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MEN'S GROOMING IN GERMANY: A CONSUMER RESEARCH AND DISCUSSION OF CURRENT CONSUMER ATTITUDES.

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Abstract

The objective of this dissertation was to explore the German men's grooming market and to discuss the usage and purchase behavior of young male adults. After a brief market analysis, this dissertation evaluates the results of qualitative and quantitative research. The conducted research explored the consumer's reasoning for and attitude towards personal grooming, and their attitude towards product attributes and the aging process. The dissertation concludes that men attach high value to personal grooming but only to the extent that their personal need is satisfied. As the male involvement in MG is highly dependent on each consumer's individual needs, the market requires a careful segmentation.
Keywords: Men's Grooming, Male Grooming, Consumer Behavior, Personal Care

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I. List of Abbreviations

BaPC	Beauty and Personal Care market
e.g.	for example
EI	Euromonitor International
i.e.	that is to say
MGM	Men’s Grooming Market
LU	Group of light-users of grooming products identified within the quantitative research, using less than 4 products in their daily routine.
HU	Group of heavy-users of grooming products identified within the quantitative research, using more than 4 products in their daily routine.
MU	Group of users of grooming products identified within the quantitative research that indicated to use at least one grooming product additionally for medical reasons.
N-MU	Group of users of grooming products identified within the quantitative research that did not indicate to use at least one grooming product additionally for medical reasons.
SKU	Group of user of grooming products identified within the quantitative research that indicated to use skin care products (either moisturizer/facial cleanser or both).
N-SKU	Group of user of grooming products identified within the quantitative research that indicated to never use skin care products (either moisturizer/facial cleanser or both).

Executive Summary

1.1. Relevance

The German men's grooming (MG) market is the third biggest worldwide (see app.1).[1] Masculinity and personal grooming are no longer contrasting and German men are on average more active than all other European men when it comes to personal grooming. As a research from Gillette (2007) found out that German men spend the highest European average of 24 minutes on daily grooming.

After its market peak in 2007 the MG category has been researched extensively with companies conducting surveys and company reports on the male target consumer. However, research has stagnated over the past years – just like the MG market. Categories that feature product innovation and satisfy individual consumer needs are driving the market growth, such as skin care or premium bath and shower. However, these categories are still considered to be in their initial phase and MG is forecasted to grow negligibly (see app.2).[2] As categories such as razors, shower gels and deodorants do not seem to promise much more potential to grow, the development of new and innovative product lines in other categories will be crucial to MG.

1.2. Research Questions

This study aims to explore and understand the consumer and purchase behavior of German men within the men's grooming market. More specifically, how they perceive men's grooming and which attitude they have towards taking care of the male appearance. Besides finding reasons for personal grooming, this research will try to understand the

[1] Euromonitor International (2015)
[2] Euromonitor International (2014), b

cosmetic concerns men might have and what they value about both the shopping experience and the product itself.

1.3. Methodology

In order to understand the consumer and purchase behavior of German men in the MG market we used three different phases of research. First we reviewed secondary data using several information sources such as Euromonitor International and previous studies held by e.g. L'Oréal. Afterwards, to test the current findings and reveal market trends, we proceeded to primary data research, starting with a qualitative phase, and followed by a quantitative phase.

The qualitative research consisted of in-depth interviews held in German with nine non-representative men. The nine men were chosen due to their age and their grooming product usage behavior, ranging from non-users to light- and heavy-users which was defined by the number of products they use: one or less products define non-users, three to five products are light-users, and more than five products defines heavy-users. The aim was to cluster information on usage and purchase behavior that provide the basis for the online survey.

The online survey was created with Qualtrics (see app.3), based on the results of the interviews, and was conducted in German with 200 male respondents. The target group was German male consumers aged from 18 to 35, however older men participated as well but did not significantly change any outcomes. The reason of focusing on the younger target was that during this age span men become young adults and professionals, earning their first own incomes. Even though the purchasing power of university students in this age might not be sufficient to strongly engage in the purchase of MG products, this generation is crucial to brands trying to develop a long-term consumer relationship.[3]

The questionnaire was divided into eight major areas of interest: general information about the respondent's demographic profile, the usage behavior and purpose of men's grooming products, the importance of product attributes, the attitude towards men's grooming, the attitude towards aging, the purchase behavior, the reason for men's grooming, and marketing influences. The quantitative data was analyzed with the analysis software SPSS version 22, with a significance level of 0.05 for all statistical evaluations.

1.4. Main Conclusions

The research proved that the male consumer attaches high importance to personal grooming. It boosts both the level of confidence and perceived attractiveness. However, MG is perceived as a mean of hygiene and taking the necessary care of one's appearance. Neither potential career opportunities nor the expectations of a partner influence the target. Further, young adults do not fear potential physical changes that might lead them to the usage of grooming products.

Today's men have an image of masculinity that does not contrast with MG, personal values like responsibility, confidence and consciousness are in the center of masculinity. However this does not raise the involvement in MG. They value mostly the recommendations of friends and family when it comes to their purchase decision and pay attention to product attributes such as the actual visibility of effects, the functionality of the product and the smell.

[3] SevenOne Media GmbH (2008)

The research has further revealed that the male target market requires a more differentiated segmentation based on individual needs. An overall observation does not lead to sufficient significant results to give recommendations towards potential marketing approaches.

2. Situation Analysis

In order to conduct the following research and understand the relevance of the research topic, an insight on the market, its forecasts, and potential trends was gleaned.

2.1. The Beauty and Personal Care Market in Germany

The beauty and personal care market in Germany (BaPC) consists of the categories baby and child-specific products, bath and shower, color cosmetics, deodorants, depilatories, fragrances, hair care, oral hygiene, men's grooming, skin care, sun care, sets/kits (see app.4) and offers products within both the luxury and mass market section.[4] With a sales value of 14.326,7 EUR million in 2013 the market is experiencing an on-going consumption trend mainly driven by product categories that offer a high level of innovation and those that are tailored for individual needs. This can be tied to the key trends of at-home spa experiences and an outer appearance that expresses individuality. Led by top players – both domestic and multinational – like Procter&Gamble, Beiersdorf, or L'Oréal the market is forecasted to grow by 10.6% until 2018.[5]

2.2. The Men's Grooming Market in Germany

The Men's Grooming category is an aggregation of men's shaving and men's toiletries.[6] According to Euromonitor International (EI), the German MG market is the

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[4] Euromonitor International (2015),a
[5] Euromonitor International (2015)
[6] Euromonitor International (2015), a

third biggest MG market worldwide, being worth 1.595,3 € million in 2014 (see app.1). The year-on-year growth of the German MG market has been continuously slowing down since its peak in 2007, when sales were beginning to develop beyond the traditional men's products towards new categories like skin care (see app.5 and 6).[7] However, the potential of the German MG market is shown in a period growth of 36.6 % since 2007, and it is still predicted to continue to grow by 11.5% until 2018.[8]

The MG category accounts for 11.7% of the BaPC in Germany, and is a major contributor to the BaPC growth.[9] Razors and Blades are still the top selling products within the MG in Germany (see app.5). However, forecasts show their growth will be negative within the next years and comparably lower value sized categories like hair and skin care, as well as bath and shower are advancing significantly (see app.2). Not only do e.g. new skin care products substitute some traditional shaving products, but the trend goes towards well-groomed facial and body hair and away from a clean shaved look.[10] A study conducted by L'Oréal in 2010 already introduced this new "Retrosexual" male stereotype that bases masculinity on traditional values, pride and confidence.[11] Growth will be achieved by products addressing specific consumer's needs, and as the male needs differ strongly from those of women, individualized product lines offer high potential.[12] While addressing female seems to focus more on beauty and wellness, practicality and multi-functionality seem to be the attributes successfully attracting the male consumer.[13]

[7] Euromonitor International (2009)
[8] Euromonitor International (2015)
[9] Euromonitor International (2014), a
[10] Euromonitor International (July 2014), b
[11] L'Oréal (2010)
[12] Euromonitor International (2014), b
[13] Euromonitor International (2014), b

3. Consumer Research

To explore the MG market in Germany and identify the key factors influencing men's consumer and purchase behavior, primary data research was conducted through both qualitative and quantitative research.

3.1. Key Findings of Qualitative Research

The qualitative research on men's consumption and purchase behavior revealed key usage and purchase factors that seem to be crucial for understanding the different types of consumers – please see app.7 for an overview of significant quotations. The choice of interviewees was based on differences within the men's usage of grooming products ranging from non-users, to light- and heavy-users. Nine German men – three of each type of user – were asked to describe their experience when using and buying grooming products. In addition, to keep the focus on the upcoming generation of MG users, the focus was on high-school students, university students and young professionals. The qualitative research has indicated that this target is switching from brands they used to purchase during their youth such as Axe or Clearasil, to more 'grown-up' brands, which supports the decision of target described before. Further, projective techniques helped to identify men's attitudes towards grooming, aging, and masculinity.

Analyzing the in-depth interviews revealed that most men who identified themselves as non-users or light-users are unknowingly belonging to the range of light-, i.e. heavy users. This can be related to a lack of education on what the category of MG actually comprises. Therefore the following analysis will focus only on the two categories of light- and heavy-users.

***The Light-Users* –** Especially the light-users lack a clear definition on men's grooming as they do not seem to care enough. They mainly use grooming products such as shower gel, deodorant, shampoo and shaving. Personal grooming is perceived as a need, a routine of hygiene, and taking care of one's appearance. The latter shouldn't be mistaken with ideals of beauty men try to achieve, it is rather the necessary precaution to a well-groomed appearance in society. Personal grooming is a basic daily routine for these men, and the most important products are therefore the ones needed for hygiene, such as soap or shower gel. More special grooming products like hair styling or facial cleansers are only used occasionally or in emergencies.

The common points of purchase for light-users are supermarkets close by or drugstores – the purchase of grooming products is always integrated in the run of other errands. The light-users appear to be loyal consumers, however, the choice of brands might vary between the different product types. Their basic request on a grooming product is to serve its purpose, therefore switching costs are only considered when this is not fulfilled or the usual product is not available. In order to avoid having to go to another store, they prefer to buy a substitute, thus availability is key. Besides the availability and effect of a product, a neutral smell is one of the most important attributes required. If the smell is neutral, and the packaging is appealing it does not matter if a product is designed for unisex or even female. The light-users do not have any problem admitting both the usage of grooming products as well as the usage of female products. Just one – the youngest – respondent mentioned a preference of male products and high importance of the related products ingredients.

The light-users, doing most of the purchases on their own, showed a tendency to value family traditions and personal recommendations when it comes to purchase decisions, this is how most of their grooming products appeared in their lives. Also advertisements of branded products that transmit a quality and strong male image might influence their decision. In general, they seem to trust well-known mass-market brands like Dove or Nivea. Regarding their price elasticity, they do not find grooming products to be expensive overall; therefore they do not perceive small differences in price as important. As they purchase rather irregularly, they cannot remember exact prices. What is attracting them at the point of purchase is rather the visualization of the product and a quality, neutral packaging.

The Heavy-Users – Besides serving the routine of hygiene and taking care of one's appearance, the heavy-users value grooming as a mean to satisfy a strong need. All respondents have additionally mentioned a specific, rather medical issue their grooming is taking care of– e.g. skin disorders that started during their puberty or the loss of hair. Personal grooming is a well-integrated routine that includes not only the basic products used by light-users, but refers to a wider range such as facial cleansers, moisturizers, or even eye roll-ons. Therefore, the product they describe as the most important also strongly depends on those personal needs.

The heavy-users main purchase channels are pharmacies, drugstores and brand stores. They are very loyal consumers while open for novelties, however these must offer a visible benefit to the product they are currently using. They seek information from pharmacists or sales assistants, and care more about the effectiveness of a product than the brand. However, as most of their grooming products are of high quality they tend to purchase premium brands. They value the price/performance ratio and are willing to pay more for high-quality and visible results. In addition, they do not trust mass-market brands and advertisements, and refuse any kind of interruption marketing. If a high-quality product fulfills their need, it does not matter whether it is a unisex or female product, however, due to the fact that they seek information from experts it is common that they use majorly male products. Besides these key attributes they take into consideration the smell and packaging of grooming products. If heavy-users receive products as a gift, it seems to be common that they only receive these from people that know exactly what they need.

Projective Techniques **–** To explore the male attitude towards grooming, aging, and masculinity, the respondents were questioned with the help of projective techniques. All answers showed similar results for both user groups.

Overall grooming is perceived as a necessity and natural behavior to take care of one's appearance. However, it has too little importance to men to engage with it any further than their individual need fulfillment. None of the respondents actually feared the process of aging and all agreed that men actually gain attractiveness when growing older. However, some men admit that they might change their anti-aging behavior within several years, so they accept men who decide to take precautions. There is a strong shift from the old and traditional image of brave, strong and hard working-men towards more personal male values such as confidence and stamina, responsibility, consciousness and being attentive. This also reflects the open-minded attitude towards men's personal grooming described in L'Oréal's UK Men's Grooming Report (2010).

The qualitative research has revealed a potential split within the consumer groups. However, being non-representative, quantitative research will test these conclusions.

3.2. Key Findings of Quantitative Research

The quantitative research, based on the key results from the in-depth interviews, was conducted with Qualtrics in German (see app.3) and analyzed with excel and SPSS. Out of the total 200 German male respondents who finished the online survey, the majority of 181 respondents were aged between 18-35 years. The focus of this research is on young men and young professionals - 57.5% of respondents being university students and 33.5% employees. However, as tests showed that the 19 responds from the men older than 35 do not significantly change any results, they haven't been excluded from the evaluation.

Most respondents have an income of 500 to 999 Euros (29.5%) or of 1000 to 1999 Euros (27%) with the remainder being equally distributed (15.5% each) between the other income ranges (below 500, from 2000 to 2999 or above 3000 Euros). Further, from 200 male respondents 54.5% stated to be in a relationship and 41% single, only 4% of respondents said to be married and 0.5% divorced.

To gain an overview on the results of the survey, general descriptive and cross tables on SPSS provided insight on the response's means. On average, the respondents have used 7.18 different grooming products within the last two weeks, led by Shower Gel, Shampoo and Deodorant (see app.8). However, only 4.64 grooming products are part of men's daily routine, led by the same products (see app.9). The most important grooming product mentioned by 36.5% of respondents is shower gel, followed by deodorant with 24.5% (see app.10).

The qualitative research has shown, that there might be an increased usage of grooming products of people that additionally mention a medical purpose of grooming, however, the quantitative research could not prove this. The averages of 7.40 grooming products used within the last two weeks, and 4.85 products used on a daily basis, evaluated for those respondents that stated to use a grooming product because of a medical reason are just slightly higher than the averages of all respondents. Further, there is no difference in the most used products (see app.11, 12 and 13). Therefore the main analysis is split into two types of consumer groups again: the light-users (LU), using less than the four products during the daily routine (N=100), and the heavy-users (HU), using more than four products within their daily routine (N=100). Nevertheless, if necessary, differences within the group of users with medical issues (MU) will be added.

***Importance of Men's Grooming* –** to measure the importance men attach to personal grooming, five different statements were tested within the survey and grouped into the general importance that men attach to personal grooming. Both groups agree (4) to strongly agree (5) that grooming is very important, with a mean of 4.19 for LU and a mean of 4.55 for HU (the difference between the two user groups is significant, p=0.000). All respondents further agreed with a mean of LU=4.05 and HU=4.38 (p=0.002) that grooming makes them feel more attractive as well as confident.

***Image of men's grooming* –** to measure the image men have of personal grooming, the respondents were asked to indicate their level of agreement on four statements such as "Skin care fits to men" or "Personal grooming is only for women". The focus on this measurement was on the perceived femininity of personal grooming. Both user groups agree that grooming has lost its female stereotype and is equally adequate for men. Further, all respondents, LU and HU ($mean_{LU}$=4.67, $mean_{HU}$=4.78, p=0.009) strongly disagree that men's grooming is just for women.

Reasons for men's grooming – To explore the reasons why men take care of their appearance the respondents were asked to indicate the level of importance they attach to seven items such as hygiene, expectations of partners, or increased career opportunities and were further able to state their own reasoning. The sole reasons valued as very or extremely important were hygiene ($mean_{LU}$=4.43, $mean_{HU}$=4.68) and attractiveness ($mean_{LU}$=3.96, $mean_{HU}$=4.24). Both were more important for HU, being this difference significant ($p_{hygiene}$=0.001 and $p_{attractiveness}$=0.003). However, besides these two reasons for grooming, all other reasons tested such as anti-aging, expectations of partners, or a tired look are not so important for both groups (see app.14). The exception was for MU with these users attaching a higher importance to the medical reasoning of grooming ($mean_{MU}$=3.35, p=0.000).

Importance of skin care – to explore the role of skin care, the respondents indicated the frequency of the usage of both moisturizer and facial cleansers. As the two variables only show a significant (p=0.01) correlation of r=0.338, they will be evaluated separately. Overall moisturizer is used more frequently than facial cleansers, which was already visible in the indication of products used within the last two weeks.

As expected, LU and HU showed a significant difference in usage frequency of both products ($p_{moisturizer}$=0.000, $p_{facialcleanser}$=0.003), with LU using moisturizer on average two to three times a month and facial cleanser less than once a month, and HU using moisturizer two to three times a week and facial cleanser once a month. However the high standard deviations on all means indicate a high amount of variation of the set of data values. To explore the reason why the usage of skin care is not as developed, respondents that indicated 'never' on one or both frequencies were asked for the reason. The main reason tending towards agreement for both user groups is the lack of a perceived benefit.

Importance of product attributes – to find which influence different product attributes might have on the consumer, the respondents were asked to indicate the level of importance, from (1) extremely unimportant to (5) important, they give to ten different items such as price, smell, packaging, or brands. The rankings for LU show that they attach the highest value to the functionality of the product followed by the smell and visibility of effects. HU gives most importance to the functionality of the product, followed by the visibility of effects and then smell. The differences are significant at p=0.001 for the visibility of effects. Further the attributes ingredients ($mean_{HU}$=4.03, $mean_{LU}$=3.56, p=0.002) and recommendations ($mean_{HU}$=4.12, $mean_{LU=}$3.68, p=0.003) are of significantly higher importance to HU (see app.15).

Attitude towards aging – to measure the overall tendency to worry about aging, the respondents were asked to rank their level of agreement, from (1) strongly disagree to (5) strongly agree, on eight potential threats of aging such as loosing hair, wrinkles, or going grey. For LU the deterioration of teeth (mean=3.24), the loss of attractiveness (mean=3.11) and the development of a paunch (mean=3.01) appear to be the greatest worries about aging, however the means revolve around the feeling of indifference towards agreement. For HU the change of skin (mean=3.47), the loss of attractiveness (mean=3.42) and the deterioration of teeth (mean=3.39) display the strongest worries of the aging process (see app.16). However, an overall attitude towards aging was computed out of these items that indicates that both user groups significantly (p=0.003) neither agree nor disagree on worrying about aging, with LU worrying even less. Further, a regression with the average worry on aging as the dependent variable and the eight items as independent variables found that 'Loosing Hair' (β=0.267), 'Deterioration of Teeth' (β=0.244) and the development of a 'Paunch' (β=0.234) are the greatest influencers of men's worry about aging (see app.17).

Purchase behavior – within the survey, different items of purchase behavior were tested such as the average monthly spending and the common points of purchase. An independent sample t-test has shown a significant (p=0.000) difference in the average monthly spending on grooming products of both user groups. With a mean of 3.89, the HU spends on average up to 20 -29 € per month on grooming products, whereas LU spends on average about 10-19 €.

To identify the most common points of purchase the respondents were asked to indicated the frequency of purchases in different channels, ranging from (1) never to (5) always. An analysis on these purchase channels has shown that drugstores are in general the major point of purchase (see app.18). The two user groups differed significantly (p=0.000) in their mean with HU (mean=3.99) visiting the drugstore even more often than the LU (mean=3.58). The second major channel is the supermarket ($mean_{LU}$=3.26, $mean_{HU}$=2.93, p=0.03). Apart HU claiming to purchase at pharmacies 'seldom' all other channels show a median of 'never' visited. An evaluation of MU identified that also they indicate to visit pharmacies 'seldom' being this group significantly different from the other users (p=0.000). Out of all the respondents, 66.5% disagree or strongly disagree that they buy grooming products online, 22.5% of respondents agree to strongly agree on this. These values spread out almost even between the two user groups.

Brand Loyalty **–** to measure the brand loyalty of both user groups, two statements and the respondent's level of agreement were tested and showed that LU is more loyal than HU. With means of LU=3.99 and HU=3.80, both user group agree on buying the same product every time but the means are significantly different (p=0.036). Moreover LU disagrees on buying new products often with a mean of 2.18, which is significantly different (p=0.000) for HU at 2.70.

Purchase decision influence – to measure potential influencer of purchases the respondents were asked to indicate where they receive information about brands and products. Sorting the data in crosstabs identified that 59% of all respondents receive information about new brands from their friends (43.7% of LU and 56.3% of HU). 51% of all respondents receive information from TV commercials, (48% of LU and 52% from HU) and 38% men stated to get recommendations from their family (44.7% of LU and 55.3% of HU). Online advertisements influence 33.5% of total respondents (47.8% of LU and 52.2% of HU). The least influencing channels are beauty advisors and radio advertisements. However, the percentages of respondents of HU that receive information from magazines, beauty advisors, or social networks are noticeably higher than those of LU (see app.19).

Attitude towards marketing – to measure men's attitude towards marketing the respondents were asked to indicate their level on agreement from (1) strongly disagree to (5) strongly agree on eight statements. With a mean of 3.81 HU agrees on having bought a grooming product they saw in a commercial, which differs significantly (p=0.000) from the mean of LU=3.30 that indicates an indifferent attitude. Both user groups however disagree on the statement whether they rely on commercials. They further indicate that a male ambassador in commercial they can relate to does not improve the chances of purchase.

Most respondents agree to strongly agree that they read the product information on the packaging (57% of LU and 59% of HU). However, hints like dermatologically tested only result in means of LU=2.87 and HU=3.12. In this matter it is interesting to take a look at MU that shows significant differences in higher means for the statements “I read the product information on the packaging” ($mean_{MU}$=3.61, $mean_{N-MU}$=3.21 p=0.014), “Hints like dermatologically tested are important to me” ($mean_{MU}$=3.35, $mean_{N-MU}$=2.80, p=0.001) and “I research information about grooming products online” ($mean_{MU}$=3.24, $mean_{N-MU}$=2.48p=0.000).

4. Analysis

This report splits the key findings from the research held into the following categories: today’s attitude towards men’s grooming, the importance of grooming product’s attributes, male grooming and aging, the purchasing process, and men’s responsiveness towards marketing approaches.

Within the analysis we tried to explore whether there are significant correlations and influences between different sets of variables. As stated, the high importance of grooming to men, taking care of their appearance makes them feel more confident and attractive. However, neither the items explaining the fear of aging nor the reasons for using grooming products significantly explain the feeling of increased confidence. A regression model including all user groups with the average importance of grooming as the dependent variable and the reasons for men’s grooming as independent variables, proofed that only the reasons of hygiene (β=0.250, p= 0.00) and attractiveness (β=0.210, p= 0.003) are significant influencers explaining the overall variance partially.

Further, a regression with the number of routine products used by all men as the dependent variable evaluated that the reasons for grooming as the independent variables only explain 21.9% of the variance. Only the reasons of hygiene ($\beta=0.273$, $p= 0.00$) and career opportunities ($\beta=0.230$, $p=0.014$) have a significant influence on the explanation of the variance. Further, the correlations between the number of routine products used and the individual user group's reasoning for MG were tested. This identified that those reasons for MG that correlate significantly with the number of routine products, namely hygiene for LU and career opportunities and anti-aging for HU, only do so with a value lower than $\rho=0.300$ at a 0.05 significance level.

However, in this context it was interesting to observe, how the reasons for MG correlate between each other within the different user groups. The results showed significant moderate to strong correlations between 'anti-aging' and 'tired look', as well as 'career opportunities' and 'expectations of partner' for all three user groups (see app.20).

A further evaluation of the correlation between the routine products used and the worries men have towards aging do not show any significant correlations above $\rho=0.300$. However, the evaluation of correlations between the worries of aging showed moderate correlations between individual worries. HU indicates e.g. a significant correlation between the fear of 'losing attractiveness' and 'change of skin' $\rho=0.595$, $p=0.01$, please see further results in app.21.

Another evaluation of data tried to identify potential influencers of the monthly spending of the user groups. The feeling of increased attractiveness and confidence does however not significantly correlate with the amount of monthly spending on grooming products. Neither do the purchase channels, only significant correlation values below $\rho=0.350$ could be identified for the different user groups. The purchase channels internet ($\rho=0.277$) brand store ($\rho=0.242$) and pharmacies ($\rho=0.246$) significantly ($p=0.01$, 2-tailed) correlate with the average monthly spending on a moderate level, assuming that these channels offer products of higher quality and variety.

The analysis has shown that there is a lack of strong correlations between the items tested, however, the average importance of grooming does strongly correlate with the image of grooming ($\rho=0.771$, $p=0.000$) which has lost its female character. Therefore, we can assume, that MG is settled within the male target but, a first conclusion of a lack of involvement of the male consumer seems to be correct.

Taking a closer look at those men who use skin care such as moisturizer and facial cleansers (SKU) and comparing to those who don't (N-SKU) revealed that they attach a significant higher importance to personal grooming ($mean_{SKU}=4.54$, $mean_{N\text{-}SKU}=4.34$, $p=0.007$) and to hygiene ($mean_{SKU}=4.66$, $mean_{N\text{-}SKU}=4.48$, $p=0.008$). A significant higher importance is also identified for career opportunities, anti-aging and a taking care of a tired look, however, these means still express an indifferent attitude (see app.22). Observing the importance of product attributes further reveals a significant higher importance of the brand ($mean_{SKU}=3.81$, $mean_{N\text{-}SKU}=3.42$, $p=0.01$) and the ingredients of the product ($mean_{SKU}=4.12$, $mean_{N\text{-}SKU}=3.56$, $p=0.000$) (see app.23). Further, the general worry about aging is significantly higher for SKU ($mean_{SKU}=3.03$, $mean_{N\text{-}SKU}=2.78$, $p=0.013$), supported by significant differences in the means of the tested items wrinkles ($mean_{SKU}=2.64$, $mean_{N\text{-}SKU}=2.27$, $p=0.01$) and the change of skin ($mean_{SKU}=3.54$, $mean_{N\text{-}SKU}=2.95$, $p=0.001$) (see app.24). Finally, a significant higher average of SKU men has already tried products they saw on commercials ($mean_{SKU}=3.73$, $mean_{N\text{-}SKU}=3.43$, p=0.013), does further product research online (mean $_{SKU}$=3.08, mean$_{N\text{-}SKU}$=2.52, p=0.001), reads the information on the packaging (mean $_{SKU}$=3.61, mean$_{N\text{-}SKU}$=3.17, p=0.005) and appreciates hints like ‘dermatologically tested’ (mean $_{SKU}$=3.22, mean$_{N\text{-}SKU}$=2.84, p=0.012) (see app.25). This evaluation leads to a basis for further research and analysis discussed in the following.

4.1. Discussion and Recommendations developed from Consumer Research

Even though it is clear that personal grooming is important to young adult men, it is difficult to find a clear tendency towards the influences of MG. So far, hygiene is the major driver of usage, followed by attractiveness. However, the rather scattered results reflect the trend that men actually seek for high individuality according to their personal needs. As mentioned, the growth of the MG market will be pushed by addressing specific consumer needs, therefore there is not one right approach in targeting the male consumer. It seems that a more detailed clustering of male consumer groups is necessary to create value.

This analysis has approached the male target by dividing it into two main user groups, the light and the heavy users and further explored significant differences for men that indicate a medical reason for the usage of grooming products. This segmentation does not seem to cover the market’s individual needs. Further research should focus on a segmentation, which is even more focused on specific consumer needs. Potential segments to explore might be men who appreciate the grooming of facial hair, men who have issues with their skin since their puberty, or men that simply see grooming as a necessity and describe themselves as non-users.

As the analysis with SPSS identified that the user groups we initially created for observation might not reveal as much significant information as hoped for, we divided the male respondents into SKU and N-SKU, to give an outlook for potential further research. SKU significantly attaches stronger importance to several of the tested items. This can be a basis for a potential marketing approach that may focus on high product information on ingredients and usage purpose. These men significantly indicate a stronger worry about wrinkles or a change of skin, which gives opportunity to endorse new consumer needs.

Overall, it can be assumed that men enjoy the less commercialized marketing approach. Even though TV commercials are still one of the major channels informing consumers, using strong male ambassadors seems to not attract the target consumer anymore. Men want to choose which information they absorb and refuse to be lulled by beauty. The biggest influencer on all user groups tested are recommendations, both from friends and family. Further, 22.5% of all respondents already buy grooming products online and research has shown a strong potential for this channel with 57% of respondents indicating that they would consider an online purchase.

4.2. Limitations and Research Suggestions

This research has aimed to analyze variables explaining the consumer and purchase behavior of young German men. However, there are some limitations. Firstly, the findings of this study were based on a random sample of young men volunteering to participate in the online survey. As a result, we can't ensure to have covered all demographic and behavioral profiles within this market. As the sample focused on all men between 18 and 35 years, differences within income and lifestyle might be significant. Further, a respondents group of N=200 does not seem to cover the scale of existing individual consumer needs. Additionally, as the timeframe of this research was limited, it was not possible to follow deeper analysis and evaluation on specific male segments from the results of the online survey. Therefore we would recommend the conduction of similar research on more precise market segments, e.g. skin care, facial hair or colored cosmetics. This approach would probably result in more detailed information on consumer's needs. Especially taking into consideration that the trend is growing towards individuality.

Moreover further research might look into how the male consumer can be brought closer to the topic of MG. It is obvious that MG has importance, but, as stated, only to the extent where a specific individual need is satisfied. How can men be engaged and involved with MG? What could be a reason to believe that it is worth to not be restricted to one's basic needs? And how is it possible to create new needs for the male consumer? Therefore it might be interesting to involve also further questions on the self-image of men.

5. Conclusion

This study proved that personal grooming is of high importance to today's target of young adult men. MG is boosting both confidence and perceived attractiveness. However, there is a strong lack of involvement, which goes beyond the basic need fulfillment. This is also shown in the misunderstanding of being an actual user of the MG category by the respondents of the qualitative research conducted. Shower gel, deodorant and shampoo still describe the most important products used by men, however in order to grow the market, other categories need to be exploited. A report of Euromonitor

International[14] has already emphasized the growth of lower value sized categories like hair and skin care. The quantitative research conducted on 200 German male consumers has shown that these categories are already passing the usage frequency of products such as razor foam (see app.8 and 9), belonging to the top selling category within MG. Further a peek into the attitude and behavior of men who use skin care supported that they value personal grooming significantly more and engage in online and offline research on product information.

Moreover, the lack of importance of the reasoning for MG and the rather practical approach of men purchasing grooming products requires a deeper and more specific research in order to identify or create new consumer needs, and exploring the consumer profiles. Companies within the MG market can still exhaust the new male image of confidence, responsibility and consciousness to create value. Research has shown that it is not product availability or a neutral smell that is driving men to purchase, therefore starting with an understanding of the male self-image seems to be key.

6. References

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