



Online Media Analysis of Women's Skin Care Perceptions
Multi-Country Consumer Study

April 2009



“Online Media Analysis of Women’s Skin Care Perceptions” is a study of **women’s blogs and online discussion forums** across **India, the US, and China**



The objectives of the study were to:

1. Demonstrate the value of online media analysis to **develop insights into women’s behavior and attitudes about skin care**
2. Determine whether online media can **be used as a source of information in emerging markets** such as China and India
3. Identify if and how the **topics discussed** by women around beauty and skin care **differ from country to country**
4. **Analyze qualitative comments in a quantitative manner to draw conclusions** about women’s behavior and opinions found online
5. Demonstrate the benefit of using online media to **gather product feedback and understand brand perception** in different countries

Key Findings



1 Assessment of Skin Care Information in Online Media

- There are over **26,000 blogs on beauty** alone, with **470 blogs** specifically **discussing organic and natural** beauty care across the US, India, and China
- These blogs provide an enormous amount of **valuable, often untapped information** on women's behavior and attitudes on skin care

2 Evaluation of Online Media as an Information Source in Emerging Markets

- While the structure and sophistication of online media differs between countries, **it can be used as a source of information in the US as well as in other emerging countries**
- In the **US**, the online media is very sophisticated and **fragmented**
- In **India**, blogging is only recently becoming mainstream
- In **China** the blogging platform is more consolidated, with **about 10 blogs capturing more than 90%** of all online comments

3 Identification of Trends and Topics Across Countries

- In order to **identify differences and similarities** in trends and topics across countries, we selected **182 blogs** from the US, India, and China:
- While **there are some topics commonly discussed** by women across all 3 countries, **the majority are specific to each country** (e.g.: increasing popularity of mineral cosmetics in US, the growing online purchase of skin care products in China, etc.)

4 Quantification of Qualitative Comments and Opinions

- Online comments can be analyzed in a quantitative manner to draw conclusions** about consumers' opinions. By collecting and **analyzing 263 postings** on organic and natural products, we concluded that:
- **67%** of the women have a **positive opinion** on natural products
 - **Effectiveness and quality** are the product attributes most commonly discussed by women across the three countries, capturing **55%** and **19%** of the **total comments**, respectively

5 Product Feedback and Brand Perceptions Analysis

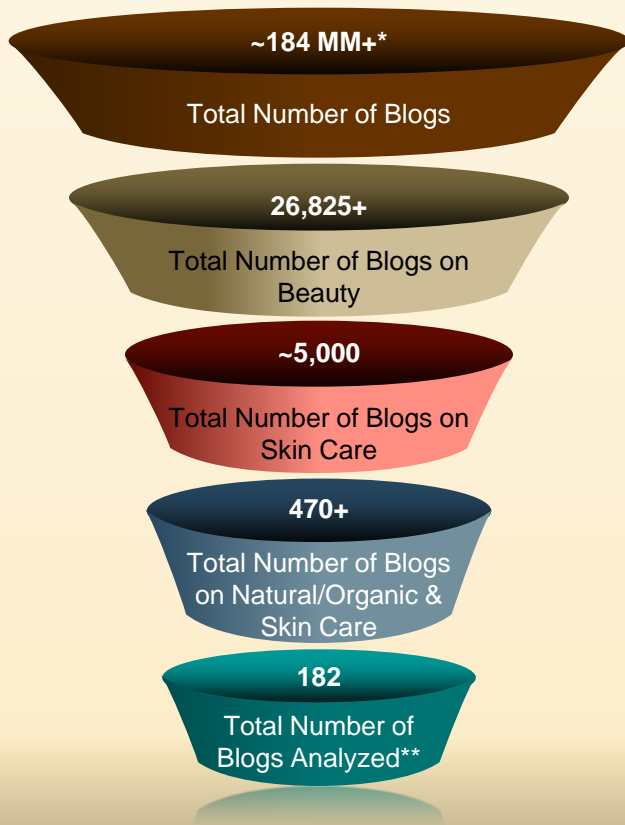
- Online media analysis can be used to gather insights about women's perceptions on products and brands.** We chose one specific brand discussed in all three countries, The Body Shop (TBS), as a focus:
- Women in the US and India highly appreciate TBS' **social responsibility** initiatives
 - Although not officially available in mainland China, Chinese consumers **frequently discuss the quality and effectiveness of TBS products**

Source: Unless otherwise stated, the source of all content is "Grail analysis of various beauty care, skin care, and organic/natural blogs and online discussion forums"

1 Assessment of Skin Care Information in Online Media

There are more than 26,000 blogs discussing skin care and beauty concerns; these sources provide valuable, often untapped, information on women's behavior and perceptions

Online Media Breakdown



Number of information sources – 26,825+

- To Identify blogs on beauty, filtered searches were applied to the total number of existing blogs

Number of sources on organic/natural skin care – 470+

- Using the same approach, blogs on skin care were identified, and within that category, 470+ blogs and online forums discussing organic and natural skin care were identified

Number of relevant sources analyzed – 182

- Out of 470+ information sources, 182 blogs and online discussion forums were chosen based on the following criteria:
 - Blog entries were generated by consumers within the past two years
 - Blogs and forums included numerous relevant comments related to the topic of the study
 - Blog entries were posted by consumers, not written by journalists, professionals, experts, dermatologists, cosmetic company executives, or part of any company website
 - Women living in the US, India and China were the primary contributors to the blog
- The comments from blogs were supplemented with additional information from a select number of online beauty and skin care-related articles

Note: *Technorati website, 2007; **Actual number of blogs analyzed for beauty care/skin care/natural/organic skin care

2 Evaluation of Online Media in Emerging Markets

The analysis of online media can generate relevant findings in countries other than the US; however, the size and sophistication of online media differs from country to country

140 in US

We scanned 140 relevant blogs, online discussion forums, and social media websites in the US

US

- The number of women actively participating in blogs in the US has reached 36.2 million (representing **43%** of all US bloggers) and approximately half of them consider blogs a reliable source of advice and information
- **The number** of blogs and discussion forums in the US is **almost infinite**, with many blogs specifically dedicated to the topic of organic and natural beauty products
- There are some blogs (like **EBeautyDaily, Makeup and Beauty Blog**) which attract a higher number of women discussing beauty topics

20 in India

We identified 20 Indian blogs and discussion forums on beauty-related topics with hundreds of registered members in each

India

- Blogging has taken off only recently in India. Women account for about **24%** of the total bloggers
- Women in India **do not talk much about beauty care and natural & organic skin care products** on blogs and discussion forums. More popular topics include baby care and motherhood, entertainment and marriage
- **Indusladies and India parenting** are some of the most popular discussion forums for Indian women

10 + 12 in China

We analyzed the top 10 Chinese blogs and forums as well as 12 smaller blogs

China

- With more than 50 million bloggers in China, blogging has become mainstream. **91% of the Chinese online blog comments are captured by the top 10 blogs.** Some of them, such as Sina and Sohu provide various categories of topics, including women's beauty care, finance, and cars
- There are very few specific blogs on beauty and skin care in China. Instead women discuss beauty-related topics on general forum and online community websites
- Two popular forums among Chinese women are **KIMISS and Rayli**

3 Identification of Trends and Topics through Social Media

The majority of the topics discussed in online media are specific and unique to each country, reflecting the different countries' perception of beauty and desired approach to achieve it



Topics Discussed Across Countries

- Use of natural and homemade beauty solutions
- Anti-wrinkle solutions to prevent or reduce signs of aging
- Preference for lighter or fairer skin and solutions to achieve it (India and China only)

Country Specific Topics and Trends

US

- Effect of the economic crisis on consumers' cosmetic preferences
- Interest in and concerns about the ingredients used in cosmetics
- Increasing use of non-beauty products for beauty treatment
- Growing popularity of mineral make-up

India

- Skin care and beauty tips related to a specific event, in particular preparation for a wedding
- Natural and home remedies for removing unwanted facial hair

China

- Low-priced but effective skin care products
- Growing advocacy towards adopting simple, basic steps for daily skin care
- Shift to online purchases of skin care products

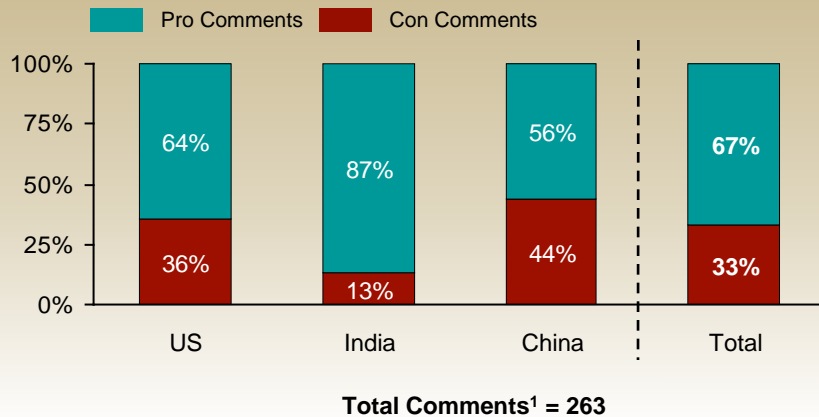
4 Quantification of Qualitative Comments

About two thirds of the comments on natural and organic products are positive, as women value the effectiveness and quality of these products

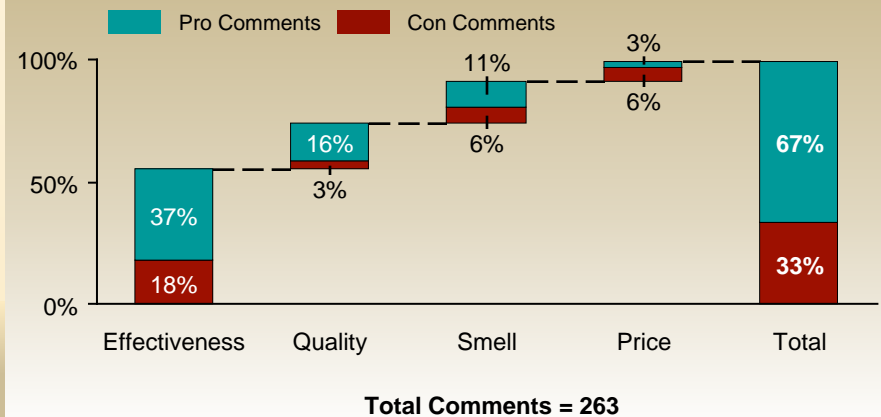
Key Findings

- Overall, 67% of comments related to organic² and natural³ products mentioned their **positive aspects**, such as their **safety and effectiveness** for allergies and their **nice smell**
- Indian women include **ayurvedic**⁴ products with natural and organic and do not differentiate between them
 - 87% of the comments on organic and natural products from women in India are positive
- The topic of organic and natural products has only recently gained attention in China; women are still divided on their benefits
- Of the 4 attributes analyzed (effectiveness, quality, smell, and price), **effectiveness (55%)** and **quality (19%)** are the attributes most commonly discussed by women across all three countries

Breakdown of Comments by Country, as % of Total Comments



Frequency Analysis of Attributes, as % of Total Comments



Note: ¹Number of online posts with comments on organic/natural products found across the 182 blogs; ²Organic products are certified by USDA and are made without using chemicals. ³Natural products are made from natural ingredients, such as minerals, botanical, and animal origin and their mixtures; ⁴Ayurvedic products are products made from specific naturally grown herbs

Source: "Annual State of the Industry: BRIC: It's Mighty, Mighty", GCI Magazine, June 9, 2008; 'Cosmetics firms heed calls for organics', Boston Globe, May 2008; 'Organic and natural cosmetics and ingredients, DARE, February, 2009

5 Product Feedback & Brand Perception – The Body Shop

The Body Shop is a popular and frequently discussed brand in the US; it is relatively new, but growing in India; and banned, but unofficially available in mainland China

Key Findings

- Although women in the US, India, and China talk about various natural and organic cosmetics brands, there is **very little overlap among the brands** discussed in **each country**
- The Body Shop (TBS) is **one of the few brands** which is **commonly discussed** by women across the three countries
- The number of **comments on TBS** in the **US and China is higher** compared to that in **India**
- **Effectiveness** and **smell** are the most frequently discussed **TBS product attributes** across the three countries



- The number of organic and natural **brands discussed** by women in the **US is higher than in India and China**
 - TBS is one of the most popular natural brands and is actively discussed in blogs in US
- Women in the US highly **appreciate the social responsibility initiatives** taken by TBS
- Many women in the US **consider TBS products to be overpriced**



- TBS entered the Indian market in 2006 and awareness of this brand is currently low, but popularity is growing
- Women **criticize that the products are difficult to purchase** due to the limited number of stores in the country
- Indian women perceive TBS to be a **premium brand** due to its high price and brand positioning

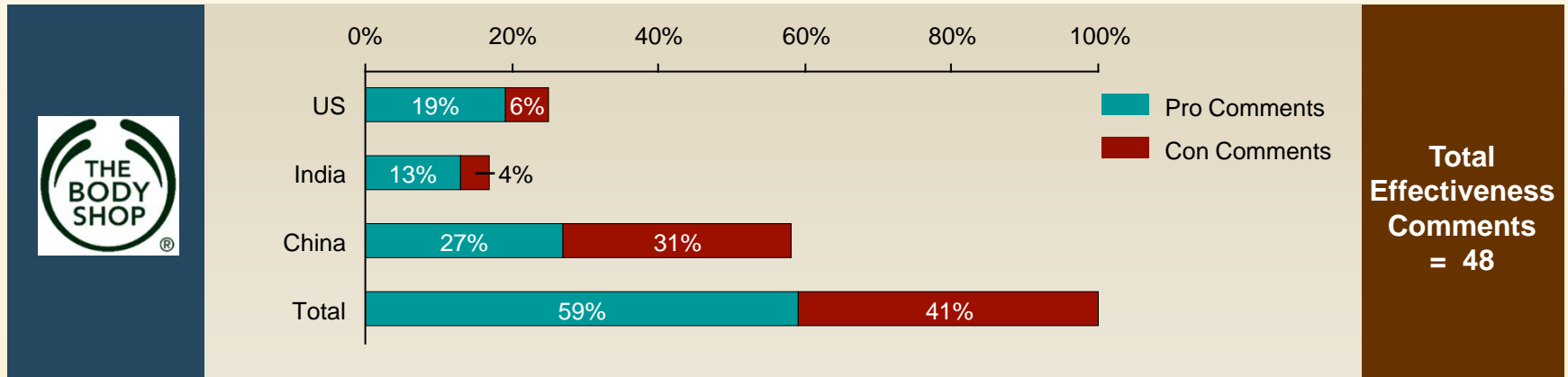


- Testing cosmetics on animals is mandatory in mainland China, so **TBS has not officially entered the market** (TBS has a 'no animal testing policy')
 - However, there is a **high TBS brand awareness** in mainland China
- Women in mainland China can purchase TBS products through **online shops** on retailer websites such (Taobao), **individual re-sellers** and online ordering through TBS company website

Note: Grail analysis of various beauty care, skin care, and organic/natural blogs and online discussion forums; "India Quarterly: Indian Beauty Market Roundup", GCI Magazine, February 2, 2009; "Anita Roddick to give away entire £51m fortune", Telegraph.co.uk, December 13, 2005; The Body Shop, Values Report 2007

The Body Shop: Brand Attribute Comparison – Effectiveness

The vast majority of product effectiveness comments from the US and India were positive, while Chinese women had mixed views of product effectiveness



Positive Comments



Controls Pimples

...have found The Body Shop's Tea Tree Oil products work great for controlling pimples (India)

Overall Skin Improvements

...I have noticed my eyes seem to be less puffy and the skin around my eyes and forehead seem to be tighter, firmer and with less pronounced wrinkles...(US)

Resolves Acne Problem

It is good, I like it. My acne is gone after using it for a couple of months. Now I keep using it for anti-acne protection. No acne appears any more...(China)

Reduces Skin's Oil Level

This helps if you have very oily skin. You are not as shiny as normal. Used with the face wash and toner I notice a difference (US)



Negative Comments



Allergies and Skin Break Outs

My skin type is mixed and is very sensitive. I had allergies after using it...(China)

...I've had so many allergic/ breakout reactions to their skincare and body products that I'm basically terrified to try any more of their makeup...(US)

Developed New Acne

My skin was not that dry after using it. But later on, I had acne turn up on my face...(China)

Not Effective in Resolving Skin Problems

..Same blemishes, same intensity, same color. No change at all... Don't waste your money on this product, as it's merely a gimmick (India)

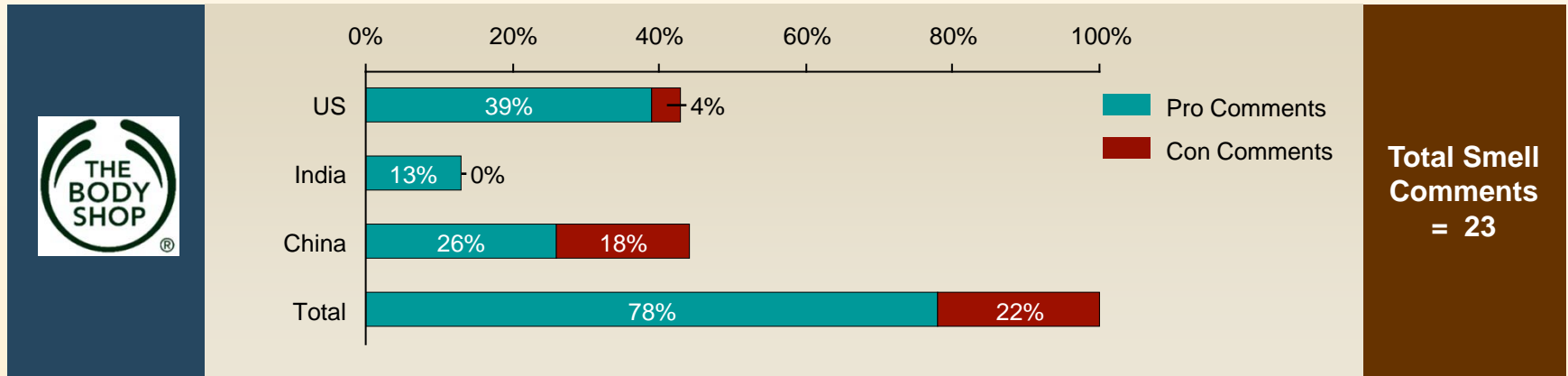
Products do not Cover Claimed Qualities

Did not see much effectiveness... it did not work for oil control as it claims... For moisture function, not very effective in winter...(China)



The Body Shop: Brand Attribute Comparison – Smell

78% of women who commented on smell liked the scent of TBS products



Positive Comments

“ Refreshing and Clean Smell

This scent is nice and delicate and refreshing (US)

...Not to mention a nice, light scent that makes you think and feel clean (India)

Delicious Smell

The body butter itself is a soft pink color and it smells simply delicious (US)

Great Smell and Cooling/Smoothing Effects

I love the smell! When applying the mask on my face, at first it feels like it hurts a little bit but then it feels cold. In the end, my face feels as smooth as eggs without shell...(China)



Negative Comments

“ Has a Strange Smell and Texture

It smells a little strange...(China)

...It feels like nothing and smells bad.. I do not like it...(China)

Smells Bad and Is Not Effective

My skin felt burned after using it. It smells bad, but I kept using it for one month and I found it was totally a waste of time...(China)

Products Go Bad

....I can definitely say that this cream "goes bad" with time, despite all of the preservatives in it. The smell has almost become unbearable (rotten, vegetable oil smell) and I suspect I may just toss the remainder in the trash...(US)





For More Information Contact:

➔ **Grail Research**
(info@grailresearch.com)

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