

2017 Southwest Personal Care Marketing Report

Consumer Perceptions & Attitudes



MOSAIC
MULTICULTURAL

Contents

- 3 Introduction
- 5 Selected Highlights
- 8 What We Found
 - 8 Consumers yearn for trust
 - 11 Employees are your brand
 - 14 Ethnic diversity: A premium on staying healthy
 - 17 Moving occasional buyers to frequent customers
 - 20 TV and direct mail flex their muscles
 - 23 Best bet: Wealthy, educated and young
- 26 Appendix
 - 27 Methodology
 - 27 Respondent profiles
 - 28 Data
 - 32 Questionnaire
 - 34 About LAVIDGE & Mosaic Multicultural

Introduction

There's not much left on the bone after we pay for necessities.

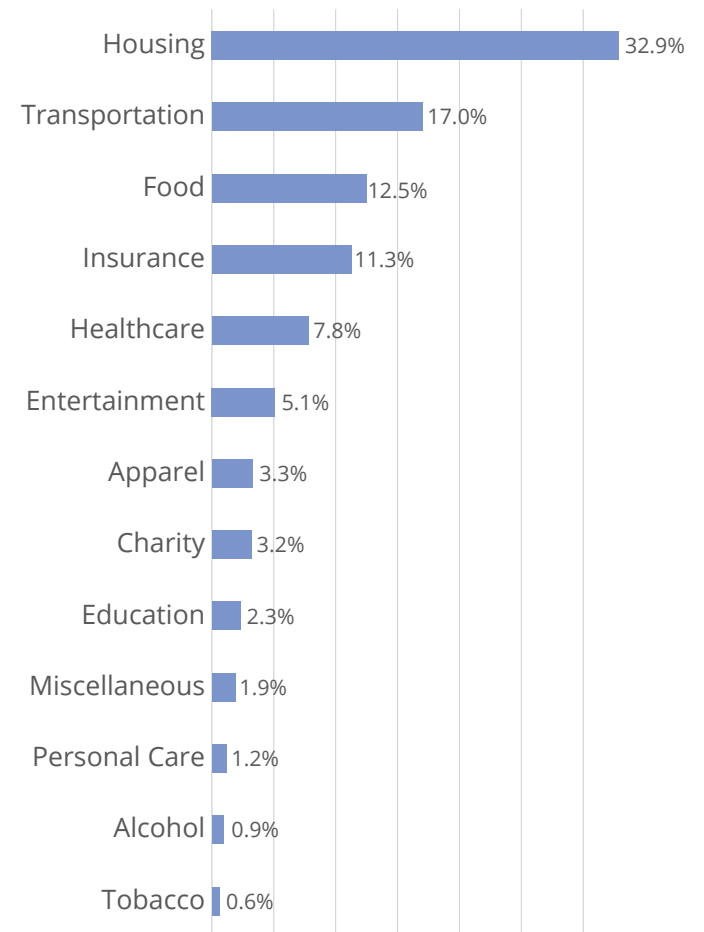
Housing, transportation, food, insurance and healthcare consume 81.5% of our take-home pay. The rest is mostly spent on discretionary items, such as entertainment and clothing. Lastly, when we have the time and the inclination, we'll splurge on ourselves—fitness clubs, hair and nail salons, massage clinics, spas, nutritionals, vitamins, beauty products and more.

Dubbed personal care, such items consume only 1.2% of the typical U.S. household's spending, or just \$683 annually.¹ That may not sound like much, but with 126 million households in the U.S., that's \$86 billion spent on nonessential products and services.

The trick for personal care businesses is to convince consumers that their services are essential and not discretionary.

Looking good isn't frivolous—it helps your attractiveness, affects how people view you and is important for career advancement. That's the message from personal care companies, and they're not wrong. According to Dr. Daniel Hamermesh, a noted economics professor at the University of Texas at Austin, attractive people earn 3–4% more than those with below average looks.

U.S. MEAN HOUSEHOLD EXPENDITURES



Source: 2015 Consumer Expenditure Survey, U.S. Bureau of Labor Statistics

In his book *Beauty Pays: Why Attractive People are More Successful*, Hamermesh explains that well-kept people are hired and promoted faster.

The personal care industry is highly competitive and appears near saturation. Does every strip mall need a nail salon? How many nutrition stores or fitness clubs does one neighborhood need?

Perhaps more than most sectors, personal care establishments are highly affected by economic winds. For example, in the massage clinic industry—where Massage Envy, Hand & Stone and Elements are key players—revenue dipped more than 30% during the Great Recession (2007–2009). The industry rebounded as the economy brightened and per-capita disposable income rose. Today, the industry is approaching \$3 billion in revenue, with an annual growth of 3.4%.

Many aspects of the U.S. economy have improved since it bottomed out in 2009. The most recent data (2015) from the U.S. Census Bureau indicates that the median household income is \$56,500. That's a record-setting increase of 5.2% over the previous year. More income means increased discretionary dollars and greater opportunity for personal care business.

The International Health, Racquet & Sportsclub Association reports that fitness club memberships in the U.S. rose from 50.2 million in 2010 to 54.1 million in 2015. The 34,460 health clubs in the nation are fighting aggressively for those members, resulting in fewer annual contracts and rates as low as \$10 per month.

Earlier this year, LAVIDGE and Mosaic Multicultural gave consumers a voice in the [2017 Southwest Healthcare Marketing Report](#). Now, we're doing the same for personal care, focusing on consumer perceptions and attitudes about advertising and marketing. This report's insights will help the industry create effective messages designed to expand discretionary spending.

Stephen Heitz
Managing Director, Interactive

Tim Trull
Managing Director, Strategy

More than
91%
of U.S. households
own at least
one vehicle



only
18.5%
of our income
remains for
discretionary
spending

Selected Highlights

Benjamin Franklin famously wrote that “in this world, nothing is certain except death and taxes.” But along the way, we also require shelter and sustenance. More than 91% of U.S. households own at least one vehicle, so we’ll spend on transportation, fuel and insurance.² And unless you never get sick, you’ll be paying doctors and pharmacies. All told, only 18.5% of our income remains for discretionary spending.³

Those excess dollars are aggressively pursued by entertainment companies, clothing retailers, brewers, distilleries, and tobacco growers. But of all discretionary spending, the most personal are the resources we spend consuming nutritionals and vitamins, and pampering ourselves at spas and salons. We join fitness clubs in January but quit within five months.⁴ We cut our hair, paint our nails and reduce stress at a local massage clinic.

To assist the personal care industry with crafting effective advertising, marketing and public relations messages to attract consumers, LAVIDGE and Mosaic Multicultural fielded a comprehensive survey in March 2017. The results provide a fascinating look at consumer perceptions and attitudes about the personal care industry.

WE'RE SEARCHING FOR TRUST

Far and away, consumers are looking for reliable products and services. The three words that ranked highest as being most effective for personal care advertising and marketing are **trustworthy**, **safe** and **honest**. **Healthy** was also ranked high. After ensuring those sentiments are in place, only then do consumers move on to more easily attainable features, such as **expert** and **convenient**.

YOUR EMPLOYEES ARE YOUR COMPANY

When it comes to messaging, we shouldn't be surprised that the big winner was **"Our staff is well trained and knowledgeable,"** which easily topped expressions related to health and convenience. Every employee is a brand ambassador, and that's especially true for personal care. The least preferred statements were **"You will feel younger"** and **"Your friends recommend us."**

ETHNICITY MATTERS

Respondents identifying themselves as African-American, Asian-American and Hispanic express views about personal care messaging modestly different than the Caucasian/white population. Together, these three ethnic groups place a much higher premium on advertising that promises to keep consumers healthier. They also chart higher than the general population in expressions about being pampered and rejuvenated, and they value the recommendation of friends. Interestingly, ethnic groups don't rank convenience—**"We have locations near you"**—nearly as high as Caucasian/white respondents.

The three words that ranked highest as being most effective for personal care advertising and marketing:

TRUSTWORTHY
SAFE
HONEST

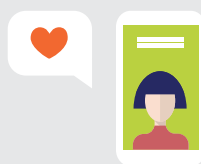
Respondents identifying themselves as African-American, Asian-American and Hispanic express views about personal care messaging *modestly different than the Caucasian/white population.*



High-income consumers (\$75,000+) show marked preferences for *magazines and newspapers*.



Households with income of \$50,000 to \$74,999 *favor radio* more than other income levels.



While social media isn't the most preferred media, it shows great promise for heavy users of personal care services.

CONVERT OCCASIONAL BUYERS WITH ASPIRATION

Personal care businesses desiring to convert new customers to frequent ones should focus on marketing messages that promise a **"pleasant experience"** and relief from **"aches and pains."** Conversely, heavy users of personal care services say they **"deserve to be pampered."**

TELEVISION AND DIRECT MAIL LEAD THE PACK

Respondents prefer to receive marketing messages via television and direct mail. High-income consumers (more than \$75,000) show marked preferences for magazines and newspapers. Households with income of \$50,000 to \$74,999 favor radio more than other income levels. While social media isn't the most preferred media, it shows great promise for heavy users of personal care services.

BEST BET: WEALTHY, EDUCATED AND YOUNG

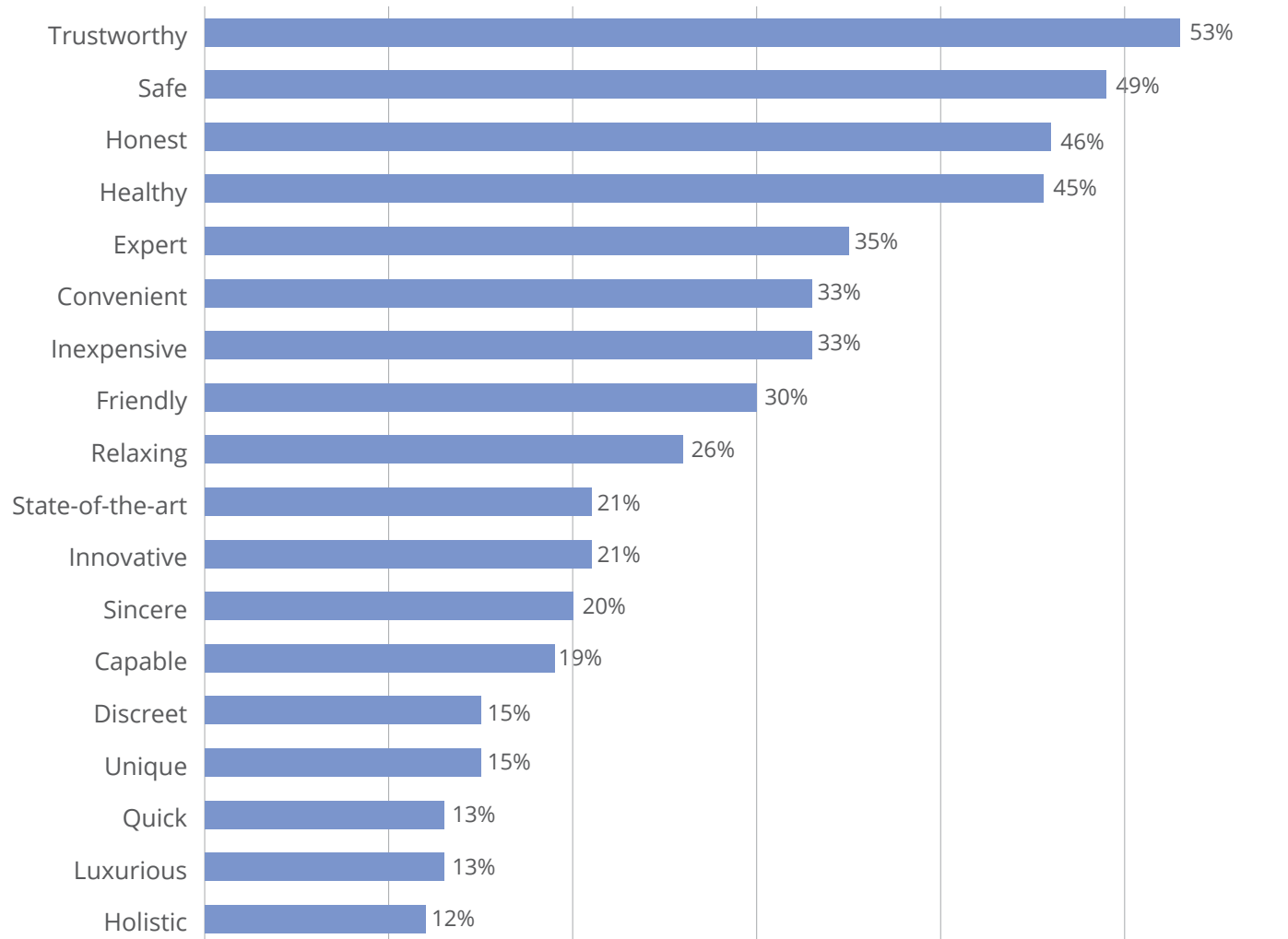
It stands to reason that households with the highest income have more money to spend on discretionary personal care services, and our survey found that to be true. Similarly, those with a college education are heavy industry customers. And the youngest survey respondents (those under 35) are the largest group of personal care users.

What We Found

CONSUMERS YEARN FOR TRUST

PREFERRED WORDS ABOUT PERSONAL CARE

Percent of all respondents who ranked each word in their top 5 of being the most effective in communicating a personal care company's benefits.



[view source data as a table](#)

The only physical contact that occurs when buying a car might be a handshake. But for many personal care services—hair and nail salons, massage clinics and wellness spas—physical touch is an integral part of what consumers buy. This intimacy is unique in our economy, and that’s probably why respondents place so much emphasis on factors that have little to do with the nature or quality of the purchased services.

We asked respondents throughout the Southwest to consider 18 different words as being the most effective in communicating a personal care company’s benefits. Their top three choices speak in a unifying voice: **trustworthy** topped the survey at 53%, followed closely by **safe** (49%) and **honest** (46%). **Healthy** was right behind at 45%.

Celebrity hairstylist and colorist Harry Josh understands why consumers are concerned about trust. “When it comes to hairstylist trust, there can be complete and utter trust, like there’s no way I’m letting anyone else do this but my hairdresser,” he told *New York* magazine. “But you have to know if your hairdresser is doing things for himself or for your best interest.”

SURVEY RESPONDERS SAID . . .

“

“I want to feel that I am being taken care of and not just a dollar sign. Someone who is trustworthy is going to treat you better than someone who is in it just for the money.”

“If I am going to pay for a personal care service, I need to trust the person doing it.”

“The last thing people want in personal care is someone who doesn’t know what they’re doing. Whether the service is from a doctor or a hairdresser, it’s important that it be done in a competent, professional manner.”

“It is important to know that procedures are not only safe, but also healthy.”

”

But trust in advertising is on the upswing. A March 2017 [YouGov](#) survey found that 61% of consumers say they trust ads. That's an 11% increase since 2014. Similarly, the same survey shows that 72% of people believe that the ads they "see, read and hear" are honest, a 16% increase.

When it comes to our bodies, trust is paramount. Once we get that squared away, we can move on to areas more closely related to product and service attributes, such as **expert** (35%), and **convenient** (33%). The survey indicates that some consumers may not be very price sensitive regarding personal care services—just a third of respondents chose **inexpensive** as one of their top words for advertising and marketing messages.

Recently, [The Wall Street Journal](#) cited data revealing that the typical gym member travels only four miles to get to their club. The lower the membership cost, the less we travel. But people seem willing to drive farther if their club is exclusive (i.e., expensive). Our survey doesn't show convenience as a primary factor, probably because there is an abundance of personal care businesses in most neighborhoods; you don't have to drive far to find a hair, nail or waxing salon.

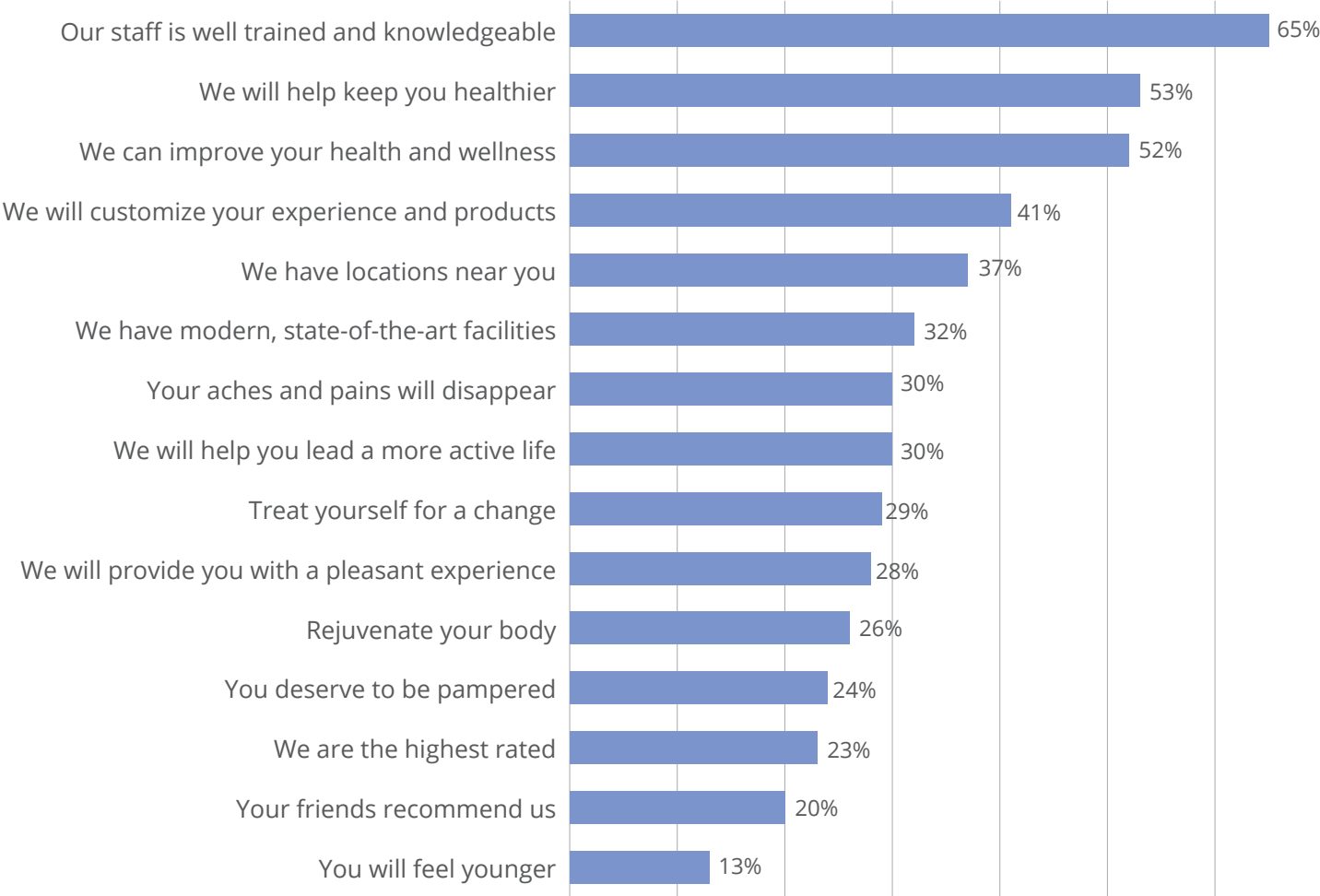
61%
of consumers say
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72%
of people believe
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are honest

EMPLOYEES ARE YOUR BRAND

PREFERRED STATEMENTS ABOUT PERSONAL CARE

Percent of all respondents who ranked each statement in their top 5 of being the most effective in communicating a personal care company's benefits.



[view source data as a table](#)

Creative directors and industry professionals probably aren't shocked that the most preferred statement about personal care is **"Our staff is well trained and knowledgeable."** It beat out **"We will help keep you healthier"** by an impressive 12%.

William Arruda, a personal branding pioneer and author of *Ditch, Dare, Do*, offers sage advice that emphasizes the importance of well-trained and knowledgeable employees:

Many companies focus all their branding efforts on marketing activities such as advertising campaigns and packaging, yet one of the most powerful brand assets your company has is your people. Regardless of which industry you're in, building a strong brand requires that all employees feel connected to the corporate brand and understand their role in turning brand aspirations into reality. If you're not inspiring your talent to be brand ambassadors, you're missing out.

The most preferred statement about personal care:
"Our staff is well trained and knowledgeable."

The least preferred marketing statement:
"You will feel younger."

An informed, talented and service-oriented workforce is crucial to delivering on a company's brand promise. When someone is giving you a deep tissue treatment, your massage therapist *is* the company. To you, the personal trainer at the fitness club might as well be the gym's CEO.

The runners-up both focus on health and wellness: **"We will help keep you healthier"** and **"We can help you improve your health and wellness."** This gets at the heart of why we spend discretionary dollars on personal care products and services. According to the Centers for Disease Control (CDC), only 15% of adults smoke, a decrease of 10% since 1997. The [CDC](#) also reports an all-time high of adults who are meeting federal physical activity guidelines. Obesity, a major disease predictor, is declining as well—a report from the [Robert Wood Johnson Foundation](#) indicates that obesity rates have dropped for the first time in four states: Minnesota, Montana, New York and Ohio.

Despite the healthiness trend, respondents are under no delusions that personal care businesses can work miracles. The least preferred marketing statement is **"You will feel younger."**

SURVEY RESPONDERS SAID . . .

“

"When you undergo a service, you want to be assured that the staff are well-trained, credentialed and licensed."

"I won't be treated by idiots. If I know more than they do, then it's time for me to leave."

"You can't properly take care of someone without the right education and training."

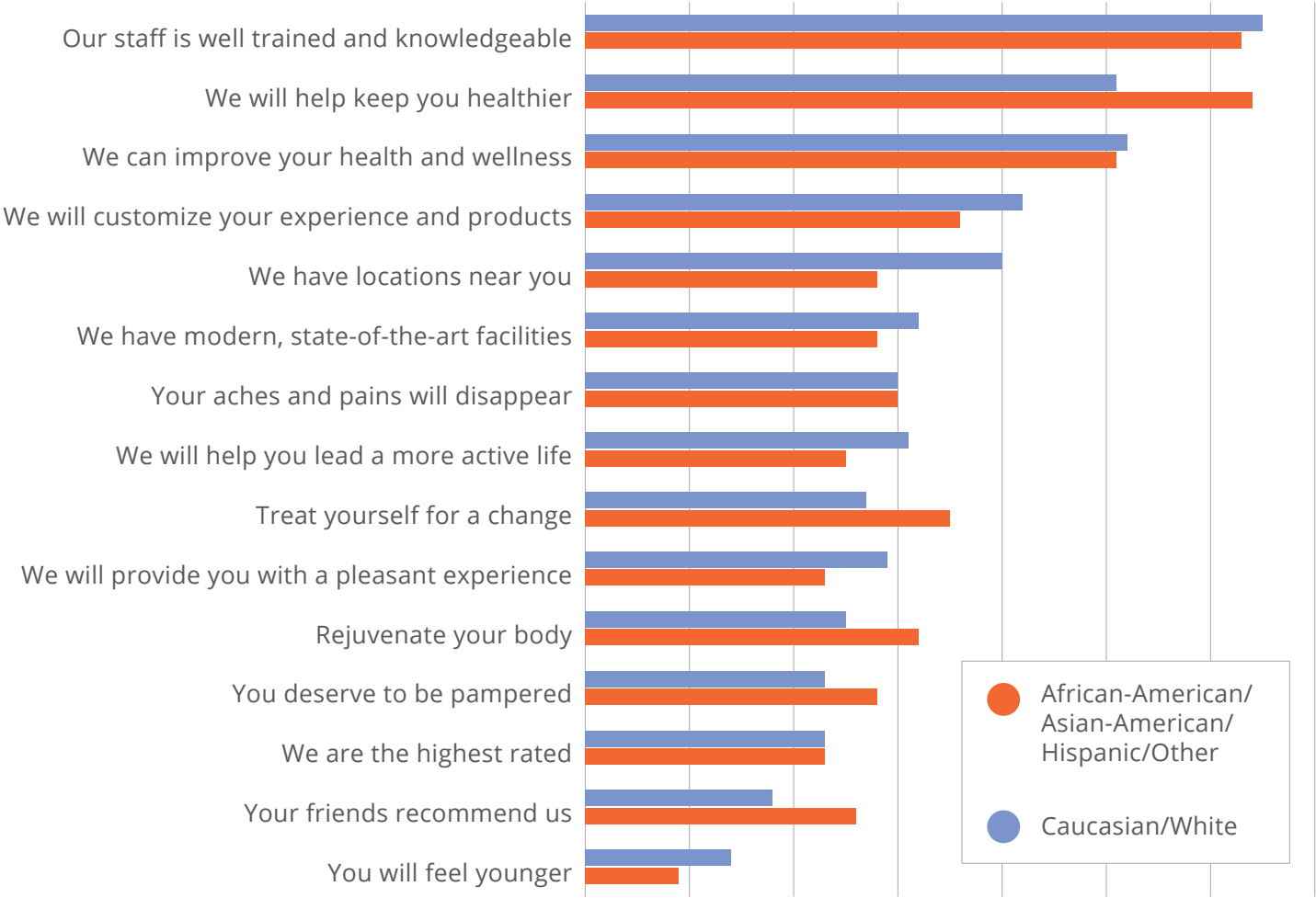
"If you can improve my health and wellness, then all other areas of my life can benefit and I will feel better about myself."

”

ETHNIC DIVERSITY: A PREMIUM ON STAYING HEALTHY

PREFERRED STATEMENTS ABOUT PERSONAL CARE, BY ETHNICITY

Percent of all respondents by ethnicity of personal care services in the past year who ranked each statement in their top 5 of being the most effective in communicating a personal care company's benefits.



[view source data as a table](#)

Nearly 20% of survey participants identified themselves as African-American, Asian-American and Hispanic. Together, they reveal subtle but meaningful differences about personal care compared to the larger group of Caucasian/white responders.

Ethnic responders chose **“We will help keep you healthier”** as their top-rated statement, favoring it a substantial 13% more than Caucasians. That’s a fascinating preference, especially because a [National Institutes of Health](#) study found that “racial/ethnic minorities generally engaged in less healthy exercise and dietary behaviors than whites, with differences more pronounced in middle adulthood.”

Mark Suarez, Principal and Managing Director at Mosaic Multicultural, says this disparity can likely be attributed to the fact that advertisers rarely focus on ethnic minorities. “Minorities don’t often receive marketing messages about personal care or preventive healthcare,” says Suarez. “That can make them more receptive to authentic communication that promises to keep them healthier. They’ll respond to such messages because, finally, someone is literally speaking their language.”



Ethnic responders chose **“We will help keep you healthier”** as their top-rated statement, favoring it a substantial 13% more than Caucasians.

Ethnic responders also rated several other statements much higher than white survey participants, including:

- **“Treat yourself for a change”**
- **“Rejuvenate your body”**
- **“You deserve to be pampered”**
- **“Your friends recommend us”**

Messages of convenience are of moderate interest to Caucasian/white responders, with 40% preferring the statement **“We have locations near you.”** But that message resonated with only 28% of ethnic responders. Why?

“Ethnic minorities won’t believe marketing that promises nearby locations because it’s not a credible claim,” says Suarez. “Take a drive to neighborhoods with significant minority populations and you won’t see many personal care stores, and certainly not national brands. Mostly what you’ll find are some mom-and-pop stores that do quite well.”

SURVEY RESPONDERS SAID . . .

“

“Improving your health is the most important element in a wellness and beauty routine.”

“I don’t want to focus on how I look. I just want to know I am as healthy as I can be.”

“Funds are limited, so I need to buy the best value.”

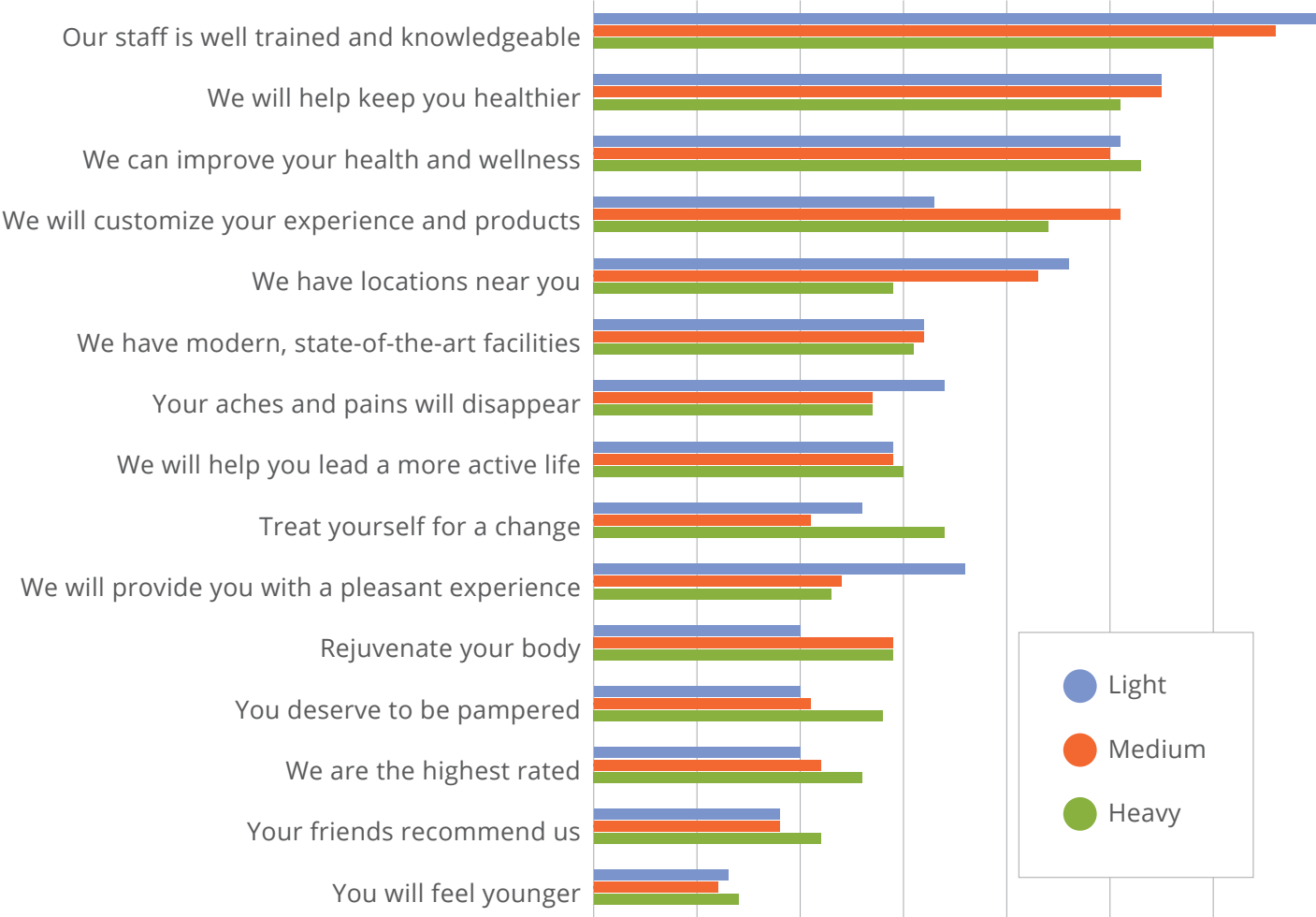
“I like products that stand out from the rest. Something that is unique is sure to attract my attention.”

”

MOVING OCCASIONAL BUYERS TO FREQUENT CUSTOMERS

PREFERRED STATEMENTS ABOUT PERSONAL CARE, BY USAGE

Percent of all respondents by usage of personal care services in the past year who ranked each statement in their top 5 of being the most effective in communicating a personal care company's benefits.



[view source data as a table](#)

Personal care marketers wishing to convert occasional customers into regulars should focus on the same messages that appeal to medium and heavy users, including **“Our staff is well trained and knowledgeable”** and the statements highlighting wellness.

But personalized marketing, made possible by such mediums as email and programmatic advertising, can also deliver messages that particularly resonate with light users of personal care services. For example, low/occasional respondents—those who have patronized a personal care establishment three times or less during the past 12 months—show a pronounced preference for **“We will provide you with a pleasant experience,”** 36% compared to medium users (24%) and heavy users (23%). **“Your aches and pains will also disappear”** is similarly favored by light users. These are aspirational statements that promise an inviting environment and miraculous outcomes.

Low/occasional use respondents show a pronounced preference for ***“We will provide you with a pleasant experience,”*** and ***“Your aches and pains will also disappear.”***

Similarly, the survey data can also help marketers craft messages designed to speak directly to heavy users (those who have bought at least 10 personal care products or services over the past year). These loyal customers, who are already among the most deeply converted, are responsive to the most popular marketing messages. And more than light or medium users, frequent buyers also respond positively to low-ranked statements, such as **“Your friends recommend us,” “We are the highest rated”** and **“You deserve to be pampered.”**

The greatest customer disparity of any statement concerns **“We will customize your experience and products.”** Medium-use customers—those who have made 4–10 annual personal care purchases—ranked that message highly 51% of the time, compared to heavy (44%) and light users (33%).

Delivering tailored marketing messages about customized services would hit the sweet spot. A survey by [Bain & Company](#) found that while less than 10% of shoppers have “tried customized options, 25% to 30% are interested in doing so.”

SURVEY RESPONDERS SAID . . .

“

“I am not a one-size-fits-all kind of person. I would actually like to see a company that cares uniquely about me and my needs.”

“If my friends are already using and like your service, then it must be good.”

“It’s important to address my individual needs versus receiving generic treatments.”

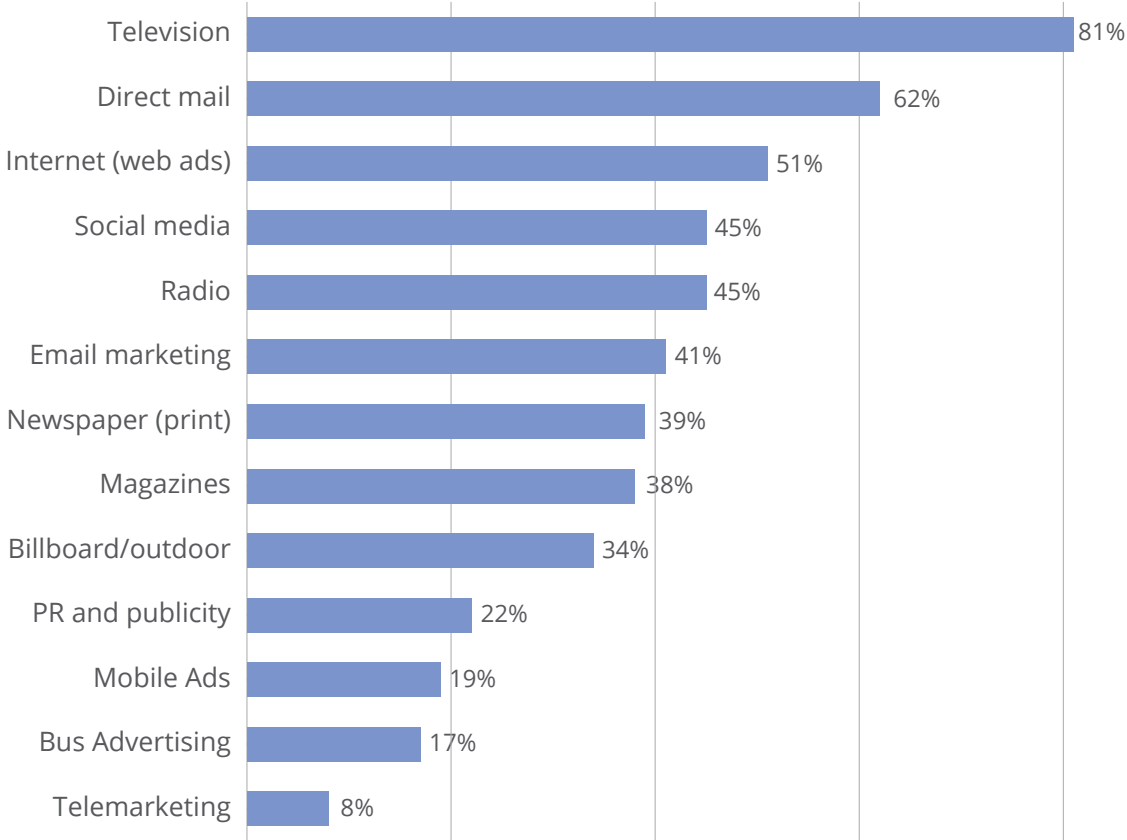
“I have a lot of back pain. I would love a company that can take the pain away.”

”

TV AND DIRECT MAIL FLEX THEIR MUSCLES

MOST EFFECTIVE MEDIA FOR PERSONAL CARE ADVERTISING

Percent of all respondents who ranked each media in their top 5 of being the best way for a personal care company to advertise or market to them.

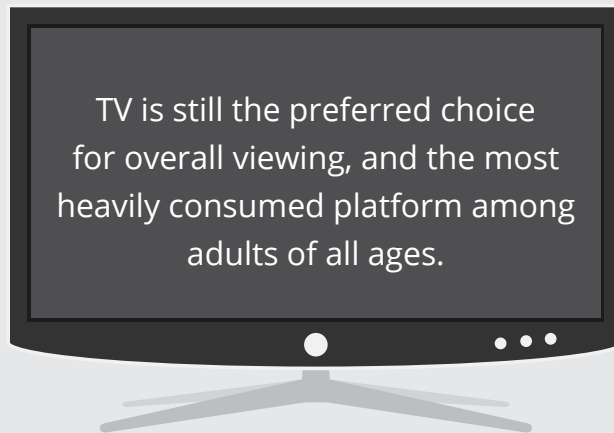


[view source data as a table](#)

When rumors of his own death reached Mark Twain, he famously wrote that the report of his death was an exaggeration. The often-declared demise of television is hyperbole, as well.

Without equivocation, respondents have chosen TV as the best way for a personal care company to advertise or market to them. This isn't just a preference; it's a mandate. More than 80% chose television in their top five preferred media, more than 20% ahead of the next most popular media. But we knew that already. [Nielsen](#) says:

TV is still the preferred choice for overall viewing, and the most heavily consumed platform among adults of all ages. TV continues to play a role in shaping our experiences of live historical events, as consumers continue to watch television as they watch history unfold. Live+DVR/time-shifted TV viewing accounts for 47% of the total average audience among adults 18+. Millennials ages 18-34 use TV-connected devices over six hours per week, while adults 18-49 spend over 14 hours each week on their smartphones.



More than
80%
of respondents chose
**television in their top five
preferred media**

Television is so ubiquitous that it would have been a shocker if it hadn't led the pack. But direct mail finishing second is impressive. At 62%, direct mail seems poised for a resurgence. That makes sense for service-oriented personal care companies that rely upon repeat business, loyalty programs, special offers and coupons. [The Data & Marketing Association](#) reports that direct mail frequently outperforms digital channels, with a house-list response rate of 3.7% and 1% for a prospect list.

The [Money Mailer](#) and [Valpak](#) envelopes that arrive in our home mailbox are packed with coupons from personal care businesses, including recent promotions for Nutrisystem, SportClips, Sculptitude, Celebrity Tanning and Proactiv. The online and app versions also offer printable coupons from Fantastic Sams, Supercuts, Hand & Stone and dozens more.

Internet advertising that appears on home computers is the third most favored media (51%). This contrasts with the few people (19%) who expressed a preference for mobile advertising.

Finally, here's another reason to feel sorry for phone sales workers who suffer repeated hang-ups—respondents ranked telemarketing dead last at a minuscule 8%.

SURVEY RESPONDERS SAID . . .

“Something that arrives in the mail usually provides more information than a short TV or radio spot.”

“I see ads on TV more than any other type of advertising. Repetition is the best memory trick.”

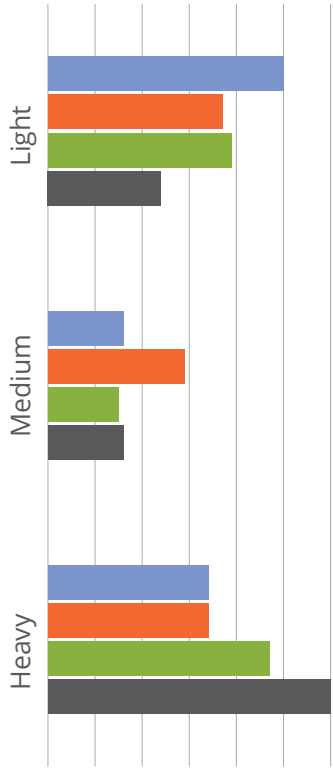
“I look at everything that comes in the mail.”

“I spend at least 12 hours a week in my car traveling to different areas, so I listen to a lot of radio.”

BEST BET: WEALTHY, EDUCATED AND YOUNG

USAGE OF PERSONAL CARE SERVICES, BY INCOME

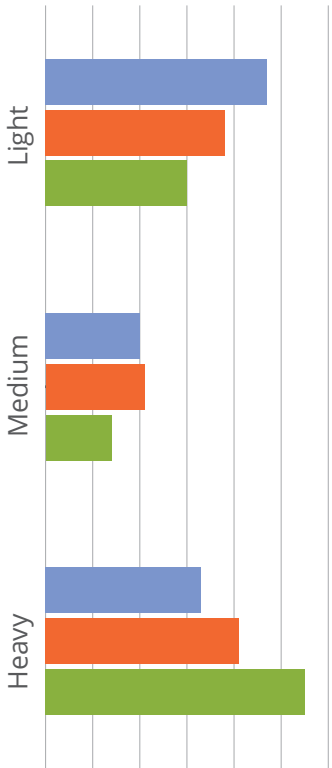
Percent of all responders by usage of personal care services in the past year, by income.



- Under \$35,000
- \$35,000-\$49,999
- \$50,000-\$74,999
- \$75,000+

USAGE OF PERSONAL CARE SERVICES, BY EDUCATION

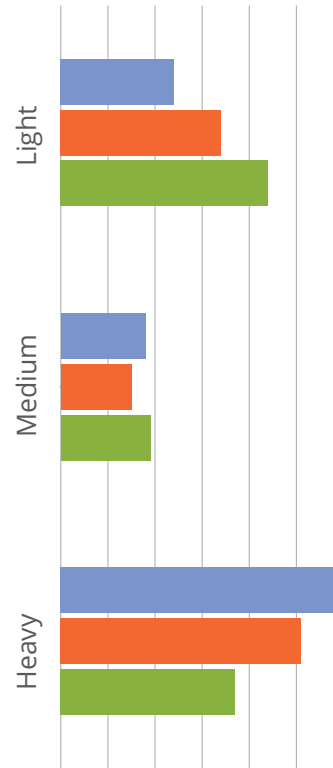
Percent of all responders by usage of personal care services in the past year, by education.



- HS or less
- Some college or trade school
- College+

USAGE OF PERSONAL CARE SERVICES, BY AGE

Percent of all responders by usage of personal care services in the past year, by age.



- Under 35
- 35-54
- 55+

[view source data as a table](#)

If you want to market to the heaviest users of personal care products and services, you should focus on consumers who are wealthy, well-educated and young. Here's how those segments play out.

Income: High earners have more money left over to spend on discretionary items, right? That's generally true, and our survey supports it. At 60%, respondents with household incomes of \$75,000 and higher spend more on personal care than lower earners. No surprise there.

Education: College graduates spend the most (55%) compared to less educated consumers. This is likely related to earnings; there is a strong correlation between income and educational attainment. Data from the [U.S. Bureau of Labor Statistics](#) shows the connection.

Median weekly earnings for each education level:

- Professional degree: \$1,730
- Doctoral degree: \$1,623
- Master's degree: \$1,341
- Bachelor's degree: \$1,137
- Some college, no degree: \$738
- High school diploma: \$678
- Less than a high school diploma: \$493

Respondents with household incomes of \$75,000 and higher spend more on personal care than lower earners.

College graduates spend the most compared to less educated consumers.

There's also a correlation between education and unemployment. Those without a high school diploma have an 8% unemployment rate, compared to only 1.7% of people with a doctoral degree. If you're unemployed you're unlikely to splurge on a weekend massage.

Age: Here's where it gets interesting. In our survey, younger respondents (those under 35) are a very large group of personal care users. At 58%, this age cluster topped the 35–54 age group (51%) and 55-plus (37%).

Young people haven't yet realized their top earning potential. And their total expenditures aren't as high as older consumers. Data from the [U.S. Department of Labor](#) shows that those 45–54 years old have a mean household

expenditure of \$69,753. That compares with \$52,062 for those 25–34 years old. It's even lower (\$32,797) for those under 25.

Several elements may explain why younger people are spending more on personal care products and services than older consumers. Generally, younger people aren't as saddled with mortgages and children as older consumers—they may still be renting or living with a parent. They are climbing corporate ladders and trying to look sharp. Also, because the average age of marriage in the U.S. is 28, younger people may be placing a premium on appearing attractive.

Younger respondents (those under 35) are a very large group of personal care users. At 58%, this age cluster topped the 35–54 age group (51%) and 55-plus (37%).



Appendix

Methodology

The objective of this research was to gather quantitative feedback from a random sample of adult consumers (18+) living in Arizona and other major markets in the Southwestern U.S. A total of 467 online surveys were completed, with the following breakdown of completes by market: Arizona, 232; Denver, 50; Salt Lake City, 43; San Diego, 50; Las Vegas, 50; Albuquerque, 42.

Individual participants were provided by a major online survey panel, with the actual survey hosted by WestGroup Research in Phoenix, Arizona. The statistical margin of error for the overall sample is +/- 4.5% at the 95% confidence level, the standard error margin threshold for most public opinion research. Average survey length was approximately 9 minutes to complete.

Error margins for sub-segments of the sample (e.g., different age groups) will vary depending on the size of that sub-segment. Statistically significant findings are noted within the report where applicable.

Research was conducted by WestGroup Research on behalf of LAVIDGE and Mosaic Multicultural during March, 2017.

Respondent profiles

GENDER

Male	56%
Female	44%

AGE

Under 35	26%
35-54	28%
55+	46%

EDUCATION

High school or less	16%
Some college or trade school	36%
College+	48%

INCOME

Under \$35,000	26%
\$35,000 to \$49,999	15%
\$50,000 to \$74,999	21%
\$75,000+	35%
No response	3%

Data

Preferred words about personal care	
Trustworthy	53%
Safe	49%
Honest	46%
Healthy	45%
Expert	35%
Convenient	33%
Inexpensive	33%
Friendly	30%
Relaxing	26%
State-of-the-art	21%
Innovative	21%
Sincere	20%
Capable	19%
Discreet	15%
Unique	15%
Quick	13%
Luxurious	13%
Holistic	12%

[view data in graph](#)

Preferred Statements about personal care	
Our staff is well trained and knowledgeable	65%
We will help keep you healthier	53%
We can improve your health and wellness	52%
We will customize your experience and products	41%
We have locations near you	37%
We have modern, state-of-the-art facilities	32%
Your aches and pains will disappear	30%
We will help you lead a more active life	30%
Treat yourself for a change	29%
We will provide you with a pleasant experience	28%
Rejuvenate your body	26%
You deserve to be pampered	24%
We are the highest rated	23%
Your friends recommend us	20%
You will feel younger	13%

[view data in graph](#)

Data

Preferred statements about personal care, by ethnicity

	CAUCASIAN/ WHITE	AFRICAN-AMERICAN/ ASIAN-AMERICAN/ HISPANIC/OTHER
Our staff is well trained and knowledgeable	65%	63%
We will help keep you healthier	51%	64%
We can improve your health and wellness	52%	51%
We will customize your experience and products	42%	36%
We have locations near you	40%	28%
We have modern, state-of-the-art facilities	32%	28%
Your aches and pains will disappear	30%	30%
We will help you lead a more active life	31%	25%
Treat yourself for a change	27%	35%
We will provide you with a pleasant experience	29%	23%
Rejuvenate your body	25%	32%
You deserve to be pampered	23%	28%
We are the highest rated	23%	23%
Your friends recommend us	18%	26%
You will feel younger	14%	9%

[view data in graph](#)

Data

Preferred statements about personal care, by usage

	LIGHT	MEDIUM	HEAVY
Our staff is well trained and knowledgeable	70%	66%	60%
We will help keep you healthier	55%	55%	51%
We can improve your health and wellness	51%	50%	53%
We will customize your experience and products	33%	51%	44%
We have locations near you	46%	43%	29%
We have modern, state-of-the-art facilities	32%	32%	31%
Your aches and pains will disappear	34%	27%	27%
We will help you lead a more active life	29%	29%	30%
Treat yourself for a change	26%	21%	34%
We will provide you with a pleasant experience	36%	24%	23%
Rejuvenate your body	20%	29%	29%
You deserve to be pampered	20%	21%	28%
We are the highest rated	20%	22%	26%
Your friends recommend us	18%	18%	22%
You will feel younger	13%	12%	14%

[view data in graph](#)

Most effective media for personal care advertising

Television	81%
Direct mail	62%
Internet (web ads)	51%
Social media	45%
Radio	45%
Email marketing	41%
Newspaper (print)	39%
Magazines	38%
Billboard/outdoor	34%
PR and publicity	22%
Mobile ads	19%
Bus advertising	17%
Telemarketing	8%

[view data in graph](#)

Data

Usage of personal care services, by income

	UNDER \$35,000	\$35,000– \$49,999	\$50,000– \$74,999	\$75,000+
Light	50%	37%	39%	24%
Medium	16%	29%	15%	16%
Heavy	34%	34%	47%	60%

Usage of personal care services, by education

	HS OR LESS	SOME COLLEGE OR TRADE SCHOOL	COLLEGE+
Light	47%	38%	30%
Medium	20%	21%	14%
Heavy	33%	41%	55%

Usage of personal care services, by age

	UNDER 35	35–54	55+
Light	47%	38%	30%
Medium	20%	21%	14%
Heavy	33%	41%	55%

[view data in graph](#)

Questionnaire

This brief survey will ask for your opinions on any advertising, marketing, websites, messages or other information you have received from personal care companies such as fitness clubs, nutrition and supplement stores, wellness spas, massage clinics and facial salons.

Simply click on the appropriate answer or, for open-ended questions, please provide as much detail as needed to express your opinion. Thanks in advance for your input!

1. During the past 12 months, about how many times have you used each of the following types of personal care services?

- Shopped at a vitamin or nutrition supplement store
- Exercised at a fitness or athletic club
- Went to a wellness spa
- Visited a neighborhood massage clinic
- Visited a facial salon
- Visited a hair salon
- Visited a nail salon
- Visited a waxing center
- Visited a cosmetic surgeon for an elective procedure
- Visited a weight-loss establishment
- Shopped online for weight-loss programs or food

2. Please indicate which of these marketing methods would be most effective for you. Click and drag into the appropriate boxes.

- | | |
|-----------------------------|----------------------------------|
| • Mobile ads | • Social media |
| • Magazines | • Ads on outside of buses |
| • Internet (web ads) | • Telephone / telemarketing |
| • Newspaper (print edition) | • Public relations and publicity |
| • Email marketing | • Radio |
| • Television | |
| • Direct mail | |
| • Billboard / outdoor | |

3. Please organize your Top 5 choices in order of favorite, next favorite, etc.

4. Why do you feel “[top answer]” would be most effective? Please be as specific as possible.

5. Please choose which words you feel would be most effective and least effective in communicating a personal care provider’s benefits.

- | | |
|--------------------|---------------|
| • State-of-the-art | • Inexpensive |
| • Safe | • Sincere |
| • Convenient | • Friendly |
| • Luxurious | • Honest |
| • Holistic | • Expert |
| • Quick | • Trustworthy |
| • Innovative | • Unique |
| • Discreet | • Capable |
| • Relaxing | • Healthy |

6. Please organize your Top 5 choices in order of favorite, next favorite, etc.

7. Why did you choose “[top answer]” as your favorite word? What is it that makes it so effective?

8. Next we’d like to get your opinions on actual marketing statements you might see from a personal care provider. Once again, please choose which you feel would be most and least effective in communicating with you.

- You deserve to be pampered
- We will help keep you healthier
- Your friends recommend us
- Treat yourself for a change
- Our staff is well trained and knowledgeable
- Rejuvenate your body
- We will customize your experience and products
- We are the highest rated
- Your aches and pains will disappear
- We can improve your health and wellness
- We have modern, state-of-the-art facilities
- You will feel younger
- We will help you lead a more active life
- We will provide you with a pleasant experience
- We have locations near you

9. Please organize your Top 5 choices in order of favorite, next favorite, etc.

10. What makes “[top answer]” your favorite statement? What makes it so effective?

11. How would you describe your current health?

- | | |
|-------------|------------------------|
| • Excellent | • Poor |
| • Good | • Prefer not to answer |
| • Fair | |

THE FOLLOWING QUESTIONS ARE FOR STATISTICAL PURPOSES ONLY.

12. Please indicate your gender:

- Male
- Female

13. What is the zip code where you live?

14. Which of the following includes your age?

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older
- Prefer not to answer

15. Which includes the highest level of education you have completed?

- Some high school
- High school graduate or GED
- Some college or trade school
- College graduate (bachelor's degree)
- Post-graduate (master's degree or higher)
- Prefer not to answer

16. Which best describes your employment status?
(CHECK ALL THAT APPLY)

- Work full-time
- Work part-time
- Retired
- Self-employed
- Student
- Temporarily unemployed or looking for work
- Homemaker
- Other
- Prefer not to answer

17. Which best describes your ethnic background?

- Caucasian / White
- African-American
- Asian-American
- Hispanic
- Pacific Islander
- Other
- Prefer not to answer

18. What is your marital status?

- Single (never married)
- Married or living as married
- Separated
- Widowed
- Divorced
- Other
- Prefer not to answer

19. Which includes your total household income last year before taxes?

- Under \$25,000
- \$25,000 to \$34,999
- \$35,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer not to answer

About LAVIDGE & Mosaic Multicultural



LAVIDGE is a Phoenix-based full-service advertising, public relations and digital marketing agency. Since 1982, LAVIDGE has specialized in discovering and communicating insights that engage, motivate and inspire. Agency clients include Phoenix Raceway, McDonald's, United Rentals and many more.

Mosaic Multicultural is a full-service multicultural marketing agency working in partnership with LAVIDGE to provide multicultural advertising, public relations and digital marketing services.



WestGroup Research, headquartered in Phoenix and founded in 1959, is the largest full-service market research firm in the Southwestern U.S., serving a domestic and international client base.



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