

Care to know the brains behind the beauty

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Multi-country Beauty Care Survey

How women spend time on Beauty Care and What prompts them to try new products

Beauty Care covers a diversity of products that address different areas of the body with the aim to enhance how we perceive ourselves and how others perceive us.

Not all products are equal in this respect, some may be more involving than others leading to different patterns of use and purchase. The level of involvement varies across cultures and time.

How involved are the women in the Middle-East and Africa with the different beauty care products, and is this involvement affected by the cultures of the different countries forming this part of the world?

It goes also without saying that such products incur constant and fast paced **innovations**, hence it becomes quite interesting to know what is likely to trigger the first time trial of new products and what would favor their diffusion among the women of the region

To answer the above questions, the WIN/ Gallup International Association Group conducted a survey in December 2015 in 7 countries in the Middle-East and North Africa region through four of its members as described in the following table

Table 1- Research agencies and Countries

Research Agencies	Countries
REACH	Lebanon, KSA, UAE, Egypt
BJ Group	Morocco
EMRC	Iran
PCPO	Palestine

The survey covered 2909 adult women and investigated how much time the respondents spend

on their beauty care in each of the following areas:

- Body Care
- Hair care
- Hand Care
- Foot care
- Way to Dress
- Facial Care
- Perfume
- Face make up
- Eye make up
- Lipstick

The respondents were asked to tell for each time on a scale from 1 to 10 if they spend little time or an extensive amount of time, where 1 means little time and 10 means an extensive amount of time. Here below the results

Chart 1 : Scores of beauty care items on time perspective scale

The results show that at an overall level Body Care comes first, followed by all the group of the Care items (all items of the group are almost ex-aequo and there is no significant difference between the scores), then by adornment items such as perfume or make up items.

The importance given to Body care indicates a high level of involvement on behalf of the respondents

On the other hand, the fact that Care items take precedence over the Adornment items indicates that women in the covered countries give greater significance to products that help them to be what they want than to those that help them look how they want to look. For the respondents, Being is more important than Looking.

Considering the answers on a per country basis, we distinguish two groups of countries:

- Countries where the women are ready to invest more time on beauty care, these are KSA, UAE, Iran and Egypt
- Countries where women would like to spend less time on beauty care, these are

Lebanon, Palestine and Morocco

Where women are willing to spend more time, they are more likely to adopt products that, though tedious to apply, bear the promise of a longer lasting effect. On the other hand, in countries where women are less willing to spend time, favorite products will be those that are easy to apply and that have instantaneous results.

The second question investigated what is the touchpoint that would drive a first time trial of a new beauty care product. Here also, the respondents were required to provide a score on a scale from 1 to 10 where 1 means that the suggested touchpoint is very unlikely to lead to try a new beauty care product and 10 means it is very likely to do so. The following chart reproduces the results:

Chart 2 : Scores of touchpoints likelihood to generate first time trial

The results show that Personal Experience, Reputation and Value for Money top the list. Trust and Expert Recommendation are second in the hierarchy. Attractive Ads or Used by a Star are at the bottom of the list.

Through this one can infer that women want to judge the new products by themselves. They build their decision on what makes the reputation of the **brand** behind this product, its safety and efficiency. They are also attentive to its price and to whether they are getting what they are paying for. They do not hesitate if needed to back up their own judgment by what they hear from people they trust or by those whom they perceive as experts. However, they are less likely to try a product only because its **advertising** was appealing or was being endorsed by a star.

Methodology:

In each country a representative sample of women users of the beauty care category with +/- 4-5% at 95% confidence level. Countries are represented by their executed sample. Results are not weighted relative to the size of each country as the purpose is to compare behaviors across countries and to look at the variants and invariants through this comparison. Hereafter the sample distribution

Table: Sample distribution per country

Country	Sample
Lebanon	518
Egypt	350
Palestine	499

Morocco	500
Saudi Arabia	360
UAE	337
Iran	345

REACH is part of WIN/ Gallup International Association Network. The network is a leading association in market research and polling. It groups the 75 largest independent market research and polling firms in their respective countries with combined revenue of over €500 million and covering 95% of the world's market.

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