former consumers perceive Fructis?

Table 1: Data Collection Matrix
Source: Original Content

*Observations were conducted in five Continente stores in Lisbon and Porto: Colombo, Amadora, Bom dia Laranjeiro, Norteshopping and Antas.

METHODOLOGY • COLLECTED INFORMATION

In order to gain relevant insights for the two research questions, aspired characteristics of the sample were defined. For the **store observations***, consumers who at least considered one haircare product on shelves were observed. Information about each observed consumer was recorded according to an **Observation Grid** (Exhibit 2). For the **in-depth interviews**, **Pre-Recruiting Requirements** (Exhibits 3.1 and 3.2) were defined to select the respondents and different **Interview Guides** (Exhibit 4) were created for each target. The detailed predefined **sample characteristics** for store observations and in-depth interviews are displayed in the following matrix (Table 2):

		PRIMARY DATA SOURCES			
		STORE OBSERVATIONS	IN-DEPTH INTERVIEWS		
RESEARCH QUESTIONS	1) How do Millennials behave within the Portuguese hair care market?	Consumers who consider and/or buy a haircare product in a store*, in particular those who seem to be aged 18-35 year olds	<table border="1"> <tr> <td> 18-25 year old Millennials Have bought for themselves at least one haircare product in the last year </td> <td> 26-35 year old Millennials Have bought for themselves at least one haircare product in the last year </td> </tr> </table>	18-25 year old Millennials Have bought for themselves at least one haircare product in the last year	26-35 year old Millennials Have bought for themselves at least one haircare product in the last year
	18-25 year old Millennials Have bought for themselves at least one haircare product in the last year	26-35 year old Millennials Have bought for themselves at least one haircare product in the last year			
2) Why has Fructis lost so much market share?	Consumers who consider and/or buy a haircare product in a store*, in particular those who consider and/or buy Fructis	<table border="1"> <tr> <td> Fructis Users Have bought Fructis at least once in the past 4 months </td> <td> Fructis Droppers Have bought Fructis at least once in the past 7 years but not in the last 4 months </td> </tr> </table>	Fructis Users Have bought Fructis at least once in the past 4 months	Fructis Droppers Have bought Fructis at least once in the past 7 years but not in the last 4 months	
Fructis Users Have bought Fructis at least once in the past 4 months	Fructis Droppers Have bought Fructis at least once in the past 7 years but not in the last 4 months				

Table 2: Research sample characteristics
Source: Original Content

*Observations were conducted in five Continente stores in Lisbon and Porto: Colombo, Amadora, Bom dia Laranjeiro, Norteshopping and Antas.

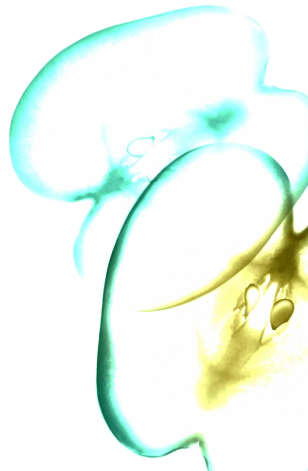


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OVERVIEW

Given the **complexity of the information collected in the Brand Diagnostic phase**, the research insights will be **presented by type of research** instead of by research question, so that the report is easier to follow.



OVERVIEW

The store observations took place from Wednesday, Sep 21, 2016 to Saturday, Sep 24, 2016. In total, **316 consumers** were observed in **five Continente stores**: one supermarket and four hypermarkets. Their respective layouts can be found in Exhibit 5. The stores were chosen by the L'Oréal team and are located in Lisbon and Porto.

Stores  CONTINENTE	Typology	Date	Time	Ongoing Promotions*	Number of observed consumers**
Continente Antas	Hypermarket	23.09.	4pm – 5pm	Nivea 50%, Gliss 50%, Elvive 50% 700ml shampoo & 400ml conditioner, Ultra Suave 75% 400ml conditioner.	32
		24.09.	3pm – 7pm		
Continente Norteshopping	Hypermarket	22.09.	6pm – 8pm	Nivea 50%, Gliss 50%, Elvive 50% 700ml shampoo & 400ml conditioner, Ultra Suave 75% 400 ml conditioner, Pantene 2 for 1, MyLabel 50%.	23
		23.09.	6pm – 9pm		
Continente Colombo	Hypermarket	21.09.	12pm– 4pm	Nivea 50%, Gliss 50%, Elvive 50% 700ml shampoo & 400ml conditioner, Ultra Suave 75% 400 ml conditioner, Pantene 2 for 1, Revlon 50% shampoo & conditioners.	121
		22.09.	4pm – 8pm		
		23.09.	10am– 3pm		
		24.09.	10am–6pm		
Continente Amadora	Hypermarket	23.09.	4pm – 7pm	TRESemmé 50%, Gliss 50%, Nivea 50%, Elvive 50% 700ml shampoo & 400ml conditioner, Ultra Suave 75% 400ml shampoo and conditioner.	107
		24.09.	3pm – 7pm		
Continente Bom dia Laranjeiro	Supermarket	22.09.	2pm – 8pm	Gliss 50%, Elvive 50%, Ultra Suave 1 for 2 Shampoo.	33
		24.09.	9am – 1pm		
Total			38 hours		316

Table 3: Overview of store observation; **Source:** Original Content

*Brands on Promotion (% off) during observation will be highlighted in pink throughout the report.

**Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

INSIGHTS ABOUT ALL OBSERVED CONSUMERS

Stores	Typology	Number of observed consumers*	Number of consumers who bought a product	Dominant Purchase Per Consumer	Decision making time**		
					<1min	1-3min	>3min
Contidente Norteshopping	Hypermarket	23	11	#1 2 units of shampoo (3/11)	7 (30%)	9 (40%)	7 (30%)
Contidente Colombo	Hypermarket	121	96	#1 1 unit of shampoo alone (46/96) #2 More than 1 unit of shampoo (19/96), usually in large formats #3 1 unit of shampoo + 1 unit of conditioner (10/96)	46 (38%)	52 (43%)	23 (19%)
Contidente Amadora	Hypermarket	107	72	#1 1 unit of shampoo (31/72) #2 More than 1 unit of shampoos (15/72)	60 (56%)	23 (21%)	24 (22%)
Contidente Antas	Hypermarket	32	19	#1 1 unit of shampoo (11/19) #2 1 serum (3/96)	3 (10%)	12 (38%)	17 (53%)
Contidente Bom Dia Laranjeiro	Supermarket	33	14	#1 1 unit of conditioner (4/14) #2 2 units of shampoo (3/14)	19 (58%)	7 (21%)	7 (21%)
TOTAL		316	212		135 (43%)	103 (32%)	78 (25%)

19

Table 4: Insights from store observations about all observed consumers (1/2)

Source: Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

**Approximated total decision making time in number and percentage (out of number of observed consumers).

INSIGHTS ABOUT ALL OBSERVED CONSUMERS

Stores	Typology	Number of observed consumers*	Consumers who bought a product				
			Total	Buyers who went straight to a specific brand		Buyers who went through the whole consumer decision journey	
				Number	Brands bought	Number	Brands bought
Continente Norteshopping	Hypermarket	23	11	8	#1 Elvive (4/8) #2 Fructis(3/8) #3 TRESemmé (1/8)	3	#1 Pantene (1/3) #2 Ultra Suave (1/3) #3 TRESemmé (1/3)
Continente Colombo	Hypermarket	121	96	49	#1 Elvive (19/49) #2 Pantene (12/49) #3 Nivea (6/49)	47	#1 Elvive (12/47) #2 Gliss (10/47) #3 Pantene (7/47)
Continente Amadora	Hypermarket	107	72	55	#1 Elvive (9/55) #2 Pantene (7/55) & Fructis (7/55) #3 Ultra Suave (6/55)	17	#1 Elvive (4/17) #2 Nivea (3/17), Fructis (3/17), Gliss (3/17)
Continente Antas	Hypermarket	32	19	12	#1 Elvive (5/12) #2 Nivea (3/12)	7	#1 TRESemmé (2/12) Remaining brands: Revlon, Ultra Suave, Gliss, Nivea, Elvive
Continente Bom Dia Laranjeiro	Supermarket	33	14	10	#1 Elvive (4/10) #2 Ultra Suave (2/10) Remaining brands: Pantene, Fructis, My Label, Linc	4	#1 Ultra Suave (3/4) #2 Linc (1/4)
TOTAL		316	212	134 (63%)		78 (37%)	

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Table 5: Insights from store observations about all observed consumers (2/2); **Source:** Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

INSIGHTS ABOUT ALL OBSERVED CONSUMERS

63% of consumers who bought a product are in the “loyalty loop”

63% of consumers who bought a product behaved as if they had already entered the consumer decision journey's loyalty loop - in regard to a specific brand or product - **skipping the first two stages of the consumer decision journey** and **starting their shopping journey immediately at the “buying” stage**.

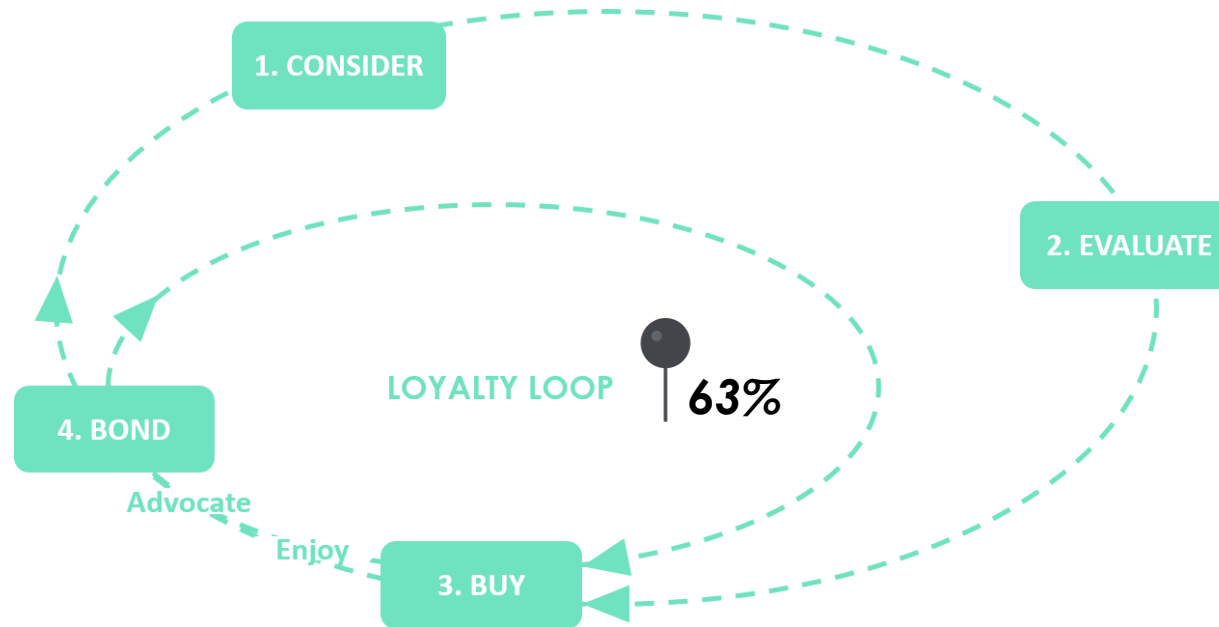
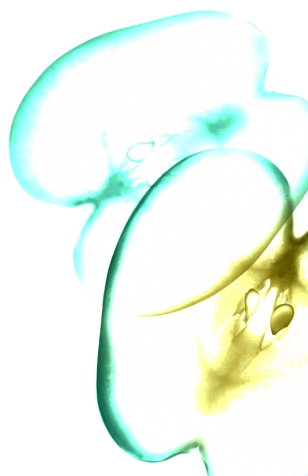


Figure 7: Consumer decision journey of 63% of consumers who bought a product
Source: McKinsey

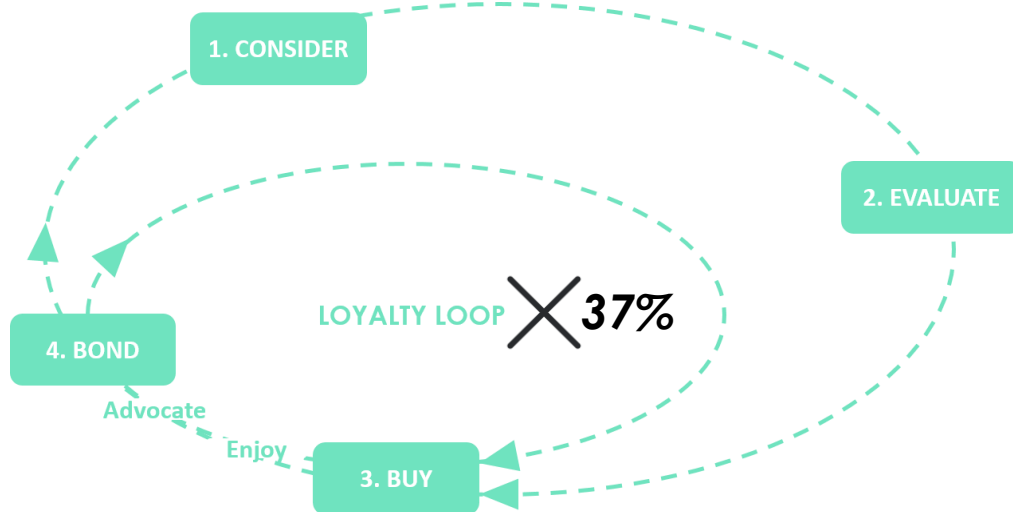


INSIGHTS ABOUT ALL OBSERVED CONSUMERS

37% of consumers who bought a product went through the whole consumer decision journey

ORDER OF CRITERIA EVALUATION:

→ 1st price → 2nd smell → 3rd type of hair match



1. CONSIDERATION STAGE

- 37% of the observed consumers who bought a product only showed intention of buying the **brands which were on promotion**.

2. EVALUATION STAGE

- This group of observed consumers **firstly compared prices**, then **smelled** the products and only then **read** the labels.
- When accompanied, the observed consumers tended to discuss the final purchase with their shopping partner.

3. BUYING STAGE

- The majority of observed consumers took **less than 1 minute** in front of the haircare shelves **before heading to the purchase moment**.

4. BONDING STAGE

- **16/78 of consumers** who went through the whole consumer decision journey **behaved as if they were not entirely convinced with their purchase**: they took a product but eventually placed it back on shelf to take a different one, some consumers even left the hair care area with one product, only to come back some time later to switch products.

Figure 8: Consumer decision journey of 37% of consumers who bought a product

Source: McKinsey

STORE OBSERVATIONS

RESEARCH QUESTION I

HOW DO MILLENNIALS BEHAVE WITHIN THE PORTUGUESE HAIR CARE MARKET?

23

The following research insights are based on the comparison of Millennials aged 18-25 and Millennials aged 26-35, with consumers aged older than 35 years. Moreover, behavioral differences between genders are analyzed.

INSIGHTS ABOUT MILLENNIAL CONSUMERS AGED 18-35 YEARS

Gender	Age	Number of observed consumers*	Number of brands considered**		Number of consumers who purchased	Number of products bought		Decision Making Time***			Consumer behavior before purchase		Brands bought most frequently (3 best sellers)
			≤2	>2		1	>1	<1min	1-3min	>3min	Buyers who went straight to a specific brand	Buyers who went through the whole consumer decision journey	
Male	18-25	8	6	2	5 (63%)	4	1	13 (41%)	5 (16%)	14 (43%)	3	2	#1 Ultra Suave (2/5) & Linic (2/5) #2 Pantene (1/5)
	26-35	24	21	3	21 (88%)	17	4				14	7	
Female	18-25	68	49	19	41 (60%)	19	22	55 (39%)	46 (33%)	39 (28%)	23	18	#1 Elvive (17/41) #2 Gliss (9/41) #3 Pantene (7/41)
	26-35	72	62	10	47 (65%)	29	18				39	8	
TOTAL		172	138	34	114 (66%)	69	45	68 (40%)	51 (30%)	53 (30%)	79 (69%)	35 (31%)	

24

Table 6: Insights from store observations about Millennial consumers aged 18-35; **Source:** Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

**Brands that were, at least, attentively observed by consumers.

***Approximated total decision making time in units and percentages (out of n° observed consumers).

INSIGHTS ABOUT MILLENNIAL CONSUMERS AGED 18-35 YEARS · AGE AND GENDER COMPARISON



18-25 Years Old

- The majority of the observed consumers aged between 26 and 35 considered maximum 2 brands (55/76).
- **Less likely to purchase** (46/76).
- More likely to **enter consumer journey again** before they buy a product (20/46).

26-35 Years Old

- The majority of the observed consumers aged between 26 and 35 considered maximum 2 brands (83/96).
- They seem to be more **likely to make a purchase** (68/96).
- **Less likely to enter consumer journey** again but still also enter this stage (15/68).
- **Elvive** (21/68), **Nivea** (15/68) and **Pantene** (7/68) are their most frequently bought brands.



- **There are significantly fewer male consumers** (32/172).
- They present a **higher probability in buying a haircare product** when entering the haircare area (26/32).
- Purchase of dominantly **one product** (21/26).
- Visit the shop either **alone or in company of their girlfriend**.
- **9/32 started the consumer journey from the beginning**.
- **Revlon** and **Pantene** (4/26) are the most frequently bought brands.
- **13/32 spent only less than 1 minute** to decide but 14/32 spent **more than 3 minutes** to decide.



- Significantly **more female consumers** (140/172).
- Present a **lower probability than men to buy a haircare product** when entering the haircare area (88/140).
- Purchase **either 1** (48/88) **or more than 1 unit of products** (40/88).
- Usually shop **alone or in company of a family member** (parent, children etc.).
- **26/88 started the consumer journey from the beginning**.
- **Elvive** was the most frequently bought brand (35/88) but also Pantene was purchased by 11/88.
- **55/140 spent less than 1 minute** to decide and **46/140 spent 1 to 3 minutes** to decide.

INSIGHTS ABOUT CONSUMERS AGED >35 YEARS

Gender	Number of observed consumers*	Number of brands considered**		Number of consumers who purchased	Number of products bought		Decision Making Time***			Consumer behavior before purchase		Brands bought most frequently (3 best sellers)
		≤2	>2		1	>1	<1min	1-3min	>3min	Buyers who went straight to a specific brand	Buyers who went through the whole consumer decision journey	
Male	26	23	3	16 (62%)	12	4	16 (62%)	5 (19%)	5 (19%)	7	9	#1 Elvive (6/16) #2 Pantene (4/16) #3 Fructis (3/16) & Nivea (3/16)
Female	118	90	28	82 (70%)	52	30	51 (43%)	47 (40%)	20 (17%)	42	40	#1 Elvive (34/82) #2 Pantene (14/82) & Ultra Suave (14/82) #3 Fructis & Gliss(7/82)
TOTAL	144	113	31	98 (68%)	64	34	67 (47%)	52 (36%)	25 (17%)	49 (50%)	49 (50%)	

26

Table 7: Insights from store observations about consumers aged > 35 years

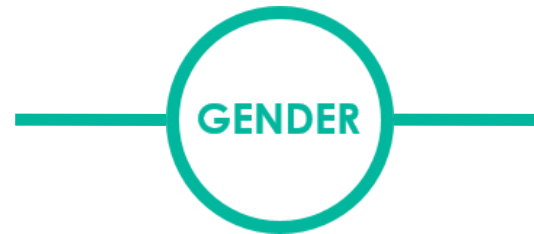
Source: Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

**Brands that were, at least, attentively observed by consumers.

***Approximated total decision making time in units and percentages (out of n° consumers observed).

INSIGHTS ABOUT CONSUMERS AGED > 35 YEARS · GENDER COMPARISON



- **Only a few male consumers were observed** (26/144).
- Men **consider few brands** (23/26).
- **2 out of 3 men bought a product** (16/26).
- Male consumers who made a purchase, bought most likely **one product** (12/16).
- Men are very **fast in their decision making process**, needing less than a minute to decide (16/26).
- They go either straight to the shelves (7/16) or go through the whole decision journey again (9/16).
- Men bought most frequently **Elvive** (6/16) and **Pantene** (4/16).



- About 1 out of 4 female consumers considered more than 2 brands (28/118).
- **About 2 out of 3 women bought** at least one product (82/118).
- Women **bought either one** (52/82) **or more than one products** (30/82).
- They are spending **up to three minutes in front of the shelves** (98/118).
- Women go either straight to the shelves (42/82) or go through the whole decision journey again (40/82).
- Women bought most frequently **Elvive** (34/82), followed by **Pantene and Ultra Suave** (14/82).

MAIN CONCLUSION



Figure 9: Millennial consumers (18-35y)
Source: Getty Images

VS.



Figure 10: Consumers > 35 years
Source: Getty Images

As our analysis suggests, there seems to be a **similar consumption behaviour** amongst Millennial consumers and consumers aged above 35. Nonetheless, there are some **exceptions**:

- **Millennials take more time in front of the shelves** than consumers aged more than 35 years old.
- **Millennials are more likely to be in the loyalty loop** when comparing with consumers aged above 35 years of age.

STORE OBSERVATIONS

RESEARCH QUESTION 2

WHY HAS FRUCTIS LOST SO MUCH MARKET SHARE?

The following research insights are based on the analysis and comparison between Fructis consumers and Pantene consumers' decision journeys. No age groups are defined to address this research question.

INSIGHTS ABOUT FRUCTIS CONSUMERS

Stores	Typology	Number of observed consumers*	Number of consumers who consider** Fructis	Number of consumers who bought a product	Number of consumers who bought Fructis				Purchases****
					Male	Female	Total	% out of consumers who considered***	
Continente Norteshopping	H	23	3	11	1 (26-35y)	1 (26-35y) 1 (>36y)	3	100%	Hidra-caracóis (2) + Oleosos (2)
Continente Colombo	H	121	16	96	0	3 (18-25y) 1 (26-35y) 1 (>36y)	5	31%	Hidra-caracóis (7)
Continente Amadora	H	107	17	72	3 (>36y)	3 (26-35y) 4 (>36y)	10	59%	Hidra-caracóis (1) + Oleosos (3) + Força e Brilho (4) + Denso&Abundante (1) + Nutri Repair3 Butter (1) + Cresce Forte (2)
Continente Antas	H	32	3	19	0	1 (18-25y)	1	33%	Hidra-caracóis (1)
Continente Bom Dia Laranjeiro	S	33	3	14	0	1 (>36y)	1	33%	Hidra-caracóis (1)
TOTAL		316	42	212	4	16	20	48%	

30

Table 8: Insights from store observations about Fructis consumers (1/2); **Source:** Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

**Consumers who approximated the Fructis' shelves and demonstrated a significant interest in buying a product.

***These values are related to the amount of consumers who actually bought a certain quantity of Fructis' products.

**** The number of Fructis' products bought does not necessarily match the number of people who bought the brand's products since some consumers bought more than one unit (x).

INSIGHTS ABOUT FRUCTIS CONSUMERS

Stores	Typology	Number of observed consumers*	Number of consumers who bought Fructis						
			Total	Buyers who went straight to Fructis shelves			Buyers who went through the whole consumer decision journey		
				Male	Female	Total	Male	Female	Total
Continente Norteshopping	H	23	3	1	2	3	0	0	0
Continente Colombo	H	121	5	0	2	2	0	3	3
Continente Amadora	H	107	10	2	5	7	1	2	3
Continente Antas	H	32	1	0	1	1	0	0	0
Continente Bom Dia Laranjeiro	S	33	1	0	0	0	0	1	1
TOTAL		316	20	3	10	13	1	6	7

31

Table 9: Insights from store observations about Fructis consumers (2/2)

Source: Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

INSIGHTS ABOUT FRUCTIS CONSUMERS

Fructis consumers' decision journey goes as follows:

- **13 out of 20 consumers who bought Fructis went straight to a specific product.**
- **7 out of these 20 consumers went through the whole consumer decision journey.**

Most consumers **picked up** a product, put it in the **shopping cart** and **left without even considering other products and/or brands**. Even if other brands around are on promotion, they do not consider them, staying loyal to Fructis.

Assumptions from these observations:

- The majority of Fructis' consumers are buying the **Fructis' product** instead of the **Fructis' brand**.
- Only **42 out of the total number of observed consumers**, 316, **considered** Fructis and the majority of these consumers **went** directly to **products only targeted for curly hair** (12/25 Fructis products bought).
- Within the consumer decision journey, those consumers are **positioned in the loyalty loop**, since they seem to be **satisfied with the product** and do not even consider others.

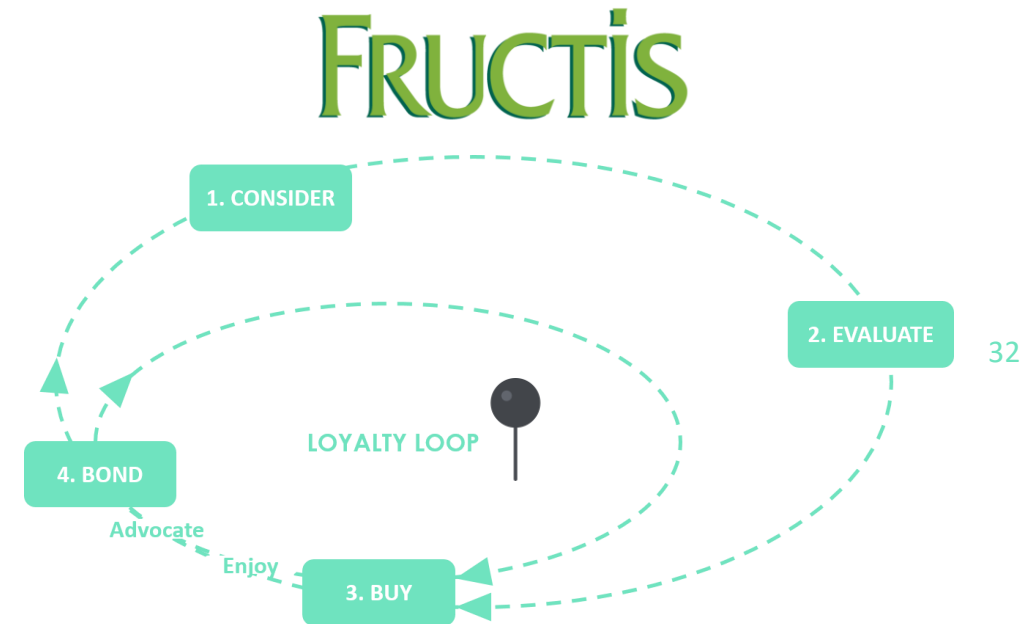


Figure 11: Consumer decision journey of Fructis consumers
Source: McKinsey

"Garnier Fructis never sells, only when it is on promotion, because the price of both 750ml and 250ml shampoos decreases a lot"

Worker of Continente Bom Dia Laranjeiro

INSIGHTS ABOUT PANTENE CONSUMERS

Stores	Typology	Number of observed consumers*	Number of consumers who consider** Pantene	Number of consumers who bought a product	Number of consumers who bought Pantene				Purchases****
					Male	Female	Total	% out of consumers who considered***	
Continente Norteshopping	H	23	6	11	1 (18-25y)	0	1	17%	1 shampoo + 1 third product
Continente Colombo	H	121	32	96	2 (26-35y) 3 (>36y)	5 (18-25y) 2 (26-35y) 10 (>36y)	22	69%	19 shampoos + 4 conditioners + 6 third products + 1 product 2in1
Continente Amadora	H	107	22	72	2 (26-35y)	1 (18-25y) 2 (26-35y) 6 (>36y)	11	50%	5 shampoos + 3 third products + 3 products 2in1
Continente Antas	H	32	3	19	0	0	0	0%	0
Continente Bom Dia Laranjeiro	S	33	7	14	0	1 (>36y)	1	14%	3 third products***
TOTAL		316	70	212	8	27	35	50%	

33

Table 10: Insights from store observations about Pantene consumers (1/2); **Source:** Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

**Consumers who approximated the Pantene shelf and demonstrated a significant interest in buying a product.

***These values are related to the amount of consumers who actually bought a certain quantity of Pantene's products.

****"Third products" stand for other kind of products, apart from shampoos and conditioners.

INSIGHTS ABOUT PANTENE CONSUMERS

Stores	Typology	Number of observed consumers*	Number of consumers who bought Pantene						
			Total	Buyers who went straight to Pantene shelves			Buyers who went through the whole consumer decision journey		
				Male	Female	Total	Male	Female	Total
Continente Norteshopping	H	23	1	0	0	0	1	0	1
Continente Colombo	H	121	22	3	11	14	2	6	8
Continente Amadora	H	107	11	2	7	9	0	2	2
Continente Antas	H	32	0	0	0	0	0	0	0
Continente Bom Dia Laranjeiro	S	33	1	0	1	1	0	0	0
TOTAL		316	35	5	19	24	3	8	11

34

Table 11: Insights from store observations about Pantene consumers (2/2)

Source: Primary Research

*Consumers who approximated the haircare area and demonstrated a significant interest in buying a product.

INSIGHTS ABOUT PANTENE CONSUMERS

Out of the observed consumers who bought Pantene:

- **69% went straight to the shelves.**
- **31% went through the whole consumer decision journey.**

The consumers who went straight to the Pantene shelves, **considered some Pantene products, picked one up, put it in the shopping cart and left without considering other brands.**

The majority of Pantene consumers starts a new consumer decision journey only within the brand's product range, not considering other brands. **They do not seem to be product buyers, but brand buyers.**

However...

Pantene has **some "outsider" consumers**

People **considering other brands on promotion**

People who **considered Fructis and Ultra Suave**

Usually, those **outsiders read the labels and smell the products they considered before Pantene.**

Despite having a **"2 for 1" promotion** in Norteshopping and Colombo, **only 3 out of 23 consumers understood** that Pantene was on promotion **and bought 2 bottles** of the same product, in order to take advantage of the promotion.

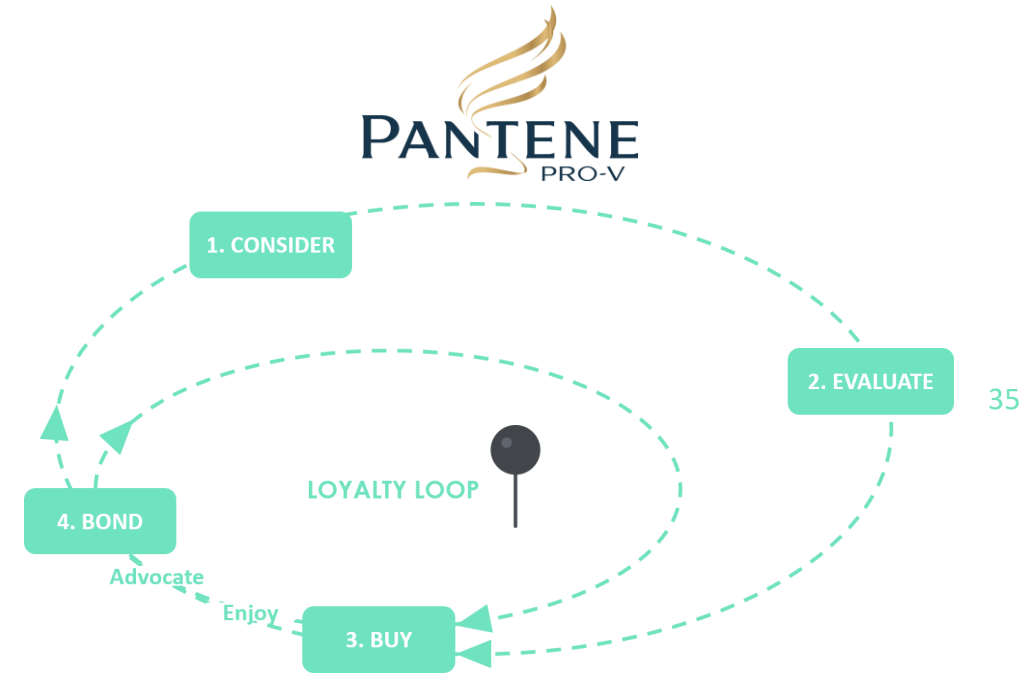


Figure 12: Consumer decision journey of Pantene consumers
Source: McKinsey

STORE OBSERVATIONS

MAIN FINDINGS

Takeaways from the analysis of all data collected from store observations.

MAIN FINDINGS

The majority of the observed consumers who bought a product behave as if they have **entered the loyalty loop** since they went **straight towards a specific brand or product**.

Two main purchasing behaviors can be identified, both within consumers who have entered the loyalty loop and consumers who have not.

BEHAVIOR 1

Within the group of observed consumers who **appear to have entered the loyalty loop of the consumer decision journey**, we have identified two sub-groups of consumers: “Product Buyers” and “Brand Buyers”.

- **Brand Buyers** go straight to a specific brand, for instance, Pantene consumers.
- **Product Buyers** go straight to a specific product, for instance, Fructis consumers.

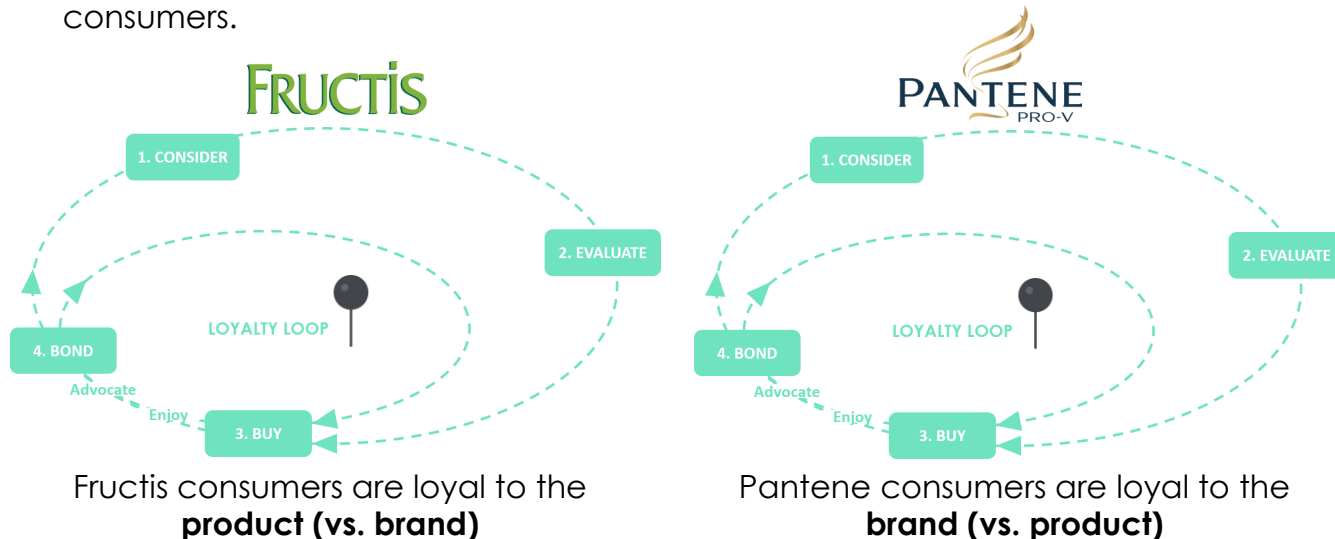


Figure 13: Consumer decision journeys of Fructis and Pantene consumers
Source: McKinsey

BEHAVIOR 2

Within the group of observed consumers who go through all the stages of the consumer decision journey, we have identified consumers whose purchasing behavior seems to be **driven by price and promotion**.

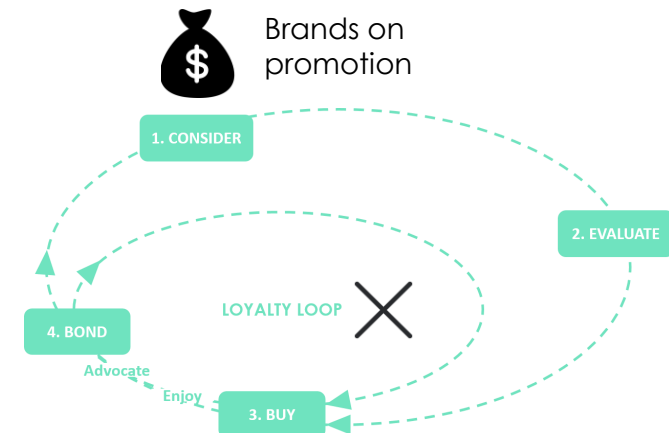


Figure 14: Consumer decision journeys of consumers driven by promotion
Source: McKinsey



AGENDA

1. Introduction
2. Context
- 3. Brand Diagnostic**
 - 3.1. Methodology
 - 3.2. **Research Insights**
 - 3.2.1. Store Observations
 - 3.2.2. In-depth Interviews**
4. Additional Research: Individual Contributions to the Branding Lab
5. Recommendations
 - 5.1. Anticipated SWOT Analysis and New Fructis Positioning
 - 5.2. Communication Strategy
 - 5.3. Addressing Communication Objectives
6. Conclusion
7. Limitations
8. References

IN DEPTH INTERVIEWS

RESEARCH QUESTION I

HOW DO MILLENNIALS BEHAVE WITHIN THE PORTUGUESE HAIR CARE MARKET?

39

The following research insights are based on the analysis of the data collected through in-depth interviews conducted with Millennial respondents.

RESPONDENT OVERVIEW

In order to address this research question, in total 33 in-depth interviews are conducted. The respondents are aged between 18 to 25 and 26 to 35, in order to enable insights about possible differences between these age groups. Moreover, the sample is also divided in terms of gender and social class, as the table below illustrates.

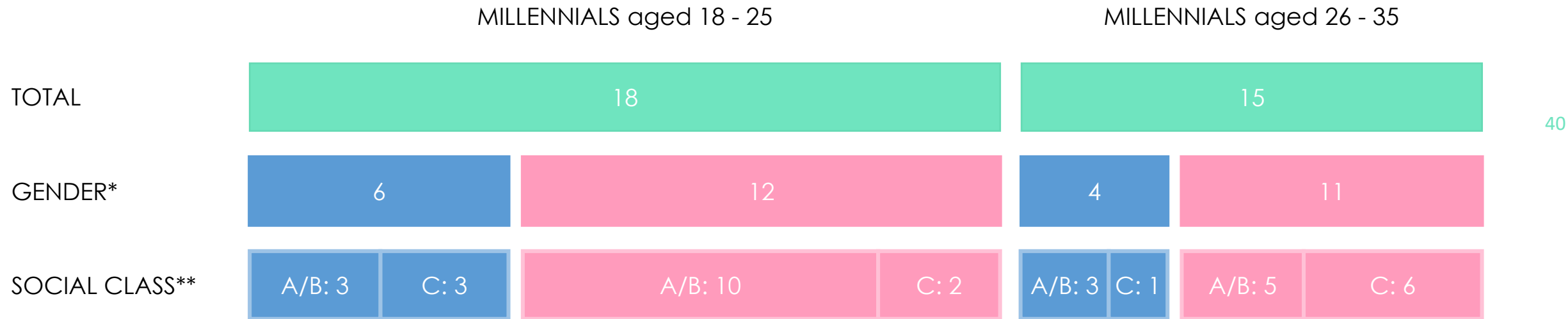


Table 12: Sample overview of Millennials

Source: Original Content

*The color "Blue" stands for Male and the color "Pink" stands for Female respondents.

**See classification table in Exhibit 7.

MILLENNIALS APPROACH TO HAIRCARE

Based on our research, it appears that the behavior of Portuguese Millennials regarding hair care is guided by **two distinct orientations**:

- **Perfection Orientation:** The **vast majority** of consumers* searches for **effective products** to address their hair concerns, not caring about potentially harmful ingredients for both their health and for the environment. They choose brands like Pantene or Elvive with 'technology-based formulas' to achieve immediately visible results such as curl definition, straightening or damage repair.
- **Natural Orientation:** A **few consumers**** are willing to **sacrifice results** to a certain extent in exchange for the use of **more natural ingredients**. They choose brands such as Ultra Suave with "natural ingredient-based formulas" to preserve hair health.

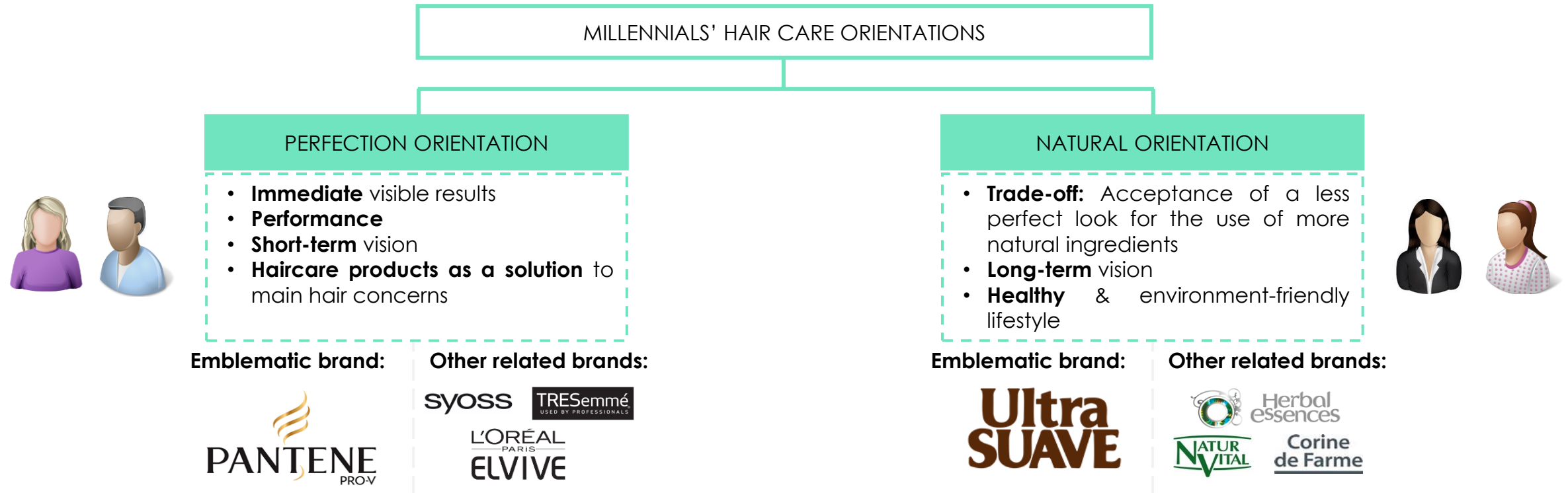


Figure 15: Two distinct orientations of the hair care market in Portugal according to the Millennials perceptions
Source: Original Content

*31/33 respondents of the Millennials target.

**2/33 respondents of the Millennials target.

PERFECTION ORIENTATION PROFILES

In order to better illustrate these orientations, **two consumer profiles were created for each orientation**. Note that while the “perfection orientation” profiles are put together as a collection of insights from all respondents out of this orientation, the “natural orientation” profiles are descriptions of two actual respondents.



Joana*

- **Gender:** Female
- **Age:** 22
- **Hair type:** Straight Hair
- **Level of Education:** Masters Degree
- **Occupation:** Student

- Brands currently in the bathroom:
 - **Tresemmé Liso Keratina** shampoo.
 - **Elvive** Conditioner.
- Nutritional Habits: very few restrictions, only avoiding sugar and looking for low carb food.
- Environmental Concerns: minimum efforts concerning recycling.

“For me it is decisive that my hair **looks straight** after showering.”

“I like my hair **smelling good** after washing it.”

“I am very careful about my **appearance**, and that is why I'm **avoiding high calories** food. I even read the labels of the food products.”



Pedro*

- **Gender:** Male
- **Age:** 24
- **Hair type:** With dandruff
- **Level of Education:** Masters Degree
- **Occupation:** 1st Job

- Brands currently in the bathroom:
 - **Head & Shoulders** shampoo.
- Nutritional Habits: avoiding fried food and red meat.
- Environmental Concerns: environmental friendly, recycling for example.

“I try **not to eat fried food** and if the price difference is not too big, I might choose the **whole-grain product**.”

“I **just use shampoo**, I don't need anything else. My hair looks fine just with shampoo.”

“I look for shampoos that are **anti-dandruff** and that have a good smell.”

“I just want to have my **hair clean**.”

NATURAL ORIENTATION PROFILES



Ana*

- **Gender:** Female
- **Age:** 26 years old
- **Hair type:** Curly
- **Level of Education:** Masters Degree
- **Occupation:** Commercial

- Brands currently in the bathroom:
 - **Ultra Suave** shampoo and conditioner.
 - **Gliss** shampoo and conditioner → due to an **expert advice** and because she thinks that switching brands is healthier and less damaging for her hair.
 - Oil spray from **Real Natura** brand.
- Nutritional Habits: the healthiest possible, eating all kinds of food.
- Environmental Concerns: environmental friendly only to a certain point, recycling and doing the basic efforts that depend on her.

"I use the **oil spray from Real Natura** because it keeps my hair healthy and without split in the ends. [This spray] is really **natural, without chemicals.**"

"**Garnier Ultra Suave** is a brand that I have used since I was young [...]. In my mind, it is kind of related with childhood, a brand that I perceive as **caring** and **transparent.**"

"Recommendations of other people can be a reason for me to buy [as it happened with **Gliss**]. But the advice has to come from someone who really knows what [he or she] is saying and with a similar **natural mind-set** [as mine]."



Maria*

- **Gender:** Female
- **Age:** 35 years old
- **Hair type:** Extremely dry
- **Level of Education:** 9th Grade
- **Occupation:** Domestic Worker

- Brands currently in the bathroom:
 - **Ultra Suave** shampoo, conditioner and mask.
 - **Herbal Essences** shampoo, conditioner and mask.
 - **Corine de Farme** shampoo, conditioner and mask.
- Main reasons why **Ultra Suave** and **Herbal Essences** are her favourite brands:
 - **Floral, fruity and "natural"** smells.
 - **Avocado and olive** ingredients.
 - New Herbal Essences' **transparent and natural appearance** packaging.
- Nutritional Habits: seeks for the **most natural and least processed food** products, always checks the origin of the product on the label → rejects chemicals, hormones and buys all healthier alternatives.
- Environmental Concerns: environment-friendly, having taught her children to recycle.

"Ultra Suave has one with olives. I recently bought it just to have a **healthier look** [...]. **I only give my children either Ultra Suave or Corine de Farme.**"

"**I don't give salmon from "aquacultures" to my children** because those are full of hormones!"

IN DEPTH INTERVIEWS

RESEARCH QUESTION 2

WHY HAS FRUCTIS LOST SO MUCH MARKET SHARE?

The following research insights are based on the analysis of the data collected through in-depth interviews conducted with Fructis Users and Fructis Droppers.

RESPONDENT OVERVIEW

In order to address this research question, in total 32 in-depth interviews are conducted with respondents who are currently using or who have used Fructis in the past. The following table shows the sample distribution in terms of gender and social class. Most of the respondents are part of the personal network of the team and therefore fall in the age group of 18-25, young Millennials.

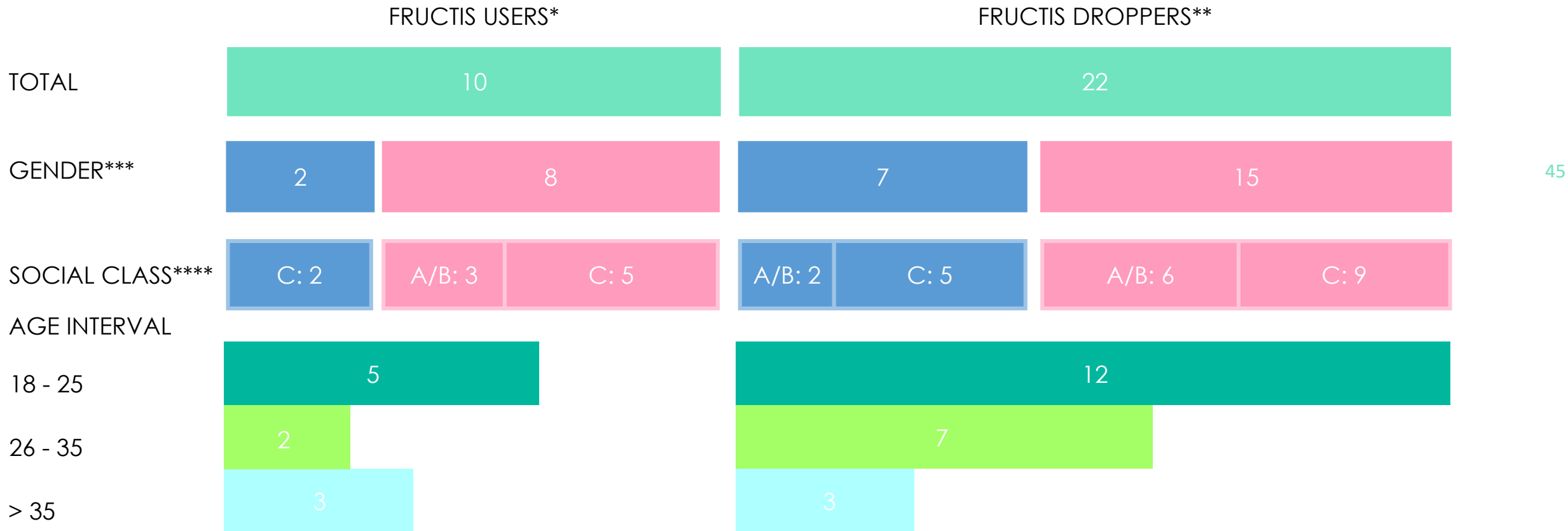


Table 13: Sample overview of Fructis users and droppers; **Source:** Original Content

*Fructis Users are the ones who have bought Fructis at least once in the past 4 months.
 **Fructis Droppers are the ones who have bought Fructis at least once in the past 7 years but not in the last 4 months.
 ***The color Blue stands for Males the color Pink stands for Females.
 ****See classification table in Exhibit 7.

CONSUMER PROFILE

The following insights define the Fructis Users and Fructis Droppers profile in more detail.

FRUCTIS USERS:

They have **discovered the brand through commercials** many years ago.

- They have been **using Fructis for several years**, while still switching brands from time to time.
- They currently **have at least two different brands** in their bathrooms.

*"I remember **seeing the ads on TV**. A group of friends going to the beach, I think. They looked carefree, adventurous."*

Video Editor, 27, Female

*"I only use **Fructis, Pantene or Syoss** because these are the ones that work best for my hair."*

Undergraduate Student, 21, Female

*"I have been using it **ever since**."*

Masseuse, 56, Female

FRUCTIS DROPPERS:

- Most of them **tried** the brand for the first time **many years ago**.
- They **used** the brand only **for a short time**.

*"I discovered the brand through **commercials**. The curls were super elastic."*

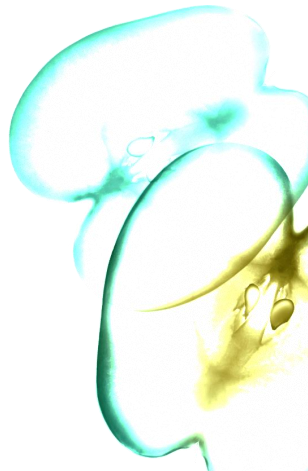
Undergraduate Student, 21, Female

*"This brand is super old, **I tried it a long time ago**."*

Domestic, 50, Female

*"I only used it for **4 to 5 months**."*

Master Student, 23, Female



BRAND PERCEPTION

The following word clouds* illustrate the perception that the respondents have of the current Fructis brand. It can be stated that both Fructis Users and Fructis Droppers perceive the brand very similarly.

FRUCTIS USERS:

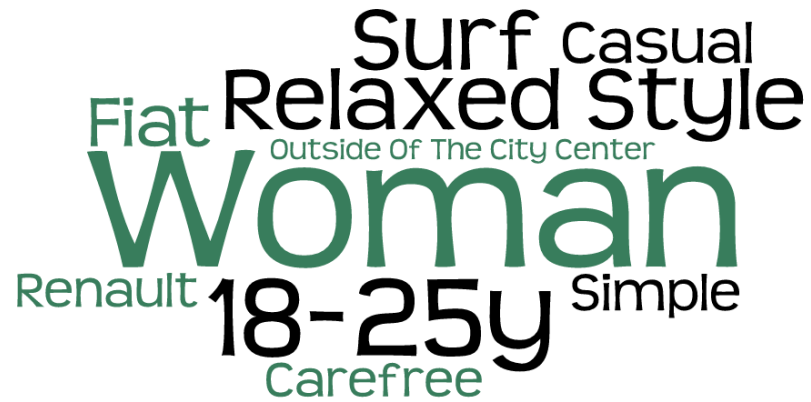


Figure 16: Word Cloud about the Brand Perceptions of Fructis by Fructis Users
Source: Original Content

"The **typical surfer**, with a **surfer hairstyle**, casual, surfer style."
Video Editor, 27, Female

FRUCTIS DROPPERS:



Figure 17: Word Cloud about the Brand Perceptions of Fructis by Fructis Droppers
Source: Original Content

"Wearing a **relaxed, hippie style**, a bikini and a headband on her head, **holding a surfboard**."
Highschool Student, 18, Female

* The larger the font size, the more frequently was the word mentioned by the respondents sample. Pantene's brand perception can be found in Exhibit 8.

REASONS FOR USING FRUCTIS

Two main reasons for using Fructis can be identified: **Fragrance** and **Formulas**.

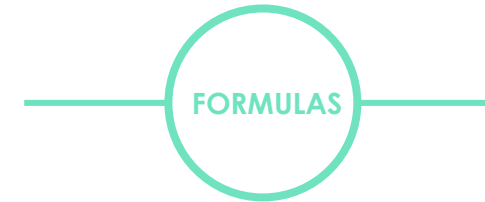


- **8/10** respondents mentioned they **liked the products' fragrances**.

*"I really like the **smell of the brands products**."*
Undergraduate Student, 21, Female

*"I love the **Fructis smell!** It is very characteristic, I really like it."*
Master Student, 22, Female

*"I like that it **smells very fruity**"*
Controller, 23, Female



- **7/10** respondents mentioned they are **pleased that the formulas address their hair concerns**, namely Hydra-Caracóis and Oleosos.
- They seem to **buy Fructis for the product and not for the brand**, they are not necessarily loyal to the brand but to a specific product.

*"I like the **smell** and **how straight my hair** looks."*
Highschool Student, 18, Female

*"I really like the **smell** and the fact that **my hair does not stay oily**. To be honest, there's nothing I don't like about the brand."*
Undergraduate Student, 21, Female

*"I like how it makes my hair look, **how it shapes my curls**."*
Bank Teller, 22, Male

REASONS FOR DROPPING FRUCTIS

Two main reasons for dropping Fructis can be identified: Formulas, Fragrances but also other reasons as stated below.

FRAGRANCES

- **9/22** respondents mentioned they **were disappointed with the results** because the formulas not addressing their hair concerns.
- **4/22** respondents said they **suffered an adverse reaction**.
- **3/22** respondents said they were **advised against the brand**, being told by family or friends not to use it.

"I liked the smell but I hated the fact that when I first bought it my hair started falling."

Financial Analyst, 24, Male

"Everyone at home told me Fructis would dry out my hair [...] I had a very bad experience, my hair got really dry."

Domestic, 50, Female

"It didn't make my hair soft enough. Also, my friend told me Fructis is not good because of the chemicals used to create such a strong scent."

Master Student, 22, Female

FORMULAS

- **5/22** respondents mentioned they were **displeased with the products' fragrances**. Note that despite this, **14/22** respondents mentioned they **liked the fragrance**.

"I stopped using it because I grew tired of the smell."

Accounting Technician, 23, Male

"The smell is like what the name says, it's super fruity, not my thing."

Undergraduate Student, 21, Female

"I didn't like the smell very much, it was too intense."

Master Student, 23, Female

OTHERS

- **2/22** respondents mentioned they **felt the brand was not directed toward them**, that they did not fit the target audience.
- Other respondents seem to **have no specific reason** to drop the brand, they just **did not like it in particular** and did not prefer it over other brands.

"I don't remember why I stopped using it. Maybe because I wanted to try another brand or maybe because my hair was tired of the same shampoo."

Controller, 23, Female

"I like the smell but honestly I wouldn't use it nowadays because I have the idea that it's more for women"

Engineer, 26, Male

CONCLUSIONS • WHY HAS FRUCTIS LOST SO MUCH MARKET SHARE?

Fragrances and Formulas are both reasons for Fructis Users to buy the product and for Fructis Droppers not to buy the brand anymore. Especially in terms of dropping, the following assumptions can explain why Fructis lost so much market share:

1. The most mentioned reason for dropping the brand is the **poor quality of the formulas**. Some formulas are perceived to be good but, overall, **Fructis is not considered a quality brand**.
2. second most mentioned reason for dropping is the **fragrance** which seems to be a feature **consumers either 'love' or 'hate'**, given that it was also mentioned as a positive attribute by the majority of Fructis Droppers.
3. Other reasons are **adverse reactions** to the formulas. **Bad experiences trigger word-of-mouth** which establishes a **reputation of being too chemical and even harmful**. Moreover, some respondents **do not find Fructis good or appealing** enough to keep using it.

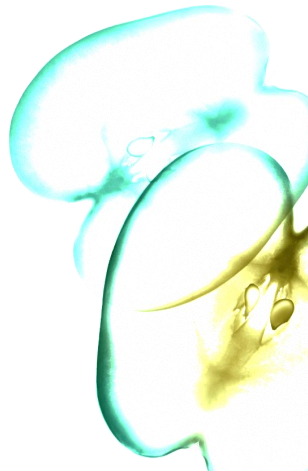
50

*"I **don't think Fructis is a quality brand**, not from my experience."*

Hairstylist, 28, Female

*"I didn't dislike it but it simply looked like plastic, so then I stopped using it because I thought it looked **a bit chemical** and I **wanted something more natural**."*

Public Agent, 52, Male



IN DEPTH INTERVIEWS

MAIN FINDINGS

51

The following slides present the takeaways from the analysis of all data collected through in-depth interviews.

MAIN FINDINGS · WHERE DOES FRUCTIS STAND NOWADAYS?

Considering the **two opposite millennial hair care orientations** previously identified, one can see that **nowadays Fructis fits neither**:

- The overall poor quality of the formulas, with few exceptions, **excludes Fructis from the “perfection orientation”**, and
- The strong use of chemical ingredients **excludes Fructis from the “natural orientation”** as well.

Moreover, as a middle-market brand, not significantly cheaper than competitors, and by not fitting either perception of performance, **Fructis is not perceived as a good purchase** compared to competitors.

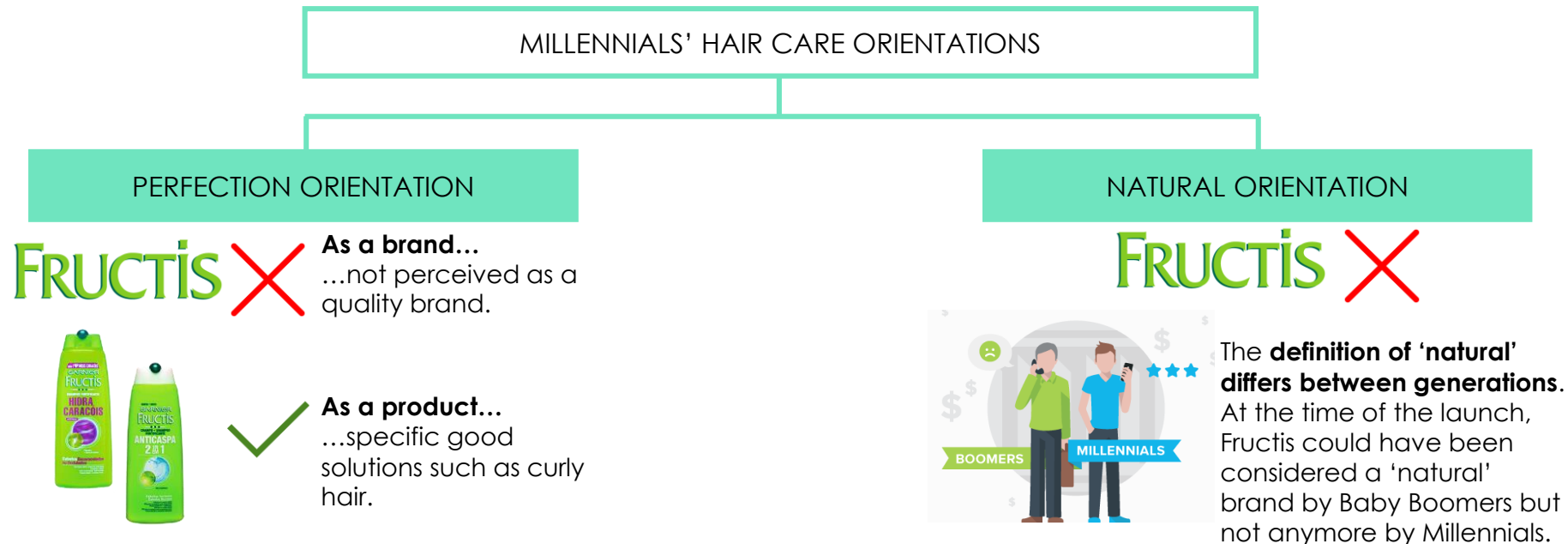
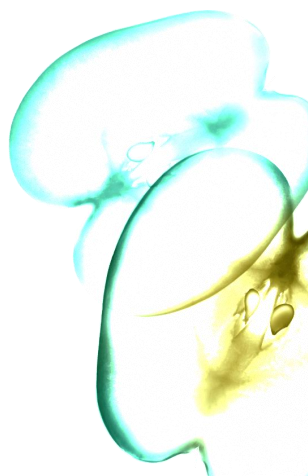


Figure 18: Categorization of Fructis within the two existing orientations
Source: Primary Research



MAIN CONCLUSION · WHERE DOES FRUCTIS STAND IN THE FUTURE?

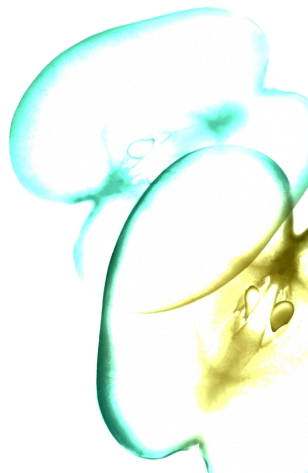
As stated before, **Portuguese Millennial hair care consumers are mostly 'perfection-oriented'**. In fact, the number of 'natural-oriented' Millennials in Portugal is still very small and, so far, this trend seems to be restricted to trendsetters.

Considering both the context of the Portuguese hair care market as well as **Fructis' new identity** based on the combination of fruit extracts with technology, one can see that the brand aims at **creating a new hair care orientation**, one that combines aspects from both current orientations in new formulas which are at the same time more natural and more effective.

Since the relaunch of Fructis implies the rise of a new haircare orientation in the Portuguese market, a way must be found to **convince Millennial consumers to shift towards the new orientation**.



Figure 19: Orientations of the relaunched Fructis brand in Portuguese hair care market
Source: Branding Lab Research



AGENDA

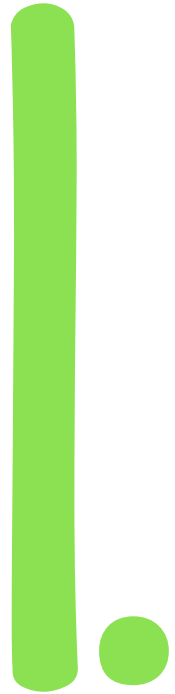
1. Introduction
2. Context
3. Brand Diagnostic
 - 3.1. Methodology
 - 3.2. Research Insights
 - 3.2.1. Store Observations
 - 3.2.2. In-depth Interviews
- 4. Additional Research: Individual Contributions to the Branding Lab**
5. Recommendations
 - 5.1. Anticipated SWOT Analysis and New Fructis Positioning
 - 5.2. Communication Strategy
 - 5.3. Addressing Communication Objectives
6. Conclusion
7. Limitations
8. References

LIST OF INDIVIDUAL TOPICS

Before starting to work on our recommendations for the relaunch of Fructis, and following the rules of the Branding Lab, five additional researches were conducted, one by each student, in order to further nurture our global recommendations. The following table presents the list of the individual topics and respective authors.

SUBJECT OF THE INDIVIDUAL TOPIC	STUDENT NAME
1. Who Are The Portuguese Millennials And How Do They Behave?	Madalena Pereira
2. How Can Brands Break The Stigma That Natural Ingredient-based Products Perform Less Than Chemical Ones?	Corina Schütze
3. How Can Brands Take Advantage Of The Superfruit Trend?	Gabriela Martins
4. How Are Natural Brands Digitally Communicating Their Definition Of Natural?	Margarida Pinheiro
5. How Are Hair Care Brands Digitally Communicating To Millennials In Portugal?	Madalena Amaral





Who Are The Portuguese Millennials And How Do They Behave?

“If it wasn’t shared, it never happened.”
(Britton, 2015)

This topic intends to provide an understanding about who Millennials are, how they behave and their lifestyle. It focuses on the identification and exploration of the main paradoxes generated by a World of changes, exploring how Fructis can integrate these insights in the relaunch of its new positioning in order to successfully communicate to its main target.



A WORLD OF PARADOXES

MILLENNIALS' WAY OF BEING AND BEHAVING IN A DAY-TO-DAY LIFE

| Brands should be connected with Millennials providing them great experiences.

Millennial Generation, also called "Generation Y" → Were born between **1980** and **the early 2000s**.

Grew up in a time of **economic disruption** as well as a **great technological development and innovation**, presenting one of the biggest revolutions in the whole mankind's history: **the Internet**.

Millennials **highly value pleasant experiences, sharable adventures** and are **afraid of missing out** ("The Gbrief", 2015) → **need to share** every new experience **through pictures**, most of the times the so-called **selfies, and videos** posts.

"Experiences help millennials to **define their identity** and creating memories (...)"

Sarbjit Nahal, 2015



(...) the motivation of the sharing is not to allow others to participate in the experience but to **prove that one was actually there**. (...) **if it wasn't shared, it never happened**.

Britton, 2015

The **most used digital platforms** that support this "**sharing concept**" are Facebook, Instagram, Snapchat, WhatsApp, Pinterest, Twitter, Blogs and YouTube, allowing Millennials to be always online and in contact with people.

Millennials are typically **curious, picky** and **pursue to remain well-informed** (Abreu, 2016).

Therefore, before deciding which brand/product to buy, they are used to make **deep researches in blogs** and **other digital platforms** that provide them opinions and comments from people that already experienced it, believing the information collected is honest and authentic.



A **great first experience is key to achieve consumer loyalty**. Otherwise, Millennials will not buy/use the brand again.

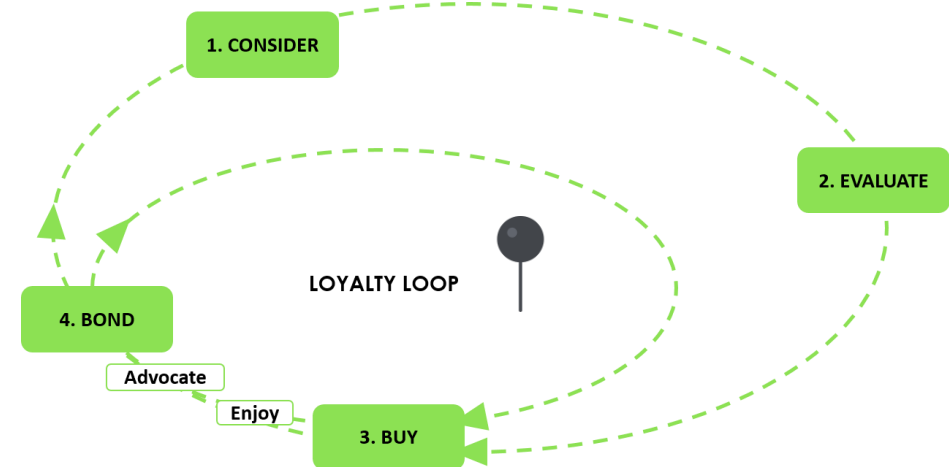


Figure 20: Millennials' consumer decision journey regarding a great first experience
Source: McKinsey

A WORLD OF PARADOXES

OVERVIEW

| Millennials are living in a World of transitions and constant changes. Therefore, they are full of paradoxes.

WORLD OF CHANGES

Technology has changed the way people communicate and interact:

- Online: **Internet** has changed people's lives and how companies do business, **allowing a high connection** between people, services and products around the world.
- Offline: **Modern advances in machinery and science** also impact everyday life. For example, the **ease of travelling and the positive impact in medicine**, allowing people leaving longer.

MILLENNIALS' PARADOXES

On one hand...

LIFE PRIORITIES	Millennials are working hard...
HEALTHY & ENVIRONMENTAL CONCERNS	Millennials are becoming healthy and green...
INFORMATION CHANNELS	TV is still a major channel...
LEISURE & ACTIVITIES	They like to be at home...
RELATIONSHIP WITH FASHION INDUSTRY	Need to belong...

But on the other hand...

- Work and life are closely connected.
- Recycling is still a "room to improve".
- Social media is taking over.
- Social events are highly valued.
- Desire for differentiation.

1st PARADOX: LIFE PRIORITIES

| **Although Millennials are working hard and want to make a lot of money, they enjoy a work-life balance and prefer to work with bright people.**

MILLENNIALS WORK HARD...

When it comes to life priorities, baby boomers are very much work-centric, being extremely hardworking and motivated by position, perks and prestige (Kane, 2016).

Even though generation X is more work-life balanced than the latter, it is still considered a workaholic generation (Mirza, 2016).

Because they live in a world of transitions, Millennials are still influenced by who **wants to make a lot of money** and **has a fulfilling career** (Nielsen, 2015).



Figure 21: Illustration of the Millennials' desire to make a lot of money
Source: Google Images

VS.

... BUT THEY ALSO VALUE OTHER THINGS.

Although Millennials desire to make a lot of money, there has been a **shift on the way of looking at life** priorities.

Millennials prefer to **have a job that they really enjoy, valuing mostly the good work environment**. They see **work and life as closely intertwined**. Therefore, they want to have a different relationship with their manager, in which they can count on them for non-work-related issues (Adkins, 2016).



Figure 22: Illustration of the good work environment
Source: Google Images

A WORLD OF PARADOXES

2nd PARADOX: HEALTHY AND ENVIRONMENTAL CONCERNS

| **Although Millennials still lack in recycling, most of them desire to have a responsible lifestyle and to do well for the planet.**

MILLENNIALS ARE BECOMING HEALTHY AND GREEN...

As we found out in our global project, Millennials are becoming more and **more concerned about health and environment**:

- They **tend to practice more sports** and make **healthier food choices**.
- Millennials are the generation with the **strongest commitment to sustainability**.

There is a great **willingness to pay a premium price** for food with great benefits* and, consequently, **to pay a premium price for products and services** that come from companies with a **strong social and environmental commitment** (Nielsen, 2014).

In terms of haircare, it is the generation **most “interested in natural ingredients and ethical quality [brands]”** (Euromonitor International, 2016).

Especially in Europe and the US, Millennials pay attention to labels that indicate the phrases **“all natural”** or **“free from ...”** (Euromonitor International, 2016).

VS.

...BUT RECYCLING IS STILL A “ROOM TO IMPROVE”.

In fact, Millennials are becoming more healthy and environmental conscious, when it comes to “pay more for an environmentally-safe version of a product” (Hower, 2013). However...



Figure 23: Illustration of a healthy and environmental conscious Millennial
Source: Google Images



“(...) Millennials actually lack in everyday green activities that have no cost.”

Ramos, 2016

When it comes to recycling, they still have some room to improve. **Older generations are significantly more likely than Millennials to recycle**, separating all the recyclables from the rest of the trash and reusing grocery bags, while Millennials claim to do so (Hower, 2013).

Turn recycling into an interesting and sharable experience would be an effective way of changing Millennials’ mind-set.

3rd PARADOX: INFORMATION CHANNELS

| Although social media is taking over, TV is still a powerful and effective channel for transmitting a message that must be considered in brands' communication strategy.

TV IS STILL A MAJOR CHANNEL...

TV is still a most used channel, followed by search engine and social media sites, mainly social networks (Nielsen, 2015). These are, with no doubt, the ones that stand out the most. However, few Millennials referred to use other kind of channels.

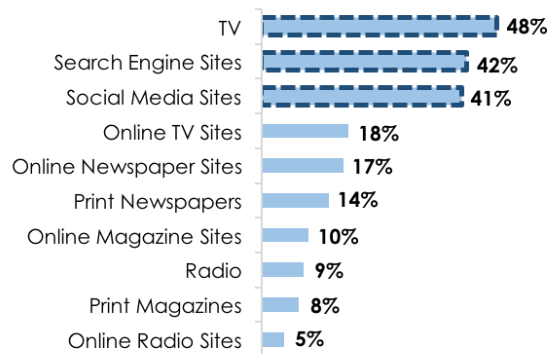
VS.

...BUT SOCIAL MEDIA IS TAKING OVER.

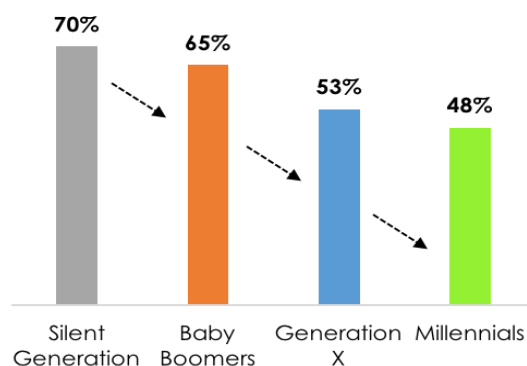
A survey from Urban Land Institute (2013) also considers **TV the most used channel** in Millennials' free time but **does not identify search engine sites as one of the most used. Instead**, it considers **Social Media**, mainly Social Networks, much more essential in their free time.

Social Media has been increasing a lot among generations (Global Web Index, 2014):

Millennials' Most Used Information Sources Globally



Global Evolution of TV's Usage among Generations



Social Media Active Usage among Global Generations

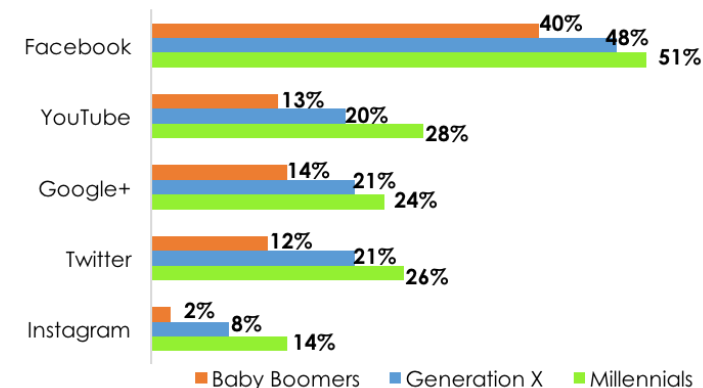


Figure 24: Millennials' most used information sources globally
Source: Nielsen

Figure 25: Global evolution of TV's usage among generations
Source: Nielsen

Figure 26: Social Media active usage among global generations
Source: Global Web Index

A WORLD OF PARADOXES

4th PARADOX: LEISURE & ACTIVITIES

| Although Millennials enjoy indoor activities, they mostly value great moments and enviable experiences which they can share with friends through social media, making them feel part of their generation's community.

THEY LIKE TO BE AT HOME...

When it comes to **favorite activities in free time**, Millennials have different top priorities or the same ones ordered differently, depending on genders. While firstly **men prefer to watch TV, women prefer to spend time with family** (Urban Land Institute, 2013):

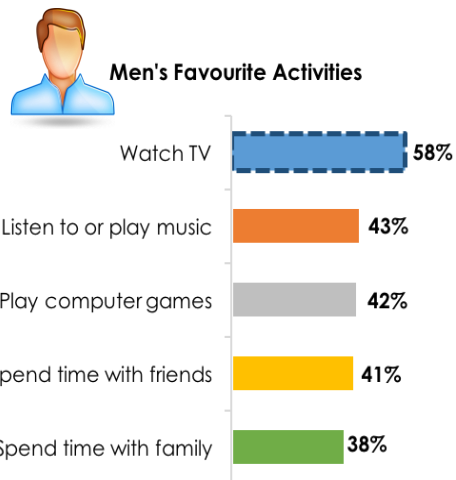


Figure 27: Men's favourite activities
Source: Urban Land Institute

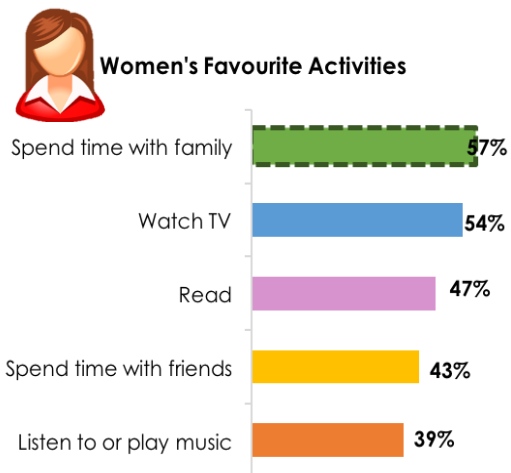


Figure 28: Women's favourite activities
Source: Urban Land Institute

VS.

...BUT SOCIAL EVENTS ARE HIGHLY VALUED.

Millennials tend to value more active and funny activities that provide a valuable and sharable experience ("The Gbrief" and Nielsen, 2015):

- Clubs
- Summer Festivals
- Tend to practice more sports
- Travelling



Figure 29: Illustration of valuable and sharable experiences
Source: Google Images



Since Millennials are the future generation, brands and businesses should adapt themselves to Millennials' way of being and behaving to succeed. Therefore, due to this Millennials' big **desire of sharing every experience**, being online everywhere and every time, **shared and digital businesses**, such as **Uber, Airbnb and Spotify**, gained success (Jornal de Negócios and Visão, 2016). These are three successful concepts among them, once offer multiple experiences at a cheaper price.

Millennials' favorite places to **get together with friends** are **their own home or friends' one**.

A WORLD OF PARADOXES

SUCCESSFUL EXAMPLES REGARDING MUSIC INDUSTRY AND TRAVELLING

The **most successful and popular festivals** among Millennials are (Blitz, 2014):

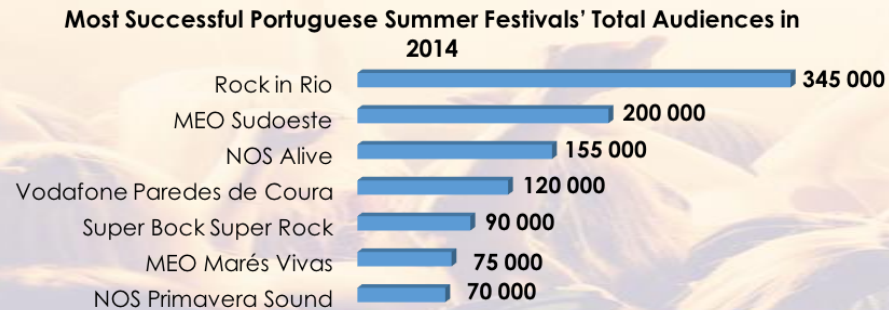


Figure 30: Most successful Portuguese summer festivals
Source: Blitz



SPOTIFY, A SUCCESSFUL BRAND

Apart of festivals, Millennials enjoy music itself. Therefore, **Spotify** is an effective digital music platform that gives **access to millions of songs** for every taste in **every moment**, creating so a **connection with Millennials**. Spotify **enhances listeners' experience** with musical content, providing them a platform where they can listen to music, make their own playlists and follow friends or artists' ones.



UBER

Technologic platform that connects people who want to move around the city and people available to take them where they want to go. Customers' **first contact** with the brand is **through an APP** to call the driver.

The brand offers several experiences during the whole process of using it:

1. Flexibility on choosing the type of service, such as UberX and UberBLACK
2. Access to driver's name and picture as well as to car brand and registration
3. Allows the customer to observe the driver going to pickup location in real time
4. Possibility of sharing the route with family or friends, guaranteeing security until the arrival
5. Automatic and electronic payment without need for cash



Digital platform that **allows people to advertise, discover and book unique accommodations** around the world.

As the brand itself says "Whether it is an apartment for a night, a castle for a week or a condominium for a month, Airbnb **connects people to unique travel experiences, at several different prices (...)**".

5th PARADOX: RELATIONSHIP WITH FASHION INDUSTRY

| Millennials want to be authentic and have the desire of building their own identity, being less attached to specific brands and creating their own style. Fashion bloggers and “instagramers” have a high impact on Millennials’ consumption decisions.

NEED TO BELONG...

Millennials usually **look for clothes or beauty products on their smartphones** to get an **update** about the latest trends in real time and to **check others’ opinions** on the digital platforms (Reuters, 2014). Others’ approval is highly value and essential for this generation.



VS.

...BUT DESIRE FOR DIFFERENTIATION.

Although they take into account others’ opinions, Millennials are becoming **more individualistic** in terms of clothing and beauty brands, being **less attached to specific brands** and **prefer to create their own style** (Reuters, 2014).

“They no longer want to be a walking billboard of a brand. Individualism is important to them, having their own sense of style”.

Michael Scheiner, 2014

Due to that **desire of creating their own identity**, Millennials are big fans of **fashion bloggers** and **“instagramers”**, once they know how to engage and provide unique and authentic experiences to them.

Figure 31: Illustration of Millennials’ own style
Source: Google Images

KEY TAKEAWAYS FOR FRUCTIS' RELAUNCH

Key takeaways from the research

1. The **first experience with Fructis has to be fantastic**. Otherwise, Millennials will not buy it again. Fructis has to recognize that the success of the relaunch will be difficult, once the first brand experience in the market was not successful among Millennials and the bad memories may still be in their minds.
2. Due to a World of changes, **Millennials are full of paradoxes**.
3. Millennials are **willing to pay a premium price for healthy food and for products** that come from companies with a **strong social and environmental commitment**.
4. **TV is still a powerful and effective channel** that Fructis must take into consideration for transmitting a message.
5. Although Millennials enjoy indoor activities, they **want to feel part of their generation's community**.
6. Although Millennials **wish to be authentic and have their own identity/style**, they **value others' opinions and approval**.

Aspects to consider for Fructis' relaunch

1. The new Fructis must move completely away from the current Fructis.
2. Fructis must come up with several brand positioning in order to attract everyone.
3. Fructis must communicate its more natural and healthier formulas.
4. Fructis must be present both in TV and Social Media.
5. Fructis must provide new and memorable experiences to Millennials, allowing them to share with friends through social media.
6. Fructis must build an aspirational status.

2. How Can Brands Break The Stigma That Natural ingredient-Based Products Perform Less Than Chemical Ones?

“Learning [happens] by appealing to [hand], head [and] heart”
(Pestalozzi, 1746-1827)

This topic intends to determine on what Fructis should focus its communication efforts in order to re-educate consumers about their negative performance perception towards natural ingredient-based products. First we formulize a model that is then tested on three brands that have already entered the market with a natural ingredient-based product. Subsequently, best practices are withdrawn from this analysis, in order to guide Fructis towards a successful relaunch communication strategy.



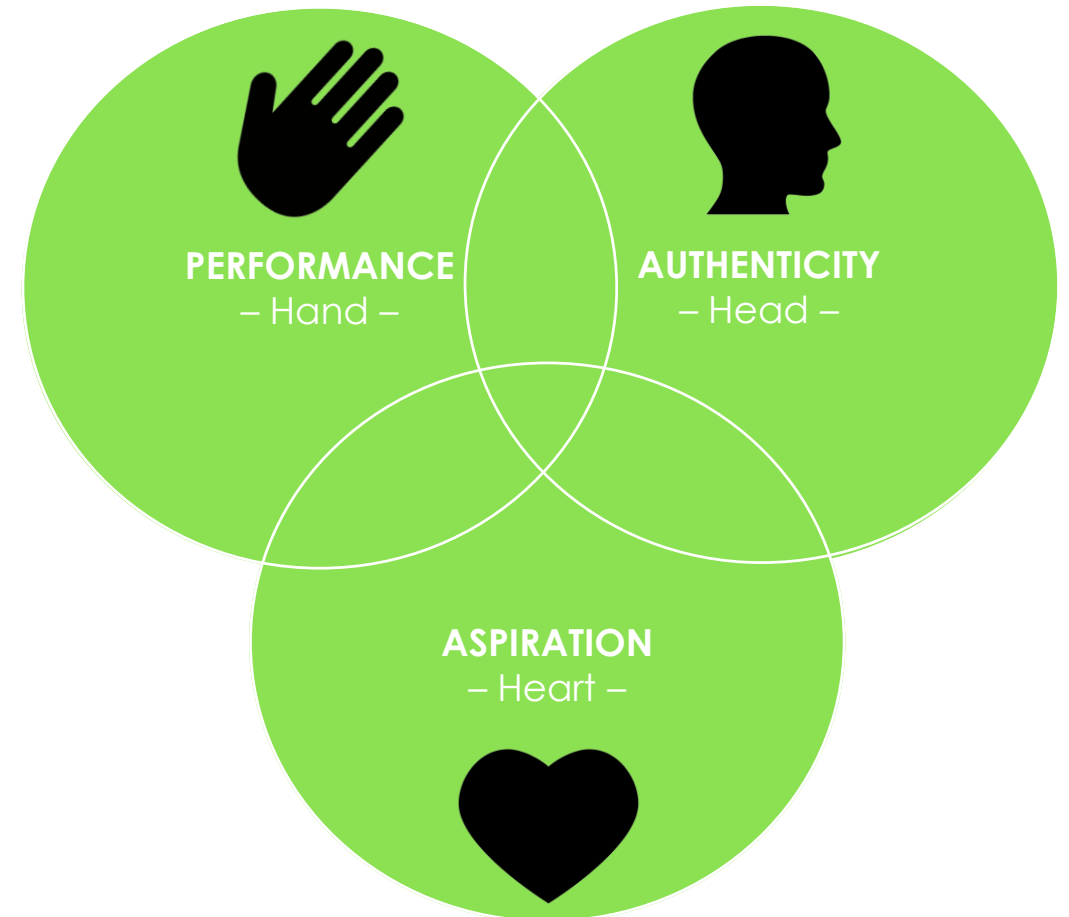
MODEL

In order to address the question, “how brands can break the stigma that natural-ingredient products perform less than chemical ones”, a certain “learning” has to take place to implement a change in the consumers mind to change their behavior. Therefore, the approach of Johann Heinrich Pestalozzi (1746 – 1827) who believed that “**learning [happens] by appealing to the [hand], head, [and] heart**” (Witoszek, 2016) is taken as a foundation for a model. Three categories are defined in order to address the consumers “learning” process:

1. “**Performance**” of a product/service in form of understanding and experiencing it, appeals to the “**Hand**”.
2. “**Authenticity**” of practices, ingredients and communication appeal to a consumers “**Head**”.
3. “**Aspiration**” of a product/brand touches the “**Heart**”.

Approaching this model from the millennial generation point of few, several overlaps can be identified according to their priorities, values and wishes. For millennials “[g]etting a good deal is a priority“, but **they won’t compromise on quality**”, as well as the fact that “**Millennials put a premium on [authenticity]**”. Moreover, with the raise of social media also digital narcissism occurred, so that **Millennials are seeking for inspiration and attraction** by brands as “[t]hey value self-expression and artistic pursuits” (Nielsen, 2014).

The hypotheses that all three previously mentioned categories have to be addressed in order to enable a successful re-education of consumers, **will be tested on the following slides.**



67

Figure 32: Three categories to address a consumers learning process;
Source: Original Content, based on Witoszek (2016)

ANALYSIS • OVERVIEW

In order to test the proposed model three praxis examples will be analyzed, in order to better understand the practical implications of each category (Performance, Authenticity, Aspiration) and to understand the validity and feasibility of the model. For this analysis, the following brands, which aim to **attract more health and/or environmental conscious consumers** with their natural ingredient-based products, are selected:

- **Coca-Cola Life** is a line extension of the Coke line of The Coca-Cola Company (TCCC) that takes advantage of the natural sweetener Stevia and a natural sugar substance. It differs in terms of taste from the other Coke drinks of TCCC, as Stevia **has a slightly bitter aftertaste, but still** contains caffeine. The product contains about one third less sugar than Coca-Cola Original (Koch, 2016).
- **Stella McCartney** is a brand of the Kering group. The fashion label uses mostly natural fabrics since the very beginning and with that is creating “wearable, effortless and timeless clothes” (Keinan and Crener, 2015).
- **Tesla** is a pioneer in electric car manufacturing. It speeds up very fast and includes a digital component (Dyer et al., 2015) that enables delivering “continuously [...] software innovations [...] in both hardware and software” (Blank, 2015).

As communication efforts can serve more than one category at the same time, in the following analysis, one aspect is defined to be part of one category on basis of the estimation of the category in which it has the biggest impact.

68

Natural ingredient: Stevia Leaf Extract and Cane Sugar	
Performance	<input type="checkbox"/>
Authenticity	<input type="checkbox"/>
Aspiration	<input type="checkbox"/>

STELLA/McCARTNEY	
Natural ingredient: Natural Fabrics	
Performance	<input type="checkbox"/>
Authenticity	<input type="checkbox"/>
Aspiration	<input type="checkbox"/>

Natural ingredient: Electricity	
Performance	<input type="checkbox"/>
Authenticity	<input type="checkbox"/>
Aspiration	<input type="checkbox"/>

Table 14: Brands analysis grid; **Source:** Original Content

BREAKING THE STIGMA

ANALYSIS · COCA-COLA LIFE

PERFORMANCE



Several **blind tests** have proven that many **consumers prefer the Coca-Cola Life** drink over the Original, Zero or Light product (Koch, 2016). Consumers may expect a very sweet taste of a Coke produced by TCCC. As the brands communication strategy is emphasising on communicating this sweet taste, consumers may be motivated to give Coca-Cola Life a try, as the communication is consistent with the idea they have in mind about products of TCCC. As the product contains caffeine, the product has the **same energizing effect** than the consumer is used to from other TCCC cola drinks (Coca-Cola Website, 2016). Consumers are **sharing their positive experiences** with the product via social media channels, especially after the **receive of a free sample drink** (“#GotItFree”).



Figure 33: Comment on Twitter from Coca-Cola Life consumer; **Source:** Coca-Cola Life Twitter Page (2015)



AUTHENTICITY



Coca-Cola Life, with its green packaging and the stating of natural ingredients, is **easily to identified as a healthy drink** (Koch, 2016).

Still, this more health conscious drink receives **limited credibility**, because it **originated from TCCC that is perceived as very unhealthy**. On social media this conflict is also visible, as the brand communicates Coca-Cola Life both as part of a **healthy nutrition** as well as a part of unhealthy nutrition. Moreover, it is mixing the communication about the products **strong sweet taste, that is learned as unhealthy**, with the **strong green labelling in terms of health** and environment (Coca-Cola Instagram Page, 2015, Coca-Cola Twitter Page, 2016).



Figure 34: Coca-Cola Life combined with healthy and unhealthy food; **Source:** Own demonstration based on Coca-Cola Life Instagram Page (2016)



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ASPIRATION



With its **green product branding** Coca-Cola Life may attract health conscious consumers.

Still, the **brand Coca-Cola stands for happiness** and a community of consumers for decades. The red can or font color is characteristic for its products and learned by the consumer. It implies the “symbolic benefit”, that consumers associate Coca-Cola products with “[a certain] taste [and] smell [...]”. By introducing Coca-Cola Life with a green can and white font, the new brand does not take advantage of these benefits (Fragan, 2015). Moreover, because of the distinct labeling, **consumers may struggle to identify the brand** because “the branding in [their] minds does not match that on the shelves” (Fragan, 2015).



Figure 35: Coke line of The Coca-Cola Company; **Source:** Own demonstration based on Beveragedaily



ANALYSIS · STELLA MCCARTNEY

PERFORMANCE



Stella McCartney's goal is to create the designs in a way that **"no compromises for [the] customer"** are created. This approach is successful as her designs are even quoted for instance as a „not-silk-taffeta-but-it-looks-like-it trench coat“. With the fact that even **models** (such as Kate Moss) **and Hollywood stars** (such as Cameron Diaz) are wearing her designs, it is "indirectly" communicated to the masses, that the designs are excellent. Moreover, even **Gwyneth Paltrow** ("actress, singer and food writer") **gave credit to Stella McCartney's designs in public** (Keinan and Crener, 2015). This quote (displayed on the right) was spread, also underlining Stella McCartney's great expertise in design.

"She has all these amazing women who wear McCartney dresses. We all represent different aspects of a woman. . . . [Stella has] something from each of us."

Gwyneth Paltrow
(Keinan and Crener, 2015)



AUTHENTICITY



Stella McCartney is very consistent in her sustainability approach. As the label uses "eco-friendly materials" and procedures since the very beginning, this consciousness is **part of the "brands ethos"**. Also the "commitment to being a **zero deforestation company**" goes in line with this. Stella McCartney is not using her approach to communicate as an "environmental brand" but as a **"responsible brand"**, that reduces attack space from critics who would blame her for instance for traveling by plane. Moreover, her **collaborations with non-profit organizations demonstrate her intrinsic motivation again** (Keinan and Crener, 2015). Her **social media appearance is down to earth**, showing for instance private pictures with her father. This makes her credible and appearing responsible as a human being.

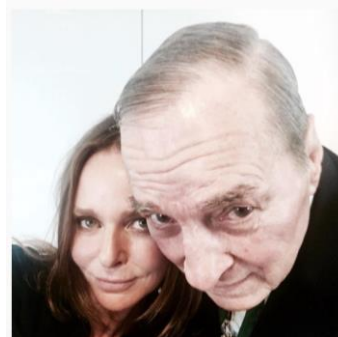


Figure 36: Stella McCartney with her father Paul McCartney on an Instagram; **Source:** Stella McCartney's Instagram Page (2016)



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ASPIRATION



Stella McCartney is creating an **aura of creativity** while collaborating with individuals and groups outside of fashion but inside **entertainment and art**.

Even though, "McCartney [defines] her company as a **luxury house that provides affordable pieces** [...]", which decreases the aspirational aspect of a luxury brand because the brand becomes accessible thereof. Also the substitution of precious for **eco-friendly fabrics**, as such as leather for albeit, has the impact that her pieces are **not necessarily perceived as luxury goods**, because this fabric is usually used in less exclusive products (Keinan and Crener, 2015).



Figure 37: Falabella bag by Stella McCartney; **Source:** MyTheresa.com



BREAKING THE STIGMA

ANALYSIS · TESLA

PERFORMANCE



The technology that enables the car to drive with electricity is designed in a way that **consumers do not experience any restrictions in terms of horsepower** (Dyer et al., 2015). Beyond that, consumers enjoy a **new, unconventional, digital connected driving experience**. **Advanced data about consumers** enables Tesla to offer **tailor made offers** and a **superior services** (Bech Hansen, 2015). **Tesla drivers are frequently communicating on social platforms** about their latest trips with a Tesla and the performance the car is showing. The company communicates the current limitations of the car (long charging time, small network of charging stations) via **offering a prospect of the solution** by heavily investing in "supercharging" stations (Adner, 2015) and by that is building confidence that the electric car industry will further grow in the future.



Figure 38: Instagram Post by Tesla Driver (2017)
Source: Tesla Instagram Page



AUTHENTICITY



Elon Musk, the Steve Jobs of the automotive industry, stands for the fact that **a Tesla purchase is a smart decision**. This becomes obvious in the **digital connection** of the car, that makes **the future oriented approach** even more **understandable and touchable**. Moreover, the investment in "supercharging stations" serves both, an improved service and the **communication of the conviction that electrical cars will be the cars of the future** (Adler, 2015). Moreover, on Social Media the brand is sharing not only pictures of the advanced design and superior connectivity of the car but also the **environmental change, in order to raise awareness for this issue in its audience**. Making the brand more credible. Additionally, celebrity endorsers are not paid (Aaker, 2015), but **real and authentic brand lovers**. Therefore, their fans project the trust from the celebrity to Tesla.



Figure 39: Digital Interior of Tesla car; Source: Tesladaily



ASPIRATION



The design of its Model X reminds on the in the cult movie "**Back to the future**" and by that is underlining the **future-oriented approach of Tesla**, as in this movie this car was a **time machine**. Moreover, through the high price and **exceptional service** (Bech Hansen, 2015) consumers feel exclusive. This established desire might change to a certain point with the introduction of the mass market car, model 3, in 2017 (Tesla Website, 2016). Tesla's **Brand Network Effect** that its created by using technology to form a **passionate community** by the use of public and own social platforms, is the basis for constant interaction with consumers (Bech Hansen, 2015). Thereby, consumers are pulled into the brand community. The high end pictures posted here are related for instance to travel architecture (Tesla Instagram Page, 2016) and therefore put Tesla in **a superior intellectual and aspirational setting**.



Figure 40: Car in the movie "Back to the Future" vs Tesla Model X; Source: Filmycar and Tesla Website



ANALYSIS • CONCLUSIONS

Concluding from the previous analysis, **a consumer "learning process"** that natural ingredient-based products perform as well as chemical ones, is a **challenging task and a successful result seems hard to achieve**. An assessment of the three analyzed brands is stated below. Tesla is the only brand that serves all three categories (Performance, Authenticity and Aspiration). According to this analysis, **the proposed model seems to be valid and appropriate as a foundation** for a consumer re-education effort towards the equivalent performance of natural ingredient-based products.

	<p>STELLA McCARTNEY</p>																			
<p>Natural ingredient: Stevia Leaf Extract and Cane Sugar</p>	<p>Natural ingredient: Natural Fabrics</p>	<p>Natural ingredient: Electricity</p>																		
<table border="0"> <tr> <td>Performance</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Authenticity</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Aspiration</td> <td><input type="checkbox"/></td> </tr> </table>	Performance	<input checked="" type="checkbox"/>	Authenticity	<input checked="" type="checkbox"/>	Aspiration	<input type="checkbox"/>	<table border="0"> <tr> <td>Performance</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Authenticity</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Aspiration</td> <td><input type="checkbox"/></td> </tr> </table>	Performance	<input checked="" type="checkbox"/>	Authenticity	<input checked="" type="checkbox"/>	Aspiration	<input type="checkbox"/>	<table border="0"> <tr> <td>Performance</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Authenticity</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Aspiration</td> <td><input checked="" type="checkbox"/></td> </tr> </table>	Performance	<input checked="" type="checkbox"/>	Authenticity	<input checked="" type="checkbox"/>	Aspiration	<input checked="" type="checkbox"/>
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Performance	<input checked="" type="checkbox"/>																			
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Aspiration	<input checked="" type="checkbox"/>																			

Table 15: Brands assessment; **Source:** Original Content

BREAKING THE STIGMA

KEY TAKE AWAYS FOR FRUCTIS' RELAUNCH

Concluding from this research, **brands should target the “learning” process** of the consumer by building their communication strategy on basis of the three pillars: **Performance, Authenticity and Aspiration**. In terms of actual performance this goal might be achieved faster, as latest technology enabled Fructis to produce formulas out of natural ingredients that do perform but **consumers have to be willing to try and “learn” about the product**. In order to achieve this move, consumers need to take L’Oréal, Fructis and the specific product, as **credible and consistent** in their behaviors. This is especially hard to achieve for brands that came up with a natural ingredient-based product from migration from a chemical ingredient-based product, as seen in Coca-Cola Life and is likely to be the case for Fructis. Moreover, as Millennials, are the generation of self-expression, Fructis should spend efforts to **fit their desired lifestyle**. Best practices from the previous benchmark are stated below and transformed into aspects that Fructis should consider for its relaunch.

Key takeaways from the research

Aspects to consider for the relaunch of Fructis

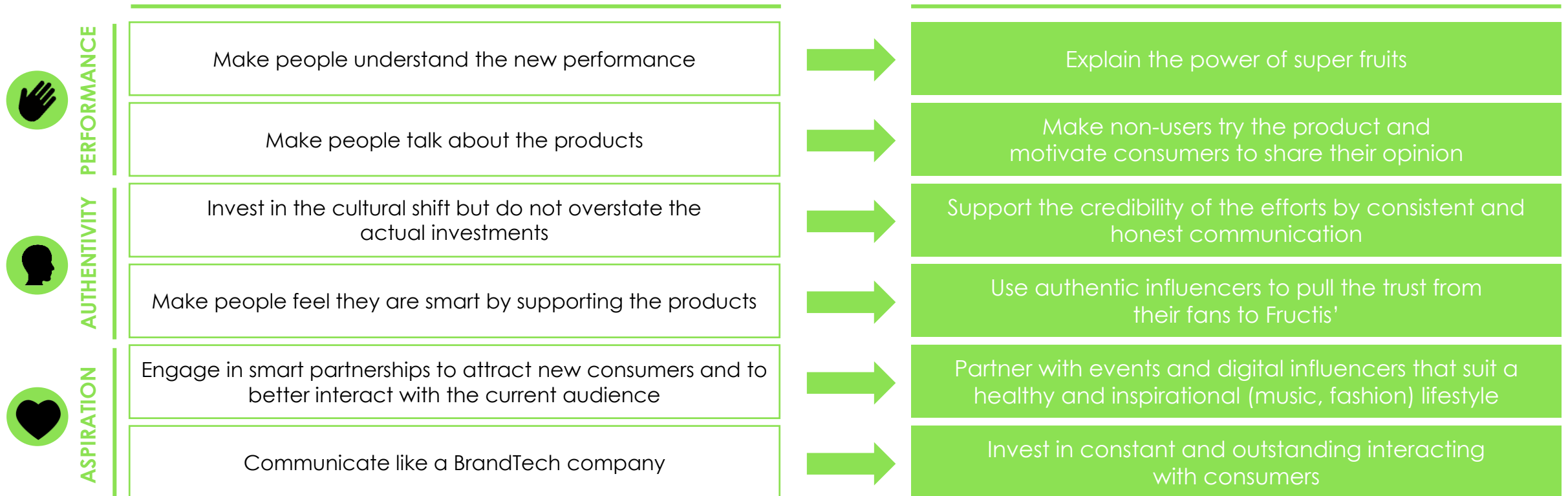


Table 16: Aspects to consider for the consumer “learning process”; **Source:** Original Content

3.

How Can Brands Take Advantage Of The Superfruit Trend?

“Superfruit is not something you find growing on a tree.”
(Crawford and Mellentín, 2008)

This topic intends to determine how Fructis can explore the power of superfruits in its communication efforts in the context of a “perfection-oriented” hair care market. First we explain the concept of superfruits in the context of current health and wellness trends, and then we look at how other brands are using the fruits in their communication strategies. Finally, we assess their suitability to Fructis’ positioning and target audience.



SUPERFRUITS

CONCEPT OF SUPERFRUITS

- **Superfruit is a marketing term designed to promote the fruit's intrinsic health benefits.** It is not something you find growing on a tree but the product of a deliberate business strategy that brings together science, marketing and the growing consumer interest in health, which enables a fruit to be marketed for its superior health benefits (Crawford & Mellentin, 2008).
- **Superfruits tend to be advertised as nuclear blasts of health.** One could argue that almost any fruit qualifies since most natural fruits contain one or more positive nutrient attributes (Rubin, 2012).

SUPERFRUIT TRENDS

- **Superfoods, in particular superfruits, have observed a 'super growth'** (Prepared Foods, 2016). The massive growth of consumer interest in "intrinsic health" through the consumption of products or ingredients which are naturally healthful is behind the surge in superfoods (Starling, 2007).
- **The superfood sensation has spread beyond food and drink.** In 2011-2015, while 43% of products launched globally with the words "superfood," "superfruit" or "supergrain" were in the food category and 11% fell under the drink category, 30% were found in beauty & personal care, 12% in health & hygiene, and 4% in pet food (Prepared Foods, 2016).
- **Superfruits have been the drivers of the wellness trend.** Fruit benefits from a halo of health in consumers' minds and their 'naturalness' is a key factor for marketing 'intrinsic healthfulness', as the word "natural" increasingly becomes synonymous with "healthy" to consumers (Crawford and Mellentin, 2008).



Figure 41: Coconut, a popular superfruit
Source: Getty Images

BENCHMARKS

The following benchmark describes how Tetley UK, Mamma Chia and Compal are exploring the superfruits in their communication strategies.



- 'Super Fruits' line of fruit infusions with added vitamins that carry **EFSA* approved health claims** (Tata Global Beverages, 2016).
- **Thorough communication of relevant and specific health benefits.**
- 'Awesome Woman' superhero character to promote '**super teas**' (Tetley Facebook & Twitter, 2016).
- **Attract health conscious consumers.**



- American brand of organic **juices and snacks made of chia seeds and superfruits.**
- Communication efforts centered around **making the brand aspirational** by promoting a lifestyle of 'holistic health': communication not focused entirely on selling the product, but on **selling the lifestyle.**
- Use of **social media** to communicate brand positioning and **establish emotional connection** with consumers (Mamma Chia Instagram & Blog, 2016).
- **Attract broader audience** beyond health conscious consumers.



- Portuguese brand of fruit juices and snacks.
- Promote products by **associating them with a healthy lifestyle**, mainly through **social media.**
- Great effort on building the status of the brand by using **famous actresses as brand ambassadors** and making use of **Instagrammers** with relatively strong social media following to promote the products (Compal Instagram, 2016)
- **Attract broader audience** beyond health conscious consumers.

THE POWER OF SUPERFRUITS

BENCHMARKS



The Tetley Tea Folk
28/10 · €

Look out world! There's a new girl in town and she's powered by our very own Super Teas...

The Tetley Tea Folk
15/11 às 7:00 · €

The SUPER TEAS have landed! Embrace your inner superhero with our tasty fruit, green or black tea with the power of added vitamins.



Figure 42: Content posted on "The Tetley Tea Folk" Facebook and Twitter pages; Source: "The Tetley Tea Folk" Facebook



Figure 43: Content posted on Mamma Chia's Instagram page; Source: Mamma Chia Instagram



Figure 44: Content posted on Compal's Instagram page; Source: Compal Instagram

ANALYSIS • SUPERFRUIT STRATEGIES

The brands previously analyzed explore the power of the fruits in their communication efforts through **two different strategies**:

“PROBLEM SOLUTION”

- **Communicate thoroughly the fruits' health benefits** by connecting each fruit and the nutrients it provides with the health issue it can solve

- **Attract the more health-conscious consumers** who are actively looking for specific health benefits and more well-informed about such topics



APPROACH

“ASPIRATIONAL LIFESTYLE”

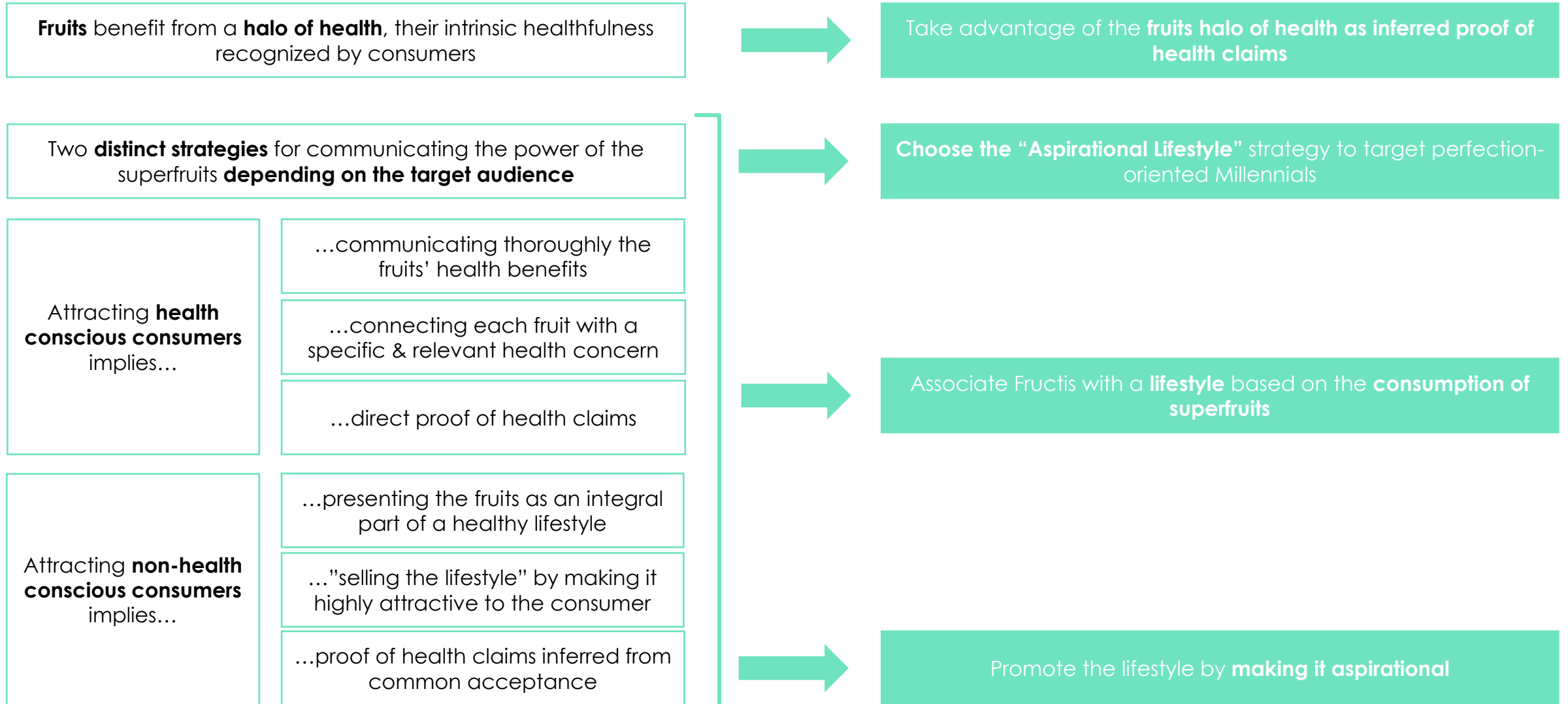
- Communicate the power of the fruits mainly through their **association with a healthy lifestyle**, taking advantage of their halo of health by presenting them as an integral part of an **aspirational lifestyle**

- **Drive consumers to embrace the health & wellness trend** by making the healthy lifestyle it promotes highly desirable

GOAL



KEY TAKEAWAYS FOR FRUCTIS' RELAUNCH



4.

How Are Natural Brands Digitally Communicating Their Definition Of “Natural”?

“The trend toward all-natural products stretches far beyond the grocery store. Consumers today are realizing everything they breathe, intake or apply can and does affect their health, which may cause them to re-assess their personal care products.”

(Lloyd, 2015)

Within this topic, we take insights from the digital approach of four Portuguese pioneer natural brands, by assessing the definitions of “natural” they are using and the way they are communicating them to consumers. After the assessment of the individual brands’ communication efforts, a strategy overview per “natural” brand group is carried out. The allocation of the brands into three distinct “natural” groups being described in the following slide.



INTRODUCTION

The growing demand for natural beauty products in mature markets has caused marketers to reformulate with a higher proportion of “truly natural” ingredients. Consumers are craving for “research-backed natural products that actually work”, keeping on hearing the words ‘organic’ and ‘natural’ in all aspects, whether it’s in their deodorant they use or the food they eat. (Lloyd, 2015). **A new definition of “being healthy” has emerged, health conscious consumers search for nutritional value, natural ingredients and trustable quality.** (Da Silveira, 2016). This particular subject enables the Fructis’ team to **gain additional insights on how to shape and communicate a natural aspirational social statement, one that is extremely disruptive, understood and credible** in the eyes of millennials belonging to both perfection and natural orientation groups defined in our global research.

HOW?

... Through the **analysis of the best and worst practices of four pioneer natural brands in communicating their definitions of “natural”**, bringing together perceptions of both brands and consumers. The brands are clustered into three groups, so that after carrying out an individual brand communication strategy overview, we can determine how Fructis can explore its “natural” enhanced positioning, in the context of a “perfection oriented” hair care market, and in accordance with the “natural” brand group it belongs to.

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Figure 45: Pioneer natural brands classified under three groups; Source: Original Content.

DEFINITION AND COMMUNICATION OF "NATURAL"



go natural

- **Go Natural** is a Portuguese **healthy-food brand** founded in 2004, being the latest acquisition of the Sonae Group's food retail company. (Marketer, 2016)
- **Definition of natural:** Balanced **combination of natural and non-natural ingredients** that create the healthiest and tastiest meals.

*"Eating healthy does not have to be a constant fight or punishment. My mission is to help you "make truces" with food every day, **without fears or guilt, but with balance**" (Lillian Barros, Go Natural Instagram, 2016)*

➔ **#FazAsPazesComAComida**
Campaign

- **"Natural" condition co-produced** with Lillian Barros (nutritionist, blogger and the author of *Juices and Water Detox*).
- Attends to **consumers' different rhythms of "natural"**: offering detox plan classified under 3 levels (1-day, 3-days, and 5-days detoxes, for people who aren't prepared for radical diets). (Garcia, 2015)
- Emphasizes the **importance of exercise and healthy eating**.
- **Communication of health benefits:** connecting each natural element and the nutrient it provides with the health issue it can solve. (Go Natural Facebook and Instagram, 2016)

- In Portugal since 2010, **Lush is a UK based producer of handmade ethical beauty products** (e.g. masks, shampoos, soaps that are 100% vegetarian, 83% vegan, 60% free of conservatives, 38% free of packaging). (Lush Portugal Website, 2016).
- Has products with expiration dates and minimal packaging policy to cut environmental waste (e.g. organic materials). (Buchwalter, 2007)
- Communication of **socially responsible and humanistic brand purposes** on social media (strong disassociation to animal testing).
- **Definition of natural:** The result of an **optimized combination of natural and synthetic safe products**: ➔ Admits the use of parabens in some products and offers an alternative for natural oriented consumers: **Self-preserving products** (currently 65% of its range).(Lush Portugal Website, 2016)

*"If you choose **not to use synthetic preservatives**, your **favorite formulas** have been **rebalanced to be naturally self-preserving** without significant changes in texture, touch, price, or product validity (Lush UK Website, 2016)*

➔ **In PT** : in our visit to the Portuguese Lush store located in the Amoreiras shopping center, we were told by the seller that when the self-preserving range was launched in-store, employees would advise consumers to sample the non self-preserving version, to see the difference for themselves and eventually chose the one they like the most.

LUSH
FRESH HANDMADE COSMETICS

DEFINITION AND COMMUNICATION OF “NATURAL”



- **Pure Leaf was launched once Unilever understood it could not reach out to the group of natural-orientation consumers** through its existent commercial brand, Lipton. The corporate brand decided to **add a line of natural teas to its' brand portfolio, launching Pure Leaf**, as a response to the national growing quest for healthier alternatives in consumer habits revealed by Pure Leaf's Brand Manager, Guilherme Pereira. (Marques, 2014)
- Portuguese multiplatform campaign (TV, outdoors, cinemas, street, sampling) in July 2016. (Marques, 2014).
- **Definition of natural: Ideal combination between natural and non-natural ingredients** that attain a low level of calories (added “touch of sugar” working side-by-side with a natural sweetener called Stevia). (Pure Leaf Portugal Facebook, 2016).
- Replication of the experience of homemade tea through a **higher composition of ingredients with 100% natural origin.** → **no artificial ingredients** like preservatives or coloring. (Pure Leaf Portugal Facebook, 2016).

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-
- **Nestlé Fitness** is a commercial brand that belongs to the Nestlé Swiss Group, world's leading company in nutrition, health and welfare.
 - **Major shift in its initial definition of “natural”:** 3 years ago it **was about achieving slimness (“Flat belly” Program”)** and **now it relies on achieving positive thinking, eating and acting)** → **“Body Positive” Program**
 - **Additional elements to the new definition:**
 - **Combination of natural and non natural** elements that create a tasty breakfast and that reflect positively into one's outer self (Point of Parity with *Go Natural* and *Lush*),
 - Involves the **use of more natural ingredients** (e.g. oat, honey, wheat)
 - **“Natural”** is about having **healthy food habits and working out.**
 - The Portuguese **associated nutritionist, Andreia Santos, substantiates** this **shift in positioning.** (Fitness Portugal Website, Facebook, Youtube, Instagram, 2016).



BENCHMARKS



"Natural" is not perfect.

The current images shared on social media follow a similar messy visual pattern that includes:

- a folded cloth
- an unfinished plate
- unaligned forks
- smashed garlic cloves
- crumbs
- a natural ingredient.



Importance of Wellness (partnership with gymnasium).



"Natural Expertise" tips.



Strong digital presence of superfruits.



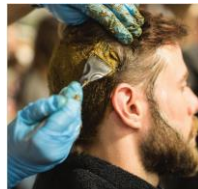
"Being healthy" promoted as a trendy & aspirational lifestyle

Figure 46: Content Shared on Go Natural's Digital Platforms; Source: Go Natural Facebook Page, 2016.

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Video with the making of a self-preserving* mask: a healthier fine-tuning of Lush's old formulas, just to the level they still perform very well.



D-I-Ys* proofs on how "natural" can be performant : → Application of a herbal hair coloring method (subtle, uniform desired end result).

O que acontece quando mistura a mais fina henna da Pérsia, manteiga de cacau orgânica de comércio justo (100% rastreável) e inspiração das antigas tradições Chinesas do chá? Resultados brilhantes. Sem m****s!

Implicitly authentic brand: → Addresses the "Don't Bullshit Me Generation" (L'Oréal Portugal, 2016) through informal communication.



Communication of an aspirational millennial tribe of rebel, REAL people → Use of tattooed female models.



Figure 47: Content Shared on Lush's Digital Platforms; Source: Lush Portugal Facebook, Website (2015) and Youtube (2016) Pages.

*A self-preserving product: refers to the product's ability to keep itself clean, through the use of natural preservatives such as honey, clay and salt (Helen Ambrosen, Lush's Co-Founder and Product Inventor, 2016)

** Do-It-Yourself Tutorials.

BENCHMARKS

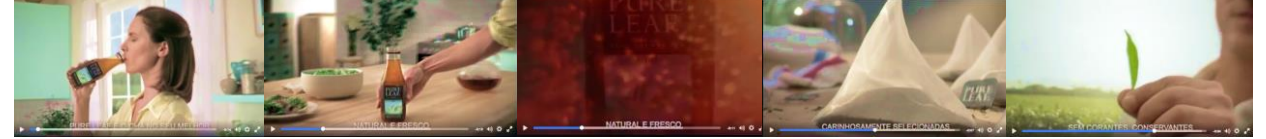


“Fresh” “Natural”
“Authentic”
“Puro Amor ao Chá”



Most frequently used wording on Facebook.

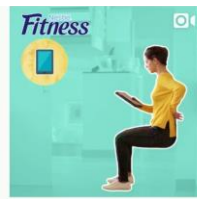
Brand Signature: “The Real Tea Was Born”.



Video with the journey of the leaf from the moment it is planted to the moment when the tea is spilled into the Pure Leaf bottle.

Figure 48: Content Shared on Pure Leaf's Digital Platforms; Source: Pure Leaf Portugal Facebook Page, 2016.

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Workouts.



DIYs with natural ingredients and recipes using Fitness cereals.



Fitness' old definition of “natural”.



Nutritionist reveals results of the shift to a new definition: products with less 30% of sugar.



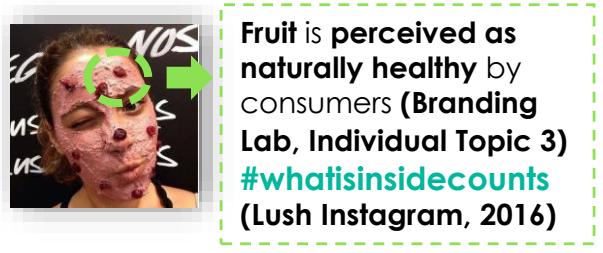
Humanitarian Initiatives.

Figure 49: Content Shared on Fitness' Digital Platforms; Source: Fitness Portugal Facebook and Youtube Pages, 2016.

“NATURAL FROM SCRATCH”: AN EFFECTIVE COMMUNICATION OF “NATURAL”

- Illustration of the **communication of the definition of “natural”**: **“A Beautiful Outside Comes From a Healthy Inside”**, assessed from the content posted on Lush and Go Natural's Instagram pages (2016). By decomposing the **double meaning of “Healthy Inside”**, we obtain:

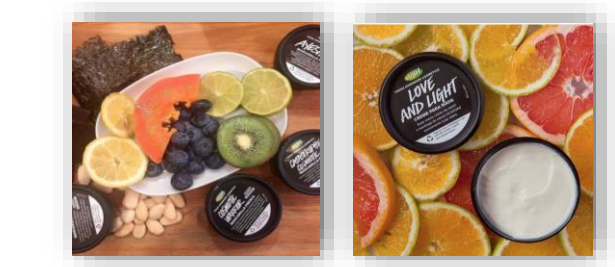
a) Healthiness of the ingredients contained in the product.



b) Healthiness of one's mind and body.



- Both brands communicate the **power of superfruits, taking advantage of their halo of health:**



- Products are not the center of the campaigns:**
 - placed within a “natural habitat”
 - association of food with a healthy or outdoor lifestyle.

- Communication of focal ingredients** predicted to be a **trend for 2017** (Lush Portugal Instagram, 2016)

LUSH'S HIGHLY SUCCESSFUL CASE

Lush presents a **highly positive brand equity** for natural-oriented consumers, **mainly due to two points of difference:**



1. Salient Animal Protection Policy

Figure 50: Comment made on Lush Portugal Facebook Page; **Source:** Lush Portugal Facebook, 2016.



2. Humanistic Brand Purpose: #clearing prejudices campaign

Figure 51: Content shared on Lush Portugal Instagram Page; **Source:** Lush Portugal Instagram, 2016.

Aside from belonging to the group of “(...) twenty-first-century [brands] that will put humanity back in business” (Reiman, 2013) (Da Silveira, 2016), **its successful transmission of “natural” is due to Lush's virtual intimacy on the “net” with key opinion leaders*** for millennials such the author of Mini-Saia Blog who constantly emphasizes its ability, “like no other [natural brand] to join natural elements with safe synthetic ingredients without harming animals” (Lice, 2011).

*Group of consumers who will influence the market segment, perceived as experts, endowed with charisma, high social visibility, and desire to be different from others. (Kapferer, 2008)

NATURAL BRANDS AND THEIR DIGITAL APPROACH

NATURAL FROM ADDING A NEW BRAND TO THE CORPORATE BRAND PORTFOLIO: THREATS TO AN EFFECTIVE COMMUNICATION

While **some consumers intercept correctly Pure Leaf's definition of "natural"**, perceiving it as a positive alternative to other refreshing drinks...

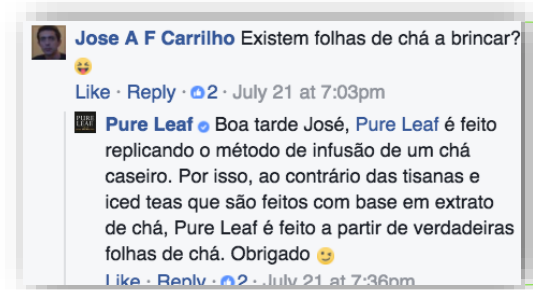
"I love tea, and I really like this brand that advertises that it sells truthful teas. This is, without the "males" that are usually added to bottle beverages (...)"

(Toluna Portuguese Online Customer Community, 2016)

... Others **make jokes out of the brand's natural positioning and authenticity claim** ("The Real Tea Was Born").

• **"Natural" seems "too marketed":**

→ By "natural products", brands mean they contain no synthetic chemicals. However, marketing products as such, is perceived as an attempt to "dumb their product down for the public". For chemical-free products to exist, the brands would have to somehow defy the laws of chemistry. (Dallmeier, 2013)



Role of the brand: to actively guide consumers towards the correct comprehension of the definition of "natural".

Figure 52: Comment made by a consumer on Pure Leaf Facebook Page; **Source:** Pure Leaf Portugal Facebook, 2016.

The sweet taste is not trustworthy by the majority of consumers. (Da Silveira, 2016)

This consumer perceives "natural" as too forced.

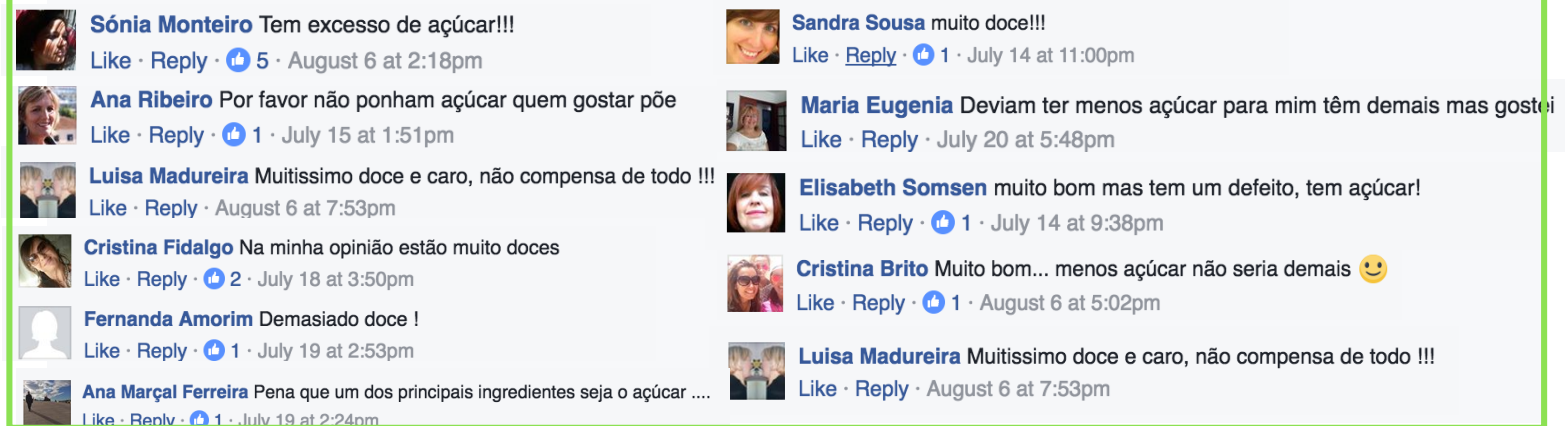
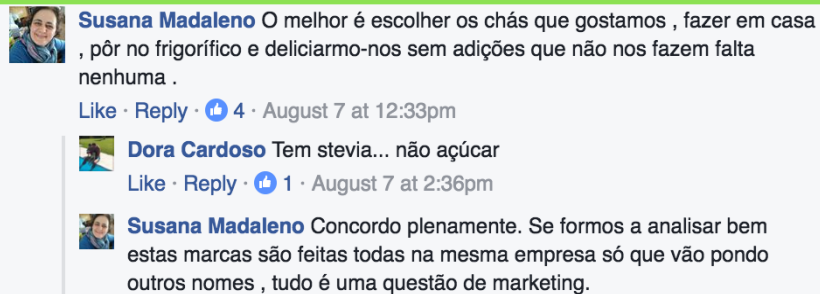


Figure 53: Compilation of comments made by Pure Leaf Consumers on Facebook; **Source:** Pure Leaf Portugal Facebook, 2016.

"NATURAL FROM MIGRATION THROUGH THE COMMERCIAL BRAND: NON EFFECTIVE COMMUNICATION OF "NATURAL"

Weight Management Positioning



Healthy-Ingredients Positioning

- Two lines were tested to **gather insights on consumers' perceptions about Fitness' recent migration to a new definition of "natural". Fitness Granola presents a much healthier composition** (sugar prevention from fruits, honey, seeds, cereals and adding of brown sugar) **and stands for the new positioning. Fitness Delice has a much more chemical composition and represents the brand's old definition of "natural".**
- Primary data was collected from a total of 64 respondents, from the 1st to the 4th of December, using convenience sampling, due to convenience and speed purposes. An online survey with mainly dichotomous and multiple choice questions was sent to friends on Facebook (mainly to 18 to 35 year olds) (see exhibit 10.1). Consumers were shown two 30 second videos containing a schematized preparation of the lines' cereals. Sample characterization can be found on exhibit 10.2.
- To the question: "Did you notice any difference in regard to the composition of the cereals (ingredients used)?" 39% replied negatively (25/64). **The most frequently noticed differences being the format of the cereals or its preparation process.**
- Even though some consumers understood the addition of healthier ingredients in the Fitness Granola line:

*"The first cereals are based on wheat and chocolate or strawberry while **the others are with healthier cereals (oats) and addition of healthy sugar (honey)**"*

Bachelor Student, 18-25y, Female

→ 25% (16 out of 64) perceive Delice as the healthiest of the lines (16 out of 64). The same proportion of respondents did not notice the transparent packaging.

*"I did not notice any great differences. **MAYBE** the ingredients"*

Incomplete Undergraduate Degree, 18-25y, Male

*"In one (video) the cereals are **stuffed/cushions**, and in the other crunchy."*

Full Time Worker, Master Student, 18-25y, Male

*The first video (**Fitness Delice**) presents a healthier facet in the sense where it uses **plenty of fresh colors and fruit**. Given that the second video is slower and separates cereals into two different bowls, its ingredients are more emphasized, which seem to be less healthy (chocolate and honey)*

Bachelor Student, 18-25y, Female



Figure 54: Fitness Delice Line;

Source: Fitness Portugal Website, 2016.



Figure 55: Fitness Granola Line ;

Source: Fitness Portugal Website, 2016.

KEY TAKEAWAYS FOR FRUCTIS RELAUNCH

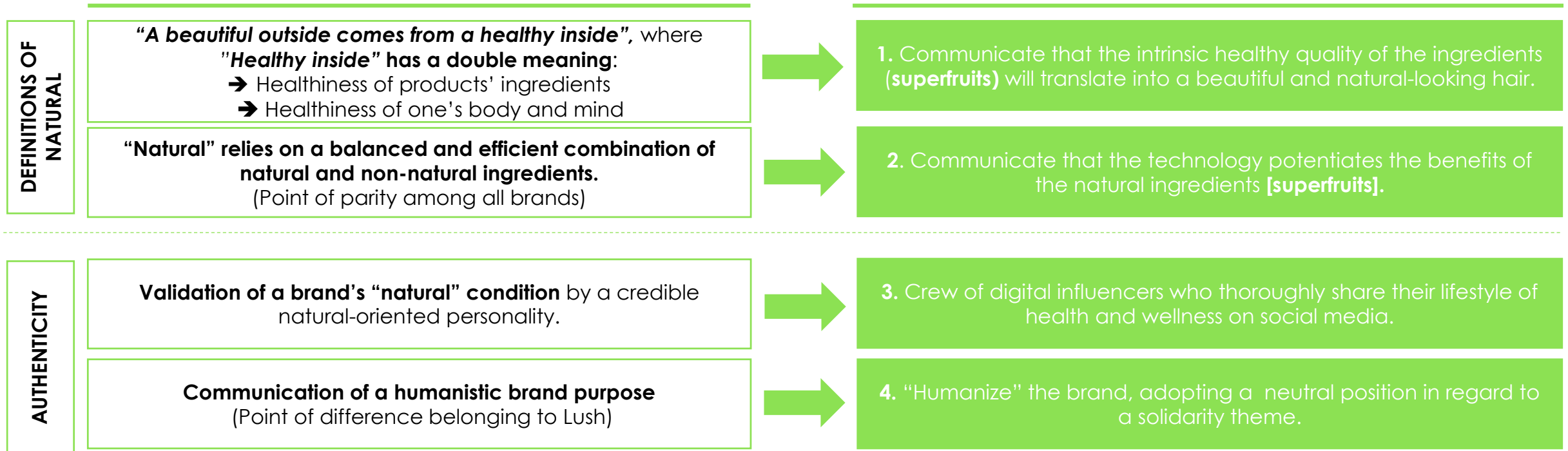
- **Major Takeaway:** It is much **easier** for a brand to **communicate the concept of “natural”** having **kept and built one from scratch** (e.g. Lush, Go Natural). For this reason, some corporate brands feel the need to create new commercial brands to convey their new message (e.g. Unilever launched Pure Leaf to substitute its non-natural tea brand, **Lipton**, in the long run). The **communication of a totally renewed definition of “natural”, conveyed by the same commercial brand** might present some **threats** such as: **consumers not perceiving the change in positioning**. Just like Fitness, Fructis is coming up with a new, natural-oriented positioning, under the same brand, the same logo, yet cleaner formulas.



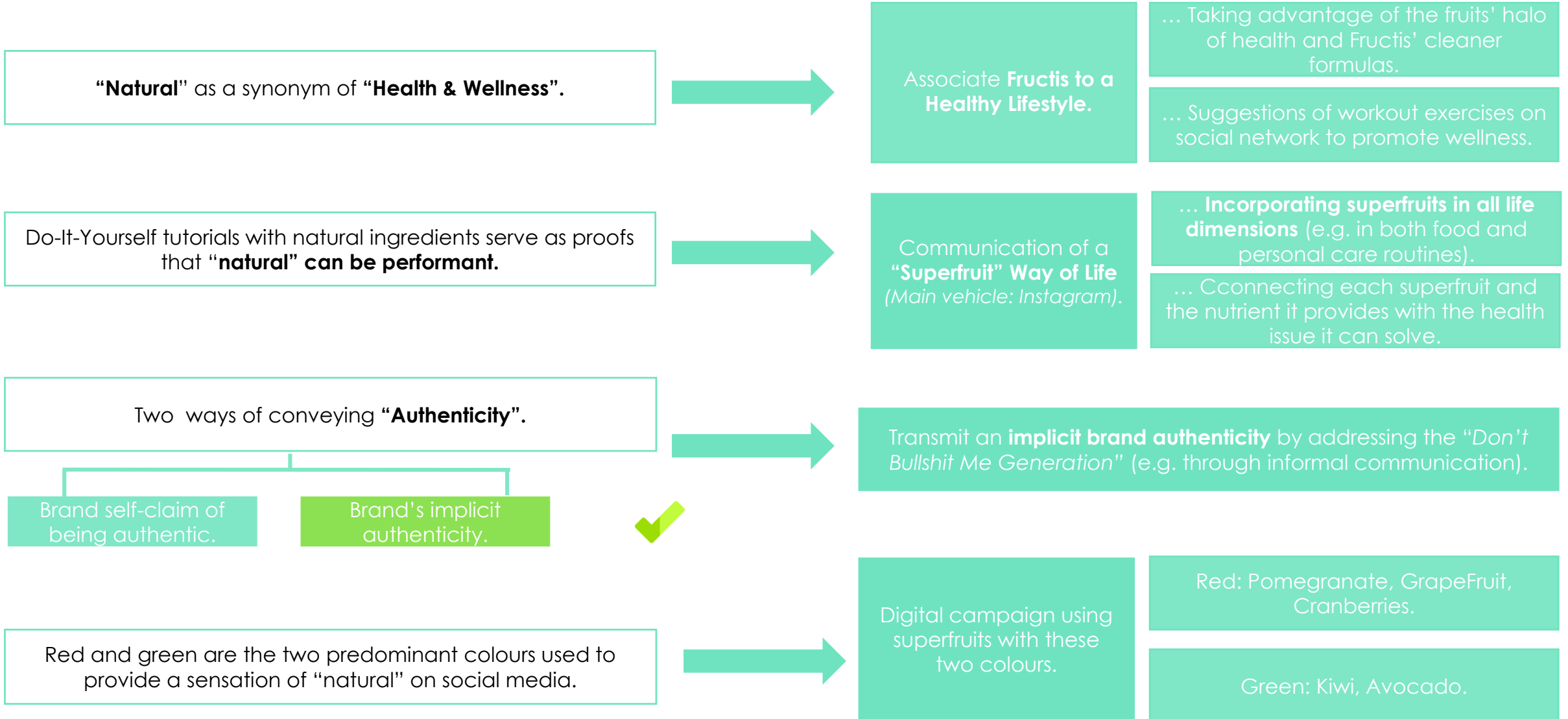
Fructis should distance itself the most it can from its current positioning.

Additional key takeaways from the research

Aspects to consider for the Fructis' relaunch



MINOR TAKEAWAYS FOR FRUCTIS RELAUNCH



5.

How Are Hair Care Brands Digitally Communicating To Millennials In Portugal?

“Brands that are overly promotional, dishonest or fixated on themselves will have a difficult time reaching this group.”

(Friedman, L., 2016).

In this specific topic, we study and compare the most relevant digital practices of hair care brands in the Portuguese market. Additionally, we analyze the best performing brands worldwide and take a closer look at their key success factors.



NATIONAL BENCHMARKS - OVERVIEW

Before deeper analyzing the most relevant digital practices of hair care brands in Portugal, this section provides an overview of the digital channels they are investing in. The brands presented below are part of the top 4 (excluding Fructis) in the Portuguese Market in terms of market share (regarding YTD August 2016) (L'Oréal Portugal, 2016). The fields in the table are highlighted in two different colours: **black** if the brand is **investing in** the selected digital channel and **white** if the brand is not investing in that digital channel.

Brand/ Market Share	Pantene MS 18,7%*	Garnier Ultra Suave** MS 15,3%*	L'Oréal Paris Elvive MS 14,1%*	TRESemmé MS 7,9%*
Facebook	Investing in...	Investing in...	Investing in...	Investing in...
Instagram	Investing in...	Investing in...	Investing in...	Investing in...
YouTube	Investing in...	Investing in...	Investing in...	Investing in...
Snapchat	Not investing in...	Not investing in...	Not investing in...	Not investing in...
SEM	Investing in...	Investing in...	Investing in...	Investing in...
Blog	Investing in...	Investing in...	Investing in...	Investing in...
Influencers	Investing in...	Investing in...	Investing in...	Investing in...

Table 17: Overview of the main hair care brands' investment in digital channels in Portugal
Source: Original content



Figure 56: Garnier Twitter post inviting its followers to follow the brand on Snapchat
Source: Garnier USA Twitter

After conducting a **google search**, we could not find sponsored search results of Garnier Ultra Suave. Additionally, any of these brands have a Portuguese account on **Snapchat** although the previous insight about Millennials shows that they enjoy this platform to engage with brands. Nevertheless in the USA, brands as Garnier are already exploring its behind-the-scenes content on this platform.

From the presented table above, we can conclude that **Pantene** is the **brand which invests in most digital channels**. Elvive and TRESemmé have a similar digital investment and Garnier Ultra Suave does not really seem to have an exclusive digital presence.

*These market shares (in value) regard to YTD August 2016 and were provided by the Fructis Team in the first briefing.
 **Considering the lack of investment an indicator of poor investment on digital communication to Millennials, we decided not to conduct a deep analysis of Ultra Suave and focus in the remaining ones' best and worst practices.

NATIONAL BENCHMARKS · PANTENE (1/2)

BRAND OVERVIEW

Pantene is a hair care brand of the Procter & Gamble group. It is the **number one in the Portuguese market** (L'Oréal Portugal, 2016), and Portuguese consumers have showed high levels of loyalty towards this brand (Global Research). In terms of share of voice (SOV), it is also the brand with the highest value (18,6%) in Portugal (L'Oréal Portugal, 2016).

DIGITAL APPROACH (1/2)

Although present in several digital channels, Pantene seems to have a **very focused approach on promoting the brand**. In order to showcase this statement, two examples are presented below:

1. Tutorials on Pantene's YouTube Channel

These tutorials were produced by the brand itself. The hairstylist has poor acting skills and promotes the brand with phrases such as “with your Pantene hair [it is very easy to...]”. Therefore, it seems to be **too forced, unrealistic** and might not ensure high visibility to Pantene (Cabelo Pantene YouTube, 2016).

In total, the seven tutorials of this series count **123.000 views**, **one comment** with a negative perspective, **62 “likes”** and **12 “dislikes”** (Cabelo Pantene YouTube, 2016).

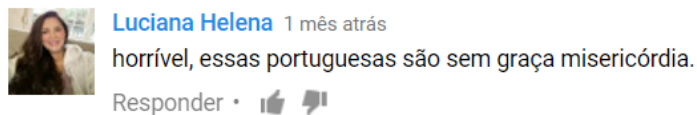


Figure 57: Only comment among all Pantene's tutorials
Source: Cabelo Pantene YouTube



122.534 views

62 👍 12 👎

Figure 58: Pantene's Tutorials Figures
Source: Cabelo Pantene YouTube



Figure 59: YouTube playlist with Pantene's tutorials
Source: Cabelo Pantene YouTube

NATIONAL BENCHMARKS · PANTENE (2/2)

DIGITAL APPROACH (2/2)

2. Cabelo Pantene blog:

This blog has a **lifestyle magazine blog design**. The content is divided into “**style**”, “**tips**”, “**how-to**” as well as “**Cabelo Pantene 2016**” and includes **several posts written by well-known digital influencers**. Despite the characteristics which could make this blog to the one which attract several Millennials, **this blog does not seem to be a success**. Although **it’s difficult to assess the failure or success rate of a blog**, it seems to be obvious in this case due to very **few comments** of consumers what can be considered as an indicator for low engagement (Cabelo Pantene Blog, 2016).

Summarized, both the tutorials and the blog created by Pantene make the content not authentic. Therefore, this content is very likely to be perceived as an attempt to push the product and doesn’t lead to an engagement with Millennials. In the end, it is an effort that the brand is doing which seems not to be worthwhile.

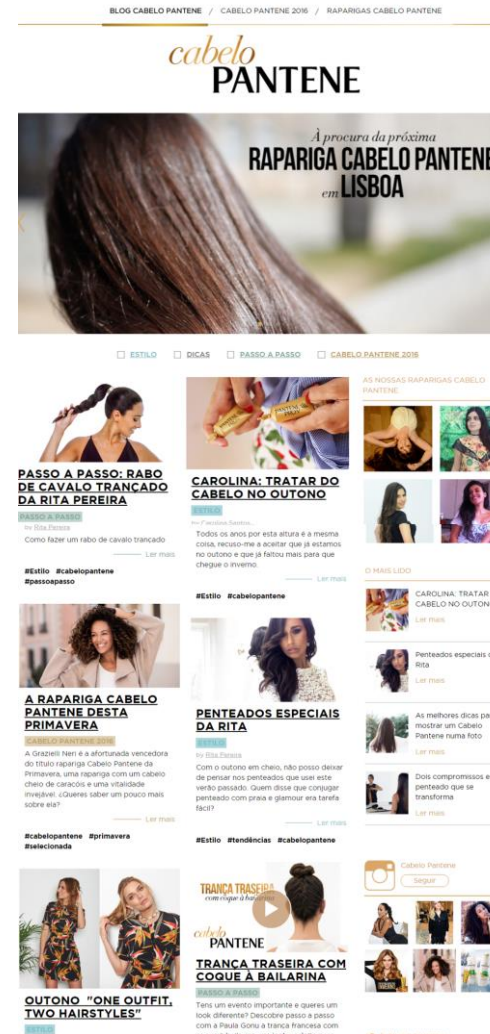


Figure 60: “Cabelo Pantene” blog homepage design
Source: Cabelo Pantene blog



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PASSO A PASSO: RABO DE CAVALO TRANÇADO DA RITA PEREIRA

PASSO A PASSO

by Rita Pereira

Como fazer um rabo de cavalo trançado

— Ler mais

#Estilo #cabelopantene
 #passoapasso

Figure 61: Example of a post written by Rita Pereira
Source: Cabelo Pantene blog

NATIONAL BENCHMARKS · L'ORÉAL PARIS ELVIVE

BRAND OVERVIEW

The **oldest beauty brand in the world**. L'Oréal Paris belongs to L'Oréal group and offers products in several product families such as hair care, make up, colorations, skin care and others (L'Oréal Paris Website, 2016). The hair care brand of L'Oréal Paris is named Elvive and is the **number 3** in the market in terms of value referring to YTD August 2016 (L'Oréal Portugal, 2016).

DIGITAL APPROACH

L'Oréal Elvive is a **very active brand on social media**, mainly on **Instagram** and **Facebook**. Its presence is supported by a **successful partnership with Cláudia Vieira**. She is L'Oréal Paris' brand ambassador and a very famous actress who counts 436.000 followers on Instagram and more than 1 million followers on Facebook (Cláudia Vieira Instagram, 2016 & Cláudia Vieira Facebook, 2016).

Recently, L'Oréal Paris challenged her **in the scope of the new Elvive Low Shampoo**. Cláudia Vieira was offered a trial kit and was asked to use the product during 10 days and to share her experiences on social media. During this period, she posted **5 videos** about the new product of Elvive on her Instagram and Facebook pages. In total she attracted **about 500.000 views**. Besides the number of views, Cláudia Vieira's posts about the Low Shampoo

generated innumerous comments about the product, such as questions of how to use it, where to buy it and feedback of users that already tried it (Cláudia Vieira Instagram, 2016 & Cláudia Vieira Facebook, 2016).

As we can infer from this example, having Cláudia Vieira associated with the Low Shampoo resulted in a **high level of engagement** of Elvive with its audience. Additionally, Elvive also achieved a **high level of visibility** for its brand and new product by taking advantage of the brand ambassador.

siidinis onde podemos comprar?
@claudiavieiraoficial

inesvieira_cv Lindona. 😊 Amanhã vou já comprar para começar os 10 dias. 😊
Boa Noite e Beijinhos Diva. 😊😊

teresa.de.matostm Já experimentei 😊
e deixa mesmo o cabelo bem lavadinho e suave.

joanaferreira_____ Se tu dizes então vou seguir o teu conselho mil beijinhos ídola @claudiavieiraoficial ❤️

jpatriciaferreira555 Vou seguir o teu conselho bjs querida

Figure 62: Comments on one of Cláudia Vieira's posts about the Low Shampoo
Source: Cláudia Vieira Instagram



Figure 63: Instagram post of Cláudia Vieira about low shampoo
Source: Cláudia Vieira Instagram



Figure 64: Images on Instagram with #10diaslowshampoo
Source: Instagram

NATIONAL BENCHMARKS · TRESEMMÉ (1/2)

BRAND OVERVIEW

TRESemmé is the **No. 4 hair care brand in Portugal** (L'Oréal Portugal, 2016) and belongs to Unilever Group. It is the leading brand with a professional positioning in mass market.

DIGITAL APPROACH (1/2)

TRESemmé is the brand which seems to **perform better** (in comparison to the other analyzed brands) **on YouTube although they are not using their own channel**. The brand has a successful partnership with three very well-known Portuguese YouTubers (Mia Rose, Mafalda Sampaio from Maria Vaidosa and Alice Trewinnard from Golden Locks) with the **“Love The Hair” channel**.

Through this channel, TRESemmé creates relevant content for its audience basically through **YouTubers** who are followed by thousands of Millennials and **discrete product placement** (the **scenarios** of the videos in this channels are exactly the same ones that bloggers use for their own videos; each YouTuber just says in a natural way which **TRESemmé products** she used to prepare her hair as she usually does for all other products on her own channel. Even in the **description** of the channel, TRESemmé is **not mentioned**) (Love The Hair YouTube, 2016).

Overall, the videos of the “Love The Hair” channel take a **focus on product results instead of on the product itself**.

This channel, sponsored by TRESemmé, was **created in July of 2016** and all tutorials (channel and YouTubers' videos not included) count about **2,1 millions views, 25.500 “likes”, 600 “dislikes”** and **several user comments** (Love The Hair YouTube, 2016).

On one side, the videos posted on this channel will be also posted on the YouTubers' channels. In this way an even bigger audience can be reached. On the other side, they are never shared by TRESemmé.

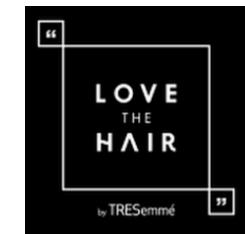
Additionally, if we compare the most frequently watched tutorials of the “Love The Hair” channel and the one of the “Cabelo Pantene” channel, we can conclude that the video from **Love the Hair has about 60% more views than Pantene's video that was released three months earlier**.



Figure 65: Product placement in one of the “Love The Hair” tutorials

Source: Love The Hair YouTube

96



2.053.544 views

25.472  **570** 

Figure 66: “Love The Hair” Tutorials Figures
Source: Love The Hair YouTube

NATIONAL BENCHMARKS · TRESEMMÉ (2/2)

DIGITAL APPROACH (2/2)

Comparing these tutorials with Pantene's, we can see that TRESemmé's model results in more engagement with Millennials than Pantene's.

As a conclusion, the format of **“Love The Hair” reaches more people** than a **common hair care brand channel on YouTube**. Additionally, we can infer from the previous analysis that discrete product placement is more effective **in terms of visibility**.

But what about engagement and sales conversion aspects?

We believe that TRESemmé's channel can increase its level of **awareness** within Millennials since the products are showed in the tutorials. However, there are **no comments about the products itself** (Love The Hair YouTube, 2016) as it happens on Cláudia Vieira's Instagram page (L'Oréal practice). That's why we are **not sure if they can convert followers into TRESemmé buyers**. Nevertheless, the fact that these influencers say that they use these products, increase chances that viewers buy the product, though we cannot really assess this impact.

On the other side, looking at the frequency and content of the comments, we can confirm that this **channel** results in a **high engagement** with Millennials. However, not necessarily the brand with them. These comments are in majority suggestions for new content and feedback about the videos. Furthermore, it seems that the audience is ignoring the product placement of TRESemmé. Inclusively, there is one comment that says “I think this is sponsored by TRESemmé, but I don't care because I love these three [influencers] and the videos” (Love The Hair YouTube, 2016).

To put it in a nutshell, this channel really seems to be a success within Millennials, but only due to the content of the videos. It means, TRESemmé might be increasing its awareness, but not necessarily engaging with Millennials and converting them into buyers.



Figure 67: Selection of comments retrieved from some “Love The Hair” tutorials

Source: Love The Hair YouTube

NATIONAL BENCHMARKS - CONCLUSION

Visibility	?	✓	✓
Engagement	✗	✓	?
Sales conversion	?	✓	?

Table 18: Impact of each brands' digital practice on consumers (based on our analysis)

Source: Original Content

Table 4 is based on our analysis and supports to conclude the impact of each brands' digital practice on consumers. Considering the previous practical cases, we came up with a necessary trade off that brands are facing when promoting their products online.

1. Firstly, it is **Pantene** that adopts a **push the product approach** through its blog and tutorials. On one side, both **do not create engagement** since there exist very few comments of users in both practices (Cabelo Pantene Blog, 2016 & Cabelo Pantene YouTube, 2016). For this reason we cannot really assess if this results in an increase of visibility and finally in higher sales.
2. Secondly, it is **L'Oréal Elvive** with its strategy of having a very well-known ambassador who guarantees a **high levels of visibility** to the brand. Based on the comments on Cláudia Vieira's social media, we can also infer that this partnership results in **engagement** with the users [through her] **and sales conversions** ("Great! Tomorrow I will buy it and start the #10dayslowshampoo") (Cláudia Vieira Instagram, 2016).
3. Lastly, it is **TRESemmé** that can achieve **high levels of visibility** through the big audience of "Love The Hair" YouTube channel sponsored by the brand. However, although this channel counts a lot of comments, we believe that the brand cannot really engage with its users. Besides, we cannot conclude from the available data that this initiative results in increasing sales.

Based on these assumptions, we conclude that if on one side the **discrete product placement might guarantee high levels of visibility** [Millennials reject overly promoted content (Friedman, 2016)], **it might also result in Millennials who are ignoring the brand** (even though they still get aware of the brand).

This reflection leads us to state that the brands should **prioritize** their goals. If the brand wants to increase its visibility, it should adopt a discrete product placement (through digital influencer with also high visibility); if the brand wants to convert that into sales, it should opt for an initiative as brand ambassador.

In order to achieve a more diversified and bigger audience, the best option for Fructis is to select a brand ambassador and to promote a discrete product placement through digital influencers.

INTERNATIONAL BENCHMARKS



L2 is a member-based business intelligence service that benchmarks the digital performance of 2.200 brands across 11 sectors such as activewear, beauty, automotive or retail. The benchmark is done according to L2's four dimensions of digital: site & e-commerce, digital marketing, mobile, and social media. All L2 members have annually access to the L2 research and its executive education events (L2 Website, 2016).



Figure 68: #LoveYourHair video campaign

Source: Dove US YouTube



Figure 69: "Strong is Beautiful: Dad-Dos" Video Campaign

Source: Pantene YouTube

Additionally to the previous analysis and to find some other digital hair care brands' practices at an international level, a closer look was taken into **L2** (see "box" in the left side of the page). From there, we are able to extract insights of the top 10 **international** hair care brands listed in **L2's Digital IQ Index®: Hair Care & Color of 2016** (Rosen, 2016):

1. *L'Oréal Paris*
2. *Pantene*
3. *Garnier*
4. *Redken*
5. *Dove*
6. *Head & Shoulders*
7. *Aveda*
8. *Bumble and bumble*
9. *John Frieda*
10. *Carol's Daughter*

From this index, where each brand is also briefly analyzed, we can state that:

1. **"How-to" content, live chat, sampling, SEO practices, geo-targeted video ads** are some of the best practices that are used by these brands and a reason for their well performance in the ranking (Rosen, 2016).
2. Campaigns such as **"Strong is Beautiful: Dad-Dos"** from Pantene as well as **#LoveYourHair** from Dove were extremely successful on social media and achieved about 7,5 and 14,5 millions of views. Emotional messages are part of these videos and might be the reason for success (Dove US and Pantene YouTube, 2016 & Rosen, 2016).

KEY TAKEAWAYS FOR FRUCTIS' RELAUNCH

KEY TAKE-AWAYS FROM THE RESEARCH

A **tutorial made by a brand is perceived as an attempt to push the product** (assessed through the reaction of a group of Millennials after showing “Cabelo Pantene trend’s room: trança em cascata” vídeo)

The creation of a **lifestyle magazine blog by a brand will not create engagement** with Millennials, even when the authors of some posts are well known digital influencers.

Having a very **well known brand ambassador ensures a high visibility to the brand** itself and to the communication of any new products.

A **discrete product placement shows to be effective** in terms of visibility. The focus is given to the product results instead of the product itself and the brand behind it (e.g. “Love The Hair” YouTube channel).

Initiatives as **“how-to” content, live chat, sampling, SEO practices, geo-targeted video ads** can make a hair care brand perform better in terms of digital.

An **emotional message can be very efficient** to reach high levels of visibility on social media. When a hashtag is associated to this story, it incentivizes the consumers to share their own story on their social media, increasing the popularity of the campaign and giving it a personal touch.



TO CONSIDER ON THE FRUCTIS RELAUNCH

Any tutorial or review about the product **should only be done by YouTubers** in their own channels, who are used to efficiently communicate a brand or product on YouTube in an authentic way.

Fructis **should not create its own blog** as it will not be followed by Millennials for being perceived as non credible. They will always prefer to follow the blogs created by their peers, and where the communication is fully genuine and follows a one-to-one basis.

Fructis **should associate itself to a celebrity** who fits the new identity but essentially **who already has high visibility** on social media.

Fructis should ensure that the **promotion** of its products by the digital influencers on social media is **discrete, authentic** and **not based on pushing the product**.

Fructis should ensure **“how-to” content, live chat, sampling, SEO practices, geo-targeted video ads** to increase its digital performance.

Fructis should create some **content with an emotional story** and a hashtag associated.



AGENDA

1. Introduction
2. Context
3. Brand Diagnostic
 - 3.1. Methodology
 - 3.2. Research Insights
 - 3.2.1. Store Observations
 - 3.2.2. In-depth Interviews
4. Additional Research: Individual Contributions to the Branding Lab
- 5. Recommendations**
 - 5.1. Anticipated SWOT Analysis and New Fructis Positioning**
 - 5.2. Communication Strategy
 - 5.3. Addressing Communication Objectives
6. Conclusion
7. Limitations
8. References

OVERVIEW

The recommendations that are presented at the end of this chapter are based on a **SWOT* analysis** for the relaunch of Fructis in Portugal targeted at Millennial consumers. Afterwards, these insights are incorporated into both the **positioning statement** and specific **communication objectives**. In order to address these objectives, we suggest a set of specific communication activities.



ANTICIPATED SWOT ANALYSIS · MILLENNIAL CONSUMERS

From the primary and secondary data collected in the Brand Diagnostic phase and the insights provided by the L'Oréal team, we came up with the following **SWOT** analysis for Millennial consumers:

STRENGTHS:

- Good image of Garnier brand
- New, more effective and cleaner formulas
- Superfruits as main ingredients
- New packaging (modern, transparent and recyclable)
- Disruptive go-to market approach
- Digital Orientation

WEAKNESSES:

- Same brand name for a new positioning
- New logo very similar to the current one
- Range not entirely free from Sulfates and Silicone

OPPORTUNITIES:

- Creation of a new orientation (1st mover advantage)
- Superfruits trend
- Millennials
- More digitally connected consumers
- Efficient Communication

THREATS:

Millennial consumers in general might...

- not perceive that Fructis adopted a new positioning
- transition slowly towards the natural orientation, not embracing the new orientation
- not like the new formulas
- not perceive the new natural positioning as credible
- doubt the credibility of the power of superfruits given the fact that unchanged best seller formulas are branded with superfruits as well

Millennial Fructis users might...

- not accept the new positioning
- not understand that the best seller formulas have not changed
- become educated to the negative effects of chemical ingredients and therefore avoid the old best seller formulas

Fructis droppers might...

- not give the brand a second chance

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ANTICIPATING THE CONSUMER MIGRATIONS

At the moment, **Portuguese Millennial hair care consumers are mostly “perfection-oriented”, which means that they search for effective products, having little concern for potentially harmful ingredients.** The number of “natural-oriented” Millennials in Portugal, who are willing to sacrifice results for the use of more natural ingredients, still seems very small and, so far, this trend is restricted to trendsetters.

As previously mentioned, currently Fructis fits neither orientation. Under the brand's new identity, Fructis aims at creating a new hair care orientation in the Portuguese market which combines aspects from both current orientations in new formulas that are at the same time more natural and more effective.

Considering that the relaunch of Fructis requires a new orientation, the brand should establish a positioning which attracts all Millennial consumers and which expresses this new one.

Given that in Portugal more Millennial consumers are “perfection-oriented” and we do not want Fructis to steal market share from Ultra Suave, the emblematic brand of the “natural orientation”, this new positioning statement should be more focused on the “perfection-orientation”.

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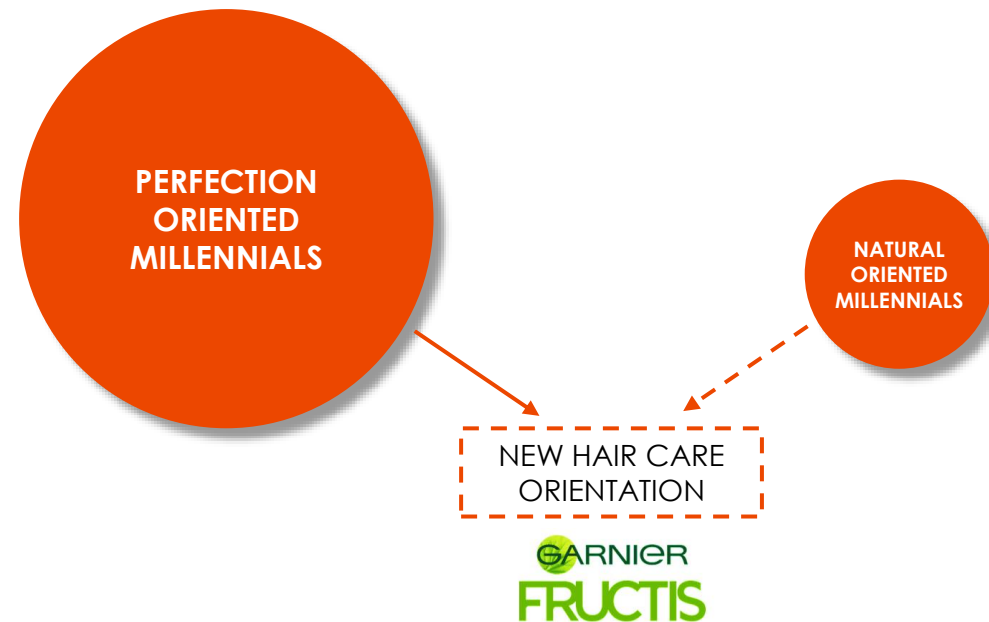


Figure 70: Consumer migrations to the new orientation
Source: Original Content



NEW FRUCTIS POSITIONING (1/2)

In order to build the positioning statement of the new Fructis brand, we have decomposed the process according to the two distinct Millennial hair care orientations. First, we took a look at how the key aspects of the relaunch of Fructis are perceived by each of the two orientations:

- 1) For perfection-oriented consumers, superfruits and the limited use of Parabens, Sulfates and Silicones are **no more than a trend**, while for natural-oriented consumers these aspects are about pursuing a **health and environmental conscious lifestyle**.
- 2) **Performance** of the new formulas should be perceived by the perfection-oriented consumers as the combination of **superfruits and high-end technology**, while for the natural-oriented consumers it should be perceived by the **intrinsic benefits of superfruits and the limited use of Parabens, Silicones and Sulfates**.

Taking these aspects into consideration, we arrived to the following positioning statements:

PERFECTION-ORIENTED MILLENNIALS

NATURAL-ORIENTED MILLENNIALS

FOR...

“perfection-oriented” Millennials who follow the latest trends

“natural-oriented” Millennials who pursue a healthy and environment-friendly lifestyle,

FRUCTIS IS...

*a **new disruptive and trendy** hair care brand*

*a **new healthier** hair care brand*

WHICH PROVIDES...

***new more effective** formulas in a **new stylish** packaging*

*a **natural hair look** through **new naturally powerful and cleaner** formulas in **new recyclable packaging***

THROUGH...

*the combination of the **power of superfruits** with **high-end technology***

*taking advantage of the **intrinsic benefits of superfruits** and **limiting the use of Parabens, Silicones and Sulfates***

Table 19: Positioning statement for each Millennial hair care orientation

Source: Original Content

NEW FRUCTIS POSITIONING (2/2)

Considering the previous positioning statements designed for each orientation, we have come up with a new positioning statement to be used for the relaunch of Fructis.

This statement expresses the new hair care orientation and, for the reasons mentioned before, it is mostly based on the “perfection-oriented” positioning statement.

FOR...

Millennials who follow the latest trends

FRUCTIS IS...

a new disruptive and trendy hair care brand

WHICH PROVIDES...

a trendy natural hair look through new more effective and cleaner formulas in a new stylish packaging

THROUGH...

the combination of the power of superfruits with high-end technology

Table 20: New Fructis positioning statement
Source: Original Content





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COMMUNICATION STRATEGY

After anticipating the threats and reflecting about the respective communication objectives, we have identified the following conflict:

THREAT A

Millennials in general might not perceive that Fructis adopted a new positioning



OBJECTIVE A

Get consumers to recognize the change in positioning by communicating Fructis as a new brand, with new, powerful and natural formulas



THREAT B

Millennials Fructis users might not understand that the best seller formulas have not changed



OBJECTIVE B

Communicating that the best seller formulas did not change

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Indeed, as also confirmed with the L'Oréal Team, it is not possible to consistently communicate an entirely new positioning while keeping some of the old formulas. For this reason, we have concluded that Fructis **should not communicate that two of the best seller formulas* did not change, in order to successfully address objective A mentioned above.**

Additionally, we consider the following threats that were identified previously in the SWOT** analysis as not being an issue, since they are specifically related to the consumers individual preferences and to the relaunched product itself (this is related to the fact that we are operating under the guidelines established by the international Fructis team):

- Millennials in general might not like the new formulas and/or not identify with the new positioning
- Millennials in general doubt the power of superfruits given the fact that unchanged best seller formulas are branded with superfruits as well
- Millennials Fructis users become educated to the negative effects of chemical ingredients and therefore avoid the old best seller formulas

*Formulas for Curls (Hidra-caracóis) and Anti-Dandruff (Anti-Caspa).

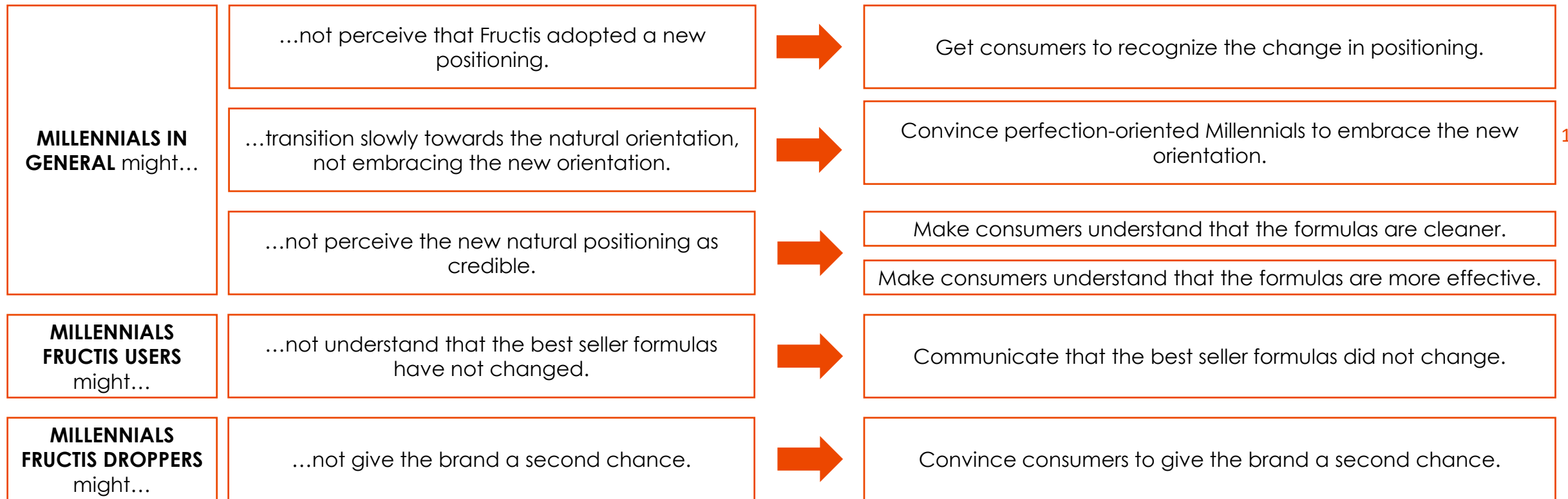
**SWOT: Strengths, Weaknesses, Opportunities and Threats.

COMMUNICATION STRATEGY

Consequently, the remaining threats presented in the SWOT* analysis are addressed according to the following communication objectives:

THREATS

COMMUNICATION OBJECTIVES



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Table 21: Threats and communication objectives

Source: Original Content



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ADDRESSING COMMUNICATION OBJECTIVES

THREAT:

Millennials in general might not perceive that Fructis adopted a new positioning.



COMMUNICATION OBJECTIVE:

Get consumers to recognize the change in positioning.

We suggest distancing the new Fructis from the current one by communicating an **entirely new brand. How?**

- Transmission of the message: **"We are coming up with a new disruptive Fructis"** through:



According to our global research, **in-store communication** is a very **powerful tool**, in fact, consumers spend an average time of 3 minutes in front of shelves, making their purchasing decision in-store.



According to our individual research, both **TV and social media** are **powerful and effective channels** for reaching Millennials.

ADDRESSING COMMUNICATION OBJECTIVES

THREAT:

Millennials in general might transition slowly towards the natural orientation, not embracing the new orientation.



COMMUNICATION OBJECTIVE:

Convince perfection-oriented Millennials to embrace the new orientation.

In order to make Millennials migrate faster to the new orientation, Fructis should manage consumer expectations about the performance of its formulas by **communicating the new definition of performance as the 'natural hair look'** and by **making it trendy**.

In order to achieve this, the brand should become aspirational through the promotion of a **lifestyle based on the consumption of superfruits: "The Superfruit Way Of Life"**. **Selling this lifestyle** would imply making it highly desirable to millennials via:

1.

Use of **Social Media** to illustrate the healthy lifestyle, in particular Instagram, sharing **captivating content** that Millennials want to follow in spite of the brand

2.

Creation of highly **inspirational content** to establish emotional connection with consumers.

3.

Use of **high-profile personalities** to promote the superfruit and wellness way of living

4.

Being **present in popular events among Millennials** such as music festivals, sports and fashion events

5.

Establish **collaborations with perfection-oriented digital influencers** in an effort to promote the benefits of the new formulas and the new trend of the 'natural hair look'. These influencers should be capable of making their followers, who are aligned with the perfection orientation, move towards the 'new orientation'.

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Figure 72: Illustration of the "Superfruit Way of Life"; Source: L'Oréal Portugal

ADDRESSING COMMUNICATION OBJECTIVES

THREAT:

Millennials in general might not perceive the new natural positioning as credible.

COMMUNICATION OBJECTIVE:

Make consumers understand that the formulas are cleaner.

1.

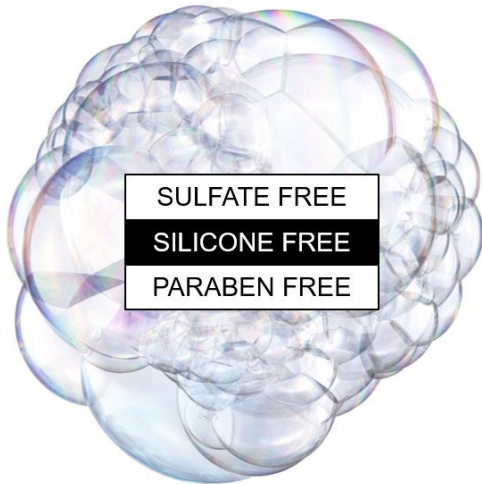


Figure 73: Parabens, Sulfates and Silicones
Source: L'Oréal Portugal

To communicate "sulfate free", "silicone free" and "paraben free" aspects of each shampoo on Fructis website and social media **individually**.

On TV, just to communicate "**all new range free of parabens**".

2.

Only communicate the recyclable aspect of Fructis bottles in a **subtle way**, for two reasons:

1. According to our research, Millennials in Portugal are still not environmentally aware in comparison to other European countries. So the effort of communicating it might not be worthwhile.



Figure 74: Recyclable packaging
Source: L'Oréal Portugal

2. Brand credibility can be at risk, since Fructis is not 100% environmentally friendly and so some fundamentalists might come and question the consistency of the brand. Although this danger is very low in Portugal, this should be considered for other countries where this risk might be higher.

3.

In order to make Millennials perceive the formulas as more natural, Fructis should provide a full **description of the benefits of each superfruit** on its website. Similar information but in a much shorter version should be shared on Fructis' Facebook pages in the form of teasers.



Figure 75: Superfruit shampoo
Source: L'Oréal Portugal

ADDRESSING COMMUNICATION OBJECTIVES

THREAT:

Millennial consumers in general might not perceive the new natural positioning as credible.



COMMUNICATION OBJECTIVE:

Make consumers understand that the formulas are more effective.

1. STYLIZED SUPERFRUITS IMAGES

In order to make the Millennials perceive the new formulas are more effective, we suggest Fructis to communicate the “power of the superfruits” through the incorporation of stylized superfruits images. These should not look completely natural in order to underline the technology component of the formulas so as to address the perfection-oriented Millennials definition of performance.

2. SAMPLING

Additionally, we suggest Fructis to enable its consumer sign up both on the website and via social media, in order to receive a **free product sample** sent to their homes.

Digital Influencers are spreading the information about this possibility to consumers who would not have been reached otherwise.

3. Following the reasoning below, we suggest Fructis to launch 1€ smaller bottles to address the high price elasticity of the consumers who have had a negative experience with Fructis before. However, we just consider this suggestion after the end of the sale of the 2 products-pack.



Figure 76: Small Fructis bottles; Source: Original Content

4. FEEDBACK BY CONSUMERS

Fructis should highlight the comments of consumers who advocate the quality of the new products on the Fructis website.

5. PRODUCT REVIEWS

We suggest Fructis to partner with YouTubers so that they talk about their experience with the new Fructis, explaining the power of superfruits without pushing the product.



Figure 77: Youtube Fructis review
Source: Original Content

ADDRESSING COMMUNICATION OBJECTIVES

THREAT:

Millennials Fructis droppers might not give the brand a second chance.



COMMUNICATION OBJECTIVE:

Convince consumers to give the brand a second chance.

1. NEW BRAND



Figure 78: Fructis packaging
Source: L'Oréal Portugal

2. SAMPLING



Figure 79: Sampling
Source: Original Content

3. MINI PACKAGING

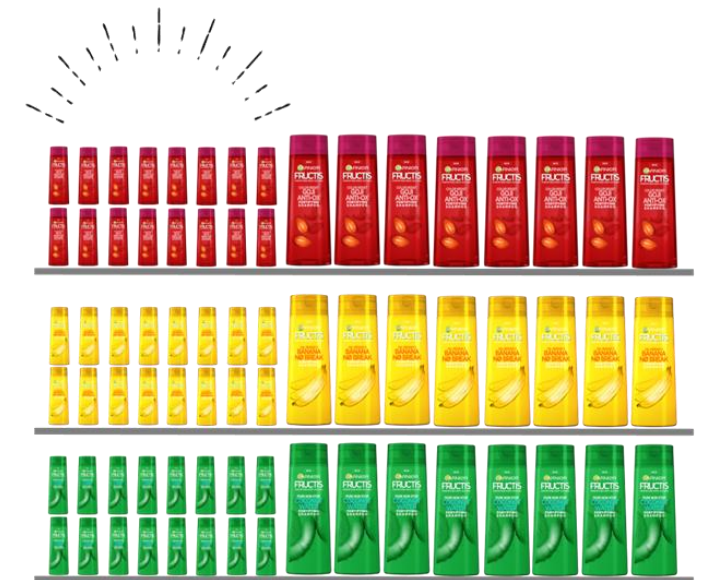


Figure 80: Small Fructis bottles
Source: Original Content



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RELAUNCH OF FRUCTIS • NEW BRAND IDENTITY

Based on the research conducted and recommendations stated, we are finally able to complete the new brand identity of Fructis. The previously undefined dimensions of "Relationship" in terms of intangible assets and "Culture" in terms of status are now complete and highlighted below:

Physical

New Hair Care Fructis Products, New Formulas, New Packaging, Revised "Garnier Fructis" Logo, Green, Superfruits, Natural Look, Recyclable Packaging, Cleaner Formulas (Free From Parabens, Limited Use of Sulfates and Silicones)

Personality

Disruptive, "Rule Breaker", Cool, Healthy, Environment-Friendly, Sociable, Authentic, Digitally Connected, Active

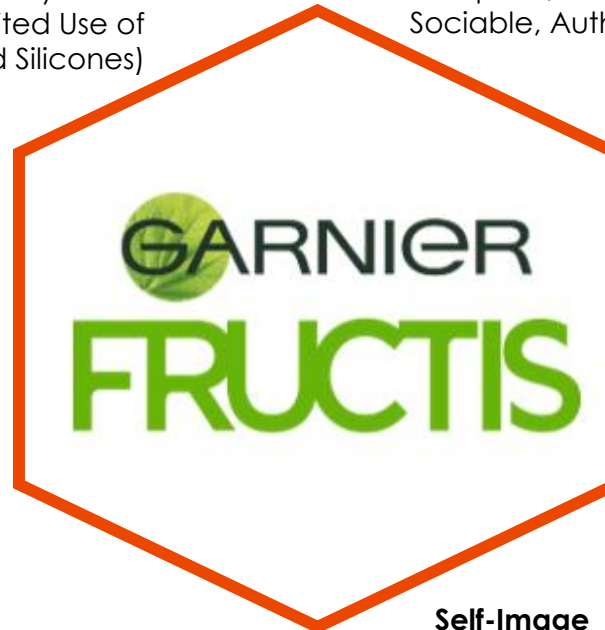
Relationship

Tangible

Quality Products, Super Hair, Natural Hair Look, Environment-Friendly Products, Healthier Formulas With Higher Quality, The Power Of Superfruits

Intangible

"The Superfruit Way of Life", Being Part of a Young, Trendy and Healthy Community, Self Confidence Achieved through Natural Beauty



Culture

Garnier Values:

Natural Beauty, Sustainability

Substance:

Efficient (Better Formulas Due To High-end Technology), Natural And Powerful (Superfruits As Main Ingredient), Healthier (Free Of Parabens), More Environmentally Friendly (Mostly Free of Sulfates and Silicone, Recyclable Packaging)

Status:

~~Aims to be~~ Trendy, Disruptive, Inspirational (High Profile Influencers Advocating "The Superfruit Way of Life"), Digitally Connected (Strong Presence on Social Media)

Customer Reflection

Young, Active/Sportsperson, Adventures, Health and Environmentally Conscious, Self-expressing Style, Sociable, Digital Oriented, Sharing New Experiences with Friends

Self-Image

"I am breaking the rules", "I have my own identity",
"I am doing good to myself and to the environment",
"I want the latest technology product",
"I believe in the power of superfruits",
"I enjoy when my hair looks natural",
"I want to share my experiences with my friends"

In conclusion, even though that this launch implies many different threats, as stated previously, we are convinced that the strategy presented is the best and only way to successfully relaunch Fructis.



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Throughout the elaboration of our Branding Lab project, we have encountered some limitations that we structured as follows:

STORE OBSERVATIONS

- Limited number of stores (5) visited.
- Limited geographical reach: Observation only of consumers in Lisbon and Porto, excluding consumers in other parts of Portugal.
- Restriction in retailer: Observations taking place only in Continente stores, excluding Pingo Doce, Mini Preço and other shops in Portugal.
- Restriction in store type: Only one supermarket visited therefore no conclusions about different behaviours according to shop type possible.
- Limited time spectrum: Observations taking place only during a specific week with specific promotions, on the selected days Wednesday to Saturday, during selected time slots, no comparison between weeks, the days Sunday to Tuesday and time slots possible.
- No background information about observed consumers available: Difficulty to draw takeaways based solely on observations of behaviour.
- Respondent selection error: Inability to exactly state of the age of the observed people, therefore categorization in age groups (18-25 and 26-35) based on our own judgement.
- Uneven sample size per gender: fewer male consumers observed, non representative sub-samples of men aged 18-25 (8<30) and aged 26-35 (24<30).
- Significant number of brands on promotion*: difficulties to discern the entry of consumers to the loyalty loop and the influence of promotions on purchasing behavior.
- Comparison between brands in and not in promotion: possibility of biased result about purchasing behaviour of consumers.
- Fructis not on promotion: no conclusions possible about consumers who buy the brand when its on promotion.
- Non-representative Fructis sample: sample size too small (20<30).
- Lack of understanding of promotion for Pantene consumers: majority of consumers did not seem to understand the offer of "2 for 1".

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2.

IN-DEPTH INTERVIEWS

- Convenience sampling: most respondents belong to the personal network of the team, therefore more Millennial respondents interviewed in comparison to respondents aged >35.
- Non-representative sub-samples (Millennials aged 18-25, Millennials aged 26-35, Fructis Users, Fructis Droppers): less than 30 respondents for each.
- Uneven sample size per gender and social class.
- Questioning Error: any improper delivery of questions by the team member interviewing.
- Respondent error: possible untruthfulness of some responses.
- Inability error: Respondents not being aware of some factors that influence their behaviour as consumers, thus not mentioning them.

3.

INDIVIDUAL RESEARCHES

- Conflicting information between data sources.
- Limited data available
- Lack of availability of a best practice in which a brand did a similar transition as Fructis, makes it more difficult to draw a parallel with the brand
- Limited space: little number of brands analyzed and analysis of each brand based on the communication activities most relevant.
- Inability to accurately assess the successfulness of the communication strategies of the brands analyzed
- Brands analyzed not only from personal care category but also from food, fashion or automotive
- Brands analyzed not only mass market brands but also niche brands
- Model building with limited scientific grounding and validity test on based on personal judgement
- Analysis only of the social media channels: Instagram, Facebook and Twitter
- Inability to accurately assess the amount and type of investment on social media of the brands analyzed

4.

RECOMMENDATIONS

- Some communication objectives are mutually exclusive, thus, can not be addressed simultaneously, which implies a trade-off.

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