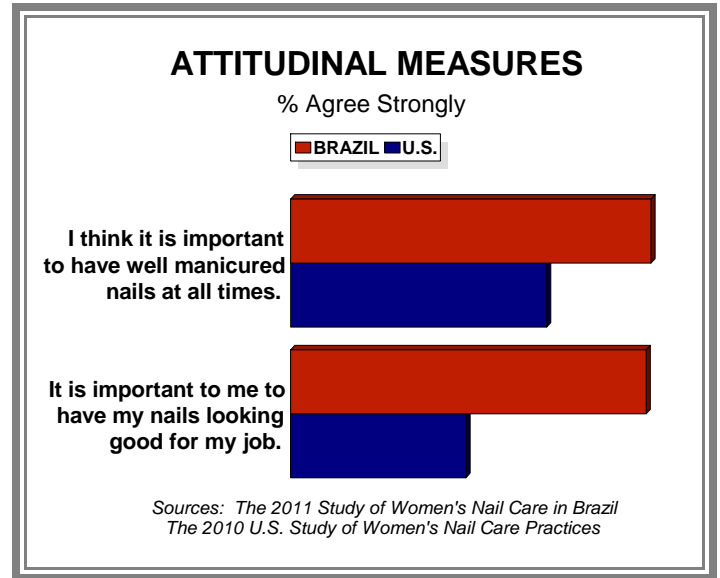


THE 2011 TARGET MARKET REPORT ON

# WOMEN'S NAIL CARE: BRAZIL vs. the U.S.

Recent research on women's nail care in Brazil and the U.S. shows strong cultural differences, for example, the importance of having well manicured nails *at all times* and nails that look good for the job (see chart).

Now, to further examine nail care differences in Brazil vs the U.S., Multi-sponsor Surveys International, LLC is offering *The 2011 Target Market Report on Women's Nail Care: Brazil vs. the U.S.* This report will examine differences between the markets on attitudes towards nail care, at home vs salon manicure and pedicure practices, preferred nail polish colors and styles, nail polish purchase criteria and satisfaction, among other measures. In addition, the report will provide an overview of the key differences between the markets and suggested market opportunities.



Some of the research questions that will be answered by this report include:

- How frequent are at home mani/pedis - Brazil vs the U.S.?
- What are the preferred nail length/shape and polish colors/finishes?
- What nail polish attributes drive purchase - colors/finishes or coverage/durability?
- How well does nail polish deliver on these key purchase criteria - Brazil vs the U.S.?
- How much concern is there about hygiene in salon mani/pedis?
- What are the nail care market opportunities in Brazil? In the U.S.?

**SEE REVERSE SIDE FOR A COMPLETE LIST OF REPORT TOPICS**

This report is drawn from two studies conducted among women who spend a lot of time on their nails each week (>15 minutes) and have used nail polish in the past month, including:

*The 2010 U.S. Study of Women's Nail Care Practices (n=777)*

*The 2011 Study of Women's Nail Care in Brazil (n=316)*

<b>PRICE:</b>	<b>\$4,900 if purchased by June 17, 2011; \$5,700 thereafter.</b> (Subject to NY or NJ state sales tax where applicable.)
<b>ISSUE DATE:</b>	July 2011
<b>DELIVERABLES:</b>	PowerPoint SUMMARY REPORT includes KEY FINDINGS section, followed by in-depth Summary, including graphs and charts depicting survey findings.

# WOMEN'S NAIL CARE: BRAZIL vs. the U.S.

COMPARISONS WILL BE MADE ON EACH OF THE FOLLOWING TOPIC AREAS:

## MANICURE HABITS AND PREFERENCES

Among past month polish users . . .

- Frequency give self full manicure at home
- Frequency go to a salon for a manicure, pedicure
- Type of salon usually go to
  - Beauty salon/full service salon
  - Nail salon
  - Nail bar (offer express color changes only)
  - Spa
  - Manicurist comes to my home
- Frequency bring own nail polish to salon
- Frequency polish fingernails, toenails by season
  - Summer
  - Winter
- Preferred polish colors and finishes
- Preferred fingernail styles and length
- Frequency use base coat, top coat when polishing nails
- Other nail products used and frequency of use

## ATTITUDES ABOUT NAIL CARE

- Agree/disagree ratings on attitudinal statements
  - I like to make my own unique fashion statements*
  - Salon polish brands are worth the extra money*
  - I am really into the new trendy nail polish colors*
  - I like a bold look for my nails*
  - It is important to have my nails looking good for my job*
  - It is more important for me to have neat and tidy looking nails than highly manicured nails*
  - I am concerned about the chemicals that are used in my nail polish*
- Rating of own skill level of working on fingernails

## PURCHASE CRITERIA/SATISFACTION

- Importance of factors in purchase of nail polish
 

<i>Ease of application</i>	<i>Fast drying</i>
<i>No streaking</i>	<i>Having the right colors</i>
<i>Having trendsetting colors</i>	<i>Good coverage</i>
<i>Long wearing</i>	<i>Brush/applicator</i>
<i>High shine/gloss/special finish</i>	<i>Brand name</i>
<i>Low price</i>	<i>Available where I shop</i>
- Satisfaction with brand use most often on purchase factors
- Need/Gap analysis of Importance vs Satisfaction
- Brand loyalty when shopping if brand not available:

## SHOPPING BEHAVIOR

- Where nail polish/lacquer usually purchased
- Rating of store's supply of nail polish
  - Usually has a good supply
  - Sometimes out of stock
  - Never has the right color
- Amount usually spend per bottle of polish
- Number of bottles, new colors purchased in past year
- Number of bottles own

## OVERALL MARKET COMPARISONS

- Key differences in attitudes, practices between Brazilian and American women's nail care
- Opportunities for each market

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*As a syndicated research offering, all findings are solely for the confidential use of subscribers in making internal marketing and management decisions.*