

RESEARCH

Understanding regional grooming behavior vital to brand growth: survey

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Dolce & Gabbana's Classic Cream lipstick

By JEN KING

For beauty marketers targeting consumers in emerging markets, it is essential to understand the grooming habits and preferred personal care products in the country at hand, according to a new survey conducted by Euromonitor International.

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In 2013, global sales of skin care products totaled more than \$107 billion and the hair care market totaled \$77 billion. These global sales figures, estimated to grow by 20 percent between 2014 and 2018, are reflective of the time, money and effort consumers spend on their appearances.

“The findings that stand out the most is the differences between countries and product usage,” said Eileen Bevis, survey manager at [Euromonitor International](#), Chicago. “There’s always country differences, but in this study in particular the products used stand out.

“We’re seeing new levels of disposable incomes in emerging markets and these consumers are eager to treat themselves,” she said. “Marketers need to make the experience inviting and attractive, this will appeal to the feeling of indulgence for this group.”

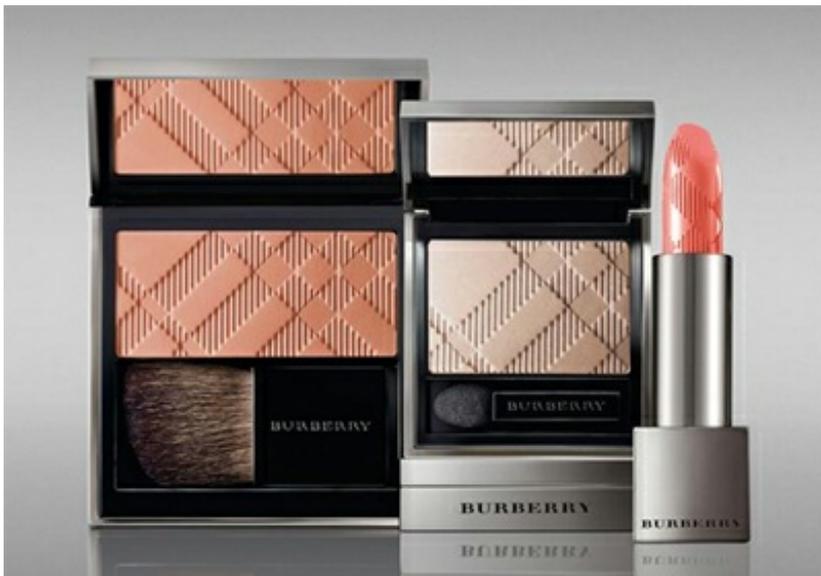
Between February and March 2014, Euromonitor's "[Personal Appearances: Global Consumer Survey Results on Apparel, Beauty and Grooming](#)" surveyed approximately 6,600 consumers in 16 emerging and developed countries: Australia, Brazil, Colombia, China, France, Germany, India, Indonesia, Japan, Mexico, Saudi Arabia, the United Arab Emirates, Russia, Spain, Turkey, the United Kingdom and the United States. The survey asked questions regarding consumers' attitudes toward style and appearance, grooming habits, purchase frequency and responsibility and the approach to the buying process.

Worldwide beauty regimens

With an understanding of consumer preferences and behavior, marketers will be able to devise strategies that cater to the localized grooming practices of specific countries rather than producing a one-size fits all beauty module. Insights on gender, region within a country and amount of effort dedicated to external appearance is all relevant to how these strategies are developed.

The desire by consumers to look good has propelled the beauty market, as well as apparel and accessories, as the "largest and most dynamic" sectors in the global marketplace.

Although the desire to look good extends to every market's consumer base, the exact definition of "looking good" has different meanings. These sentiments influence how consumers purchase beauty and personal care products.



Burberry's spring/summer 2012 beauty collection

Fashion is a global motivator for achieving individual style. Of respondents, most leaned toward a "fuss-free" fashion style with only 14 percent describing their wardrobe as "formal" and 15 percent said their look is "high-style."

In China, those surveyed said that they favor stylish over practical clothing and are more likely to shop at luxury boutiques online. Many also said that they would describe their personal style as "lavish," only wearing brand-name clothing and shoes.

The survey's data broke down the grooming habits and products used in different regions to give marketers a better sense of which products would do best in particular

marketplaces.

Expectantly, women and younger consumers spend more time on their appearance daily with an average grooming time of 42 minutes whereas male consumers devote 6 minutes to a half hour on grooming. Euromonitor broke down grooming into general hygiene, skin care routines, fragrance, hair care and cosmetics.



Tom Ford's grooming product line for men

Not surprisingly, only 4 percent of women surveyed claimed to not use any beauty products within the past three months.

The amount of time spent on grooming impacts purchase frequency and what is considered a “must-have” product. Having an understanding of which products are purchased more often will allow marketers to evaluate opportunities to increase sales.

Euromonitor also found that the path to purchase for personal care items involves four phases: opportunity, research, selection and purchase. Opportunity is based on personal reasons typically reserved for when a product runs out or a desire to experiment, while the research phase is based on recommendations and brand insertions tactics.

Selection is motivated by what is available but is limited because consumers tend to stick with a brand they know and product used in the past resulting in less experimentation in the personal care sector. Lastly, purchase is decided on a balance of principles such as desire, quality and brand name along with budget constraints.

These phases differ by country and marketers must adapt product displays to appeal to the sentiments of local consumers thus increasing the likelihood of a sale.

Localized attention

Establishing a trusting relationship with consumers is needed for expansion in new regions.

Estée Lauder Cos.' expansion practices are marked by entering emerging markets ahead of other companies despite the increased risk, according to the "Building Empire" session May 13 at the FT Business of Luxury Summit.

Understanding risk tolerance is a must when embarking on any new project, especially when setting up shop in marketplace that is still developing. As one of the world's most valuable brands, Estée Lauder strives to introduce its products ahead of competitors to better understand emerging markets ([see story](#)).

Beauty brands that curate Web sites to local sentiments fare better among consumers.

For example, international beauty brands are facing stancher competition from local players in the Chinese market, according to L2's latest beauty report.

Lancôme and Estée Lauder secured the top two spots, greatly outperforming the 61 percent of brands that ranked challenged or feeble. L2 argues that digital innovations offer a "moat" for brands that want to protect gains made in the country ([see story](#)).

Understanding the grooming patterns of Chinese consumers will help brands establish a sound presence in the country.

"Beyond product usage, marketers can take away an understanding of consumers and their attitudes to drive more effective advertisements and product marketing," Ms. Bevis said.

"For example, Chinese consumers feel that they need to dress for success," she said. "Chinese consumers prioritize how they look and are likely to be more receptive to premium ingredients or products aligned with recent trends."

Final Take

Jen King, lead reporter on Luxury Daily, New York

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