

WOMEN'S  
MARKETING  
INC



# THE BEAUTY BUYER'S PATH TO PURCHASE

The Influential “**Super Beauty:**”  
Do You Know How To Find Her?



## EXECUTIVE SUMMARY

Women's Marketing Inc. took a deep look into the beauty consumer, how she shops and the role media plays along her path to purchase. From this research, the Super Beauty was identified.

When it comes to beauty, her advice is always spot-on. By the time you've heard about a product, she's already found it, tried it, reviewed it, and told everyone from her babysitter to her yoga instructor that they should buy it, too. She's the "Super Beauty," the influential consumer who is leading explosive growth in the beauty category. The numbers tell a dramatic story: while total beauty sales from mass market and prestige beauty products rose from \$45.5 billion in 2009 to \$45.7 billion in 2012, that number rose to \$66 billion in 2013, according to NPD / eMarketer / Kline & Company / ATKearney. And this top influencer is showing the rest of the marketplace the way.

In this study, we will investigate the Super Beauty consumer—who she is, where she goes for information, and how she travels down her path to purchase. We will explore how beauty industry marketing and advertising buys have been reaching this trendsetting consumer. In conclusion, we'll offer key actions to consider when creating a more strategic media mix for the important target market for beauty products in 2014.



# WHO IS THE SUPER BEAUTY?

(AND WHY IS SHE IMPORTANT TO YOUR BRAND)?

## SHE'S A TRENDSETTER.

A risk taker, a style-maker, and a communicator, the Super Beauty is a consumer who knows what she wants: where to learn the scoop on the latest beauty products, where she'll go to buy them, and how she'll spread the word. Studies from Spring 2013 GfK MRI show that she's adventurous and considers herself creative. To relax, she shops. And when a Super Beauty shops, she seeks out what's hot—so it's no surprise that **she's using at least 11 beauty products on a daily basis.**

## SHE'S BEYOND INFLUENTIAL.

Because she's so in the know, the Super Beauty is her friends' go-to source for details on the latest must-buys...especially since she's often the first in the crowd to try new products (Index 153). **People come to her for advice before making their own purchases** (Index 172)—which works for her because nothing makes her happier than **sharing and writing reviews on the products she loves** (Index 154). Her influence, therefore, becomes quite well spread. Not only is she informing her family, friends, and neighbors, but she's also giving tips out to her colleagues, her stylist, her favorite blogger, and even the barista at the coffee shop on the corner (*all Spring 2013 GfK MRI, Super Beauty*).

THE  
SUPER  
BEAUTY

**MEDIAN AGE: 37**

**HHI: \$70,000**

**COLLEGE EDUCATED**

**WORKS FULL-TIME**

**MARRIED WITH  
YOUNG CHILDREN**

**TRENDSETTER**

**BEYOND INFLUENTIAL**

**HEAVY MEDIA USER**

## SHE HAS A SOFT SPOT FOR MEDIA.

How does Super Beauty stay super on-trend? She's a big media fan. She uses more media than average to stay updated—although she confesses she finds the most inspiration and entertainment from her favorite magazines and websites.

## SHE HAS A UNIQUE PATH TO PURCHASE.

While most consumers consult 10.4 sources of information on average before they buy an item, Super Beauties, according to the Google ZMOT Study, use only seven. Moreover, the Super Beauty's pre-purchase habits change depending on the beauty category: 71% learn about new cosmetic products from magazines; for hair, 59% go straight to a brand website; and 68% learn about body care products from TV commercials (*Source: Total Beauty Survey*).

## SHE'S BUYING ONLINE AND OFF.

The Super Beauty will go wherever she needs to go for the product she wants—whether it's at the mall or simply by clicking away on her laptop. In-store, she starts out in department stores (46%) and drug stores (23%). Online, her buys are more evenly distributed: she'll purchase across general merchandise sites (33%), mass retailers (24%), and specialty retailers (22%) (*Source: Spring 2013 GfK MRI, Super Beauty; Mintel, 1,928 Internet users who bought beauty products*).



### IN-STORE PURCHASE HABITS



### ONLINE PURCHASE HABITS



## HOW SHE'S BEING REACHED NOW

Kantar Media reports that, overall, media buying trends from 2008 to 2012 demonstrate a shift from TV to magazines and the Internet. As a whole, the beauty sector looks a little different: the top five spenders (P&G, L'Oréal, Unilever, J&J, and Estée Lauder) drive the media mix, and they favor TV first, followed by magazines and digital.

However, when you remove these top five and focus solely on beauty advertisers spending under \$5MM in measured media per year, magazines and TV change share of dollars—and the story better reflects the overall media buying trends. Within

this group of advertisers, print is the most-used form of media. Digital is growing fast, though, and perhaps it's for good reason: According to ATKearney/eMarketer, in the last year, almost 6 in 10 women said they purchased their beauty or personal care products via the web. And it certainly shows. Reports from ATKearney/eMarketer say that, of all U.S. retail e-commerce sales in 2012, beauty and personal care products accounted for 12%—an increase of 167% YOY. Moreover, e-commerce accounted for 8% of total beauty product sales, and is expected to increase 50% from 2013 to 2016.

## TREND WATCH: PRODUCTS SHE'LL WANT



**BBs FOR HAIR:** Major players in the hair industry are rolling out BB products, some of which include anti-aging and hydrating ingredients.



**SKIN, BODY, AND HAIR OILS:** This new generation of natural oils is on the rise and will continue to grow.



**NAIL ART:** Nail polish sales soared to \$768 million in 2012, up 32% YOY; drugstore sales of polish and nail products rose 59% YOY.

*Source: MintLife, Nails Magazine, WWD, Allure*

### INSIGHT:

Some people are considering the “**NAIL POLISH INDEX**” the new economic barometer: Instead of buying lipstick when times are tough, consumers are buying a new bottle of polish.



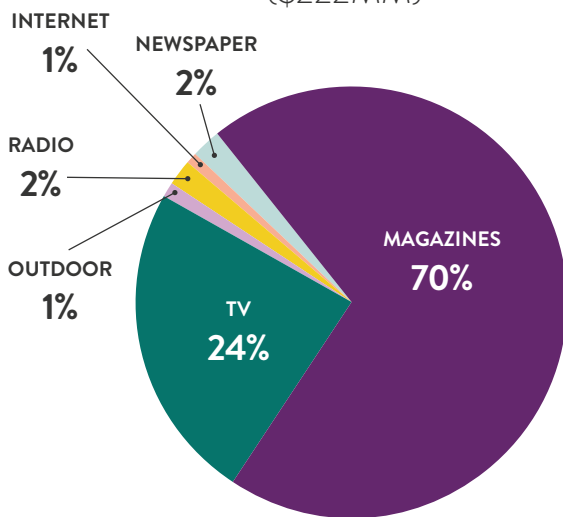


# BEAUTY CATEGORY 5-YEAR TREND

(UNDER \$5MM IN  
MEASURED MEDIA)

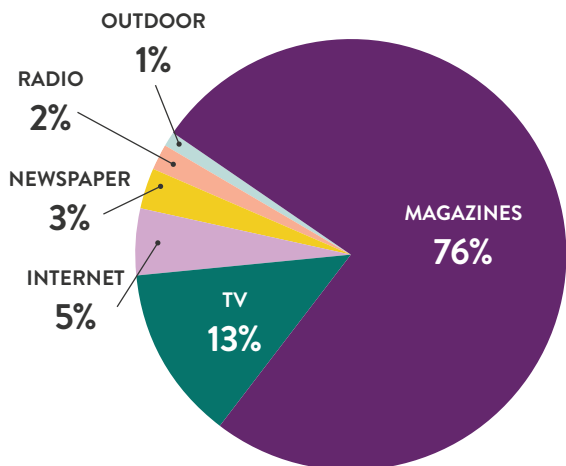
## FY2008

(\$222MM)



## FY2012

(\$285MM)



Source: Kantar Media;

Beauty = Hair, Cosmetics, Skin, Bath

## MOST ADVERTISED PRODUCTS

1. **FACIAL SKINCARE** (\$1B)
2. **SHAMPOO/CONDITIONER** (\$690MM)
3. **FRAGRANCE** (\$470MM)
4. **FOUNDATION** (\$385MM)
5. **BODY SKINCARE** (\$295MM)
6. **LIP** (\$275MM)
7. **HAIR COLOR PRODUCTS** (\$265MM)
8. **MASCARA** (\$235MM)
9. **NAIL** (\$225MM)
10. **EYE SHADOW** (\$120MM)

Source: Kantar Media 2012

# LOOKING AHEAD:

## RECOMMENDATIONS FOR REACHING THE SUPER BEAUTY



The dramatic rise in beauty sales certainly shows promise for the industry moving forward—and targeting and engaging with the Super Beauty (and all the consumers she influences) should remain top of mind. Looking ahead, consider these actions to create a more strategic media mix that better reaches this vital target market for beauty products.

### 1. REMEMBER WHAT MOTIVATES HER.

The media mix driven by the industry's top five spenders favors TV buys before print and online. But consider where the very influential Super Beauty says she finds her inspiration: magazines and the Internet.

### 2. TAILOR THE MEDIA MIX FOR EACH PRODUCT CATEGORY.

The paths to purchase for the Super Beauty vary widely depending on the specific beauty product she's seeking. Use a custom media approach to reach her at the point of influence.

### 3. ACCELERATE HER PATH TO PURCHASE ONLINE.

The Super Beauty buys from a range of online retailers—and e-commerce is showing to be a growing opportunity for beauty products as a whole. Use digital media to speed up her purchase path with click-to-buy functionality. (Source: ATKearney/eMarketer/eMarketer)

### WANT MORE INSIGHT ON THE SUPER BEAUTY?

Using industry-leading insight, Women's Marketing Inc. helps beauty brands achieve their objectives through a strategic mix of media options—and maximizes their potential to be everywhere the Super Beauty is now. **Contact us** about our marketing and advertising capabilities for the beauty industry and ask us how we can help you grow your brand.