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# Understanding Personal Care Purchasers

Google Compete Custom Beauty Research Study  
U.S., 2009

# Study Methodology

## Survey Analysis

- 4,244 consumers in December 2008 who had recently purchased beauty products & 1,448 consumers in January 2009 who had recently visited a beauty-related website

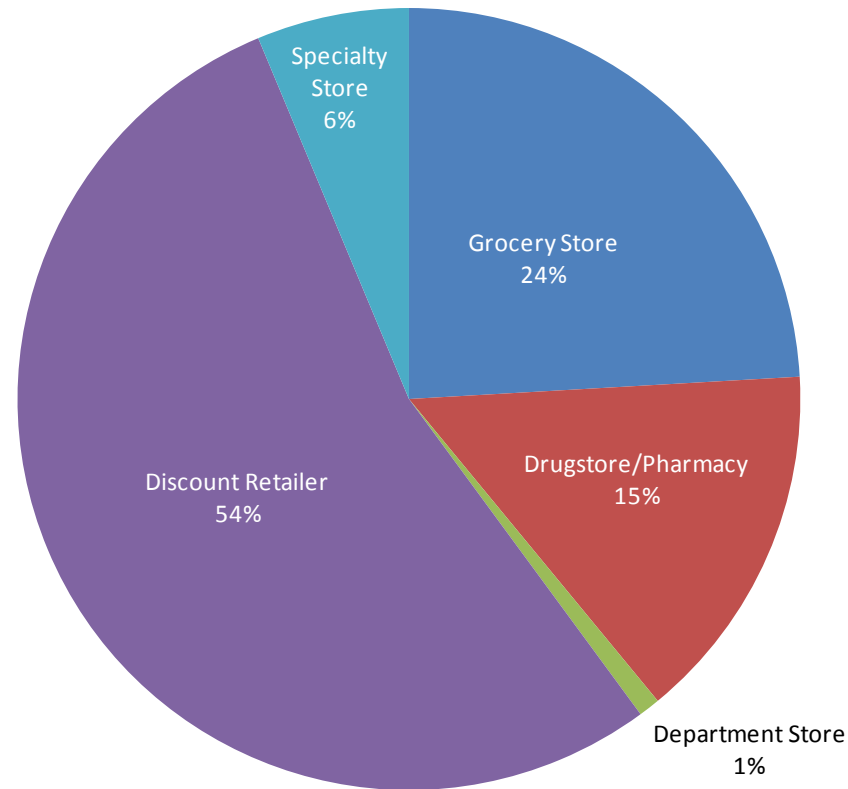
## Definitions for Survey Data (which were self reported):

- To obtain a data cut across the beauty sub-verticals, the surveys asked respondents about their most recent purchase and whether or not it was:
  - Fragrance
  - Personal care (soap, body wash, razors, deodorant)
  - Cosmetics/skincare
- If respondent chose cosmetics/skincare, they were then to check off what brand they purchased among a set of brands here which lead to the classification of prestige vs. mass cosmetics/skincare

Prestige	– Avon	– Lancome	Mass	– Maybelline
	– Mary Kay	– Clinique		– Revlon
	– Bobbi Brown	– M.A.C cosmetics/skincare		– L'Oreal
	– Elizabeth Arden	– Chanel		– Neutrogena
	– Bath & Body Works	– Aveda		– CoverGirl
	– The Body Shop	– Estee Lauder		– Olay
	– L'Occitane	– Bare Escentuals		– Dove
	– Dior	– Origins		– New York Color
	– Other*	– Clarins		– Sally Hansen
		– Benefit		– Nivea
	– Prescriptives	– Clearasil		
		– Other*		

# Most in-store personal care sales occur at discount retailers

Place of purchase for in-store personal care products  
Among in-store personal care purchasers



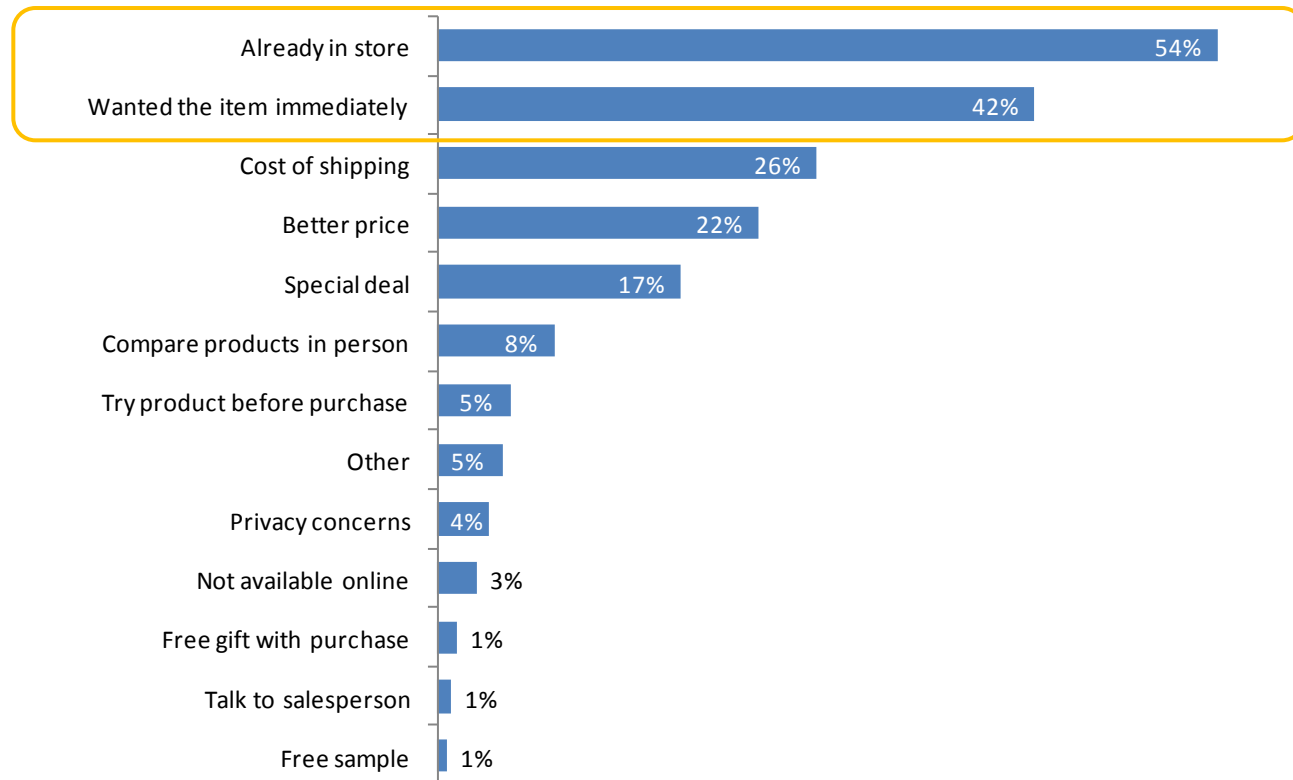
Q5: You mentioned that you bought your most recent Personal Care purchase at a store. From which of the following kinds of stores did you make this purchase?

Base: In-store personal care purchasers, n=1017

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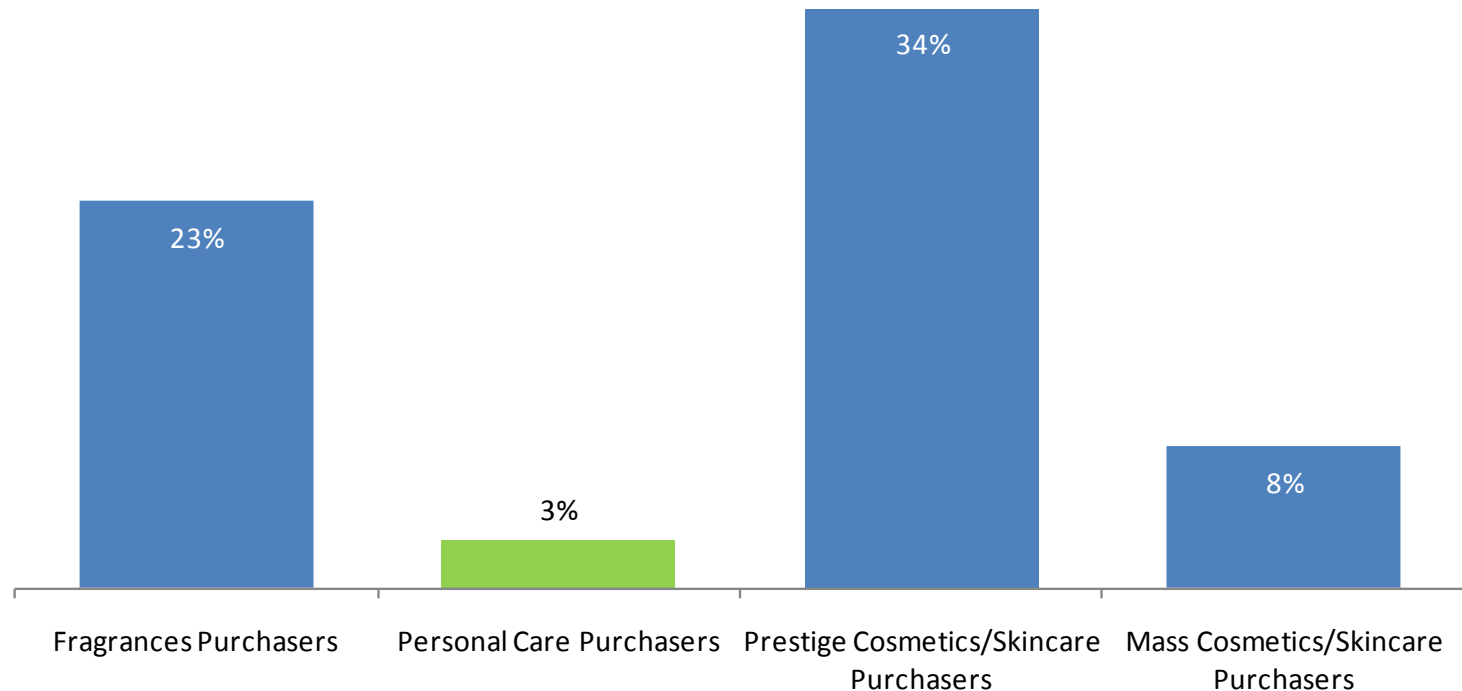
# Personal care purchasers who buy in-store do so in part because they are already in the store and they want the items immediately

Reasons for purchasing personal care products offline  
Among in-store personal care purchasers



# A large opportunity exists for personal care marketers to increase consumers' likelihood to purchase online

Propensity to purchase beauty products online



# Online purchasers prefer the ease and convenience of home delivery

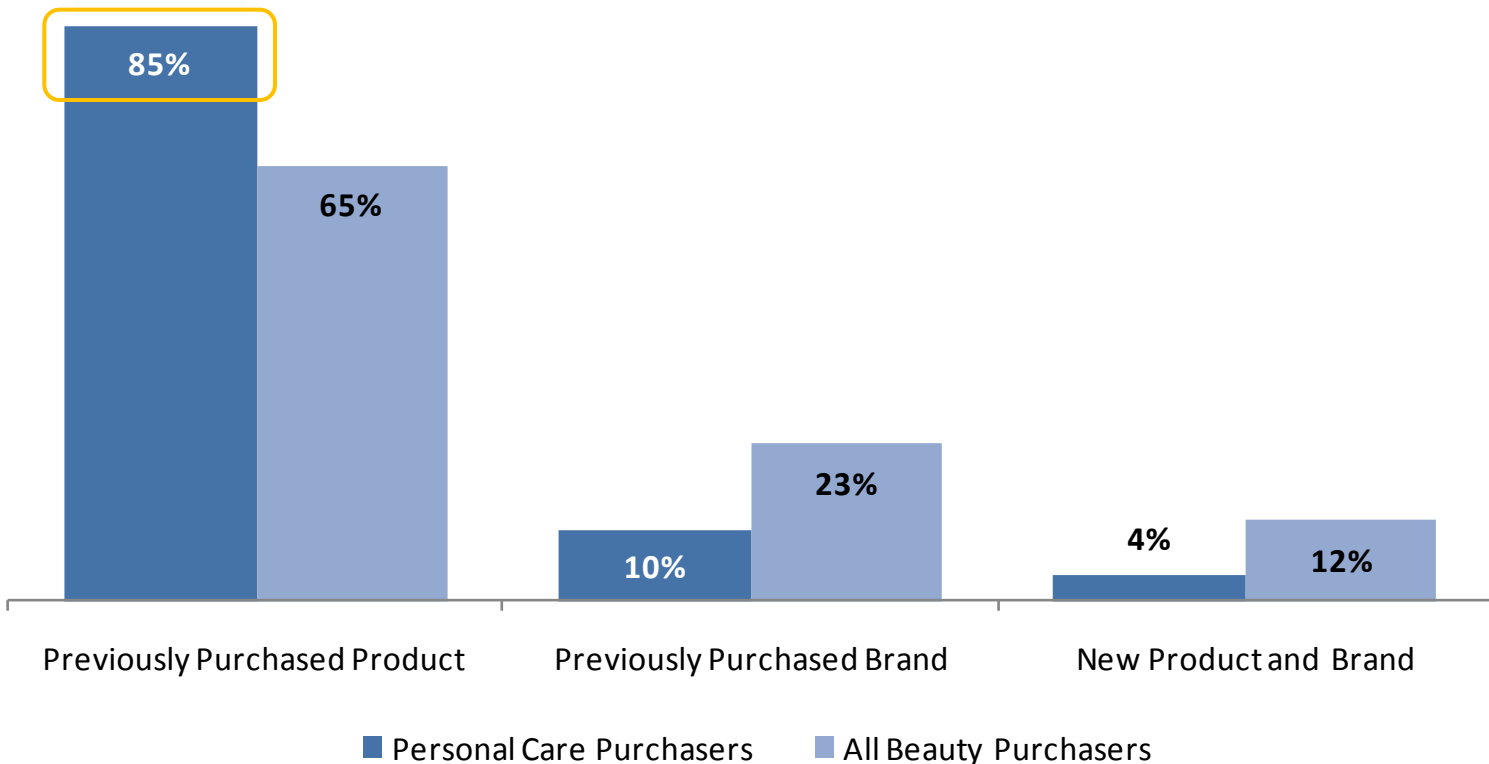
Reasons for purchasing personal care products online  
Among online personal care purchasers



\* small sample

# Personal care shoppers are more brand loyal than other beauty shoppers

Type of product purchased most recently

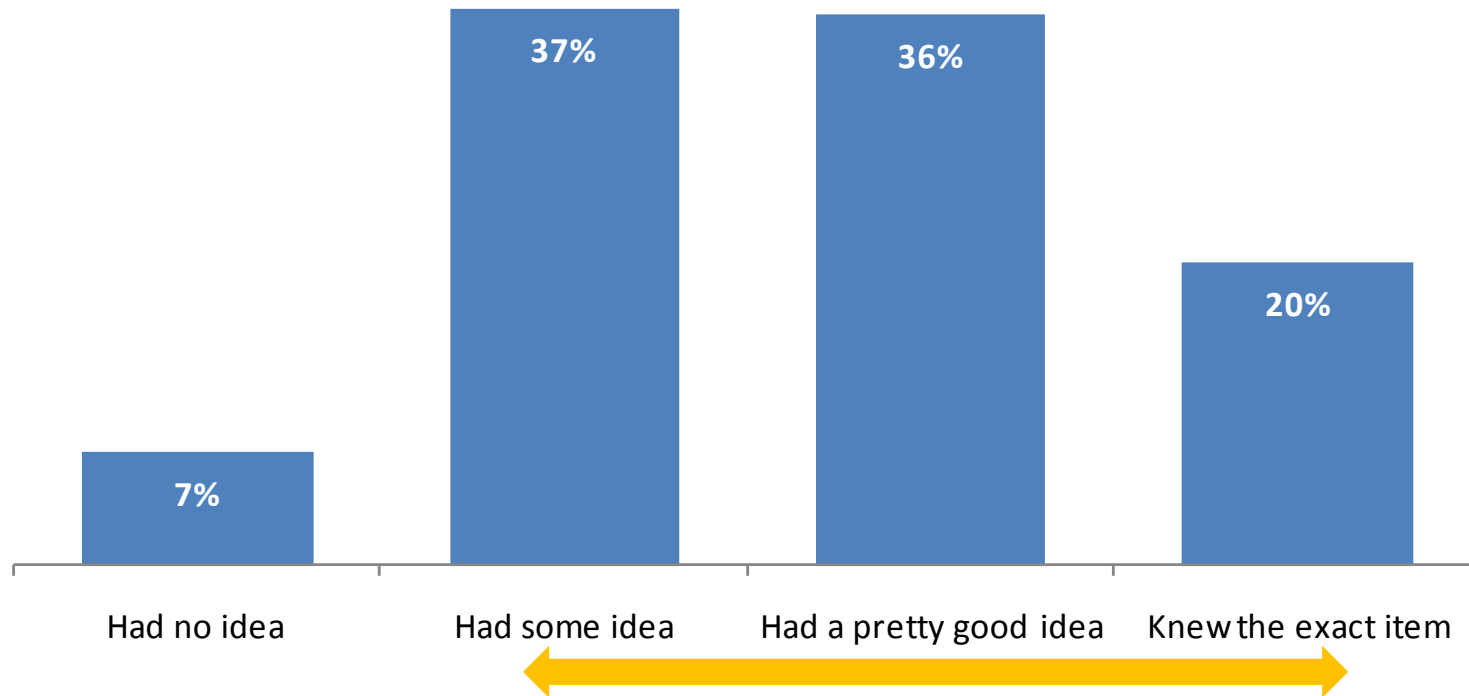


\*\* indicates significance at the 95% level



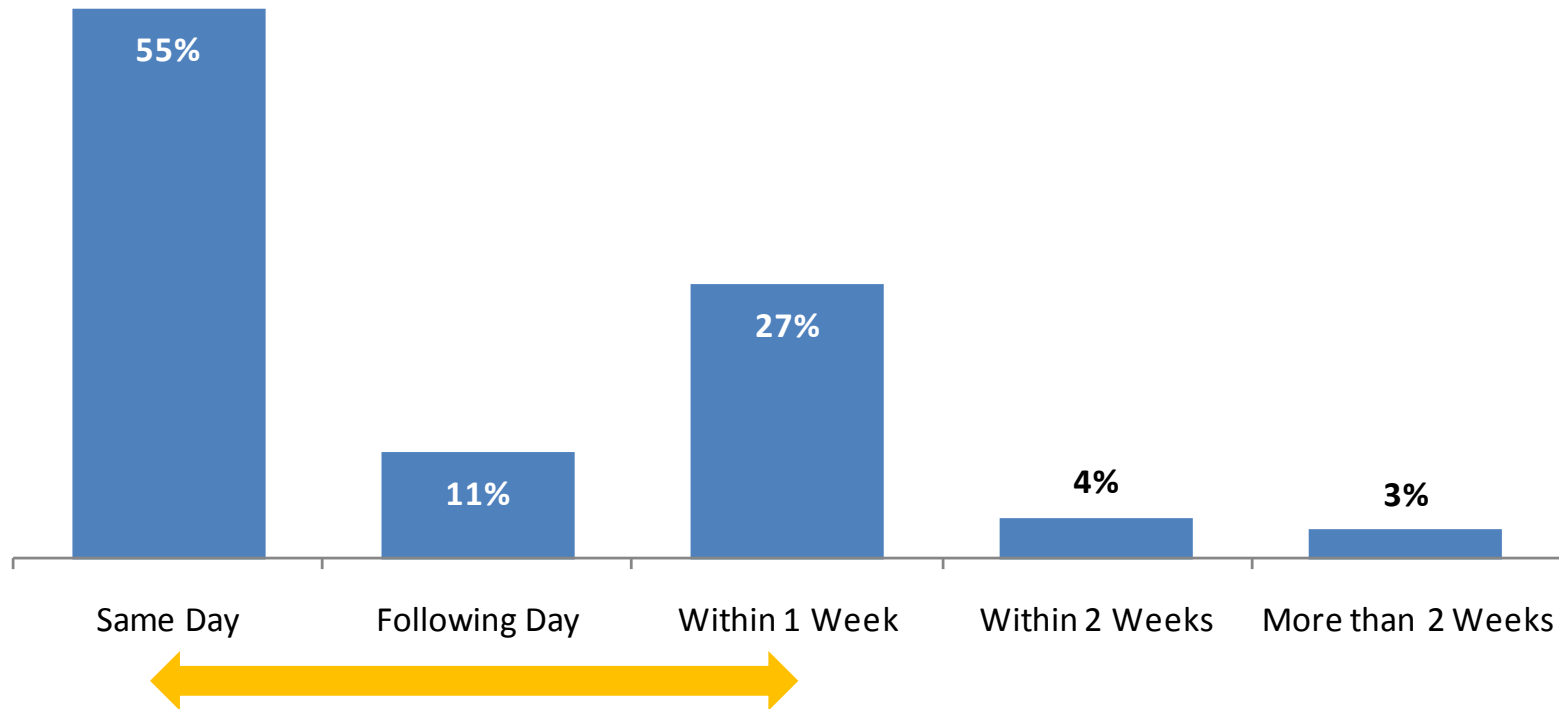
# Personal care purchasers who conduct research already have an idea of the item they intend to buy

Mindset about most recent personal care purchase  
Among personal care purchasers who conducted research prior to purchase



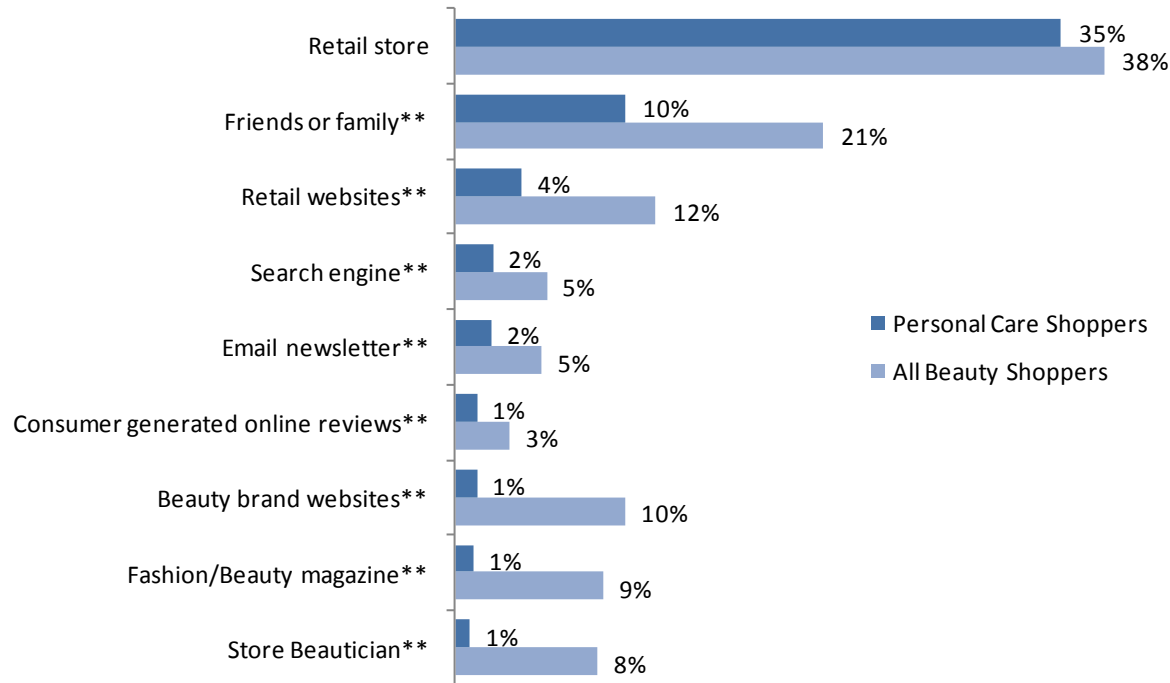
# 93% of personal care purchasers buy within a week of starting their product research

Time between initial research and purchase for most recent purchase  
Among personal care purchasers who conducted research prior to purchase



# A large opportunity exists for personal care marketers to increase consumers' propensity to research online

Resources used by personal care purchasers



\*\* indicates significance at the 95% level

Q2: Thinking about the {Insert "Cosmetics/Skin Care", "Fragrance" or "Personal Care"} products you purchased in the past three months, what sources did you use to find information about what products and brands to buy?

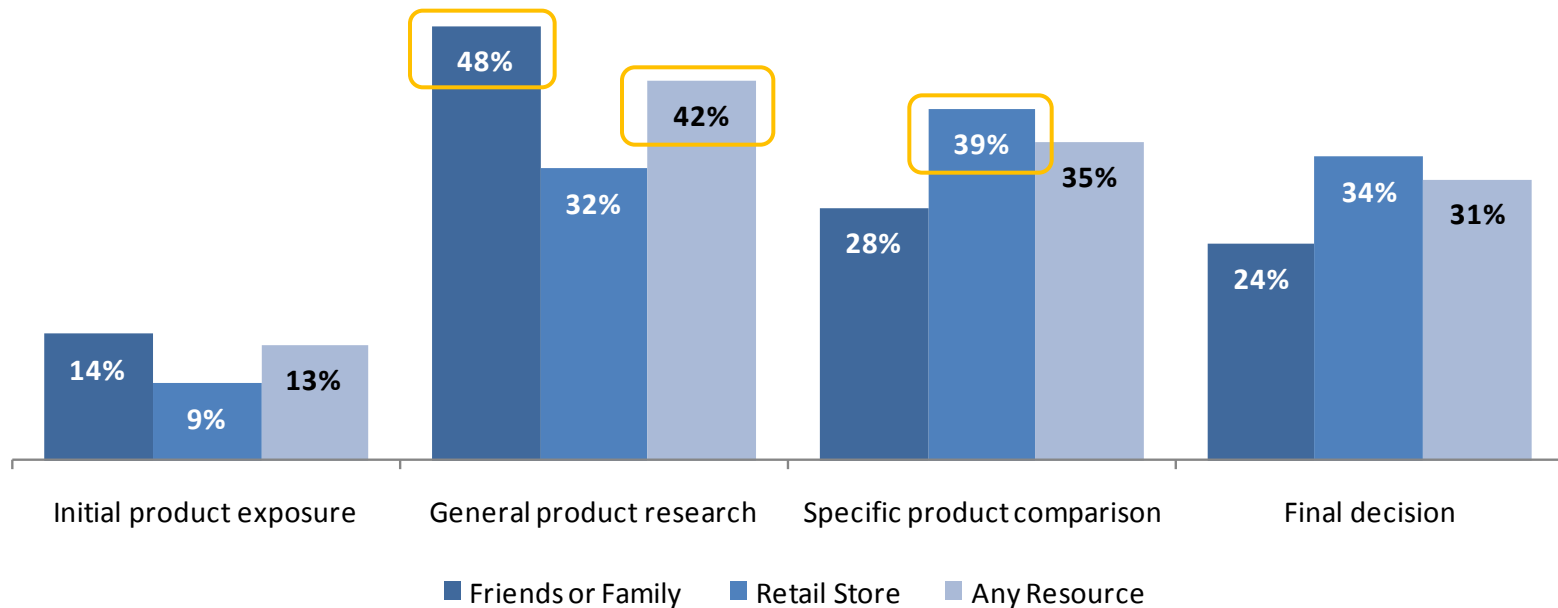
Base: Personal care purchasers, n= 1060; Beauty purchasers, n=4244

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# Personal care purchasers conduct research to obtain general product information

## Timing of resources used by personal care purchasers

Among personal care purchasers who used each to shop for their most recent personal care product



Q8. Thinking about your most recent Personal Care purchase, when did you use each of the sources during your decision about what to buy?

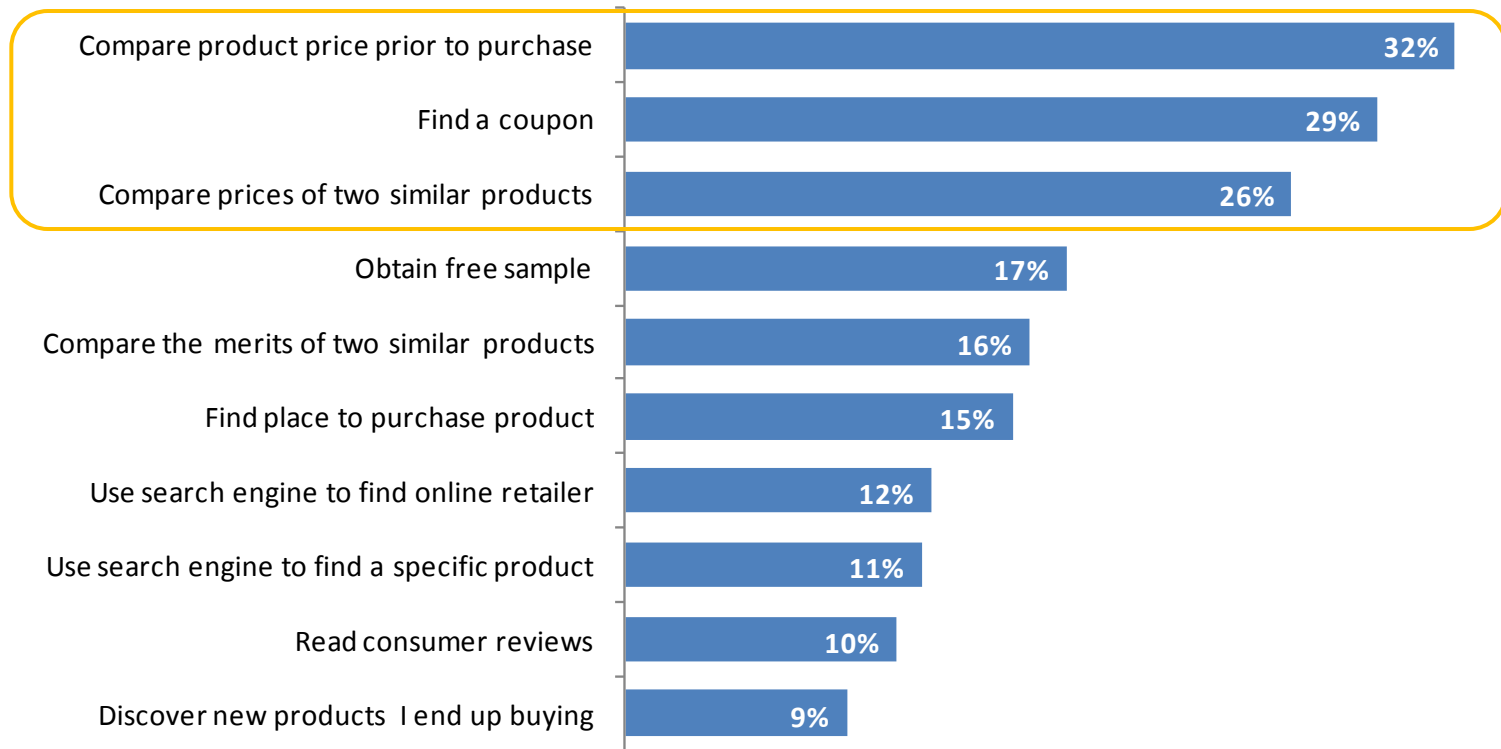
Base: Personal care purchasers who used friends or family prior to purchase, n=50; Personal care purchasers who used a retail store prior to purchase, n=152; Personal care purchasers who used any resource prior to purchase, n=241

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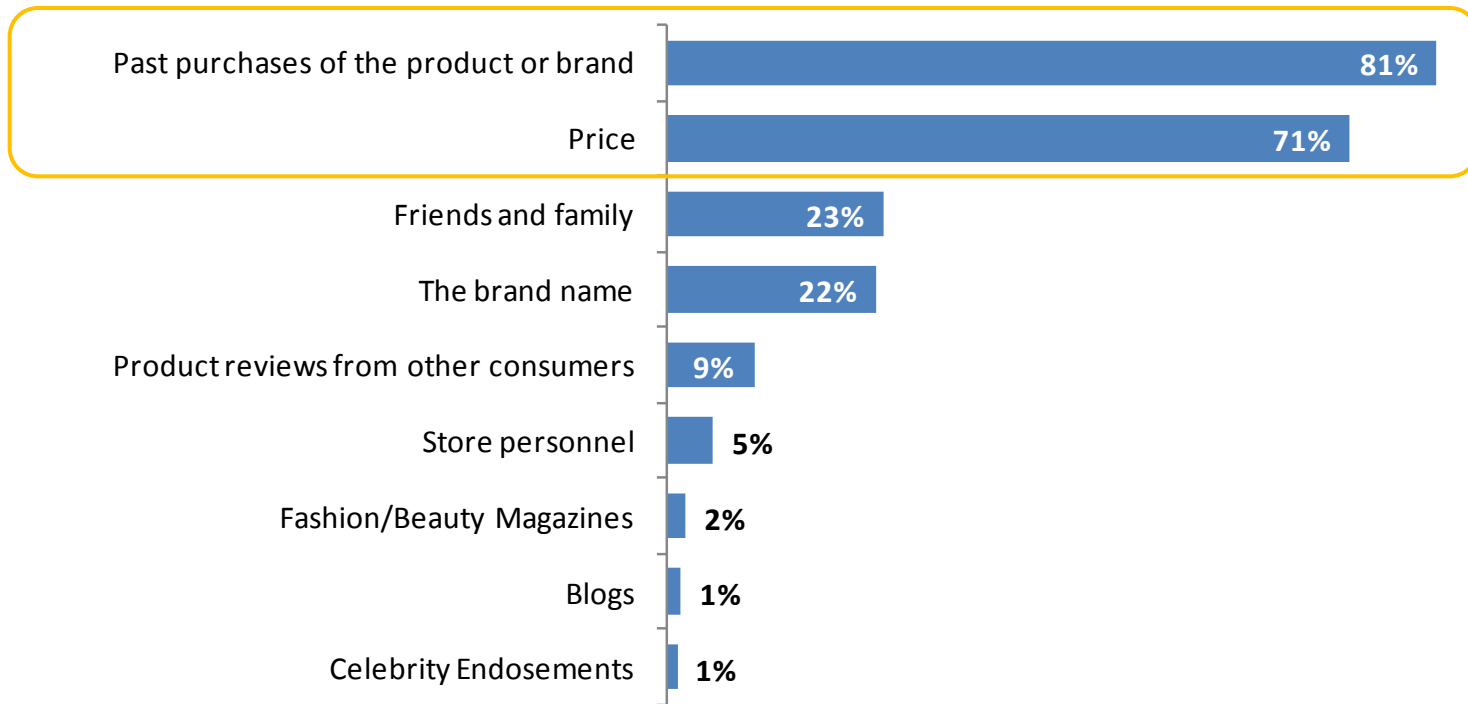
# The web helps personal care shoppers be price savvy

Tendency to perform specific actions when shopping online for personal care products  
Personal care purchasers stating “Often” or “Frequently”



# Personal care shoppers are extremely price sensitive

Influence of sources on purchase decision  
Personal care purchasers stating “Extremely Influential” or “Very Influential”



# Why should personal care marketers care about the web?

*Because online personal care researchers are ...*



## Influencers

- Online researchers are **2X** more likely to tell others about their favorite brands and products compared to offline personal care researchers<sup>\*\*+</sup>
- Online researchers are **twice** as likely to be viewed as knowledgeable about beauty products compared to offline personal care researchers<sup>A\*\*+</sup>

## Bigger spenders

- Online researchers are **4X** more likely to spend \$50 or more per month on personal care products compared to offline researchers<sup>B \*\*+</sup>

\* indicates significance at the 90% level  
\*\* indicates significance at the 95% level  
+ indicates small sample

A: Q19: Below is a list of statements related to personal care. How much do you agree or disagree that each of the following statements describe you, using the 5-point scale below?

B: Q16; During a typical month, how much would you estimate you spend on personal care products?

All of the Above:

Base: Online personal care researchers, n=34; Offline personal care researchers, n=207

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# Why should personal care marketers care about the web?

*Because online personal care researchers are ...*

## More engaged consumers

- **26%** of online researchers use 6 or more different personal care brands vs. **14%** of all offline researchers <sup>A+</sup>
- **59%** of online shoppers vs. **5%** of offline shoppers use the web to research personal care products at least once a month <sup>B\*\*\*</sup>
- Online shoppers are **3X** as likely to read multiple beauty magazines compared to offline personal care shoppers <sup>C\*\*</sup>



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\*\* indicates significance at the 95% level  
+ indicates small sample

A: Q15: Thinking about all the personal care products you use regularly, how many different brands do you use?  
B: Q13: You mentioned earlier that you go online to find information about what Fragrances and brands to buy. Approximately how often do you go online to look for information on personal care products?  
C: Q20: How many beauty-related magazines (such as InStyle, Vogue, or Self) do you either subscribe to or regularly read?  
All of the Above:  
Base: Online personal care researchers, n=34; Offline personal care researchers, n=207  
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