

*THE TRUTH  
ABOUT*

*BEAUTY*





# McCANN

## TRUTH CENTRAL

On behalf of the global citizens of McCann, I'm excited to share with you The Truth About Beauty, our global study of the beauty category. At McCann, discovering and sharing the truth is our passion, embodied in our century-old credo, Truth Well Told. The Truth About Beauty is the third full-length report in our Truth series, which are researched and produced by our internal research unit called Truth Central. Truth Central embodies the truth-hunting spirit behind all the great work that we do at McCann, as we seek relentlessly to discover the truths that illuminate the world and help brands to make their mark in it.

We're particularly excited about the Truth About Beauty. McCann has a deep commitment to the beauty industry, reflected in the creative and inspired advertising we have produced for our long-standing partner L'Oreal Paris. As the beauty industry evolves and new technologies emerge, we have committed ourselves to charting how beauty attitudes and behaviors are changing in a globalizing world. In the Truth About Beauty, we look at these changes and put them into the context of the eternal truths that lie at the heart of our profound fascination with beauty.

Please enjoy our view of the Truth About Beauty.



Daryl Lee  
Chief Strategy Officer, McCann



## THE TRUTH ABOUT BEAUTY

Globalization and technology have made the beauty industry both more dynamic and more innovative. Easy air travel has given rise to a global fashion industry, and looks conceived of in one country can quickly become the desired style around the world. The Internet had made it easier for tips, tricks, reviews, recommendations, and even warnings to circulate at light speed among the worlds connected consumers. As these same forces propel the beauty industry to new scientific advances, it's important to understand what really matters to beauty consumers. Who sets the standards for beauty? What must one do to truly look beautiful? What does feeling beautiful mean? And what beauty dreams do we still have?

To find out the truth behind these questions, McCann Truth Central conducted 7,249 online interviews, a conjoint study, and 40+ focus groups in 15 global markets.

The findings are framed around four chapters

1. *THE CHANGING COMPLEXION OF BEAUTY*
2. *THE RISE OF WHOLE BEAUTY*
3. *STRENGTH IN BEAUTY*
4. *WHERE REALITY MEETS FANTASY*

QUANTITATIVE RESEARCH CONDUCTED IN FRANCE, GERMANY, US, UK, BRAZIL, MEXICO AND CHINA.

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*THE CHANGING  
COMPLEXION OF  
BEAUTY*



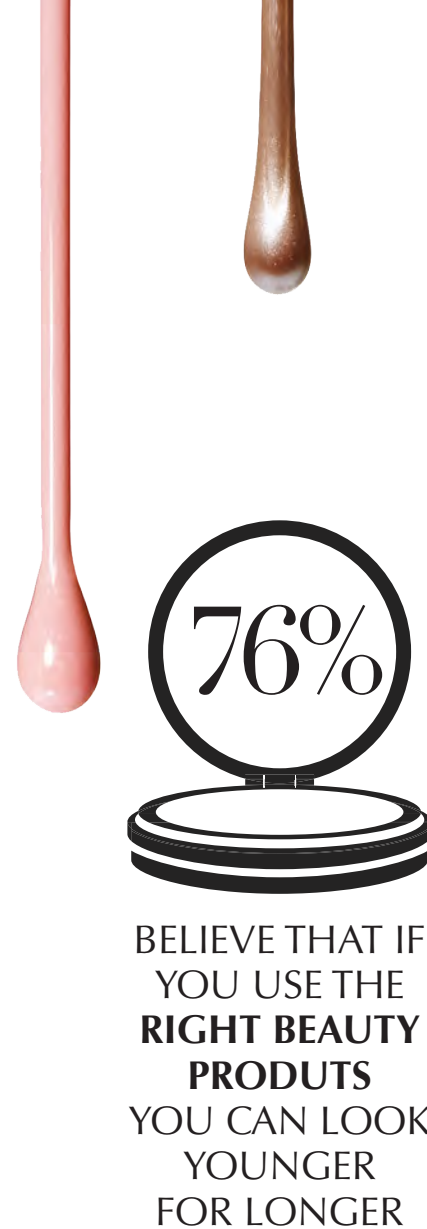
## BEAUTY IS NON-NEGOTIABLE

Even though the past few years have been tough economically for women around the world, beauty is increasingly regarded as ‘non-negotiable’. Indeed, 83% of women believe there are higher standards of beauty today than there were in the past. In the emerging markets we’re seeing the rapid democratization of beauty. In India, for example, beauty was once restricted to special occasions like weddings but is now viewed by women as an everyday opportunity.

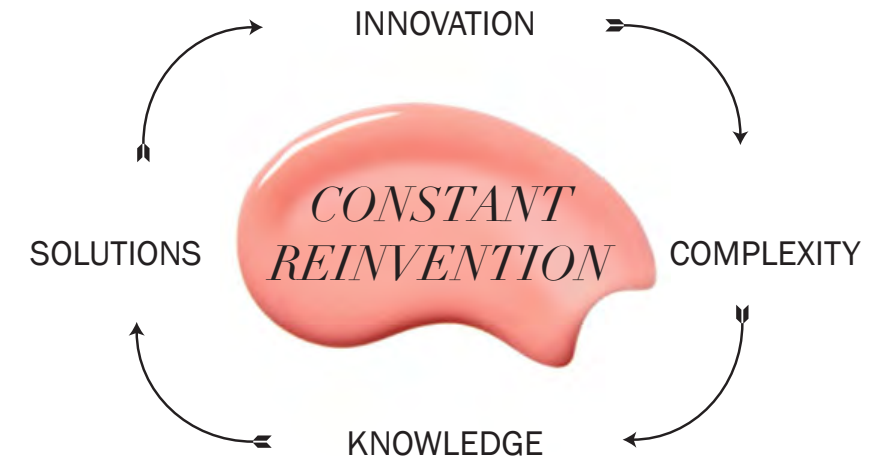
The imperative of beauty is certainly being picked up by the newest group of beauty consumers. Over half of women 16-34 say they started thinking about aging and preserving their looks before the age of 30. This is nearly ten years sooner than those 35+ said they started to think about aging. These young consumers also think they’ve learned more about beauty, with 72% saying they know more about beauty than their mom (and these young women are increasingly educating their mothers and aunts about products). This new knowledge is giving rise to optimism: 76% clearly believe in the innovation of the beauty industry, agreeing that the right beauty products can keep them looking younger for longer.

## CONSTANT BEAUTY REINVENTION

This combination of necessity, knowledge and innovation has created a dynamic world of beauty, one which is defined through constant reinvention by beauty brands and beauty consumers.



BELIEVE THAT IF  
YOU USE THE  
**RIGHT BEAUTY  
PRODUCTS**  
YOU CAN LOOK  
YOUNGER  
FOR LONGER



Whilst many women laud the impressive choice that innovation from the beauty industry has created, they also lament the resulting complexity. Women around the world describe the stress they experience when attempting to choose between products at the point of purchase. Women have responded to this increased complexity and choice by arming themselves with more and more knowledge. Almost 70% of women in Brazil and Mexico consult a beauty blog for tips and advice at least once a month and almost 60% of women in Brazil and China consult online reviews at least once a month.

Nowhere is this dynamism more pronounced than in the emerging markets. 63% of Chinese women and 55% of Brazilian women change their beauty routines once every couple of months or more. Only 25% of French women make changes this frequently. Most Europeans said they were making changes less than once or twice a year, if at all.

The emerging markets may be changing their routines so often because they’re inspired by the globally dynamic world of beauty. Brazilian women think Northern Europeans are the most beautiful women in the world, Germans think Brazilians are the most beautiful and the Chinese give that honor to the French.

All of this leaves us with a very fast moving world of beauty. Exposed to constant changes, innovation and inspiration, women have responded in different ways. We’ve identified five types of beauty consumers based on their attitudes towards beauty.





## THE FIVE GLOBAL BEAUTY ARCHETYPES



*THE POWERFUL PEACOCKS* (15% of the population) are particularly drawn to experimentation. They love the dynamism in beauty, in part because they're looking to get ahead in a dynamic world. Particularly present in rapidly growing China, Powerful Peacocks associate beauty with career success and power.



*THE SEDUCTIVE FOXES* (27% of the population), the largest group globally, love to use beauty products to enhance their femininity. Seductive Foxes associate beauty with romantic and sexual prowess, and like using cosmetics to feel sexy.



*THE SOCIAL BUTTERFLIES* (16% of the population) love the beauty conversation. They enjoy sharing tips with their friends, being inspired by beautiful women, and the feeling of contentment and success that comes with looking beautiful. Particularly present in Latin America, Social Butterflies have grown up buying beauty products from their friends and neighbors who are direct sellers.



*THE GRACEFUL SWANS* (23% of the population) like the subtle enhancements that come from using good beauty products. For them, beauty leads to confidence and contentment. Graceful Swans appear most frequently in Europe and the US, and like to focus on improving their existing beauty.



*THE COMFORTABLE CATS* (19% of the population) are largely happy with their natural beauty. While they do use some beauty products, they're the least likely to hope for or expect dramatic changes. More concentrated in Europe and the US than emerging markets, Comfortable Cats view a few staple beauty products here and there as a means to feel even more comfortable in their own skin.

## WHAT IS THE OPPORTUNITY FOR BRANDS?



Help consumers to manage complexity: Anything brands can do to help women navigate the point of sale, simplify their beauty regimes by offering products with multiple benefits, or provide a 'beauty system' approach by joining up products will be very welcome from a consumer point of view.



Understand the new paths to knowledge and be part of the conversation: There is a new beauty conversation, and this conversation is online. Women in emerging markets are particularly hungry for any information they can source about beauty tips and advice; brands should seek to have a role in this conversation. As women are looking to other cultures for beauty ideals there is an interesting opportunity for global brands to share tips and advice across the world.



Secure loyalty in the dynamic emerging markets: Women in emerging markets are experimenting and playing with many different products and approaches to beauty. The opportunity here is to position your brand as the brand for life, not just this month...



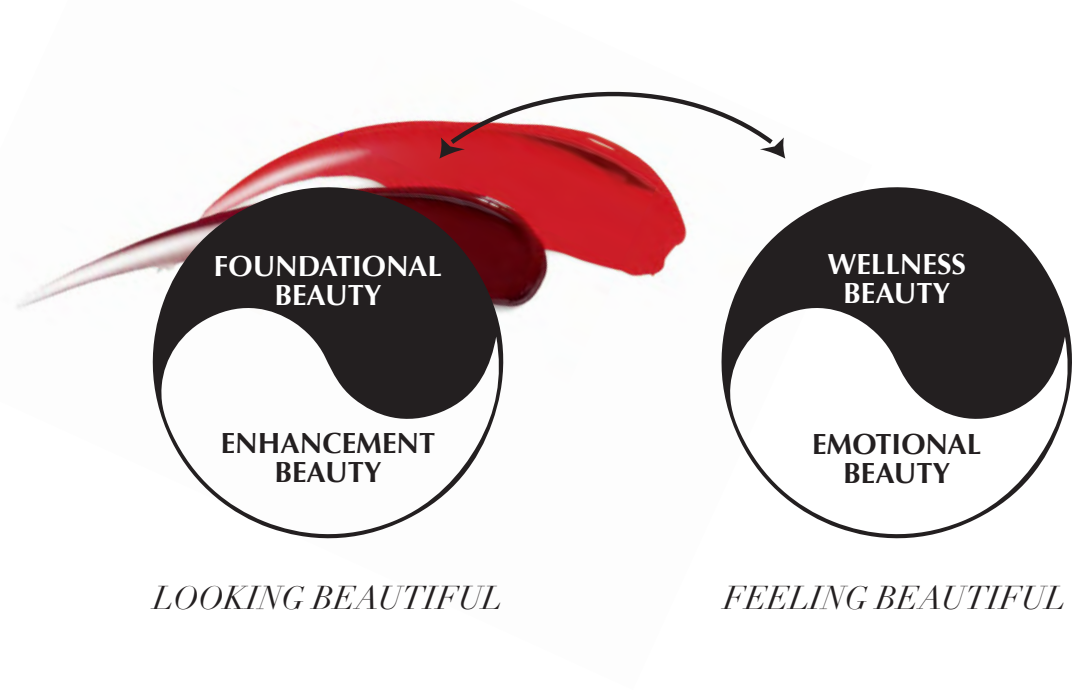


*THE RISE  
OF WHOLE  
BEAUTY*



Whilst we have identified differing attitudes to beauty within our five beauty archetypes, women all around the world are becoming more and more aware of the many interrelated factors that must combine to create ‘beauty’. There are four key components that women think about when it comes to building and maintaining their beauty: Foundation Beauty, Enhancement Beauty, Wellness Beauty, and Emotional Beauty.

THE WHOLE BEAUTY ECOSYSTEM



LOOKING BEAUTIFUL

**FOUNDATIONAL BEAUTY:** Skincare, haircare, haircolor, sunless tanner. These are the ‘building blocks’ or basics that provide a solid foundation for one’s beauty.

**ENHANCEMENT BEAUTY:** Color cosmetics, accessories and style. These are all the elements women tend to play with when they want to take their beauty to the next level or reinvent their look to suit a mood or occasion.

FEELING BEAUTIFUL


**WELLNESS BEAUTY:** Taking your vitamins, getting enough sleep, staying out of the sun and taking your make-up off before bed. The notion of ‘wellness beauty’ is becoming more and more important around the world. In fact, when asked what the most important thing when it came to achieving beauty was, women put ‘eating the right food’ and ‘getting enough exercise’ above all other factors.

**EMOTIONAL BEAUTY:** Confidence, talent, charisma, kindness, intelligence. Nowadays women seek to demonstrate beauty via substance as well as style.

The Whole Beauty Ecosystem is a virtual circle; women around the world believe that if they look more beautiful then they will feel healthier and more confident...and if they feel healthy and confident then this will shine through, making them look more physically beautiful.

There is certainly a demand for whole beauty brands and solutions amongst women. Particularly in the emerging markets where 55% of women in Brazil and 49% of women in China say that they actively want to buy products from the same brand in more than one category.





*Your make-up came out perfectly, your hair looks like it came out magically out of the universe...you're like "the world's mine, I look awesome, I feel awesome, I am awesome" and it sometimes feels like other people see it...I feel I have better encounters and you're more productive at work and everything is right.*

USA 30-40

## WHAT IS THE OPPORTUNITY FOR BRANDS?



A brand can have a point of view on the entire beauty ecosystem. For example, if a brand is selling a nail polish it can advise women on how to care for their nails, advise them on which supplements to take to grow stronger nails and advise them on which accessories, lipstick and haircolor will work best with that particular shade.



Brands with products in more than one category can (and should) improve cross-fertilization across categories. The most important thing to remember is that no beauty brand is ever just selling a lipstick, a nail polish or a shampoo...they are selling one part of the whole beauty ecosystem...one part of the 'I just broke up with my boyfriend beauty solution' or the 'I have a big meeting at work beauty solution' or the 'I've had a baby and I want to feel like myself again beauty solution'.





*STRENGTH IN  
BEAUTY*





*Nearly 70% of women globally think that being beautiful helps them get what they want out of life, and the same number believe that the relationship between happiness and beauty is directly proportional. 93% of women said they felt more confident overall when they knew they looked beautiful.*

Women are not shy about admitting that being beautiful does have its advantages, both in the personal and professional spheres. 80% agreed that looking beautiful makes it easier to find a partner or boyfriend and easier to find a good job.

Clearly, looking beautiful is still a deep psychological need for women today, although they express a range of opinions on what constitutes beauty: asked about the effect they wanted to achieve as a result of their makeup routines, women of different nationalities gave very different responses. Chinese women, for instance, were much more driven by physical beauty than German women: 61% of Chinese said that they wanted makeup to make them look as young as possible, while only 14% of German women responded similarly.

Consequently, while Powerful Peacocks and Seductive Foxes dominate the Chinese market, Comfortable Cats and Graceful Swans are dominant in the German market. Not surprisingly, Brazilian and Mexican women are almost overwhelmingly Social Butterflies or Seductive Foxes. These demographic differences reveal a valuable opportunity for beauty brands to customize their image and message in every country to appeal to the particular needs of those customers.





Despite these differences, however, there has been a global, common evolution in what ‘beauty’ means to women today. Rather than seeking to conform to one global beauty stereotype, women are instead seeking to emphasize their individual beauty through good health and emphasizing their strongest features.

While the language of aspirational beauty varies by geography – in the Philippines it is referred to as “putting the effort into effortless”, in France as “naturally perfect”, and “suppin” in Japan and Korea – the concept is essentially the same. In a world where easy access to cosmetic surgery has sparked a fear of looking ‘fake’, women are increasingly trying to showcase their born beauty in the best possible light.

Nevertheless, it is possible to get a sense of the model of perfection to which contemporary women aspire. An aggregation of respondents’ opinions on beauty culminates in this profile: a 28 year-old slim Italian brunette with flawless, silky skin and vibrant hair.



*There’s like this weird sort of paradox I guess, that people ultimately want to fit in but stand out. I’m not going to work with a smokey eye but I still want people to think ‘Wow! There’s something about her.*

USA 18-25

## WHAT IS THE OPPORTUNITY FOR BRANDS?



Enable women to unlock all the benefits of beauty. Women know that beauty can help them thrive in their personal and professional lives. If brands are to achieve an emotional connection with women, they must understand and reflect the role that beauty plays in women’s lives.



Recognize that the strength of beauty is important everywhere but manifests differently. Brands should look at the size of segments in different markets around the world and think about how they can convey success to the Powerful Peacocks or develop an online conversation to fuel the Social Butterflies.



Reflect the effortless and individualistic beauty ideal that women aspire to globally. Brands can help women to unlock their individual beauty by pinpointing their best assets and understanding how to accentuate them.





*WHERE REALITY  
MEETS*

*FANTASY*



Beauty has always lived in the world of fantasy, dreams and aspiration, and for years, stunningly beautiful celebrities have been represented by the industry. Our research shows that the majority of women around the world still feel either positive or inspired when they look at pictures of beautiful celebrities, and this is particularly pronounced in China (76%) and Mexico (75%). Very few women stipulate that celebrities make them feel depressed or angry.

#### THE INNER CYNIC VERSUS THE INNER DREAMER

Whilst every woman has an inner dreamer that desperately wants to hope and dream when it comes to beauty, she also has an inner cynic. Fuelled by a more transparent online conversation, the inner cynic has become a little noisier in recent times.

As a result, despite the strong desire to dream, women scrutinize all marketing activity from brands, almost as if they are waiting for the brand to trip up. As a 45 year old woman commented after watching a beauty ad, “The only thing that bugged me is that at one point it looked like she was putting her cream on over her make-up, and I don’t think you would do that in real life.” The inner cynic is always on the hunt for the truth.

So whilst women are still inspired by celebrity we also see a strong desire for authenticity. More than 50% of respondents said they are bothered by airbrushing.



BELIEVE THAT  
CELEBRITIES  
USE THE BEAUTY  
PRODUCTS  
THEY ENDORSE

*I check my favorite  
artist Yuna Ito's blog  
and she talks about  
the skincare products  
she's using and I  
want to try them.*

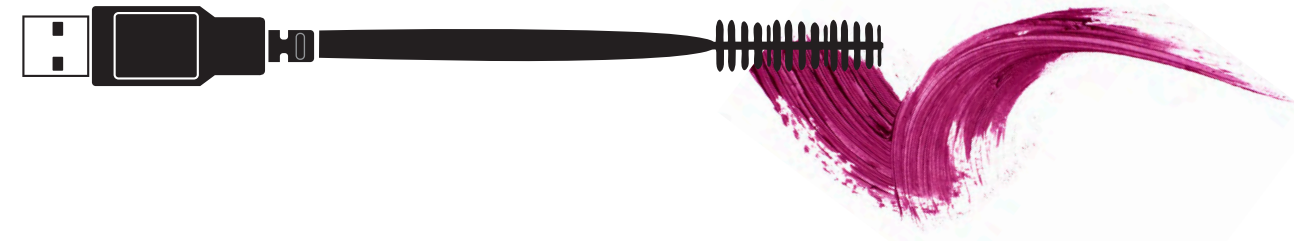
JAPAN, 20S

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#### USING THE RIGHT CELEBRITY IN THE RIGHT WAY

Celebrity endorsement still has traction with women, but they want to see a real connection between the spokesperson and the product. The TV ad should be supported by tweets, blogs, Facebook pages and ‘glimpses inside the celebrity’s make-up bag’ which show a genuine affiliation with the product.

When women think about celebrities they want to see in beauty advertising they talk about the perfect blend of style and substance, of accessibility and aspiration...90% of women globally want celebrities used in beauty ads to be famous for something in addition to their looks.







## THE KEY IS STRIKING THE PERFECT BALANCE BETWEEN FANTASY & REALITY

When it comes to beauty communication, brands should think about offering enough fantasy and aspiration to satisfy the inner dreamer but also enough reality to drive credibility and satisfy the inner cynic. For example, 86% of women say that in beauty advertising they like to see a naturally beautiful woman with a few lines on her face.

Moreover, the advertising that women gravitate towards tends to have a story and spokesperson that women genuinely connect with. A US woman said the following after viewing the L'Oreal Paris advertisement featuring Julianna Margulies: "When you made her look more real... you made her look more like us...even though Julianna Margulies is nothing like us, but you convinced us for 30 seconds that she was."

## THE BUSINESS OF PLEASURE

When we talk about the perfect blend of fantasy and reality we should never lose sight of the fact that women ultimately see beauty as a source of pleasure and playfulness. In fact, 63% of women believe that putting on cosmetics and getting ready to go out is one of life's greatest pleasures.

When asked about the in-store experience, women around the world say they are seeking something akin to a candy store for adults. The top three things women say that they want from the in-store beauty experience are:

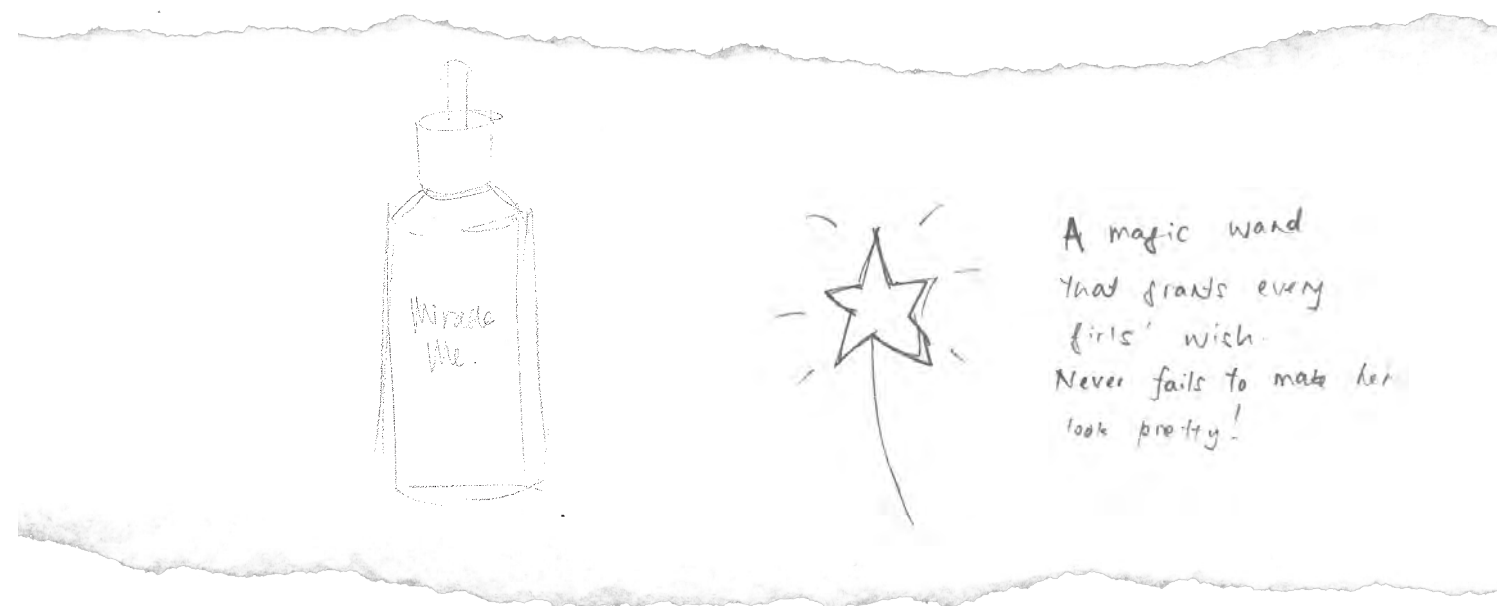
||||||| *AN OPPORTUNITY TO TOUCH AND TEST THE PRODUCTS*

||||||| *PRODUCTS THAT ARE EASY TO FIND*

||||||| *PRODUCTS THAT ARE BEAUTIFULLY DISPLAYED*

## A DESIRE FOR MAGIC

We also asked women around the world to design their own fantasy beauty products, and many of these products reflected a desire for magic and transformation.



For women, beauty is pleasurable, playful and magical, and we should always represent this desire within the inexorable quest for greater innovation and efficacy.



## WHAT IS THE OPPORTUNITY FOR BRANDS?



Mix reality with fantasy to achieve an emotional connection. Brands must satisfy the inner dreamer with aspirational images of beauty and satisfy the cynic with real proof of efficacy, an authentic connection between the spokesperson and the product, and not relying on overly-airbrushed images.



Introduce playfulness at the point of purchase. Beauty is the business of pleasure, but opportunity to engage at the point of sale with interactivity, technology and advice is often overlooked.



Recognize that there is a desire for magic when it comes to products. Women want products that surprise, delight and intrigue them (as well as impress them with the latest science and technology).

# 5 TRUTHS ABOUT BEAUTY



BEAUTY IS NON-NEGOTIABLE



THERE ARE FIVE GLOBAL BEAUTY ARCHETYPES



WOMEN TODAY THINK IN TERMS OF A WHOLE BEAUTY ECOSYSTEM



MAGIC & PLAYFULNESS ARE CENTRAL TO THE CATEGORY EXPERIENCE



EVERY WOMAN HAS AN INNER DREAMER THAT SEEKS TO BE INSPIRED







McCANN  
TRUTH CENTRAL



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