

Insights

Beauty

EYE Beauty Survey 2010

The EYE Beauty Survey gives an inside look into the minds of EYE Shoppers – their habits and preferences – as it relates to beauty. Results cover cosmetics, hair care and skin care usage.



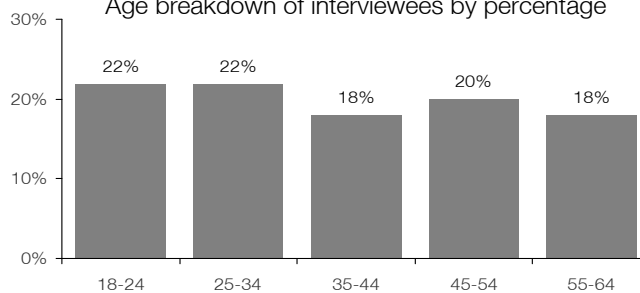
Basic demographics

Gender



100%

Age breakdown of interviewees by percentage



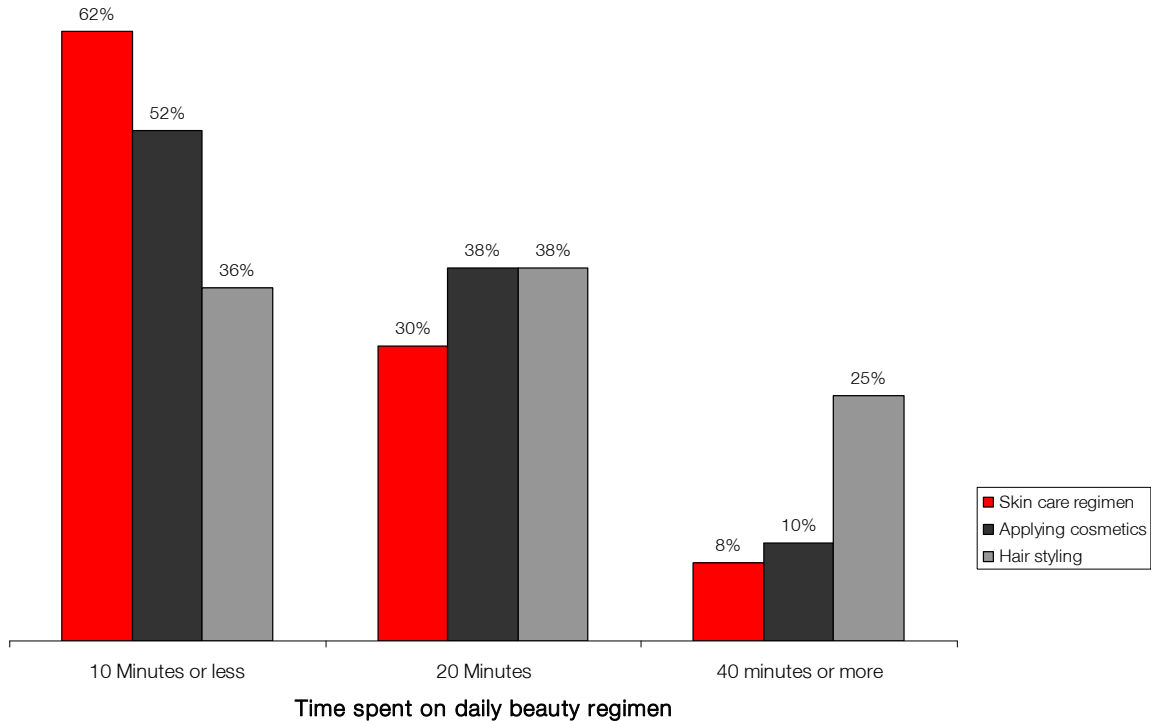
Highlights

EYE Shoppers value personal beauty.

- EYE Shoppers spend a lot of time on skin care, cosmetics and hair styling daily
 - More than a third of Shoppers spend 20 minutes applying skin care and cosmetic products
 - One in four EYE Shoppers spend 40 minutes or more on their hair

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EYE Beauty Shoppers care about their looks



EYE Beauty Shoppers are constantly looking for new products/services that will improve their looks.

Top areas of concern are:

- Hair (76%)
- Skin (74%)
- Body/weight loss (62%)

Beauty Motivators

While conventional wisdom holds that women are loyal to their favorite beauty brands, EYE's survey found that **66% of women are interested in trying different solutions.**

What motivates EYE Beauty Shoppers to try new brands?

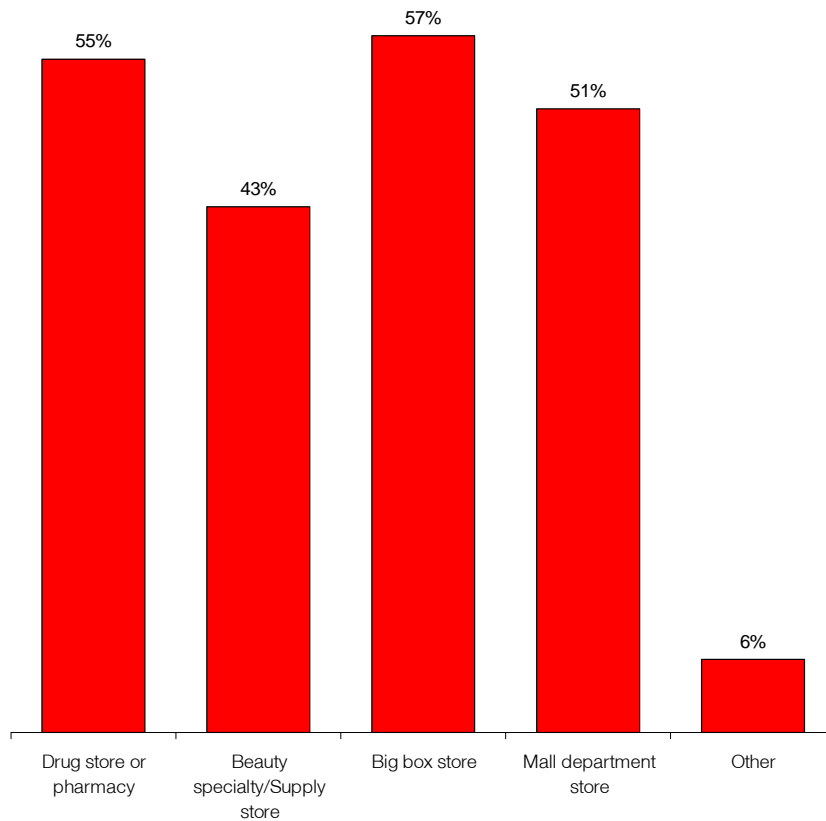
- 66% favor gift-with-purchase
- 65% indicated that they are enticed by special offers
- 56% are influenced by product tests and samples
- 45% are motivated by coupons and mobile coupons

Beauty as part of the shopping experience

80% of EYE Beauty Shoppers enjoy mall shopping for beauty products!

- On the given day of a mall visit, Shoppers not only visit department stores at the mall for their beauty shopping needs (51%), they also frequent the big box stores such as Target, Wal-Mart, Kmart and BJ's (57%), drug stores or pharmacies (55%) and beauty specialty/supply stores (43%) making the mall an advantageous venue to advertise products and services sold at these locations.

Shoppers visit other stores when they go to the mall



Advertising to Beauty Shoppers at the mall can influence their purchase decisions **beyond** the mall.

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Beauty shopping venue preference

EYE Beauty Shoppers purchase beauty products at different venues:

Items purchased at a Drug Store	
Skin care products	57%
Cosmetics	48%
Hair care products	57%
Teeth whitening products	58%
Nail products	56%
Fragrances	20%
Weight loss products	44%

- Teeth whitening products are the most popular products bought at drug stores among EYE Beauty Shoppers

Items purchased at a Big Box Store	
Skin care products	36%
Cosmetics	37%
Hair care products	42%
Teeth whitening products	32%
Nail products	36%
Fragrances	22%
Weight loss products	27%

- Hair products are the most popular products bought at big box stores among EYE Beauty Shoppers

Items purchased at a Beauty Supply Store	
Skin care products	33%
Cosmetics	42%
Hair care products	34%
Teeth whitening products	8%
Nail products	28%
Fragrances	33%
Weight loss products	7%

- Cosmetics are the most popular products bought at beauty specialty stores among EYE Beauty Shoppers

Items purchased at a Dept. Store	
Skin care products	32%
Cosmetics	42%
Hair care products	15%
Teeth whitening products	10%
Nail products	14%
Fragrances	58%
Weight loss products	11%

- Fragrances are the most popular products bought at department stores among EYE Beauty Shoppers

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Beauty shopping venue preference

There are many reasons an EYE Beauty Shopper may choose one beauty venue over another. The top two reasons given are convenience (74%) and cost (72%).

- By advertising those traits that make their product or beauty venue most convenient, advertisers can stay top of mind with the mall Shopper.
- By advertising sales, promotions and overall value, beauty advertisers can introduce or reinforce their brands to those Shoppers who are cost conscious.

Eyelites: Reaching Beauty Shoppers

Being at the mall inspires Shoppers to try and buy new beauty products (73%)

70% of EYE Beauty Shoppers are influenced by Eyelites when in the market for beauty products.

- 45% of those Shoppers stated that they may be influenced by Eyelites to buy one brand over another
- 73% of those Shoppers stated that they may be influenced by Eyelites to try something new

By reminding consumers of a new offering or upcoming sale/promotion, advertisers are more likely to garner interest from those consumers while they are in a shopping state of mind.



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Media's effect on purchase decisions

Mall advertising influences Shoppers more than radio, newspapers, direct mail and all other outdoor advertising including billboards, cinema, bus stops, buses and telephone kiosks/booths.

Over 40% of those interviewed stated that mall advertising influences their purchase decisions.

Coupled with the fact that Outdoor has the lowest CPM of all media formats, mall advertising provides an **efficient and cost-effective** means to advertise your message.

There are many ways companies have advertised their products, services or brands to you. Which of the following influences your purchase decision?

Advertising Medium	
Television	64%
Magazines	59%
Word-of-mouth	50%
Shopping Malls	41%
Internet/Email	41%
Direct mail	34%
Newspaper	25%
Outdoor billboards	16%
Cinema	13%
Bus stop	9%
Buses	8%
Radio	6%
Telephone booth	1%



Mall media can influence Shoppers to engage with new products and plays a pivotal role in a complete media buy.

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Methodology

EYE's insights were conducted in conjunction with Toluna Inc.

Toluna conducted 304 online surveys on behalf of EYE with a random sample of women aged 18 to 64 between April 15 and April 19, 2010. All participants must have visited at least one EYE mall in the top 17 DMAs in the past month. Adults who work at an EYE mall were not allowed to participate in the study.

About EYE

EYE USA's portfolio encompasses over 3,500 panels in 250 shopping malls across the country, with more than half the portfolio sitting in the top 30 DMAs. EYE's digital network includes nine malls across the country.

EYE has offices in and operates Out-of-Home media businesses in Australia, New Zealand, Indonesia, Singapore, the United Kingdom and the United States of America. Eye Corp Pty Ltd is a wholly owned subsidiary of Ten Network Holdings Limited, a publicly listed company, which operates Australia's TEN television network.

Contact

For more information about EYE, please contact:

- **Ellen Carucci** – Vice President, Sales, EYE USA, ellencarucci@eyecorp.com
- **Michelle Schiano** – Vice President Marketing, EYE USA, michelleschiano@eyecorp.com

EYE, 747 Third Avenue, 35th floor, New York, NY 10017 (646) 871-4430