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

THE BODY SHOP INDONESIA

How can The Body Shop Indonesia better engage the new millennial generation?

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WORK PROJECT: HOW CAN THE BODY SHOP INDONESIA BETTER ENGAGE THE NEW MILLENNIAL GENERATION?

Keywords: The Body Shop, Indonesia, Millennials, Brand Management

As an intern at The Body Shop Indonesia (TBSI) in Jakarta from June to September 2016, we approached the challenge "How can TBSI better engage the new millennial generation?" by conducting and primary and secondary research. Based on the research, we recommend TBSI to (a) follow a brand strategy which understands millennials as a unique target and which acknowledges their me-focus, (b) add a specific millennial-positioning to TBSI's overall brand positioning and (c) realise this positioning through implications focused on making TBSI the leader in the emerging beauty trends in Indonesia. Recommendations were presented to and approved by TBSI.

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I. INTRODUCTION & MAIN OBJECTIVES OF THE PROJECT

The Body Shop is a global cosmetics brand known for its high quality, natural products. At the same time, The Body Shop is considered a pioneer when it comes to sustainable business practices, meaning that the brand aims for a positive triple bottom line which combines economic, environmental and social values. Achieving a positive triple bottom line in any business is challenging. However, it is even more challenging to achieve it in a country that is still in development – such as Indonesia. Indonesia is marked by stark contrasts: It is evolving rapidly and trends are spreading fastly among the young population. However, at the same time, Indonesia is still facing struggles of developing nations.

Internship at The Body Shop Indonesia

Having worked in several European countries and in Australia, I was looking for a professional experience that would challenge me in new ways. As such, The Body Shop Indonesia (TBSI) provided a unique opportunity to apply and deepen my marketing skills while combining them with sustainable values in the entirely new and dynamic context of Indonesia. As an intern at TBSI in Jakarta from June to September 2016, I was given the role of an external analyst of the brand. The main goal of my internship was stated as "getting ahead of competition by being the first brand in Indonesia to understand and address millennials as a truly unique target". This goal translates into the specific challenge of this work project (WP), which is:

How can The Body Shop Indonesia better engage the new millennial generation?*

The challenge is faced by firstly gaining an overview of Indonesia, its consumers and the Indonesian health and beauty market. Secondly, the target group of millennials is characterised using both theory and global trends. Thirdly, The Body Shop's story, values and features are presented while laying a focus on the brand's presence in Indonesia. Building on these three sections, the challenge is further approached by conducting primary research. Based on these research findings, a strategy and practical implications are recommended to TBSI in order to successfully engage the new target. Lastly, limitations and propositions to further research are presented.

Branding Concepts

The approach of this work project is grounded on branding literature. The main concepts used are brand image and brand identity. As literature offer various definitions of both concepts, the concepts will be used as defined below:

Brand Image is defined as "perceptions about a brand as reflected by the brand associations held in consumer memory" (Keller, 1993).

Brand Identity are fundamental means of consumer recognition which symbolize the brand's differentiation from competitors. The brand identity is what the brand managers intend the brand to be, and is therefore different to the brand image as perceived by consumers (Kapferer, 2008).

*Here defined as 15-25 year olds. For further information, please refer to slide 4.

II. CONTEXT: INDONESIA

Land & Economy

With over 260 million people identifying with over 300 ethnic groups, who inhabit 1000 of the overall 18000 islands, Indonesia is the fourth most populated country in the world, and one of the most culturally and socially diverse. Today, according to The World Bank (2016), Indonesia is the largest economy in Southeast Asia (SEA), the tenth largest economy in terms of purchasing parity worldwide and a member of G20. The country has an annual GDP growth of 6% and has recovered well since the Asian financial crisis in the 1990s. The currency is the Indonesian Rupiah (IDR) [1 Euro = 14500 IDR]. The Indonesian economy follows a 20 year development plan, from 2005 to 2025, with five-year plans (RPJMN) dedicated to specific topics. The current one focuses on infrastructure development, education and healthcare. Despite its rapid development over the last decades, Indonesia is still facing common struggles of developing nations, such as poverty, environmental degradation, underdeveloped infrastructure, corruption and high inflation rates (The World Bank, 2016; Euromonitor, 2016a).

Indonesia: GDP per capita development

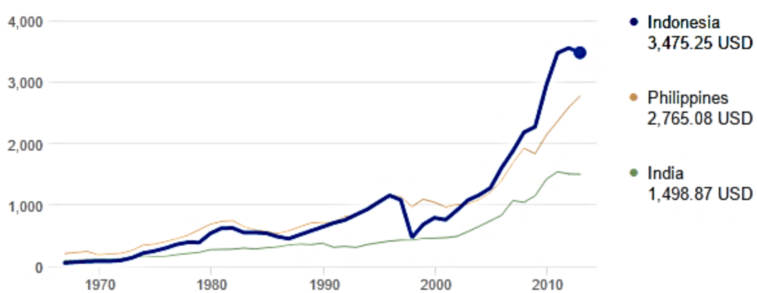

Figure 1: Indonesia: GDP per capita development, The World Bank, 2016

Consumer Diversity

Overall, Indonesian consumption fundamentals are positive, such as its favourable demographics (young and growing population), the high private consumption (57% of GDP) and the rapid urbanisation. However, Indonesian cities are at different levels of consumerism (Razdan, Das & Sohoni, 2013). Indonesia's consumers can furthermore be characterised as diverse, with varying tastes and preferences across the islands and cities. Therefore, it is expected that companies will increasingly need to localise products and value propositions while crafting portfolios of local and global brands. Following this line of thought, it is expected that localisation not only to countries, but even to cities will become increasingly relevant. This trend of localisation to cities of for example marketing campaigns is especially relevant as cities' populations are growing into the size of countries. Supportive of this argument of needing carefully managed brands is that Indonesian consumers attach more importance on brands than consumers of any other nation at this stage of development (Budiman, Chhor & Razdan, 2013). Furthermore, Indonesian consumers value "local" brands, meaning brands which are perceived as being Indonesian. However, many international brands such as Nestlé's KitKat are believed to be local (Razdan, Das & Sohoni, 2013). Additionally, it was found that there is an affluent consumer class of 20 million Indonesians that is less traditional than previous generations and that appreciates personal indulgement and rewarding themselves (Razdan, Das & Sohoni, 2013). Despite its vast rural areas, almost all of Indonesia enjoys good mobile internet connection which is mainly used for social networks. Likewise, with 43% of the population owning a smartphone, given the degree of development, internet usage is huge. Therefore, it is less surprising that 70% of internet usage is through mobile devices (Balea, 2016; Jakarta Globe, 2016; Loras, 2016). Far less developed is e-commerce in Indonesia. Although numbers on the exact penetration of e-commerce vary largely (between under 1% to 15%), given the lack of infrastructure, the technical difficulties to ship between the islands as well as the mistrust Indonesians have against online payments, it is likely that the actual numbers are on the lower end of the spectrum (Cosseboom, 2014; DailySocial, 2012; Hecht, 2014).

II. CONTEXT: INDONESIA

Health & Beauty Market

Overall, the health and beauty market is dominated by multi-national corporations such as Unilever, P&G and L' Oréal. Competition is however intensifying as hundreds of local and international brands are entering the market every year. Especially Korean brands are increasingly favoured by Indonesians. Premium products have an overall value share of 6%, of which market leader Pond's [positioned as premium in Indonesia] makes up 40%. The fastest growing segment is skin care (1.13 billion Euro in 2015) and until 2019, Indonesia is projected to enter the top 10 global skin care markets. Within the segment of skin care, anti-aging products are among the best performing ones (L' Oréal, 2014; 2016; Euromonitor, 2016b).

Channels

In Indonesia, health and beauty products of international brands are mostly sold in Department stores and Monobrand stores, and to a lesser extent in supermarkets and pharmacies. All stores are almost exclusively located in malls. In more rural areas as well as in less wealthy areas of the cities, two channels are predominant: The first one is small, traditional stores in which local brands and international brands are sold in single-serving packages. The second one is individuals reselling products to their neighbours and personal networks (Euromonitor, 2016b; TBSI, 2016).

Health & beauty trends in Indonesia

As Indonesia is rapidly developing, aspirational lifestyle brands are increasingly used. Furthermore, there is an increased demand for beauty salons and spas. Simultaneously, there has been an increase of skin problems due to the high levels of pollution in cities and increasingly unhealthy lifestyles. In addition, while make-up has traditionally been used for festivities such as weddings or ceremonies, most women were not using it on a daily basis. More recently, women of all ages and especially young millennials are adopting it and in some cases, young girls even adopt make-up before their mothers. Furthermore, niche targets have been expanding with brands marking their products as natural or "halal" (L'Oréal, 2014; 2016; Euromonitor, 2016b; TBSI, 2016).

Halal is defined as "permissible - and in translation it is usually used as lawful. The Halal food Authority rules for halal are based on Islamic Shari'ah" (Halal Food Authority, 2016). Please refer to HalalFoodAuthority.com for further details. Please refer to figure 1 below for an example of the halal certificate on products:

Figure 1: Halal Certification (Halal Food Authority, 2016)

II. CONTEXT: MILLENNIALS WORLDWIDE – DEFINITION & DEVELOPMENT

Definitions of age group vary

Most sources define millennials as being born between 1980 and 2000 (e.g., Bump, 2014; Euromonitor, 2015; Goldman Sachs Global Investment Research, 2016). Within this range, especially the younger millennials show behaviours which differ from those of previous generations. Furthermore, this younger age group is of particular interest to TBSI because they are currently not included in the brand's target. Therefore, the focus of this project is on 15–25 year olds without necessarily excluding the adjecent ages.

Why millennials? ...because of their current & future spending power

- Millennials have a high disposable income: "By 2018, Millennials will have the most spending power of any generation" (Bazaar, 2012);
- In many parts of the world millennials are the largest generation alive and are just entering the job market;
- "There's two billion millennials around the world and 86 percent of them are living in emerging markets" (Nahal, as cited by Ellyatt, 2015);
- Therefore, now is the key time for brands to enter young consumer's lives in order to stay relevant in the future, and potentially over their entire lifetime.

...because they are different

- Millennials grew up with technology, in a globalised world, have seen environmental, political and financial crises while at the same time, having had a relatively comfortable start in life. This has led them to be aware of global causes and to explore other lifestyles than previous generations, as well as to be more confident in their own potential (Schawbel, 2015);
- "Millennial attitudes are early indicators of widespread future trends" (BCG, 2012);
- "They have a lot of influence over older generations and are trendsetters across all industries" (Schawbel, 2015);
- "Companies have been struggling with connecting with this generation because many of the traditional methods of advertising have proven ineffective at capturing their attention" (Schawbel, 2015).

Identity Development

Following Erikson's model of identity development (1994), there are two main stages in millennials' journey of growing up: First, there is the younger stage characterised by a dissatisfaction with one's body. In this stage, immediate results are sought to change the appearance. Applying this idea to skin care, products which either solve problems such as acne or which transform the appearance through make-up are especially relevant in this stage. Over time, the young millennial then becomes increasingly satisfied with his or her own body and is more interested in long-term care. At this later stage, beauty and skin care have a more long-term orientation and anti-aging products are becoming part of the skin care routine. The age at which millennials pass from one stage to another depends on a number of factors such as the culture or the personal environment and ultimately, each millennial's development is a unique journey.

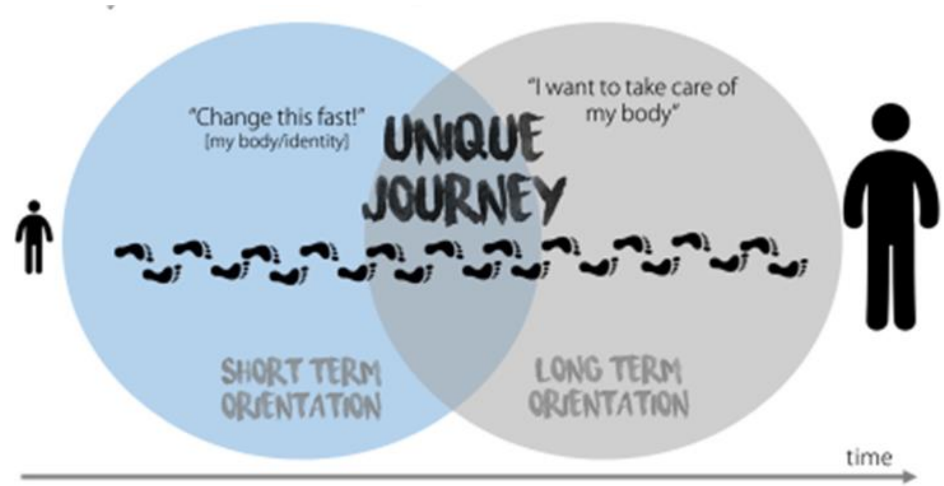

Figure 2: WP author, adapted from Erikson (1994)

II. CONTEXT: MILLENNIALS WORLDWIDE – CHARACTERISATION & TRENDS

Euromonitor (2013) characterises millennials as being digital and social, caring about new values, the center of their lives and as a new generation of consumers. Below, these characterisations are further defined and illustrated with recent trends.

MILLENNIALS ...are digital & social

- Online and socially networked;
- Superficial, constantly seeking approval from others through social media;
- Sharing content & closely connected to peers;
- Instantaneity seekers (Euromonitor, 2015).

Trends: Millennials are always connected and social media has become an integral part of their lives. As such, media addiction as well as an "always on, anytime, anywhere, but only when and where I want" – attitude are equally present (McKinsey & Company, 2014). Furthermore, social media is mainly used to share content and to connect with friends across multiple social networks, using multiple devices (Statista, 2016). In most parts of the world, e-commerce still contributes to a very small percentage of overall purchases from millennials but is believed to quickly increase. Consumers demand integration of online and offline shopping and likewise, they are using online reviews for both (McKinsey & Company, 2014). Furthermore, console, PC and gaming apps are strongly trending with more online-offline integration and communities, such as the game Pokémon GO or the streaming platform Twitch.

Branded content on social media works for millennials if it is...

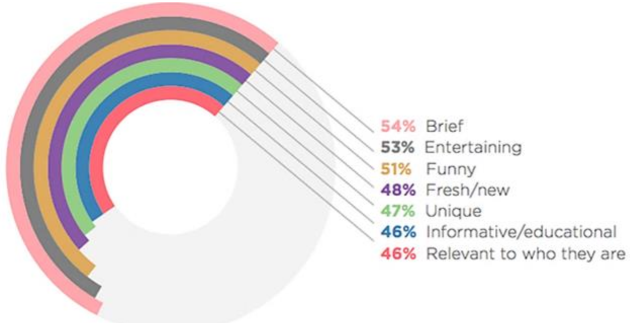

Figure 3: Branded Content, Yahoo Content Marketing Ingestion Study (2013)

...care about new values

- Tolerant of differences;
- Being socially and environmentally conscious is the norm;
- Compared to older generations, they have less faith in political and religious institutions (Euromonitor, 2015).

Trends: Millennials are increasingly demanding sustainability in products and business practices (Hanks, Odom, Roedl & Blevis, 2008). Furthermore, Millennials form lifestyle tribes around shared interests, which do not necessarily depend on shared geographies. Examples include freeletics, LGBT community, vegans or Apple fans. Moreover, among bloggers (i.e., a person who keeps a Web log (blog) or publishes an online diary), vloggers (i.e., video-bloggers) and brands such as Dove, there is a trend of focusing on values such as diversity, confidence, on being natural and authentic (Martin, 2010; Cova & Cova, 2010).

...are the center of their lives

- Economically optimistic despite a challenging reality, high expectations at life;
- Confident, individualistic, entitled, narcisstic;
- Modern, risk-taking, innovative;
- Hip, funny, humorous and content-generators (Euromonitor, 2015).

Trends: Selfies – millennials worldwide take over 1 million selfies every day and selfies make-up 30% of all photos they take (Wilson, 2014).
Customisation – products and experiences that can be customized are favoured by millennials (Kamis & Frank, 2008).

...are a new generation of consumers

- Informed and increasingly sceptical about advertising and promotions; instead, millennials form their own opinion through brand's actions, influencers such as bloggers and peers;
- Prefer to spend on experiences (Euromonitor, 2015).

II. CONTEXT: THE BODY SHOP – STORY & VALUES

The Body Shop was founded in the UK in 1976 by Anita Roddick (1942 – 2007) as a premium brand of natural skin care and make-up products with a social and environmental orientation. The Body Shop grew rapidly and today, it is present in 61 countries, with a head-to-toe range of over 1200 products. The Body Shop distributes almost exclusively through its monobrand stores, of which a small fraction is franchised. Furthermore, in most countries where it is present, The Body Shop has an online store as well as it has a global strategy of using no traditional media advertising. The Body Shop's stores have strict guidelines to ensure that the customer experience is the same everywhere in the world, making it a truly global brand. In 2006, The Body Shop was bought by L'Oréal, which caused a media controversy questioning The Body Shop's value commitment. In reaction to the controversy, Anita Roddick argued that she "sees herself as a kind of "Trojan horse" who, by selling her business to a huge firm [L'Oréal], will be able to influence the decisions it makes " (Cahalane, 2006).

From its very beginning, The Body Shop aligned itself with social and environmental causes, and in 1990 *The Body Shop Foundation* was created. The brand followed its value commitment with the five guidelines of:

Figure 4: The Body Shop's initial values (The Body Shop, 2016)

In 2016, the brand reformulated these guidelines into the "ENRICH, NOT EXPLOIT (It's in our hands)" commitment (see fig. 6 on the right). While having faced mild criticism in the past – such as that sustainability was not ensured at each step of the value chain, that The Body promotes consumerism, or that the brand is against trade unions and pays low wages – the commitment is aiming very high by stating that "our aim is to be the world's most ethical and truly sustainable global business" as well as by declaring concrete steps which need to be taken in order to reach this goal.

Figure 5: Portrait and quote by Anita Roddick (The Body Shop, 2016)

Figure 6: Enrich Not Exploit commitment (The Body Shop, 2016)

II. CONTEXT: THE BODY SHOP IN INDONESIA – FEATURES & ACTIVITIES

The Body Shop was already present in 37 countries before it was introduced to Indonesia in 1990. After initial struggles which included a fire in the office, TBSI managed to effectively launch and continuously expand its business. In Indonesia, The Body Shop based its strategy on entering the market before most other international brands, a well-adjusted pricing strategy and, above all, the strategic location of its stores. Today, TBSI has 153 shops exclusively located in malls of 39 cities of which almost half are in Jakarta. The other shops are spread over 38 cities in Indonesia. What has since changed is however that the initial success drivers are not exclusive to TBSI anymore. Consequently, TBSI's main point of difference evolved towards the brand's strong value commitment. TBSI has a market share of around 2% and stable, yearly sales of around 55 million Euro. TBSI currently employs over 1300 people and has a strong culture of corporate volunteering and CSR for social and environmental causes, which is often combined in events where TBSI's team for example plants trees or helps out in local kindergartens and orphanages.

Figure 7: TBSI CSR event (TBSI, 2016)

Channels

TBSI sells almost exclusively through monobrand stores with at least one trained make-up and skin care expert per store. Online sales only account for less than 1% of the total sales (about 0.2%) but are expected to grow rapidly. Channels are TBSI's own website and local B2C marketplaces such as *Lazada*, *blibli* or *elevenia*.

Competitors (TBSI's internal perspective)

Main competitors are

a. based on price: *Bath & Body Works*, *Victoria's Secret* and *The Face Shop*.
b. based on product similarity and stores' location: *Clinique*, *Kiehl's* and *L' Occitane*

It is noticeable that except for *Clinique*, these brands are all distributing through monobrand stores in well-located malls in Indonesia, showing that although it is not a point of difference anymore, location is still among the most important success drivers for TBSI.

Communication

Advertising is not part of The Body Shop's international strategy. However, TBSI has few ads in high-fashion magazine Harper's Bazaar, on the radio (cosmopolitan FM) and on YouTube.

TBSI holds promotional events such as meet-and-greet events with bloggers or CSR events. For many events, consumers are engaged or can even volunteer. These events provide content for TBSI's social media communication.

In TBSI's online presence, the overall tone of communication is cheerful, engaging, product-focused and features promotional discounts. English and Indonesian language are mixed. The brand's online channels include:

- The brand's website, which is primarily used for e-commerce and special discounts;
- Social media
    - Facebook: Highly engaged, diverse contents
    - YouTube: 15 paid vloggers giving tutorials on TBSI products, Fashion Week content, Enrich Not Exploit-campaign
    - Instagram: #BeautifulFriday as a mini-tutorial, posts which are product-focused, and some communication of brand values
    - Twitter: Mainly used for customer complaints
    - Pinterest: Colourful, product-focused
- The brand's app "Love Your Body Club", which supports the shopping experience by allowing customers to scan products, locate stores or by providing additional product information, as well as information on the member's loyalty programme.

III. ADDRESSING THE CHALLENGE

Building on the previous sections of secondary research, the challenge is addressed by conducting primary research. In particular, four sets of qualitative interviews were conducted in order to gain insights from and about the target group of 15-25 year old Indonesian millennials. Please see Appendix I for the pre-recruiting questionnaires, Appendix II for the interview guide and Appendix III for further details on the sample.

Primary Research

Overall, 55 people were interviewed, of which 15 were employees or managers at TBSI and 40 were customers. TBSI's customers are mainly female, which was represented in the sample. In the study, the male respondents did not offer any particular insights. Therefore, both the analysis and the recommendation focus on female millennials, while not necessarily excluding men.

I. Manager interviews
   - n = 7, from various departments

II. TBSI millennial customers
   - n = 31, aged 17-25, female (25), male (6);
   - Interview technique: One-on-one, in-depth qualitative interviews of 45-60 min, conducted in English, in-person or through skype
   - Sampling: Referral and online acquisition

III. Complementary focus group
   - n = 9, female, aged 18-25
   - Interview technique: Focus group & anonymous notes
     - To confirm and further explore key insights from in-depth interviews
     - To control for cultural bias as Indonesian respondents feel more comfortable in a group setting
     - Please refer to Appendix IV for material which was created during the complimentary focus group.

IV. Store staff interviews
   - Sample: n = 8, four locations in Jakarta, working in the stores on average for two years
   - Technique: semi-structured, in-depth qualitative interviews with a translator

IV. FINDINGS: DEFINITION OF BEAUTY IN INDONESIA

Beauty when growing up

While growing up, Indonesian girls indicated that they are under strong pressures to be beautiful. In the study, millennials further identified their mothers as a main source of pressure: They warn their daughters not to have too dark skin as they are concerned for them to find a husband. Aside from this, “body shaming”, meaning the bullying based on physical appearance by peers (online and offline) are experienced by many. Overall, there is a strong social urge to alter one’s appearance during teenage years. Later, usually above the age of 20, respondents become more satisfied with their appearance, thereby confirming Erikson’s model of identity development (1994).

> *“I used to hate my large forehead, everyone was making fun of me. But now, I learned to love it, because it’s part of what makes me!”* (Female, 24, freelancer)

Dominant beauty ideal

Respondents described a strong and clearly defined beauty ideal which is marked by white, flawless skin, thick black hair, a slim body and an overall young and cute look. Furthermore, this definition of beauty is closely linked to whitening one’s skin and to having international beauty idols, most commonly from the US or Korea.

Emerging beauty ideals

Besides the dominant definition of beauty, the research highlighted emerging trends which are in opposition with this dominant beauty ideal. Emerging trends are characterised by diverse and unique definitions of beauty, which are often in line with being proud of one’s brown skin (Ind.: *hitam manis*) and with actively opposing whitening products. Moreover, we identified a smaller trend of proudly identifying with local cultures, such as the regions or islands where they come from (e.g., Java, Bali, Lombok or Sumatra).

> *“I don’t care if others call me ‘hitam manis’, I take it as a compliment”* (Female, 22, student)
>
> *“I am proud of my skin because it shows where I come from – and that I love to be outside”* (Female, 20, student).

Whitening

In the study, Indonesian millennials define whitening as leading to *“bright skin”* (Female, 21, student), *“glowing skin” (*Female, 24, freelancer) and *“a lighter skin colour”* (Female, 23, student). Opinions on whitening include: "I *use it but it doesn’t really work”* (Female, 22, student), *“I used it before, everyone is using it, but now I stopped” (*Female, 24, freelancer) and that *”it’s dangerous”* (Female, 20, student). Generally, consumers are divided between seeking white skin (dominant trend) and actively rejecting whitening products (emerging trend). Similar to millennials’ indication of skin colour being a highly controversial topic, an analysis of online media(Bhattacharya, 2013; Nonamerah, 2014; Osman, 2016; Toumbourou, 2008) and offline media (please refer to Appendix V) confirmed the divide between a strong mainstream trend of white skin and a smaller counter-trend of appreciating all shades of skin. Bloggers linked skin colour to the self-definition of their Indonesian identity (see figure 8 and 9 below).

- *“Just don’t be afraid of getting a tan. And remember to keep the environment clean.”* – Salini Rengganis, female Indonesian pro surfer (as cited in Indo Surf Life, 2012)
- *The sugary brown begins: Being a brown-skinned woman in Indonesia”* – Little Nomad Id, Indonesian travel blogger (as cited in Appler, 2015).
- *“I think the latest idiom that is derived from hitam manis as a compliment to very brown complexion is ’selem kopi, maal ajine’: the blackness of coffee (Luwak), it is exclusive.”* – Ida Ayu Indah, Indonesian blogger, 2014

Figure 8: Instagram-Blogger Trinzi on matching lipstick colours to Indonesian skin tones (#kulitpesonakayubakar on Instagram, 2016)
Figure 9: Salini Rengganis, female Indonesian pro surfer (Indo Surf Life, 2012)

IV. FINDINGS: BEAUTY & SKIN CARE PURCHASE BEHAVIOUR

Overview

Respondents are commonly not certain about the amount of money they spend on beauty & skin care as many of their purchases are impulsive. They furthermore indicated that they enjoy trying new brands and products and use non-branded and branded products simultaneously (high- and low-involvement behaviour with the category). E-commerce is generally not used. Overall, in the study, respondents showed a low loyalty to brands. However, for a few high-involvement brands, millennials did indicate loyal behaviour. For TBSI, respondents did not indicate any specific purchase behaviour that would differ from that of other skin care and beauty brands.

> *"Sometimes I go to the mall with my friends and we try out new products and make-up looks on each other"* (Female, 19, student)

In store

On average, each customer visits a TBSI store 3.33 times a year. Currently, customers aged 40 to 60 spend the most. However, more recently, spending of younger customers is increasing. These millennial consumers come to the shop informed after consulting blogs and online reviews:

> *"Some customers know a lot about our products already, so we have to keep up and continue our training in order to make the service even better"* (Staff, store in Jakarta)

> *"I follow a lot of beauty blogs, both Indonesian and from abroad. And if they use a product and they like it, I know that it will be good and I need to try it"* (Female, 21, student)

Under 25 year old customers are almost exclusively girls, and they usually visit the store in groups of three to four. In order to choose a product, millennials indicated that they inform themselves online, try it in store, ask friends and family, receive news through advertising, look for promotions and discounts or follow their doctor's advice. The study furthermore revealed that millennials seek different benefits depending on their age: Younger consumers want to solve specific problems (oily skin, blemishes) and want immediate results through skin care and make-up. From the age of 25 onwards, anti-aging products are regularly bought.

> *"Honestly, the only thing that matters for me is that it [skin care] works. Fast" (Female, 19, student)*

> *"I sometimes try new products, but they need to be really good. Otherwise I will not add them to my skin care routine"* (Female, 24, judge)

Halal

When asked which factors are important when choosing a product, no interviewee spontaneously mentioned "halal". When asked specifically about it, the majority said that they do not care about "halal", while a small group said that they value it as one factor among many. In-store interviews indicated that halal is not relevant except for a minimal number of more mature customers. Overall, it seems that a halal-certificate can have a marketing benefit for a minority group but for the majority of the under 25 year olds, it is not a major factor for considering a brand or product. As TBSI is currently in the process of introducing a Halal symbol on its products, this project will not focus more on the "halal" feature.

IV. FINDINGS:

BEAUTY & SKIN CARE USAGE BEHAVIOUR

Many brands are used at the same time, and some interviewees even mix products to make them last longer. Most respondents started using skin care between the age of 12 and 15, often initiated by their mother. From the age of 18-20, they are fully responsible of their own skin care. When millennials were younger, mothers were usually not supportive of them using make-up but changed their minds as their daughter grew older:

> *"Because she saw how pretty it [me with make-up] looked"* (Female, 22, student).

Some respondents indicated that their mothers started using make-up only after they have seen it on their daughters.
For TBSI, respondents did not indicate any specific usage behaviour that would differ from that of other skin care and beauty brands, except for a small group that indicated that they miss instructions on how to use TBSI's products.

> *"Sometimes it would be great if products would say how to use them, how much to use and which exact steps I need to follow for best results"* (Female, 23, student).

THE BODY SHOP INDONESIA'S BRAND IMAGE

In the primary research, respondents did not indicate any deep associations about the brand, stores or products but overall, had a positive brand image of The Body Shop (please refer to Appendix VI for quotes). One exception to this are the values, which respondents frequently mentioned:

- Generally, TBSI's brand values are linked to being "green" and to "CSR";
- In many cases, being "green" is associated to the idea of being a safe, natural product;
- Most respondents are not aware of the ENRICH, NOT EXPLOIT campaign and do not intuitively understand it. When explained what stands behind it, they are however supportive and interested to find out more;
- Most respondents indicate that they support these values and about a quarter of respondents indicated that the values are among the main reasons they choose TBSI's products;
- Overall, respondents show high awareness and knowledge of both sustainability in general and of TBSI's dedication to them.

Furthermore, using the projective technique, respondents were asked *"If The Body Shop Indonesia was a person, how would the person be?"*. Millennials' responses confirmed the generally positive image with no further deep associations except for the values.

> "*A beautiful, mature woman*" – (Female, 17, student)
>
> "*She is an activist*" – (Female, 22, student)
>
> "*A very polite person, but not like someone you would take to hang out with your friends*" – (Male, 22, accountant)
>
> "*A woman, in her early 30s, very elegant and wears black all the time*" – (Female, 23, student)

IV. FINDINGS: THE BODY SHOP'S BRAND IDENTITY

In defining the current The Body Shop's brand identity (Kapferer, 2008), both secondary research and interviews with the managers at TBSI were used. We present the brand's global identity below and, if applicable, the facets of this identity which are more predominant in Indonesia.

Physique

"the brand's most salient features"

- Logo and name;
- Characteristic store layout;
- Colourful packaging which represents the natural ingredients;
- Product's natural scent;
- Value commitment "Enrich Not Exploit" used in brand's stores and online communication.

Figure 10: The Body Shop's logo and products, arranged by WP author, retrieved from (TBSI, 2016)

Relationship

"what the brand gives to its consumers/how it treats them in transactions"

Tangible benefits

- Natural ingredients;
- Professional products and service;
- A multisensory experience;
- The best natural ingredients from all parts of the planet.

Emotional benefits

- Guilt-free indulgence: "Treating myself well without doing harm to the planet, its people or to my own health";
- A way to help consumers take care of their bodies and minds;
- A way to be involved with the planet and its people.

Insights on TBSI

The strong service and the great number of stores (almost 150) in top locations are, although not exclusive to TBSI, a factor that makes the brand stand out over others. In Indonesia, offering natural products which adhere to international quality standards are perceived to be safer for one's health (i.e., non-toxic) than local products.

Customer Reflection

"the brand's projected or desired consumer type"

- Someone who loves nature, but lives in the city;
- Who is aware of social and environmental causes and supports them;
- A woman in her early 30s who takes good care of herself and who values an indulging experience without a bad conscience;
- A person true to her/himself.

Insights on TBSI

In Indonesia, the projected consumer type is significantly more wealthy than the average population and purchases high-premium and luxury personal care products.

IV. FINDINGS: THE BODY SHOP'S BRAND IDENTITY

Personality

"if the brand was a person, what kind of person would it be?"

- Happy and fun to be around;
- Knowledgeable and aware of the world;
- Beautiful in her own way, unique;
- Cultural and sophisticated;
- Natural;
- Funny and quirky.

Figure 11: Lily Cole for The Body Shop (The Body Shop, 2016)

Culture

"core values of the brand and the brand's source of inspiration"

- Founder Anita Roddick and her belief in sustainability;
- Natural ingredients, sourcing from local communities all over the world;
- The brand's corporate culture of fun and doing good;
- Value commitment "Enrich Not Exploit":

  The way we do business, the way we make products, the way we source ingredients, and the way we use our voice; we're different because of our values" - The Body Shop, 2016.

Insights on TBSI

Within the "Enrich Not Exploit"-commitment, TBSI focuses most on the environment. TBSI emphasises their strong corporate culture of team spirit, corporate volunteering and social events.

Figure 12: The Body Shop's "Enrich Not Exploit"- Value Commitment (The Body Shop, 2016)

Self-Image

"what managers expect consumers to feel when purchasing and using the brand"

- "I am doing good for myself while doing good for the environment";
- "This is fun!";
- "I like myself the way I am! ;
- "I am beautiful because I am unique".

Insights on TBSI

- "I get all the benefits I need through natural ingredients";
- "I get a wide range for all of my needs – from head to toe";
- "It's a cool brand and they actually care about me as a person, about the environment and its people".

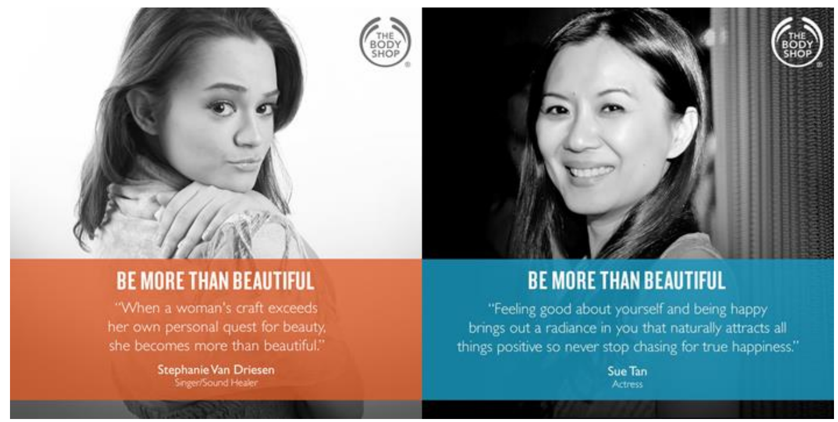

Figure 13: "Be More Than Beautiful"-Campaign for International Women's Day 2014 (The Body Shop, 2016)

IV. FINDINGS: PERCEPTION OF COMPETITORS

Based on respondents' insights in the study, we constructed a map to reflect millennials' views on competitors. The two criteria which emerged in the research as specifically relevant for millennials are:

a. **Brand's social statement** – the brand's image with regards to sustainability, being green and to CSR.
b. **Engagement with millennials' lives/me-substance** – the substance the brand gives to the consumer, or how much it places the consumer at the centre of all of its actions. Brands which perform highly on this dimension were described as being edgy, as having a positive ideal and as being international.

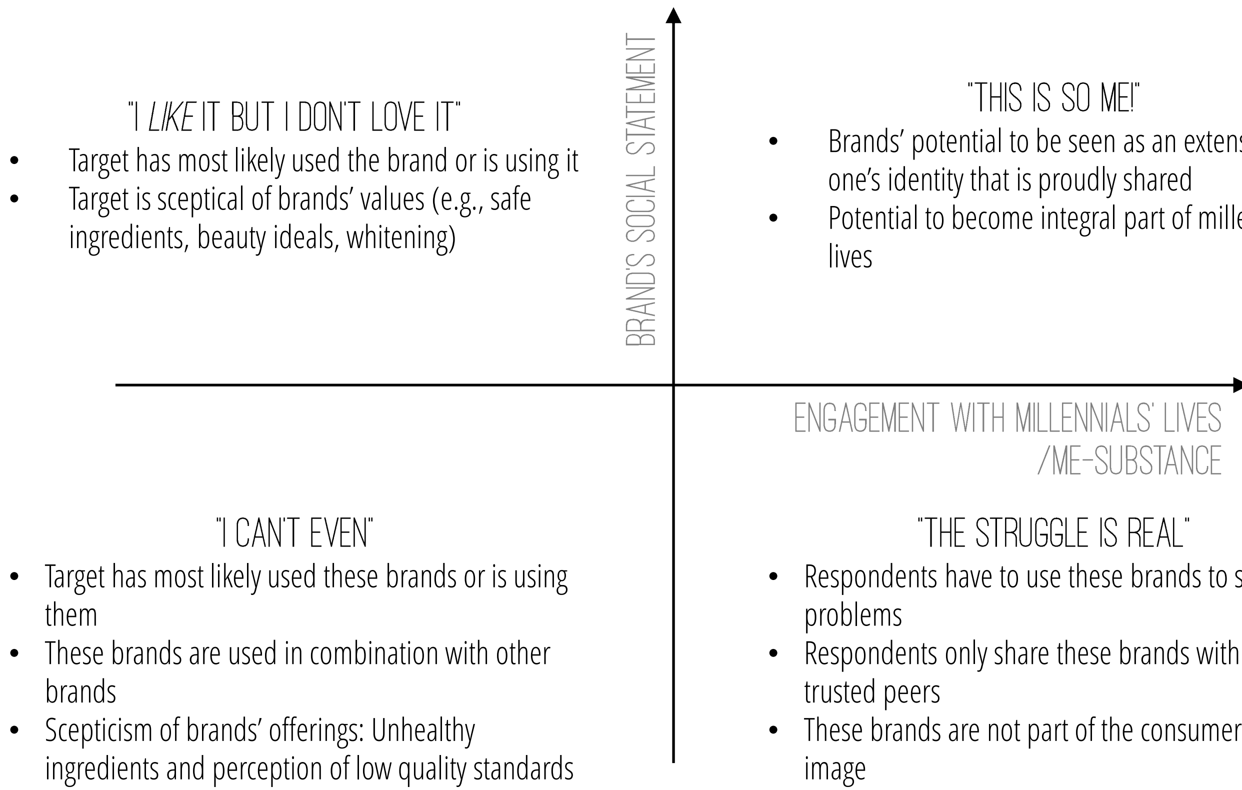

Figure 14: Competitor mapping, based on the primary research (WP author, 2016)

IV. FINDINGS: PERCEPTION OF COMPETITORS

It is to be noted that the map is not intended to reflect purchase or usage behaviour and that it is not representative of other segments. The brands mapped are by no means an exclusive list but instead show TBSI's competitors which were most frequently mentioned in the study.
(1) Brands which respondents indicated as having strong and positive values, such as being environmentally-friendly.
(2) Brands which are perceived as having a positive social statement, due to them being local.
(3) Brands which balance both features (i.e., brand's social statement and me-substance).
(4) Brands which are traditionally considered luxury brands.
(5) Brands which offer a wide range of high-quality make-up products.
(6) Make-up brands which are still small in Indonesia but expected to grow rapidly.
(7) Brands from Korea which cannot be purchased in Indonesia but are used by many respondents.

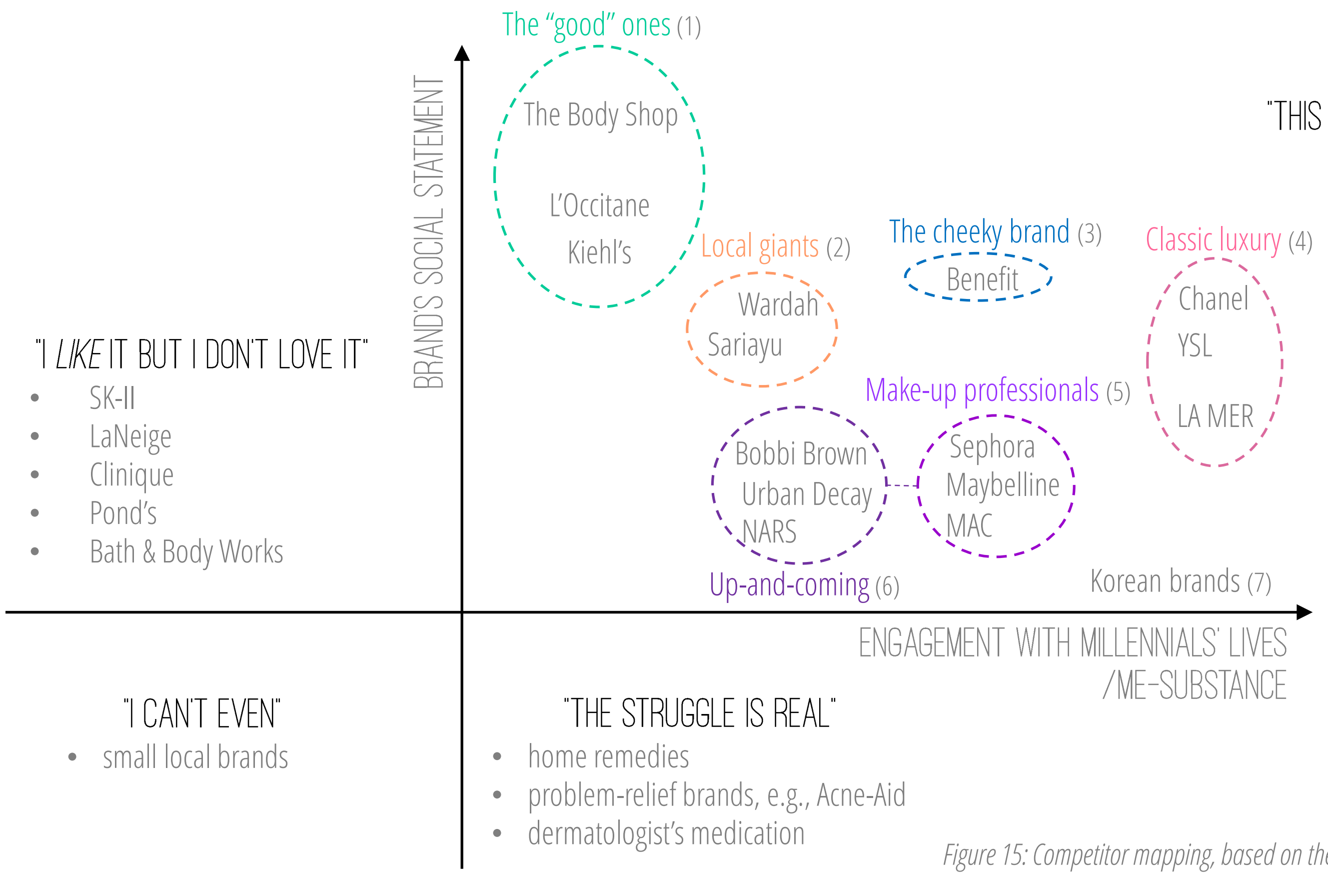

Figure 15: Competitor mapping, based on the primary research (WP author, 2016)

IV. Findings: SWOT Analysis – The Body Shop Indonesia's Current Engagement with Millennials

Strengths
- Monobrand stores, TBSI's own trained staff;
- Stores are numerous and well-located in malls;
- Wide product range: From head to toe;
- Provide value proposition and POD: Brand's values of sustainability, natural and quality products;
- indulging experience with a good conscience.

Weaknesses
- Millennials do not feel that TBSI targets them directly and instead perceive the brand as serious and mature.

Opportunities
- Millennials' willingness to spend;
- Millennials' "me-focus";
- Localising communication to major cities within Indonesia;
- Trends
  - Green trend, social conscience & sustainability
  - Customisation
  - E-commerce
  - Gaming
  - Health & fitness trend
  - Mainstream beauty ideal vs emerging beauty trend: Diversity, real and natural beauty, all skin colours.

Threats
- Increasing scepticism for brands;
- Other brands stress "me-focus" more strongly than TBSI
  - Korean brands are becoming increasingly popular
  - Chemical, highly-effective products offer immediate effects, especially for whitening and anti-aging
  - TBSI's image is positive, but does not have many deep brand associations in comparison to e.g., the "classic luxury" brands

V. RECOMMENDATIONS: STRATEGY, POSITIONING & IMPLICATIONS

We solve the WP challenge "How can TBSI better engage the new millennial generation?" by recommending TBSI to (a) follow a brand strategy which understands millennials as a unique target and which acknowledges their me-focus, (b) add a specific millennial-positioning to TBSI's overall brand positioning and (c) realise this positioning through implications focused on making TBSI the leader in the emerging beauty trends.

In particular, as TBSI already performs highly on the dimension of social statement (i.e., values of sustainability), we recommend that the brand emphasises the individual values more (i.e., the me-substance or me-focus) and through that, gain a competitive advantage. Other brands, which currently stress the me-focus successfully cannot adapt their external values as easily, since millennials are sceptical of and informed about brands' value claims. Performing well on the dimension of brand's social statement demands a full dedication – which TBSI has followed since ist beginning. Therefore, by adding a me-focus to TBSI's current value proposition, TBSI will gain a unique position in the minds of millennials as well as of other targets.

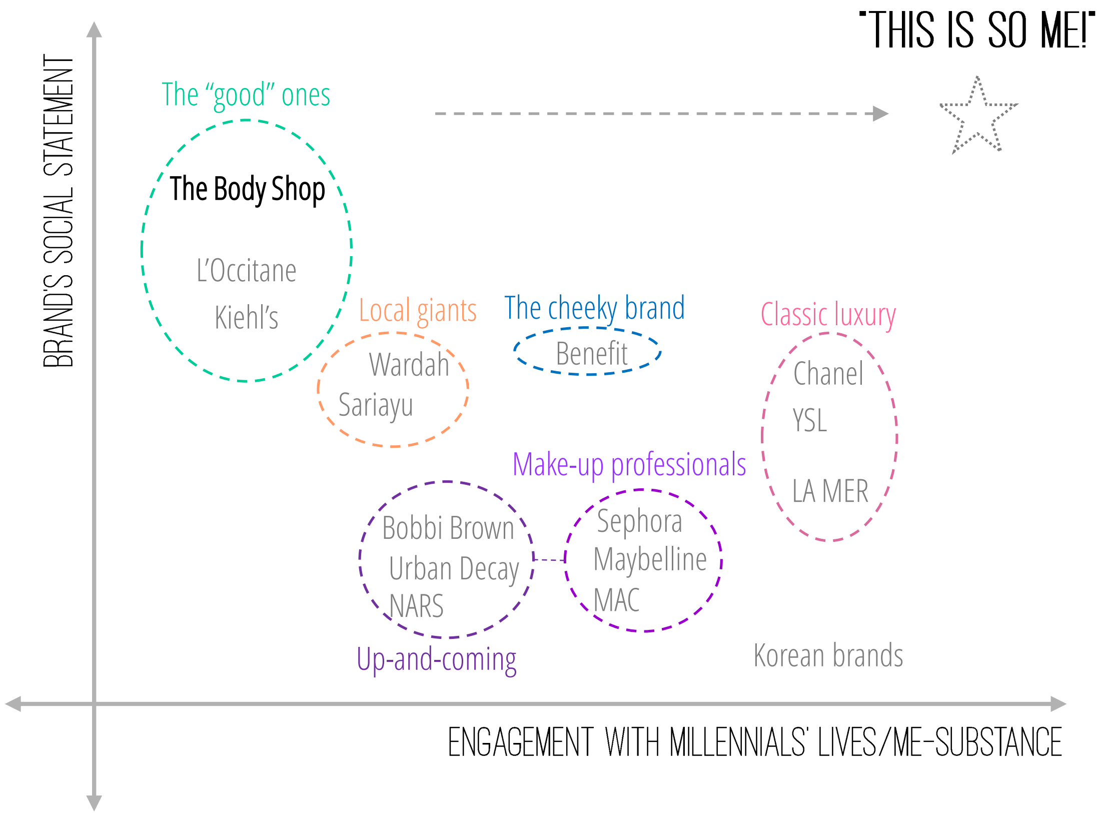

Figure 16: TBSI's projected competitive positioning (WP author, 2016)

In order to reach this positioning, TBSI's managers are recommended to both stay true to the brand's social statement while simultaneously dedicating themselves to putting the "me-llennial" at the heart of its brand.

In the following, we present recommendations to realize this me-focus, structured under the three headlines of:

I. Me-Strategy

II. Me-Positioning

III. Me-Implications

A crucial element of these recommendations are that they are not intended to boost short-term sales but instead aim at authentically creating a brand image of TBSI in millennials minds with which they can identify.

In the long-term, when millennials recognise TBSI as a brand with which they can identify, they will proudly share it with their social networks – online as well as offline. This unique position bears the opportunity of TBSI becoming an integral part of millennials' lives – and potentially remaining one over their life-time.

V. RECOMMENDATIONS: STRATEGY, POSITIONING & IMPLICATIONS

Me-Strategy

Currently, Indonesia is dominated by a mainstream trend of beauty (marked by white skin, a young/cute look, etc.), while millennials are increasingly exploring emerging trends of more diverse, natural and unique definitions of beauty. Within these emerging trends, some consumers are even actively opposing the mainstream definition of beauty, as well as they are opposed to whitening one's skin. This shift from a mainstream beauty trend towards more local, authentic and diverse ideas about beauty have been developing in many parts of the world over the last decade. Therefore, it is proposed that TBSI takes a bold position and becomes the leading brand in the emerging beauty trend in Indonesia. Leading the new trend does however not mean that TBSI abandons consumers who currently follow the mainstream beauty ideal. Instead, both concepts can coexist, while TBSI gradually migrates from the mainstream to the emerging beauty trend. This transition does not have to be drastic but rather, TBSI can slowly lead the path towards a more progressive, more diverse and more positive ideal of "real beauty". In particular, by furthermore following a long-term, complimentary strategy (online/offline) that addresses millennials as a unique target and which focuses on the emerging beauty trends, TBSI will be able to get ahead of competition.

Me-Positioning

For the urban, conscious me-llennial: "The Body Shop is my skin and beauty brand which gives me the best benefits for my body and mind because their social statement and substance relate to who I want to be."

Me-Implications

Based on the primary research, millennials' insights can be formulated as a few guidelines, which will allow TBSI to reach "me-llennials" in the way they would expect to be reached:

I. Don't push, but pull: While promotions can have a short-term benefit, being constantly flooded with discounts and special offers can put millennials off and even devaluate the brand perception they have in their minds. Similarly, a communication which is mostly based on products can be perceived as not relevant to millennials' lives. Instead, providing content which is relevant to who they are as a person (rather than as a consumer) and which does not push a sale is more effective in pulling them into a long-term relationship.

II. Co-creation: Offering opportunities for co-creation shows millennials how much they are valued and engages them closely with the brand. Ideally, TBSI can take the role of a facilitator through which millennials create unique and authentic content.

III. Offline & online: Millennials are digital natives which are surrounded by technology 24/7. While on the one hand, this makes it relatively easy to reach them, millennials are increasingly blocking out branded messages. They block messages both passively as the sheer amount of branded content becomes a noisy clutter as well as actively if they are annoyed by it or feel that it is not relevant for them (through for example ad blockers or by unfollowing brands on social media). Therefore, while online communication is a crucial element for the engagement with the brand, the final goal is to become an integral part of millennials' lives – and that is less about how much they "like" the brand than it is about how much the millennial actually loves it, interacts with it and talks about it to their close friends.

V. RECOMMENDATIONS: STRATEGY, POSITIONING & IMPLICATIONS

IV. Authentic & fun: Millennials are informed and increasingly sceptical about brands. They demand brands to be transparent about their values and actions. Combining an authentic and honest communication with a fun, lively and edgy tone is more appreciated by millennials than creating a brand image that seems too perfect to be true.

V. Jakarta & beyond: Localising communication to major cities or islands (e.g., Jakarta or Bali) shows the dedication of TBSI to their target.

Examples on how TBSI can translate these guidelines into practical actions are presented below:

Example I: Holistic problem-solver & lifestyle companion

Especially for younger millennials, beauty and skin care is closely linked to solving problems linked to their appearance. While make-up brands provide immediate, but not lasting solutions, TBSI can take a more holistic approach which helps millennials find their confidence, while having fun and exploring their products. Content examples for TBSI's social media include:

- How to use products-tutorials, e.g., "*How to use Tea Tree Skin Clearing Facial Wash to make it last 2 months!*", or *"Back to campus-look in under 5 minutes"*
- How to solve problem-tutorial, e.g., "*SOS: Skin-break out before a date – here is how you save it",* pairing products for best results, especially between skin care and make-up
- Product-hacks, such as "*10 hacks every brow-obsessed needs to know*", or "*Give them the love they deserve: Cleaning and storing your products for maximum results"*
- Holistic advice, such as "*My weekly food plan for glowing skin*", or *"10 ways to get glowing skin"*

Following this idea of being a holistic problem-solver and lifestyle-companion, TBSI could also consider cooperating with wearable electronics-brands or fitness-apps in order to be featured as a skin expert.

Example II: Sustainable-Me

Linking TBSI's CSR to millennials lives by:

- Including them at volunteering events;
- Providing content on what everyone can do every day, e.g., "*10 ways of being more green every single day";*
- Allowing millennials to propose and vote for causes or projects which TBSI supports;
- Showcasing and supporting Green-ambassadors and Social-ambassadors, i.e., exemplary millennials talking about their stories, projects or causes in a relatable and fun way.

Example III: Millennial store experience

We recommend TBSI to invest on the future potential of millennials by adapting the store experience and customer service to meet the requirements of younger customers. In particular, we suggest that TBSI adds focus sessions on millennials in staff's training. In these, TBSI's staffs learns for example how to become and remain a make-up professional who has expertise beyond what millennials already know from YouTube.

V. RECOMMENDATIONS: STRATEGY, POSITIONING & IMPLICATIONS

Example IV: ## #YOUNIQUE CAMPAIGN

We created the #YOUnique campaign to effectively communicate TBSI's new "me-focus" while staying true to its external brand values. As such, the campaign's message is that every single millennial is beautiful in their own way and that beauty comes in all colours. Within this campaign, TBSI's can link the diversity and natural qualities of its brand to the natural and diverse beauties of Indonesian millennials – while keeping a cheerful, edgy and fun tone of communication. Through this, the campaign will enable TBSI to communicate a more holistic view of beauty that goes beyond make-up and instead relates to taking care of one's entire body and mind. Therefore, the campaign's goal is to strengthen TBSI's "me-image" among millennials, generate positive word-of-mouth and be a source of content generated by millennials.

As such, the campaign will be up-beat, colourful and fun and will be executed in co-creation with millennials and across multiple channels with online-offline integration. The common feature of the campaign across all channels are squares in the colours of TBSI's products, while only featuring the logo very subtly and not directly promoting a sale of the products.

Channels cover Billboards, Stores, Events and social media (especially YouTube and Instagram). Across all channels, footage will be continuously collected for post-production usage. Practical examples on the execution per channel are provided on the following slide.

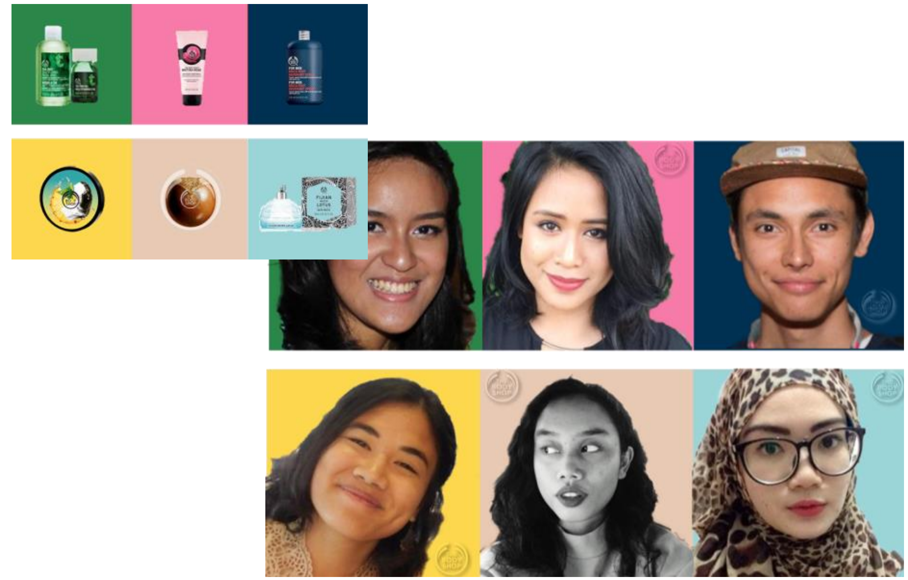

Figure 17: Illustration of the #YOUnique campaign (WP author, 2016)

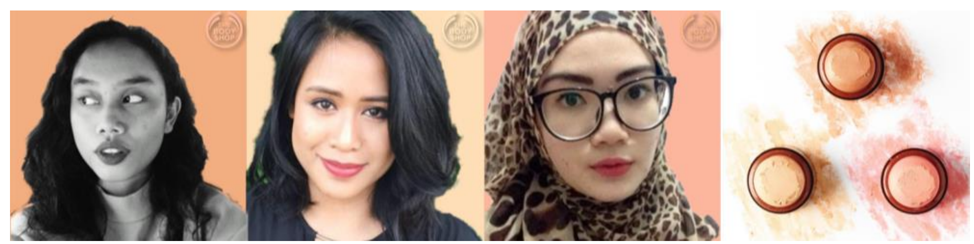

Figure 18: Illustration of the #YOUnique campaign (WP author, 2016)

V. RECOMMENDATIONS: STRATEGY, POSITIONING & IMPLICATIONS

#YOUNIQUE CAMPAIGN – CHANNELS

I. Billboards: Public art – Opportunity for co-creation by adding to the art work, taking photos of and reading other people's notes. Possible locations in Jakarta: Kota Tua, Taman Menteng, Car-free-day around Sudirman.

Figure 19: #YOUnique campaign – Public art (WP author, 2016)

II. Stores: Mini art – A smaller version of the #YOUnique billboards in selected stores.

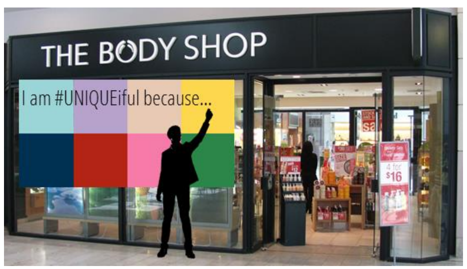

Figure 20: #YOUnique campaign – Store: Mini art, (WP author, 2016)

Figure 21: #YOUnique campaign illustration, retrieved from Google Images (2016)

III. Events: Colour up my city – Improving old, grey and run-down parts of the city, by e.g., artifying walls in collaboration with (street) artists, improving kindergartens or greening an area. Potential cooperation with The Colour Run in cities all across Indonesia.

IV. Social media

a. YouTube: Video Statements and stories – Video-statements which offer more in-depths material, such light-hearted comments (i.e., "my eyebrows are on fleek") as well as personal, deeper stories, e.g., on how a girl found her confidence or has overcome previous beauty-insecurities. People can create their video at home and upload it to YouTube or use a video-booth which will be located at TBSI's events.

b. Instagram: #YOUnique, #AllShadesOfBeautiful, #LiveLifeInColour, #NaturallyBold

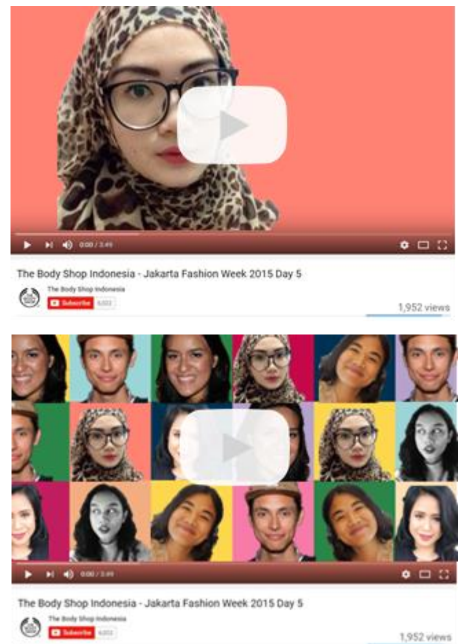

Figure 22: #YOUnique campaign – YouTube (WP author, 2016)

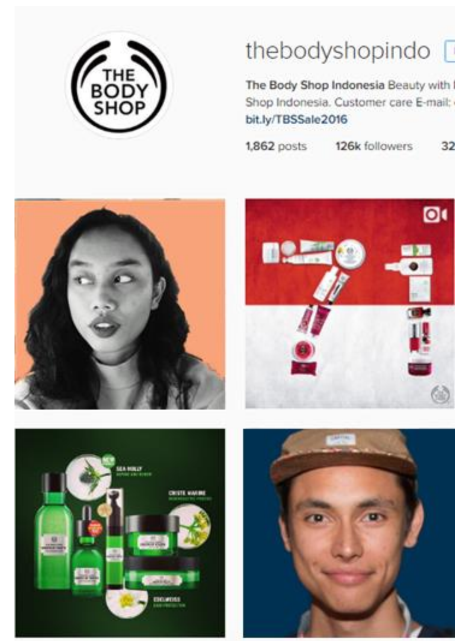

Figure 23: #YOUnique campaign – Instagram, (WP author, 2016)

VI. LIMITATIONS, FURTHER RESEARCH & FINAL NOTES

Limitations

A main limitation of the primary research was that it was conducted by a non-Indonesian researcher and therefore, cultural bias both in respondents' answers and in the analysis of these answers are possible. Partly, these bias were controlled for by adding a complimentary focus group after some millennials had indicated that they feel more comfortable in a group setting. On the other hand, in the course of the interviews, it was revealed that my outsider role had advantages, as well: In general, Indonesian millennials have a strong view of Europeans being open-minded, non-judgemental and having less societal boundaries. During the interviews, this view was beneficial as it helped Indonesian millennials to feel secure when opening up about opinions which were not conform with societal norms (e.g., the emerging beauty trends).

A second limitation relates to the recommendations. In particular, it is uncertain how well TBSI will be able to implement the proposed strategy because

a. TBSI's independence from The Body Shop international is unclear, and

b. Currently, TBSI's resources are up by staying on top of day-to-day business and therefore, the brand has limited resources to implement a long-term strategy.

This limitation needs to be met by establishing close cooperation between TBSI and The Body Shop's headquarters in order to stress the importance of the proposed strategy in Indonesia and to evaluate its relevance on a global level.

Further Research & Final Notes

When presented to the board of management of TBSI, the WP and the solution to the challenge were very well received. It was furthermore agreed on that a further research within 5 years would be needed in order to measure the impact of the proposed strategy.

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