



Natural and Premium Foundation

Agile Attitudes & Usage™ Study





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Background & Objectives

Background

GutCheck's Marketing team was seeking an Agile Attitudes & Usage study that could be used as marketing material to both show the level of analysis provided with that product and to share out to potential clients in the cosmetics industry.

Previously, GutCheck ran qualitative research in the US focusing on natural body care products. Results indicated that most people don't buy natural personal care products because of the high cost, though many positive benefits are attributed. GutCheck seeks a deeper understanding of how women define "natural" and "premium" in the context of foundation and to determine the key differentiators of natural foundation.

Objectives

- How do women define natural and premium foundation?
- Why do women buy foundation from brands that are natural or premium? Why do they not?





Methodology

Methodology

This study was conducted via an online quantitative survey. Each survey lasted approximately 7 minutes.

| Method | # of Respondents |
|-------------------------|------------------|
| Agile Attitudes & Usage | 401 |

| Audience | Qualifying Criteria |
|-------------------------------|--|
| Gender | Females |
| Age | 18-55 |
| Region | Capture |
| Kids in HH | Capture |
| HHI | Capture |
| Makeup Worn | Wears foundation at least 4 times per week |
| Brands Worn | Capture |
| Preferred Brand | Capture* |
| Premium or Natural Foundation | Purchasers or Considerers |

Survey clicks were balanced to population level data on Age, Gender, and Region to ensure a natural fallout of the sample.

**Throughout the report we compared "Premium Preferred" and "Natural Preferred," defined as those whose preferred brand of foundation was classified in analysis as a premium or natural brand, respectively.*



Executive Summary

Key Findings

The differences between how women define premium and natural are slight, and don't lead to an increased interest in natural.

We wear the foundation because it's lightweight, easy to put on, and matches our skin tone. We like that it makes our skin look flawless all day. These are the reasons we like the foundation we do regardless of what brand that foundation comes from. From premium brands, we expect foundation that makes our skin look naturally flawless and uses high quality ingredients. Foundation from natural brands does those things too, but also uses organic ingredients and is eco-friendly. Those of us who prefer natural foundation might not know exactly what brands are natural, since even though we say that a natural brand is our favorite, we also don't care about buying foundation from natural brands. Additionally, we don't choose a foundation just because it is from a natural brand name. If we think of a certain brand as premium, we're more likely to attribute the positive characteristics we look for from our preferred foundation to that brand's foundation.



Key Findings

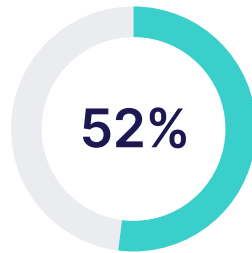
Women buy the foundation they do because of the way it makes them look, not because it comes from a natural brand.

**Top 3
Reasons to Buy**



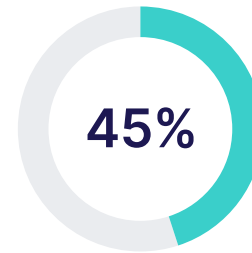
Of consumers buy foundation because it feels lightweight, is easy to apply, and is the right color for their skin.

**Definition of
Premium**



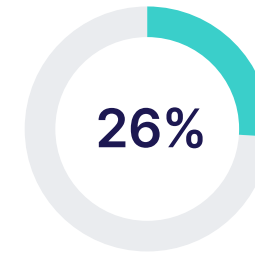
Define premium foundation as making their skin look flawless.

**Definition of
Natural**



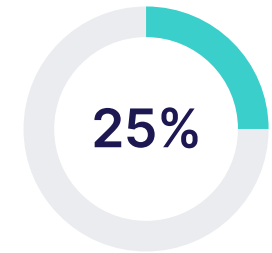
Define natural foundation as using organic ingredients and being eco-friendly

**Reasons to
Buy Natural**



Buy foundation because it is from a natural brand, which is not one of the biggest reasons women choose natural foundation.

**Importance of
Natural Brand**



Of those whose favorite foundation is from a natural brand said they don't care about buying foundation from natural brands.

Implications For Natural Foundation Brands

Natural brands can focus messaging on convincing consumers of the importance of using foundation with natural ingredients.

Many who buy natural foundation focus on the importance of it looking and feeling natural as more Reasons to Buy Natural Foundation important than the foundation having natural ingredients or being from a natural brand.

Most women would not try a new foundation just because it comes from a natural brand name. Even those who prefer foundation from natural brands don't buy it because it is from a natural brand. Convincing consumers of the importance of natural ingredients could differentiate natural brand names.

Those who prefer premium foundation think that natural foundation looks natural but not that it uses high quality ingredients. Additional education around the ingredients of natural foundation, geared towards premium purchasers, could help to change their minds.

Reasons to Buy Natural Foundation

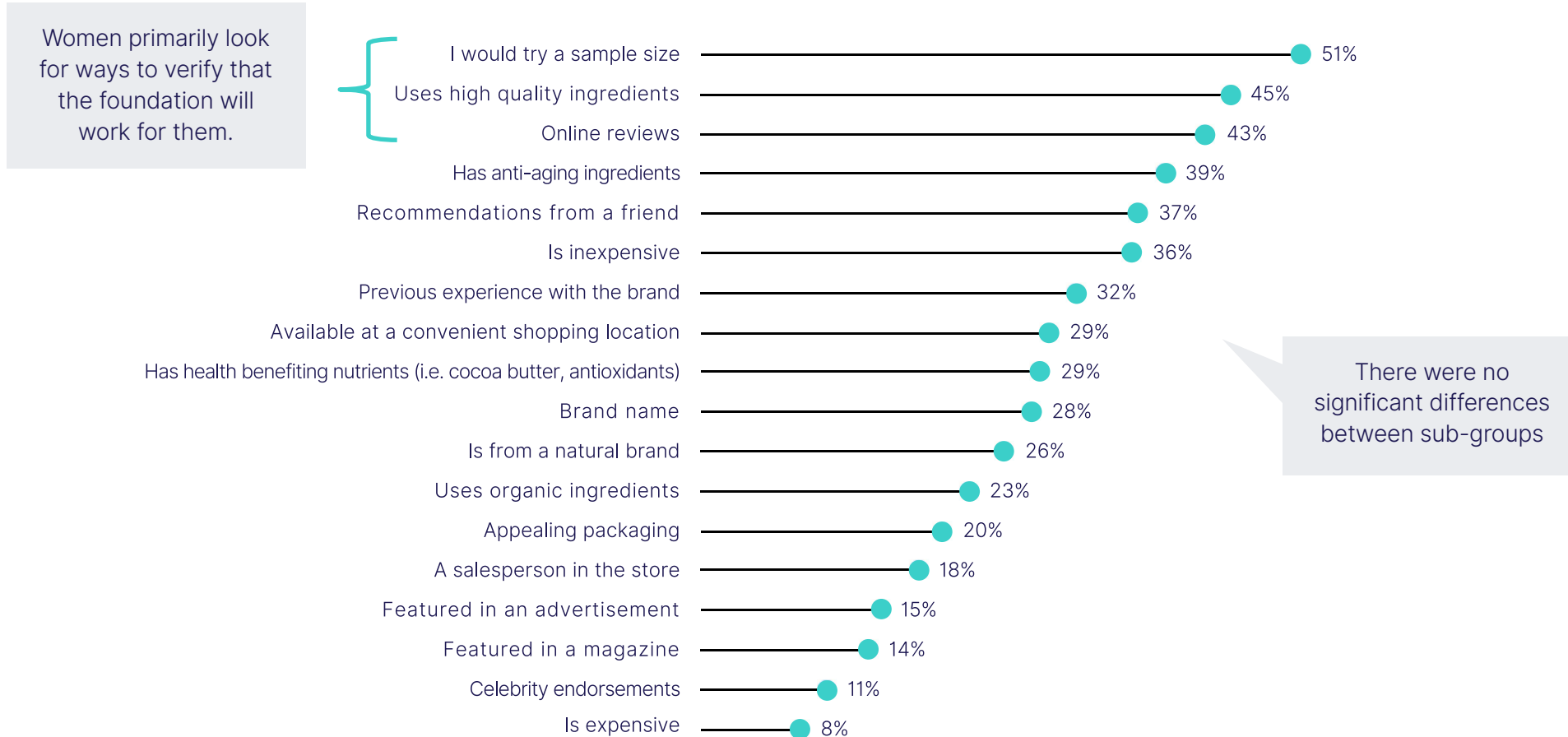




Chapter 1: Reasons to Purchase

Impact On Purchase Decision, Total (n=401)

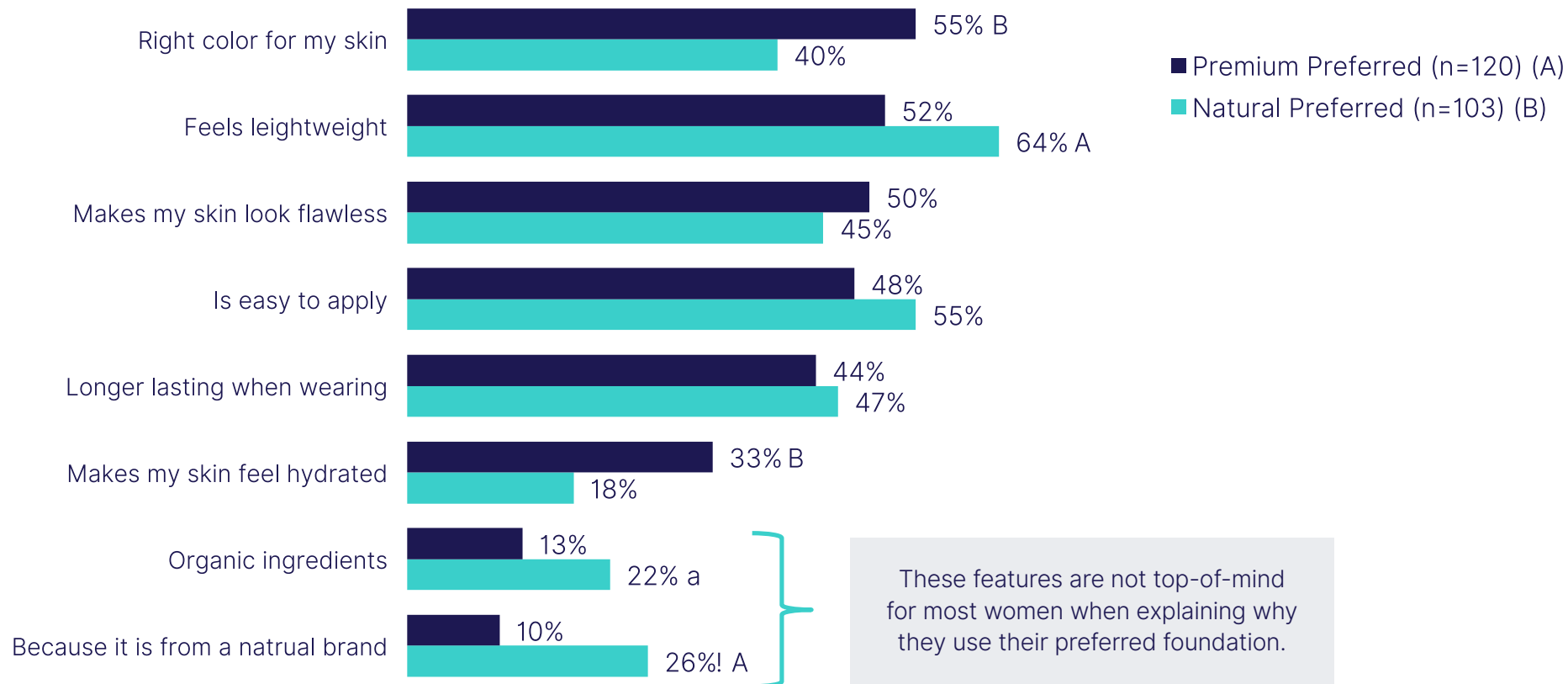
If women wanted to buy a new foundation, a variety of factors could influence their decision about which one to try.



If you were deciding to buy a new kind of foundation, what would impact your decision?

Reasons For Foundation Purchase, Premium Vs Natural Preferred*

Women choose the foundation they do for the same reasons, regardless of the type of brand they prefer.



You said that [pipe: preferred brand] is your favorite brand for foundation. Why do you use that foundation?

*"Premium Preferred" is defined as those whose preferred brand of foundation was classified in analysis as a Premium brand and "Natural Preferred" was classified as a Natural brand.

Note: Subset of reasons women might choose their foundation are pictured, full data can be found in appendix.

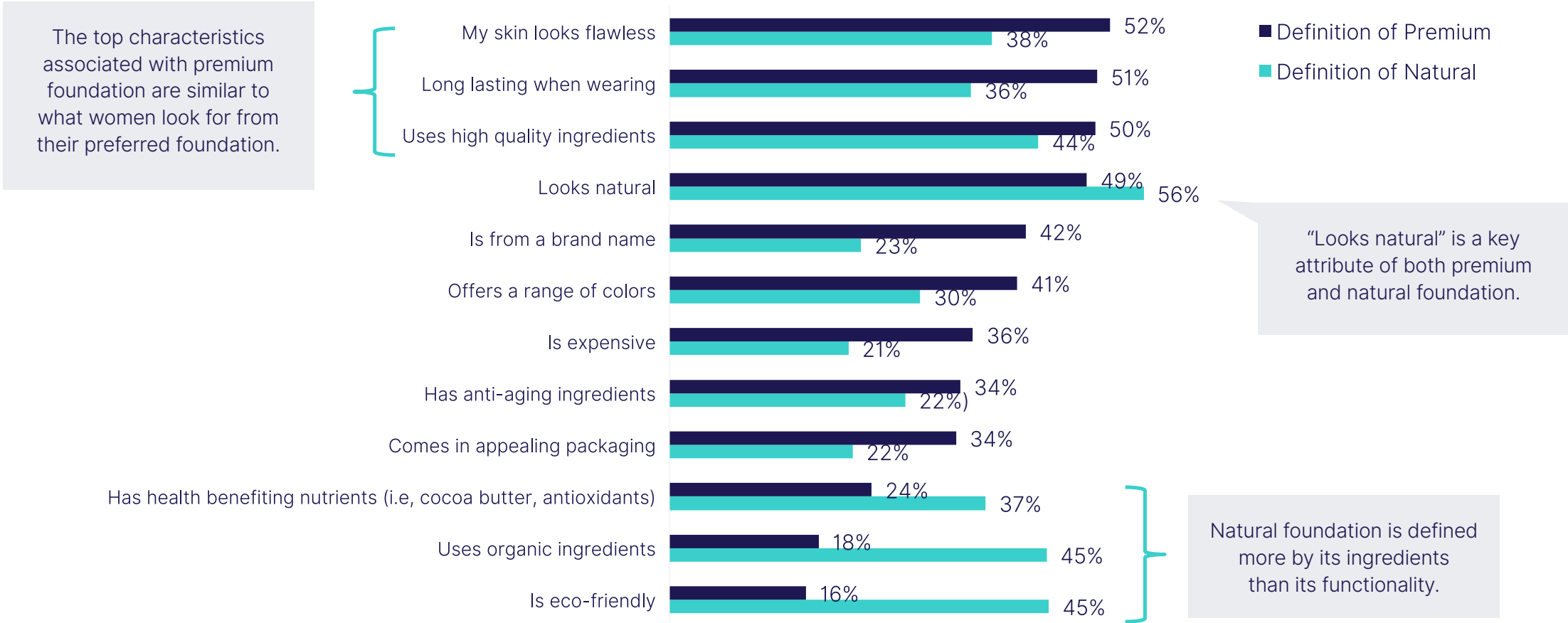
Statistically significant differences are indicated by letters where upper letters indicate significant differences at a 95% confidence interval, lower case at 90%.



Chapter 2: Defining Natural & Premium Foundation

Differentiating Premium and Natural, Total (n=401)

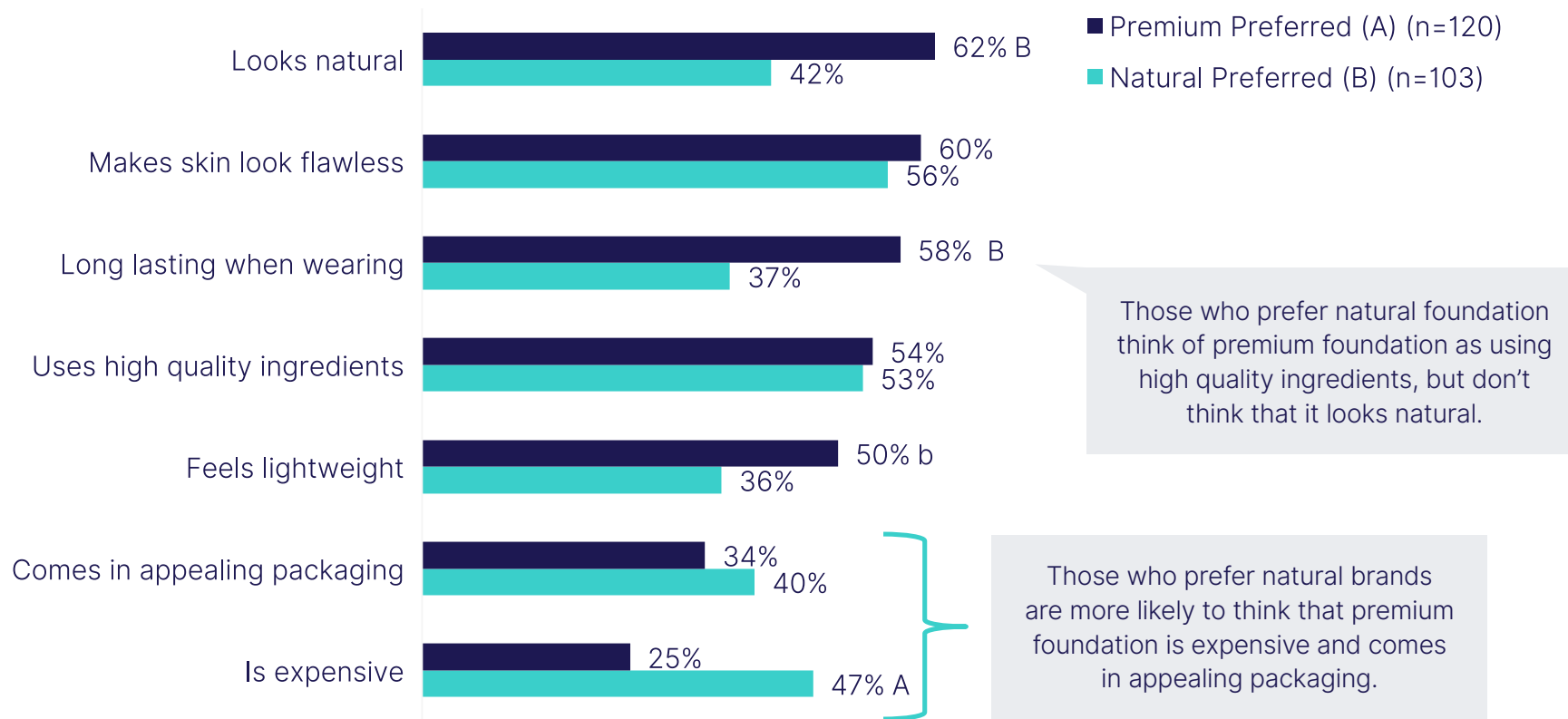
Certain characteristics are more strongly associated with premium foundation than natural foundation.



What are the key characteristics of a foundation from a premium/natural brand?
 Note: Some answer options have been removed. Full data can be found in appendix.

Defining Premium, Premium Vs Natural Preferred*

Regardless of the type of foundation women prefer, they agree that premium foundation makes skin look flawless and uses high quality ingredients.



What are the key characteristics of a foundation from a premium brand?

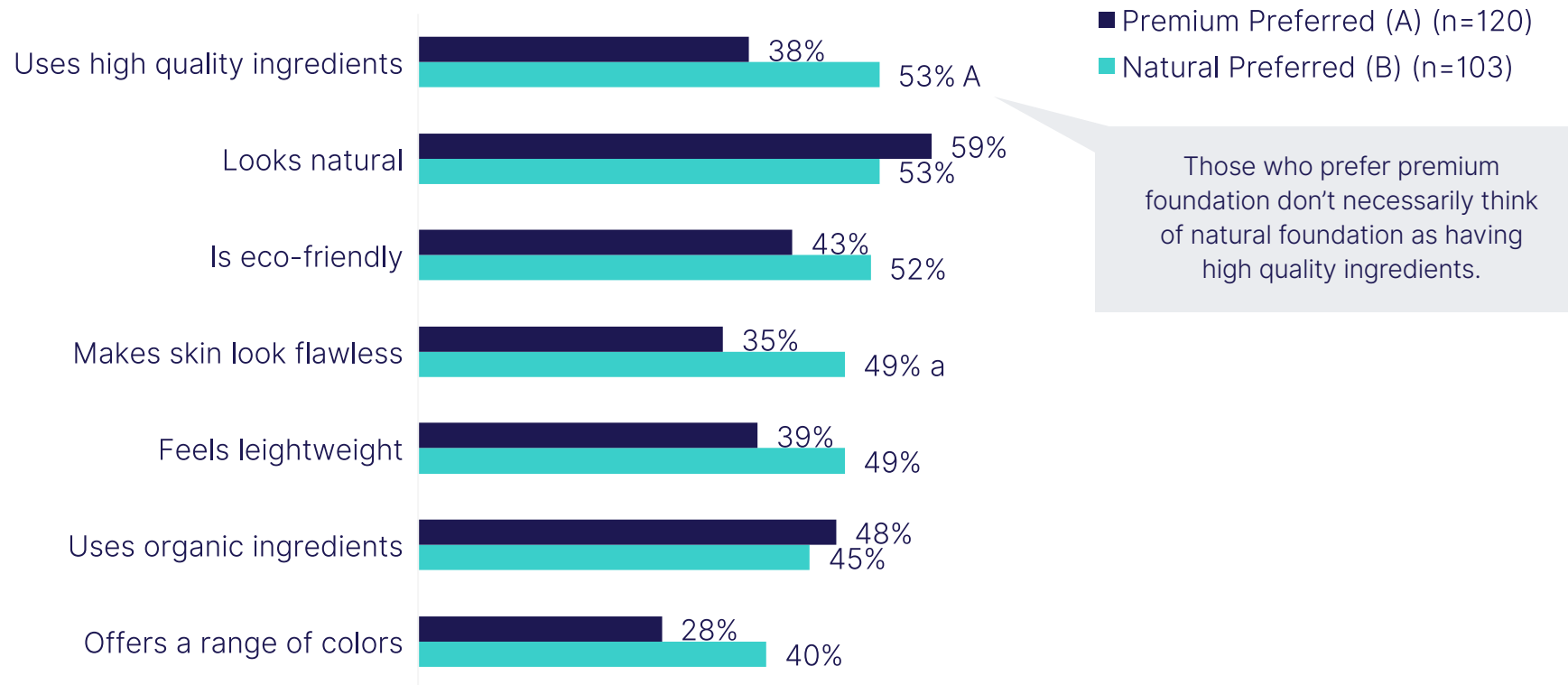
*"Premium Preferred" is defined as those whose preferred brand of foundation was classified in analysis as a Premium brand and "Natural Preferred" was classified as a Natural brand.

Note: Top answers are pictured, full data can be found in appendix.

Statistically significant differences are indicated by letters where upper letters indicate significant differences at a 95% confidence interval, lower case at 90%.

Defining Natural, Premium Vs Natural Preferred*

The key characteristics that women associate with natural foundation are similar to those associated with premium foundation regardless of which type of brand women prefer.



What are the key characteristics of a foundation from a premium brand?

*"Premium Preferred" is defined as those whose preferred brand of foundation was classified in analysis as a Premium brand and "Natural Preferred" was classified as a Natural brand.

Note: Top answers are pictured, full data can be found in appendix.

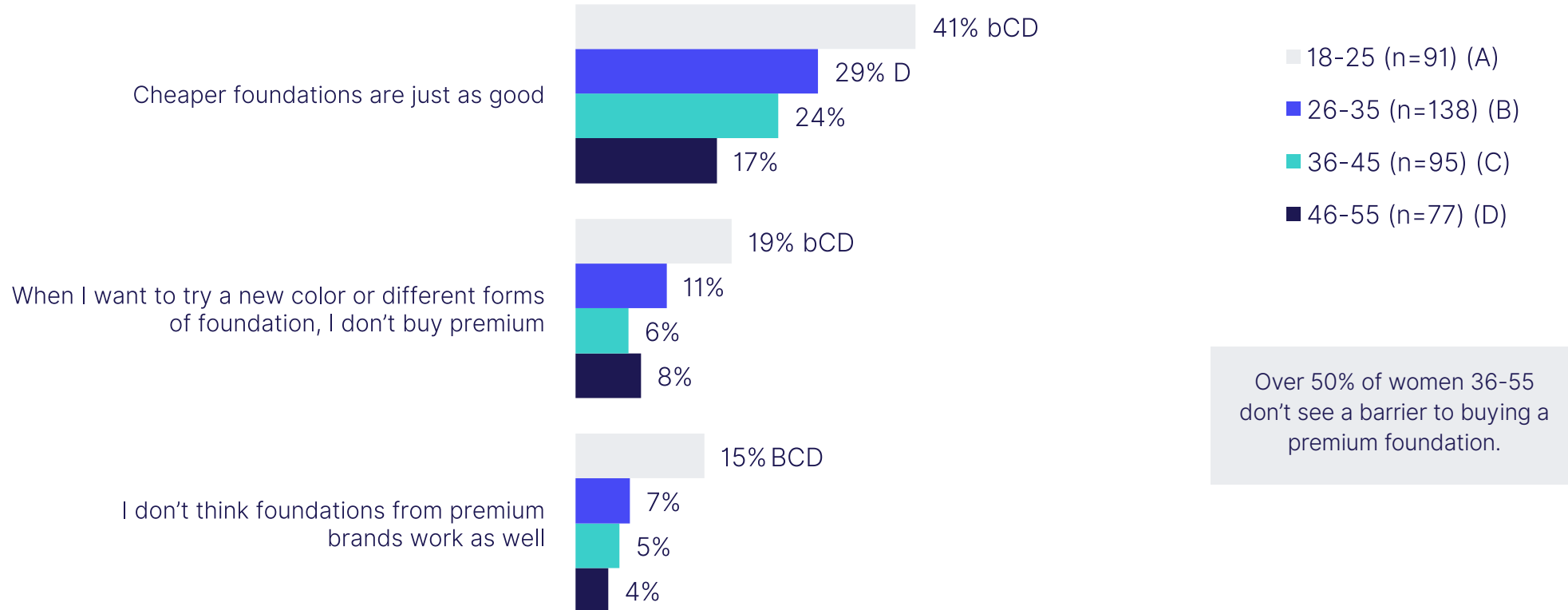
Statistically significant differences are indicated by letters where upper letters indicate significant differences at a 95% confidence interval, lower case at 90%.



Chapter 3: Barriers To Purchase

Reasons Not To Buy Premium, Age

Younger women cite price, variety, and effectiveness as reasons why they wouldn't buy foundation from a premium brand.

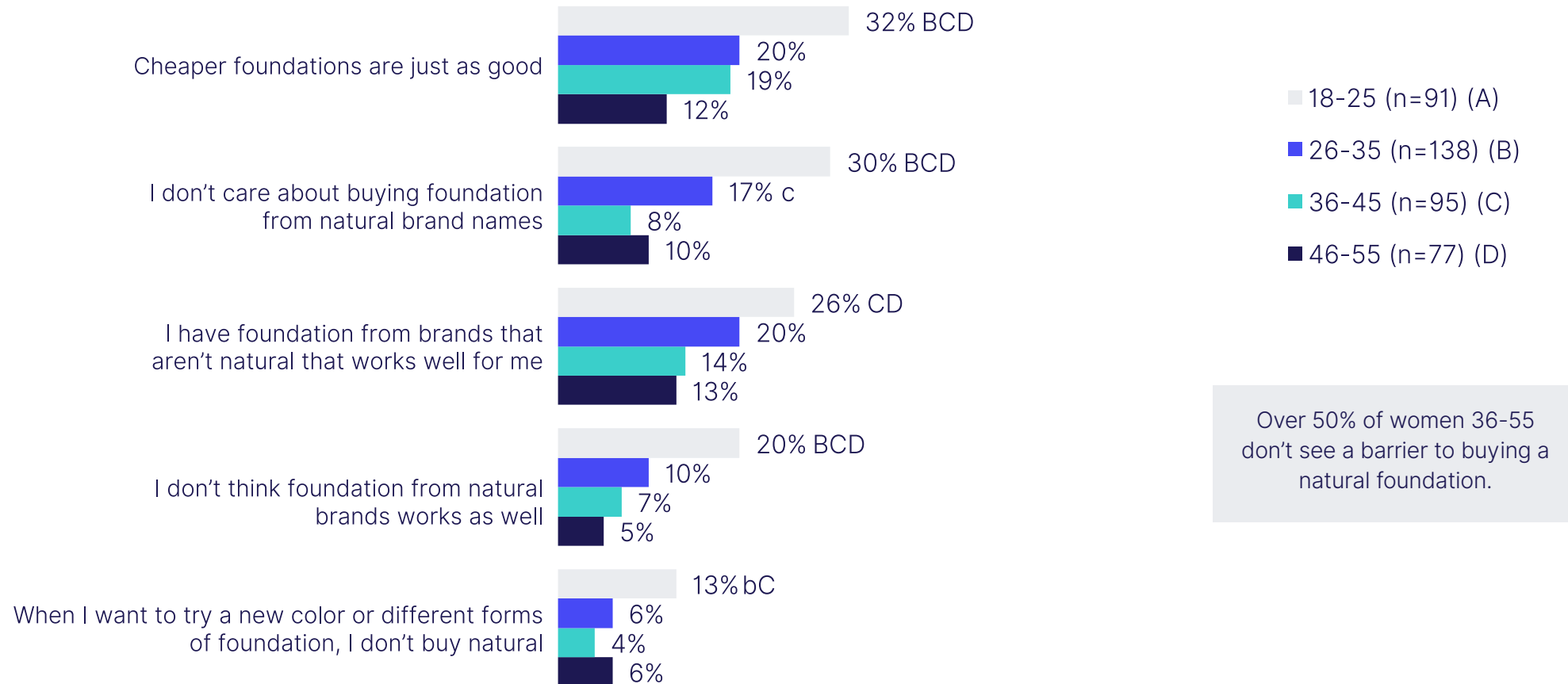


Why would you NOT buy foundation from premium brands?

Statistically significant differences are indicated by letters where upper letters indicate significant differences at a 95% confidence interval, lower case at 90%.

Reasons Not To Buy Natural, Age

Younger women are less likely to buy a natural foundation due to price and the lack of importance / efficacy for them personally.



Why would you NOT buy foundation from natural brands?

Statistically significant differences are indicated by letters where upper letters indicate significant differences at a 95% confidence interval, lower case at 90%.



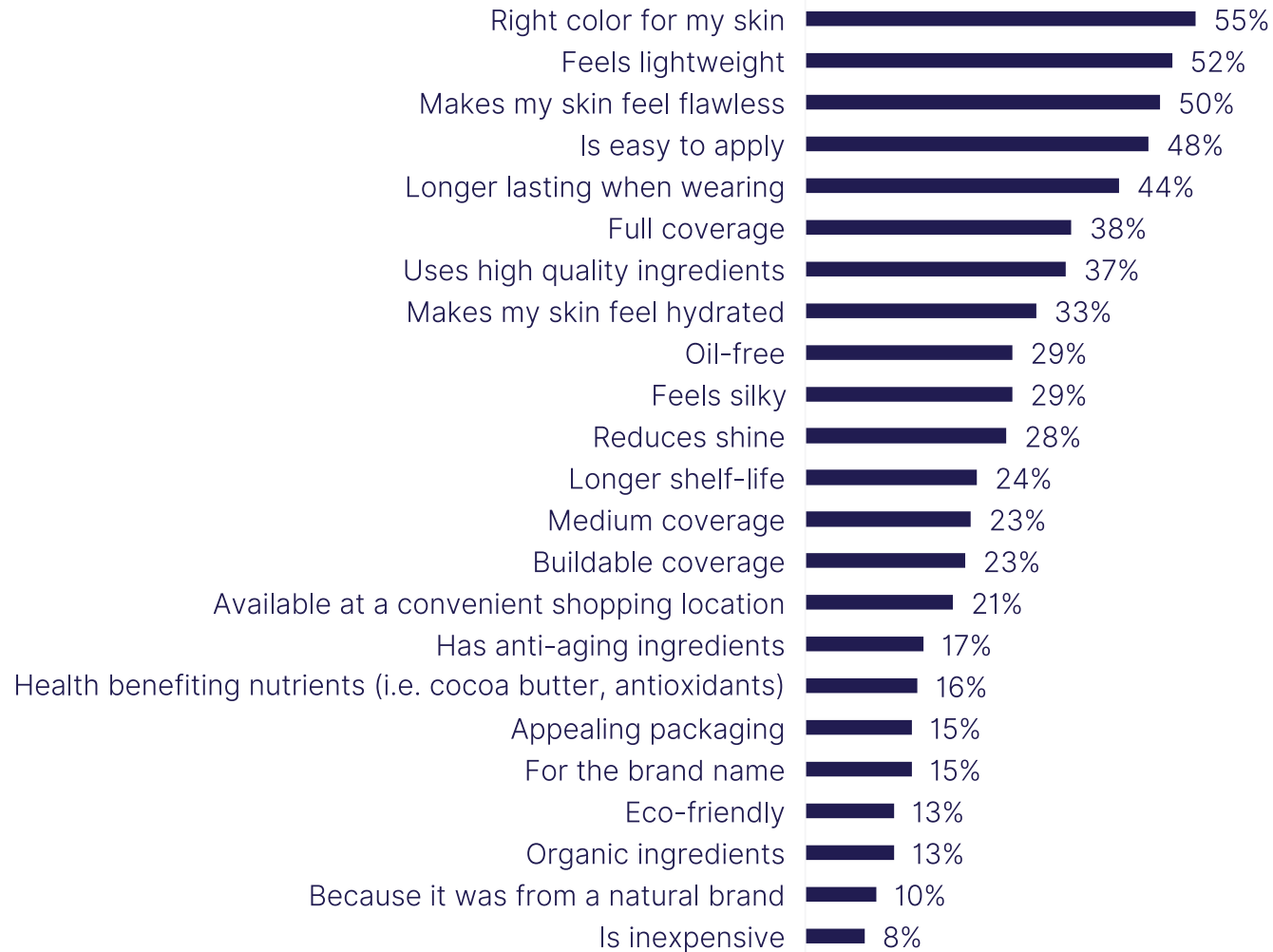
Appendix

Reasons For Foundation Purchase, Total (n=401)



You said that [pipe: preferred brand] is your favorite brand for foundation. Why do you use that foundation?

Reasons For Foundation Purchase, Premium Preferred (n=120)



You said that [pipe: preferred brand] is your favorite brand for foundation. Why do you use that foundation?

"Premium Preferred" is defined as those whose preferred brand of foundation was classified in analysis as a Premium brand.

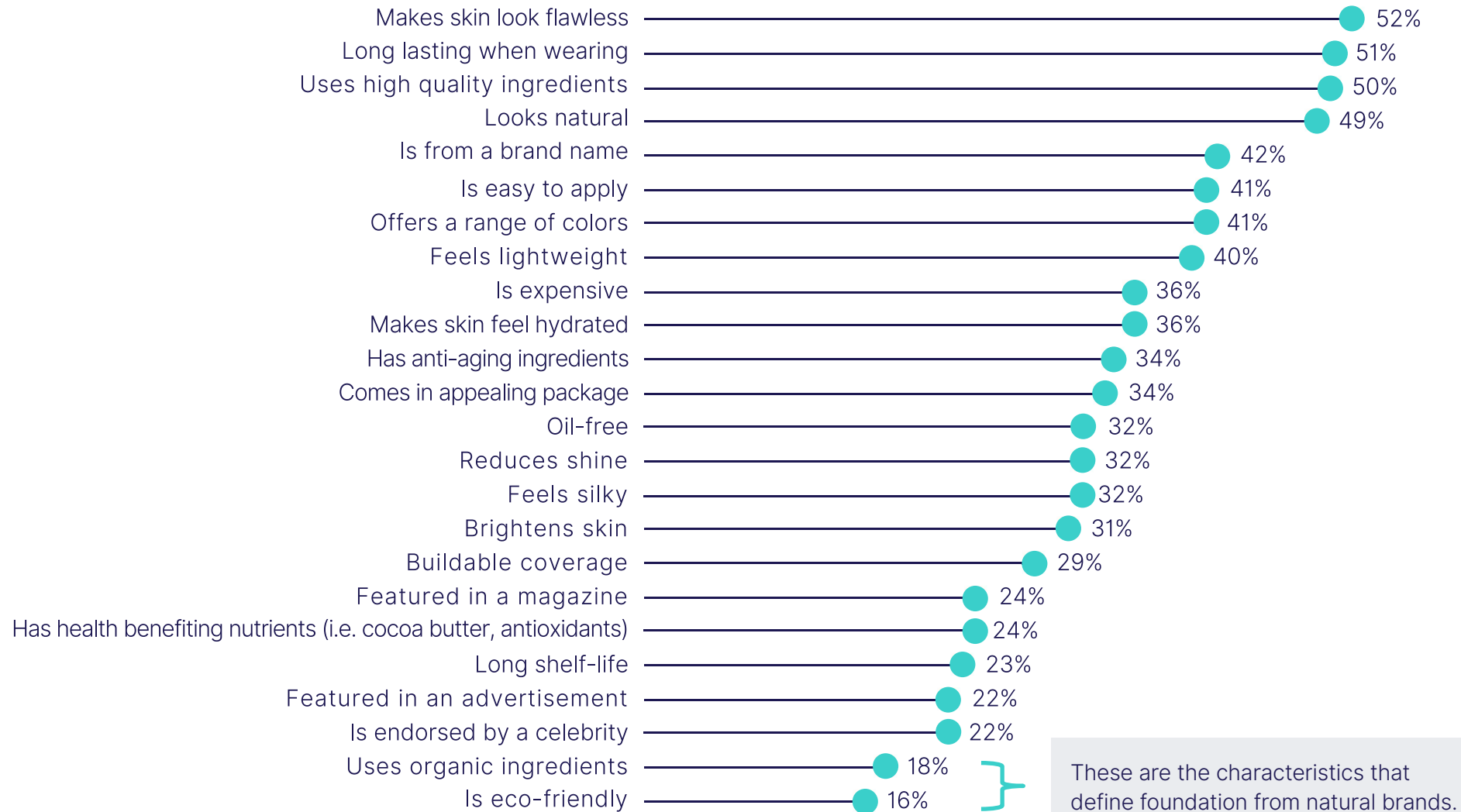
Reasons For Foundation Purchase, Premium Preferred (n=103)



You said that [pipe: preferred brand] is your favorite brand for foundation. Why do you use that foundation?

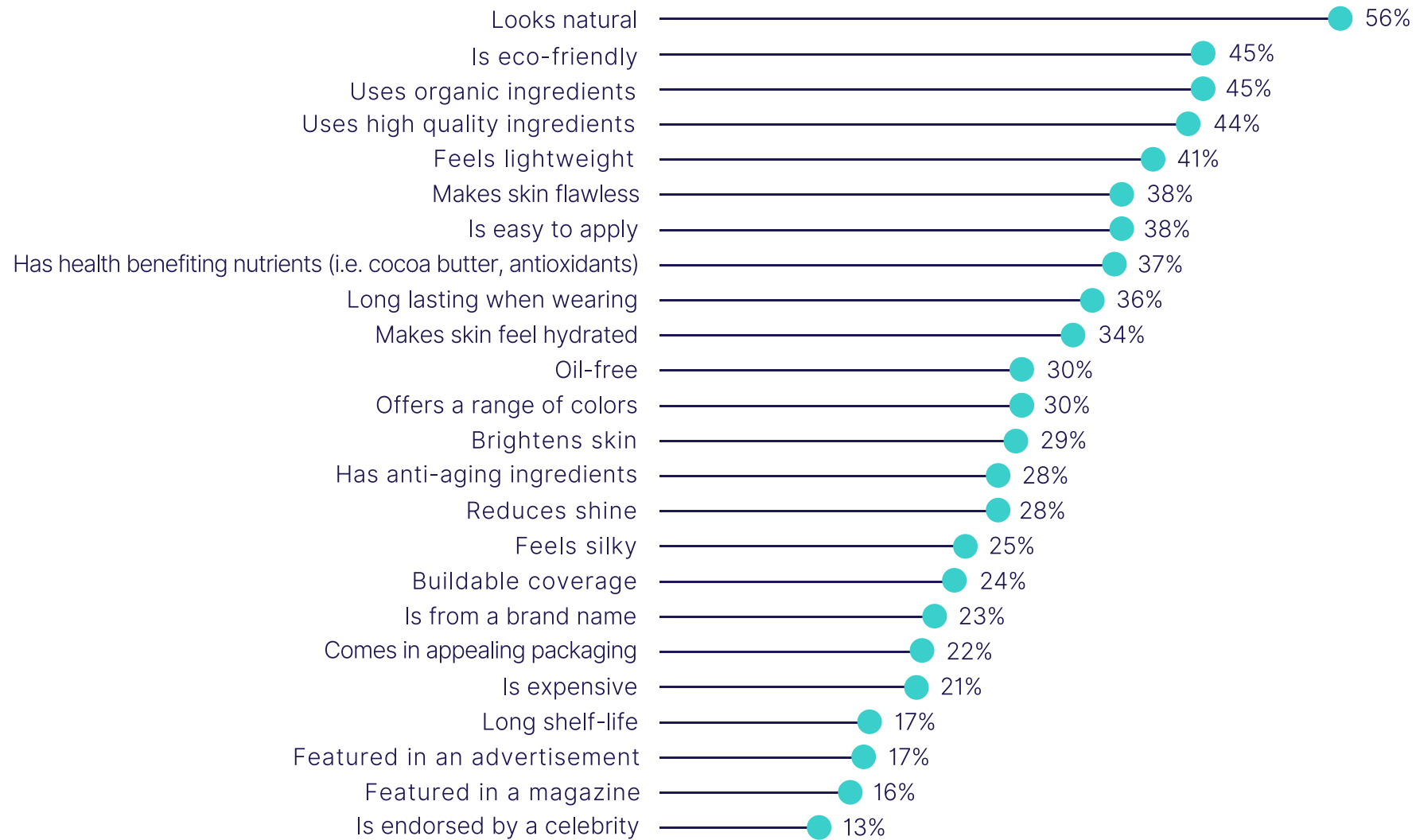
"Natural Preferred" is defined as those whose preferred brand of foundation was in analysis as a Natural brand.

Defining Premium, Total (n=401)



What are the key characteristics of a foundation from a premium brand?

Defining Natural, Total (n=401)



What are the key characteristics of a foundation from a natural brand?

Appendix: Sample Demographics (US n=401)

| Gender | |
|--------|------|
| Male | - |
| Female | 100% |

| Age | UK |
|-------------|-----|
| Under 18 | - |
| 18 to 25 | 23% |
| 26 to 35 | 34% |
| 36 to 45 | 24% |
| 46 to 55 | 19% |
| 56 to 65 | - |
| 66 or older | - |

| Household Income | |
|---------------------|-----|
| Less than \$20,000 | 11% |
| \$20,000-\$29,999 | 11% |
| \$30,000-\$39,999 | 12% |
| \$40,000-\$49,999 | 11% |
| \$50,000-\$59,999 | 11% |
| \$60,000-\$69,999 | 7% |
| \$70,000-\$79,999 | 9% |
| \$80,000-\$89,999 | 5% |
| \$90,000-\$99,999 | 5% |
| \$100,000-\$124,999 | 8% |
| \$125,000-\$149,999 | 3% |
| \$150,000 or higher | 6% |
| I prefer not to say | 1% |

| Region | |
|--|-----|
| Midwest - IL, IN, IA, KS, MI, MN, MO, NE, ND, OH, SD, WI | 21% |
| Northeast - CT, ME, MA, NH, NJ, NY, PA, RI, VT | 18% |
| South - AL, AR, DC, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV | 39% |
| West -AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY | 22% |

| Children in HH | |
|----------------|-----|
| 0 | 41% |
| 1 | 26% |
| 2 | 20% |
| 3 | 7% |
| 4 | 3% |
| 5 or more | 1% |

Appendix: Sample Demographics (US n=401)

| Frequency of Makeup | |
|----------------------------|-----|
| Every day | 56% |
| 4-6 times per week | 44% |
| 2-3 times per week | - |
| Once a week | - |
| A few times per month | - |
| Once a month or less often | - |

| Natural Considerer | |
|----------------------------|-----|
| Very likely | 58% |
| Likely | 42% |
| Neither likely or unlikely | - |
| Unlikely | - |
| Very unlikely | - |

| Premium Considerer | |
|----------------------------|-----|
| Very likely | 45% |
| Likely | 55% |
| Neither likely or unlikely | - |
| Unlikely | - |
| Very unlikely | - |

| Types of Makeup Worn | |
|-----------------------|------|
| Eyeliner | 80% |
| Mascara | 90% |
| Eye shadow | 77% |
| Foundation | 100% |
| Concealer | 75% |
| Bronzer | 44% |
| Blush | 71% |
| Lipstick | 65% |
| Lip gloss | 64% |
| Other, please specify | 5% |
| None of the above | - |