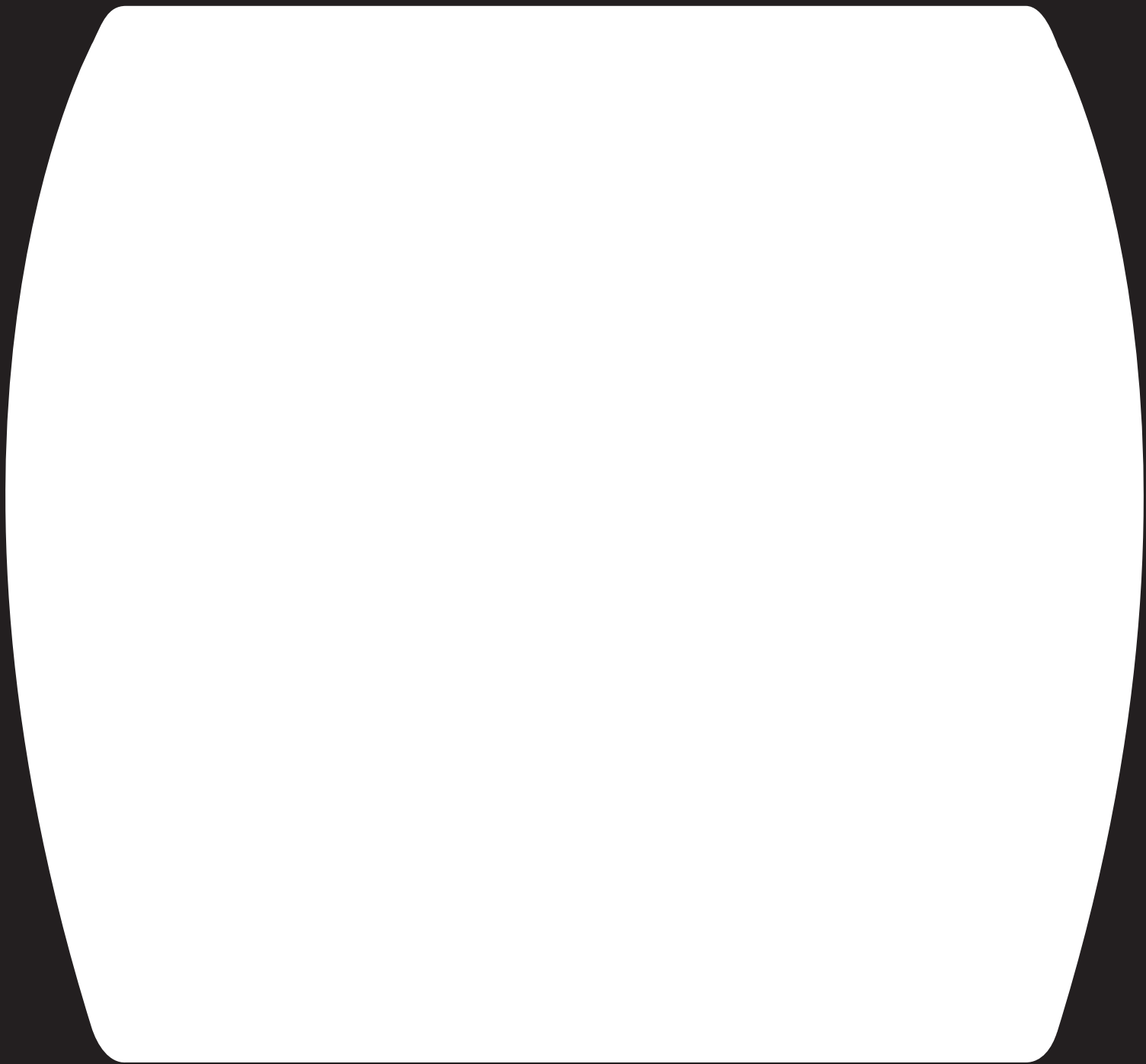
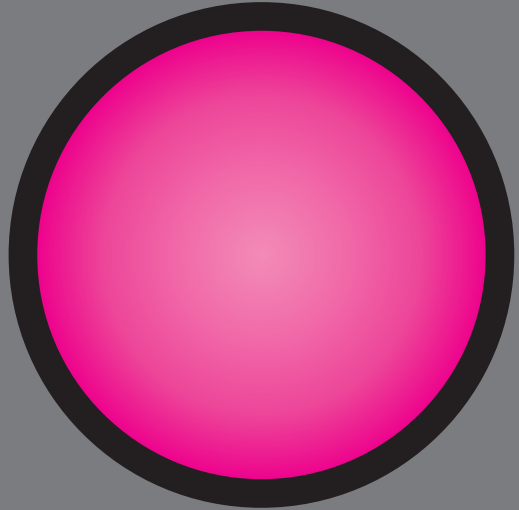
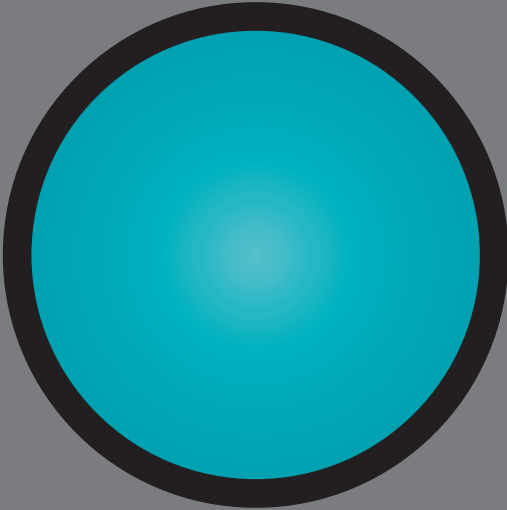


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Active Engagement





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The digital face of beauty

The current generation of 18-24 year-old young women is the first to have grown up with mobile and internet technology shaping their attitudes towards brands and media communications.

The digital face of beauty looks at how Web 2.0 has – and has not – changed the behaviour of this first generation of ‘digital natives’ within the health & beauty category, and identifies the resulting opportunities for brands.

Overview

An eternal quest for the perfect product means young women are always open to new product temptations. In spite of – or perhaps because of – a proliferation of choice, young women pursue a never-ending search for the perfect health & beauty product. The internet has only intensified this quest for the perfect product, allowing them to question every choice.

Young women are their own health & beauty experts. Young women are using the internet to challenge traditional health & beauty advertising messages – consulting product-review sites and online forums for unbiased information and advice.

Young women are relatively unconcerned with ingredients; they just want a product that works. Overwhelmed by information, young women focus their online search on finding out if the product actually works.

In-store shopping is still a vital influence on purchase decisions. Even with the comparative information available online, young women still need to experience a product before committing to a first-time purchase.

Sales assistants can still make or break a purchase. While the internet can help consumers clarify their intentions before visiting the store, an unhelpful or pushy sales assistant can make a near-purchase consumer leave without buying anything.

Traditional advertising should be grounded in reality. Female digital natives still use traditional health & beauty advertising (e.g. magazine, television, outdoor) as a new-product alert. However, with product reviews and opinions quickly disseminated within Web 2.0, any over-claim will be exposed, threatening conversion of the new-product alert to a sale.

Digital communication should be used to give consumers a more actively engaging experience of the brand. Digital communication can build relationships and encourage sales if it is used to provide engaging and contextually-relevant content and services that bridge the gap between on- and offline experiences of the brand.

The drawer of broken dreams

“In the factory we make cosmetics; in the store we sell hope.” Charles Revson, Revlon founder, 1932

Today’s young women may use the internet to seek out objective and informed opinion on health & beauty products, and have long been wise to the strategies of the marketing industry, but MEC’s research suggests that at heart, they still end up buying the hope that Charles Revson spoke of over 75 years ago.

“I’m sure this year something else will be landing in my ‘drawer of broken dreams’. Because that’s what they do, they sell you dreams and then they break them.” (Spain)

How can a brand avoid ending up in this “drawer of broken dreams”? For today’s advertisers, the challenge is not to over-pitch the hope they are selling – “broken dreams” can be quickly and widely shared online, damaging both brand and sales. Motivations for buying health & beauty products may not have changed with the arrival of a connected world, but receptivity to brand communication apparently has.



The eternal quest for the perfect product

“No product is ever so good that it could not be better.” (Poland)

Young women appear to be on an eternal quest for the perfect product. Driven by either unfulfilled health & beauty ambitions or a belief that there are better products out there, they are always open to new product temptations. Manufacturers' continued innovation only serves to fuel this eternal quest.

“Products that promise something novel and revolutionary are a temptation. I've bought these products; it's as if you think “It could be a lie, but it could be true”, and you have to buy it just to make sure.” (Spain)

With the hopeful heart often triumphing over the rational head, previously unmet expectations do little to deter them:

“When it comes to my body, it doesn't take much to persuade me. Cellulite will not go away with just one cream, but when they talk about products which get rid of cellulite, I test them all!” (Italy)

“The internet is probably the primary source of any research that I do, although there is a deluge of information that can leave us feeling overwhelmed.” (India)

The internet has intensified this never-ending quest by creating what Barry Schwartz called the 'paradox of choice' – too much information and too many opinions leave people unconvinced that they have already bought the best product for them.

Brands therefore need to simplify the decision-making process and reassure consumers that they have made the right choice. A one-to-one relationship that builds trust will encourage loyalty at a brand level, which will simplify their purchase pathway, while ongoing post-purchase dialogue reassures customers that they already have the best product for their individual needs.

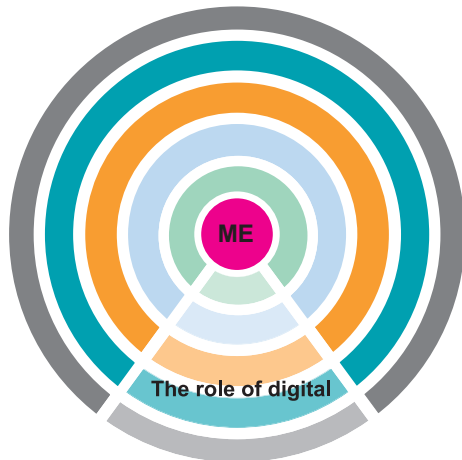
I am my own expert

When it comes to choosing new products, to whom do people turn for advice?

Young women will naturally consult people in their most immediate circles of trust (see below), but there is only one person they consider a true expert on their health & beauty needs: themselves. Despite of all the information available, they will ultimately judge the effectiveness of a product by what they see with their own eyes.

“I think there are no beauty experts as such. The most important beauty expert is me.” (Russia)

Circles of trust



- Seeing & Testing
Samples, testers,
packaging
- Independent
product reviews
Online, magazines, TV
- Advertising
In-store sales
assistants, brand
websites
- People I know
Mum, friends, beauty
therapist & hair stylist
- A corporate face
Online, magazines,
outdoor, TV

Brand affiliated ‘experts’ – such as in-store sales assistants and ‘experts’ in advertisements – are viewed with caution: young women are not convinced of their independence and this makes them wary of trusting them.

“I am always afraid that the advice will be given with the intention of just selling me a product rather than actually helping me.” (Italy)

The most relied-upon source of information and advice are the people they know and trust: friends and family (mother and sisters), and their personal beauty-professionals (e.g. beauty therapist, hair stylist, dermatologists).

“I get most of my advice from friends and my mom. I like talking to my friends because we all pay attention to the same things. I like talking to my mom because she’s older and she’s tried many products through the years, so I value her opinion.” (USA)

In some cultures, young women still seek advice from their grandmothers, believing in tried-and-tested homemade recipes that have outlived commercial products.

“I never forget to ask my grandmas about their homemade beauty recipes. These are tried and tested remedies and they always work.” (India)

There is no purchase pathway

In the internet age, product reviews in women's magazines and television shows remain a popular source of trusted advice, as long as they are perceived to be objective and independent.

But their main source of information is the internet, where they consult brands' own websites and more importantly, product-review sites and online forums. The independent viewpoints of 'people like me' are considered more trustworthy than any brand associated 'expert'.

“These days I do a lot of my information seeking for health and beauty products on the web as you get hundreds of opinions and lots of information at the click of a button.” (UK)

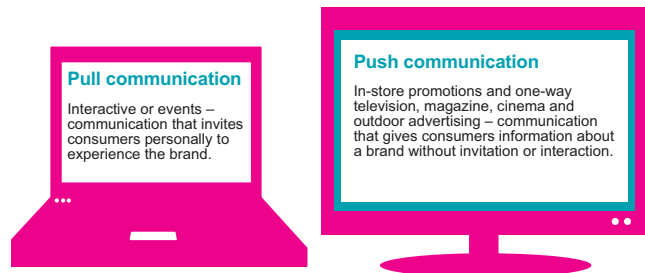
Brands that use their website to present themselves as a virtual friend, rather than as a corporate expert or sales tool, are likely to prove most engaging. L'Oreal's 'Skin and Hair Discovery' website is a good example – with beauty consultation questionnaires, tailored advice, entertainment, all housed in fun, girly graphics, the site feels more like an independent beauty portal.

“I like websites from brands that, while they are advertising their products, they value you as a woman, not as a consumer.” (Spain)

Health & beauty is a high interest category, but the time a consumer spends investigating her product choice can vary hugely. A single consumer may spontaneously be tempted to buy a product in-store simply because she was in the mood to do so or because of a special offer, or she may consult everyone she knows and many she doesn't (thanks to online forums) before making her product choice.

The internet can affect every element of the purchase choice from research, through transaction, to post-purchase reassurance: there is no linear purchase pathway, on- or offline.

Brands therefore need to use both pull communication (e.g. interactive or events – inviting consumers personally to experience the brand) and push communication (in-store promotions and traditional advertising – giving consumers information about a brand without invitation or interaction).



I just want a product that works

When young women search for information, that search is focused on finding a product that works. A combination of the complexity and volume of available information, and cynicism towards brand claims, means that understanding ingredients is a step too far for some consumers.

“Without any pharmacology education, a product’s composition is like Chinese to me. It is the result that is most important.” (Russia)

Brands that focus on the end-benefits of their products – via demonstrations and case studies – may be more likely to engage young women and offer a ‘reason to believe’ than those that focus on scientific language about ingredients.

“People want to know what a product does and whether it is likely to suit their needs. Blinding them with unexplained science will not help them achieve this goal.” (UK)

Brands’ internet sites are an ideal platform for demonstrating a product’s benefits. For example, Weight Watchers’ website focuses on the benefits of losing weight via easy-to-understand advice, and includes case studies, before-and-after pictures, online forums and healthy-eating recipes.



The continued influence of the store

Despite an increased role for the internet, young women still enjoy the multi-sensory experience of in-store shopping. The retail environment nurtures spontaneous purchasing, which can side-step rational pre-purchase research.

“I love going to the shops, even if it’s just to have a look! You need to stop, look to see what you want, try the smells and colours... When I am buying something for myself, I stop and look at lots of things, even if I already know what I want.” (Italy)

Eye-catching packaging is of course engaging; but the more tactile the shopping experience – offering shoppers the chance to test the product – the greater the opportunity to convince them of the product benefits.

“I just love those little testers and packets... I’ve bought products just because I could test them beforehand.” (Germany)

This need to experience a product before buying – to see, feel, touch and smell it, as confirmation of online advice – makes the internet more likely to be used for repeat purchases.

“I only buy stuff online when I already know how it smells or looks or feels. Kinda like repeat purchases of stuff I already have. I won’t buy anything I need to see in person first, like foundation, eye shadow, perfume, etc.” (USA)

Brand websites that offer a more engaging brand experience – including product demonstrations, personalized advice and free samples – are more likely to encourage purchase by enabling consumers to confirm their choice before reaching the store.



Sales assistants can make or break a purchase

Young women are cynical about brand-affiliated sales assistants, believing that they do not have the consumer's best interests at heart.

“I don't really trust what sales assistants say because I believe for the most part all they are doing is promoting their product.” (China)

Perhaps because of this cynicism, they do not like to be approached by sales assistants – if they want help, they will ask for it. When they do approach a sales assistant, they want bespoke advice without sales speeches; and there is nothing more frustrating than discovering the sales assistant does not know which products would be best suited for them.

“If I'm not satisfied with his/her answer, I leave the shop and never visit it again.” (Russia)

Brands should of course ensure sales assistants are trained and knowledgeable about their products and returning customers; but given the importance of the internet in shaping purchase decisions, they should also consider creating 'virtual sales-assistants' to give tailored advice to consumers online. For example, Nivea's website has a virtual consultant which helps visitors identify their skin type and product needs.



Traditional advertising should be grounded in reality

Health & beauty advertising acts primarily as a new product alert for young women – they use it as a ‘shop-window’ to see what is newly available. The ad alone doesn’t make them rush to buy the product, but will encourage them to find out more from other sources.

“The media, and especially magazines, make me aware of new products on the market. However, they never help me in making a decision to purchase.” (Poland)

This shop-window effect holds true irrespective of whether people like or believe the ads. While some women refer to negative effects that health & beauty advertising can have on self-esteem, they are still tempted to buy products featured in those ads.

“Women are put under a lot of pressure to be as perfect as the models in the ads. Sometimes I notice that I am doing it too and think ‘Ah! I’d be like that if I had that product – it would make me look better!’ But that’s really not so. I have a normal figure but when I see these celebrities on the adverts and compare myself to them, I feel like a fat pig.” (Germany)

Increasingly, if brand communication is to do more than just raise awareness, and actually engage its audience, it must appear to be grounded in reality.

Dove’s communication is an obvious example. Its category-breaking communication is attention-grabbing, but importantly it appears honest. By using ‘real’ models and focusing on intrinsic values rather than just external appearance, the campaigns are perceived as more believable by many consumers.

“I was surprised when Dove brought out its firming range with curvy women in the advert. That made me want to buy the product immediately to see if it worked - it was a bit more realistic.” (France)

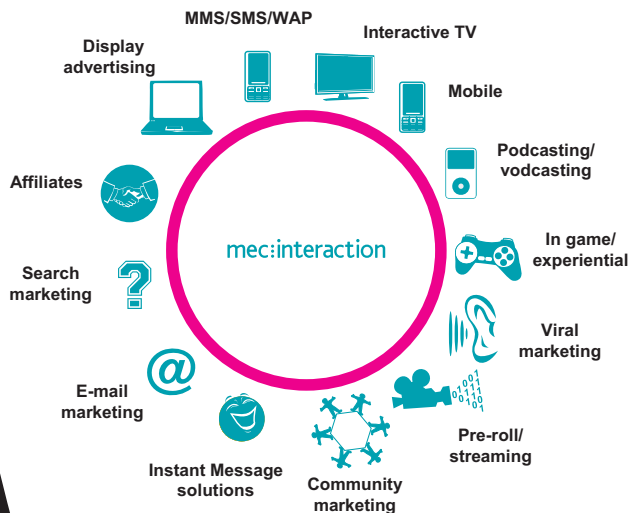
Furthermore, a contextually-relevant choice of channels will help drive engagement. As traditional forms of commercial communication come under threat (with channel fragmentation and reduced attention-spans), health & beauty brands that take advantage of less passive channels are more likely to engage consumers.

For example, Rimmel London’s website has ongoing customer-feedback on all its products, a social-networking page allowing visitors to make friends and share pictures, competitions to win tickets to events it is sponsoring, as well as the option of actually buying its products online.

Digital communication recommendations for health & beauty brands

Traditional advertising remains a vital part of the marketing mix and a valuable means of catching consumers' attention and creating awareness. However, as young women turn to the internet to become self-experts (across all sectors), it is becoming more important to communicate across digital platforms.

Digital Platforms



MEC's 'Four Pillars' summarise the different roles for these digital platforms:

- Reach consumers
- Engage consumers
- Bring transactions
- Manage and build reputation

MEC's Four Pillars



The approach to digital communication that different brands take will depend on brand positioning and which of the pillars they want to emphasise. For example, some aspirational or luxury brands may focus more on reputation and less on engagement. Brands should consider the options available and pick the most appropriate for them.

To reach consumers...

Use health & beauty forums and sector-specific social networks to reach consumers, providing them with contextually-relevant content – Advice, tips and product demonstrations will attract consumers to the brand's website to find out more and to the shop to try products.

Competitions to attend events or win products, or surveys offering bespoke advice and free samples will attract consumers to the brand's website, and offer an opportunity to build a database for future customer-relationship management.

Leverage the power of search – Search engines are the starting point for digital natives at most stages of their non-linear purchase process.

Brands should invest in search-engine optimization and search-engine marketing that helps people navigate to online touchpoints that engage them with the brand.

A return to WAP – As 3G penetration and usage increases, digital natives will increasingly use WAP technology to seek advice and information when they are on the move. Health & beauty will always be a hot topic among young women, and the health & beauty industry is in a good position to take advantage of this growing communication channel.

Brands should attract consumers to their WAP site by leveraging mobile search, health & beauty forums and social networks (as described above).

To engage consumers...

Create opportunities for the consumer to play with the brand online – Young women enjoy 'playing' with health & beauty products – borrowing and talking about each other's products.

Invite people to share content online (for example, best make-up tips, best party pictures etc) and allow visitors to vote on it, encouraging conversation about the brand both on- and off-line.

Consider hosting games and other entertainment (e.g. music) on the brand's website, to give consumers a reason to spend time there and talk about the brand.

As far as possible, recreate online the multi-sensory experience of the retail environment – Use the brand's website to give consumers a more engaging experience of your brand and products – including product demonstrations, virtual assistants, bespoke advice and free samples.

Provide digital content directly to consumers that adds value and facilitates conversation – Brands should consider creating a digital widget to distribute in health & beauty discussion forums and social-networking and product-recommendation sites. Once downloaded to their social-networking page, desktop or mobile, this application can give the consumer news, tips and samples based on individual preferences.

Use content that overlaps the real and virtual worlds, bringing online consumers to the brand offline, and offline consumers to the brand online – For example, host or sponsor events, such as a girls' night-out, music concert or fashion shows. Advertise the event on- and offline with competitions to win free tickets.

To drive transactions...

Use mobile phone communication to encourage spontaneous and planned purchasing – The mobile channel can bridge the gap between digital communication and in-store purchasing.

Use mobile coupons to encourage consumers to buy on- or off-line. Coupons can be sent to customer databases, or to consumers texting a freephone number in response to an ad or in-store promotion.

Brands can ask people to sign up for samples that could lead to purchase (and also build customer databases) by inviting them to text their address to a freephone number. This number could be placed on the brand's ads (on-and offline) and in-store promotions.

To manage and build reputation...

Health & beauty brands live and die by reputation. Brands should treat Web 2.0 influencers as their most valued advocates – Leverage positive online word-of-mouth: target brand advocates with product launches, for example, providing free pre-launch samples.

Use buzz monitoring, tracking what people are saying about your brand to identify and quickly respond to negative feedback and to track competition.

Brands should consider creating their own buzz – For example, by creating a blog facilitating brand evangelists (ensuring that they clearly state that they work for or represent the brand) to discuss the brand and the latest beauty trends, fashion, movies and celebrities etc.



...and continue to make the most of offline communication

Where possible, keep advertising grounded in reality to avoid disappointed consumers spreading negative word of mouth via Web 2.0.

Focus on the product's end benefits and avoid over-complicating your message. Justify any use of scientific language: how does the scientific ingredient work; what is the benefit for the consumer? Independent evidence will support the sell.

Ensure in-store sales assistants are informed about your products and repeat customers, so that they are in a position to build a relationship of trust.

Continue to use in-store promotions and testers to encourage spontaneous purchasing.

Simplify consumers' decision-making process with an ongoing dialogue of tailored communication, distributing news and samples chosen specifically for each customer.



The digital face of beauty was written by MEC MediaLab, Mediaedge:cia's consumer insight and ROI division.

Using MEC's proprietary qualitative online research method, DigiFaces™, *The digital face of beauty* examined the relationship 18-24 year old women have with health & beauty across 11 countries: China, France, Germany, India, Italy, Poland, Russia, Spain, UK, USA, and a pan-regional Latin America sample.

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