

2019 eCommerce Cosmetics trends: **How European women purchase cosmetics online**



Photoslurp

zinklar

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Photoslurp and Zinklar partnered together to create this research for the cosmetics eCommerce industry.

Photoslurp is a marketing and visual eCommerce platform. We help brands increase their eCommerce conversions with the collection and publication of User Generated Content, which has been posted on social media by customers. Photoslurp integrates this media onto the websites and product pages of clients to give shoppers the opportunity to view products being used by real consumers, with the ability to click and shop directly.

Zinklar is the SaaS platform that delivers results in real time and turns Market Research into an everyday solution for brands globally. This research was conducted through the Zinklar platform.



Introduction

The eCommerce cosmetics industry faces unique challenges when distributing products within the online market. **Brands are constantly grappling with how to inspire customers to purchase without the opportunity to experience the product for themselves.** Meanwhile, cosmetics consumers increasingly grow more interested in purchasing beauty products over the internet, pushing eCommerce brands to discover new ways to build a user-friendly and compelling online shopping experience.

While all industries are adjusting to the online customer-to-brand relationship, the cosmetics industry is particularly vulnerable to the many hurdles that come with selling their products over the internet.

Though shopping choices are always based on personal taste, the cosmetics world takes this rule to a whole new level. In this market, buyers have more on their mind than just personal style or identity; with cosmetics products, they must also consider skin and hair type, skin sensitivity, health, and much more.

What would be met, in-store, with testers, free sampling, and in-store make-overs, can't be handled the same way online. These distinct challenges lead us to question how cosmetic brands can best sell their products on the internet, without the ability to get customers' hands on the product before purchase like they would in a store.

While new opportunities are developed regularly—for example different forms of customer reviews, digital presentations of how products are made or used, or influencer demonstrations



and recommendations of products— there’s a monstrous gap in our understanding of which tools actually inspire online shoppers on the hunt for cosmetics.

Rather than take broad stabs into the dark, eCommerce brands need to make informed decisions in order to get the ROI that keeps the brand afloat.

For this reason, this study looks at the shopping habits of women in five key countries in Europe: United Kingdom, Germany, Spain, France, and Italy. Research of this nature helps us understand what motivates, inspires, and encourages them to purchase cosmetics brands online and answers the question: how can cosmetic brands optimize their online shopping journey to fit the needs of their customers?

With our expertise in the eCommerce industry and experience working with online cosmetics brands, we interviewed women across Europe to develop the most comprehensive report to date on what women look for while shopping online. Looking at features like customer reviews, how-to videos, and images of other customers using the products, we also examined how impactful devices such as discounts/ promotions, purchasing conditions, and return policies are to conversions.

With this information, cosmetics brands will have the ability to make more informed decisions when designing and creating their online stores. To find these answers, first, we must first look at the main challenges that come up for eCommerce cosmetics brands.





CHAPTER 1

The challenges of selling cosmetics online

After more than five years working within the eCommerce industry, continuously speaking with top brands and interviewing industry leaders, we developed five industry standard challenges that cosmetics brands face when taking to eCommerce. They help us to better understand how customers respond to the ever-changing world of online shopping.

Those challenges are:

1

Convincing customers to keep coming back to their brand, as cosmetics products are generally purchased on a rolling basis and not on a daily or weekly basis.

While the public tends to purchase cosmetics throughout the year, beauty and health products are not generally bought every day or even every week. This means that cosmetics brands are constantly challenged to reach and inspire their customers throughout the entire year to keep them interested in purchasing from their brand.

This brings us to challenge number two.

2

Competing within a congested market, where customers can quickly change between products and brands.

The availability of cosmetics products, through retailers and more, also poses a challenge for online brands. Customers need a specific reason to keep coming back to one brand, whether it be the products, ease of purchase, or an inspiring brand image.

The availability of varied products with different uses or advantages encourages shoppers to spread themselves within the market. How can cosmetics brands convince users to keep coming back to their eCommerce?

And, perhaps more importantly, how can you get customers to try your products in the first place?

3

Showing customers how well their products work without being able to test them for themselves.

This is perhaps the biggest disadvantage when selling cosmetics online. In-store, brands rely on the performance of their products when customers try them, including testing for ease-of-use and skin or hair tone matching (depending on the product).

Without the ability to show customers how products feel or how well they work, brands are developing new ways of proving that through their eCommerce. We will discuss these new tools further on in Part 3 of this report.

Additionally, many cosmetic products - especially make-up and beauty - perform best when used correctly. In-store, sales associates can effectively demonstrate this to potential customers to ensure that they get the desired effect. The same cannot be said about eCommerce, which brings us to challenge number four.

4

Teaching customers how to use their products to demonstrate effectiveness and keep customers coming back.

Customers who purchase online may try a product without learning how to use it and assume that it isn't very effective. Online cosmetic brands are developing new ways to rectify the distance that's created between sellers and buyers online. This is also important for remedying the fifth challenge.

5

Inspiring shoppers enough to make the brand a part of their everyday lives / routines.

With social media engagement often used as a KPI for brand development, it's obvious to see that inspiring everyday users is crucial to creating a brand identity that gets customers to keep coming back. There's a lot to be said for building a devoted brand community - one that openly engages with your brand and will even create content featuring your products when asked.

Our solution

These five challenges create an interesting environment for opening up to the online market. One that can be very fruitful, if online brands know how to leverage their eCommerce presence effectively.

So with these five challenges in mind, we surveyed females who have purchased cosmetics within the past year within the UK, Germany, Spain, France and Italy to learn what affects their cosmetics purchasing decisions.

To make the results as comprehensive as possible, this research addresses these challenges and our findings with four questions:

1. How often do customers purchase cosmetics online?
2. Where do customers purchase cosmetics online?
3. What products are customers interested in purchasing?
4. What inspires customers to purchase cosmetics online?

By looking at buyer behavior under these four questions, cosmetics brands will have a better understanding of how to use each to improve the online shopping journey of their online store.



CHAPTER 2

Research results

There is a clear gap in our understanding of how customers purchase cosmetics on a large scale, one that accounts for multi-country analysis and that includes the newer techniques that online brands are using today. For that reason, we surveyed 1,500 women within the UK, Germany, Spain, France, and Italy to fill this gap in our knowledge.

Here is what we found.

****Please note that some data and tables will be found in the annex at the end of the survey.***

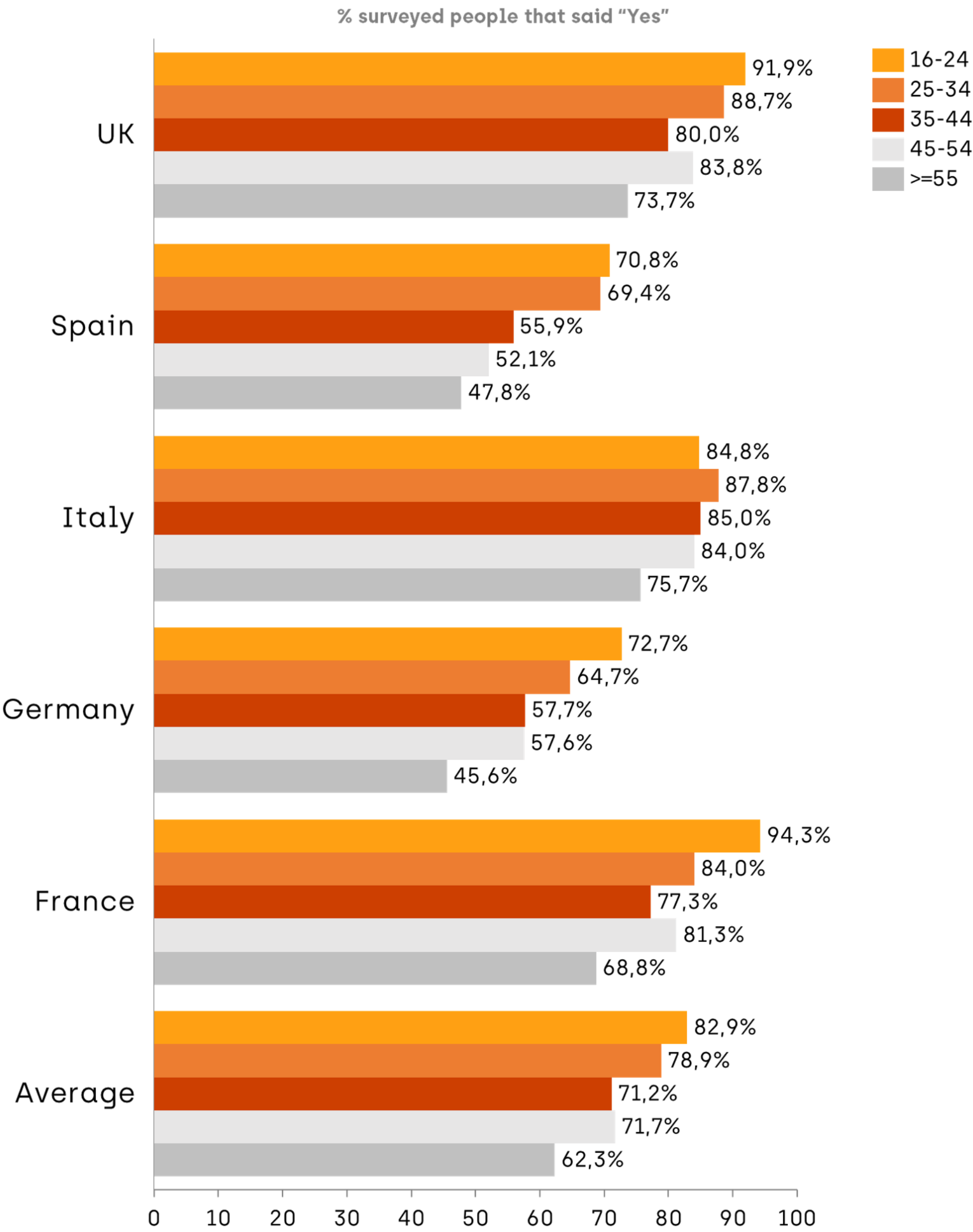
QUESTION 1

How often do customers purchase cosmetics online?

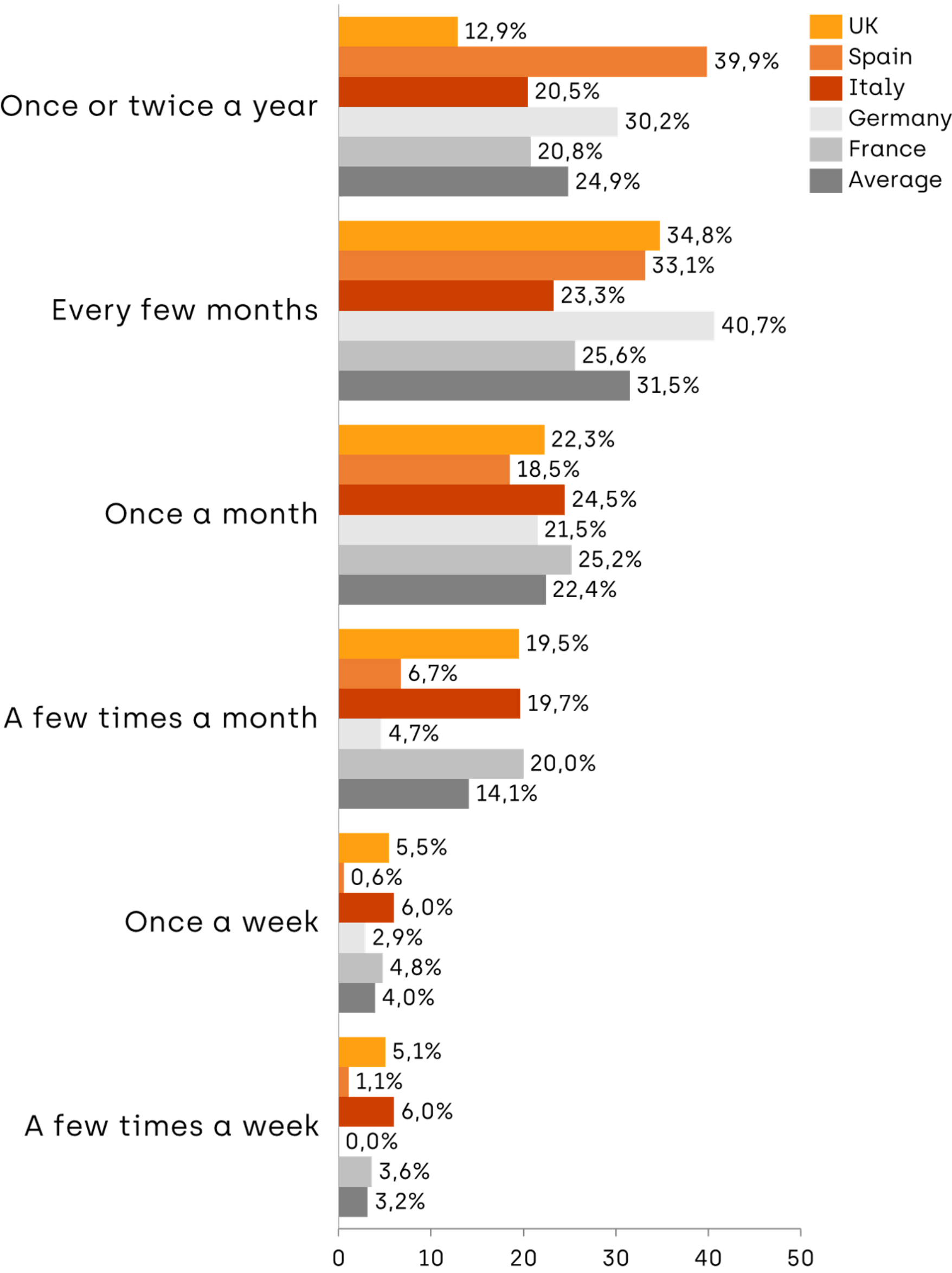
Key summary: Cosmetics products are generally not bought weekly or daily but over the span of months and on a rolling basis.

Key statistic: 73.9% of our respondents have bought cosmetics online in the last 12 months.

Have you bought cosmetics online in the last 12 months?



How often would you say you buy cosmetics online? By country

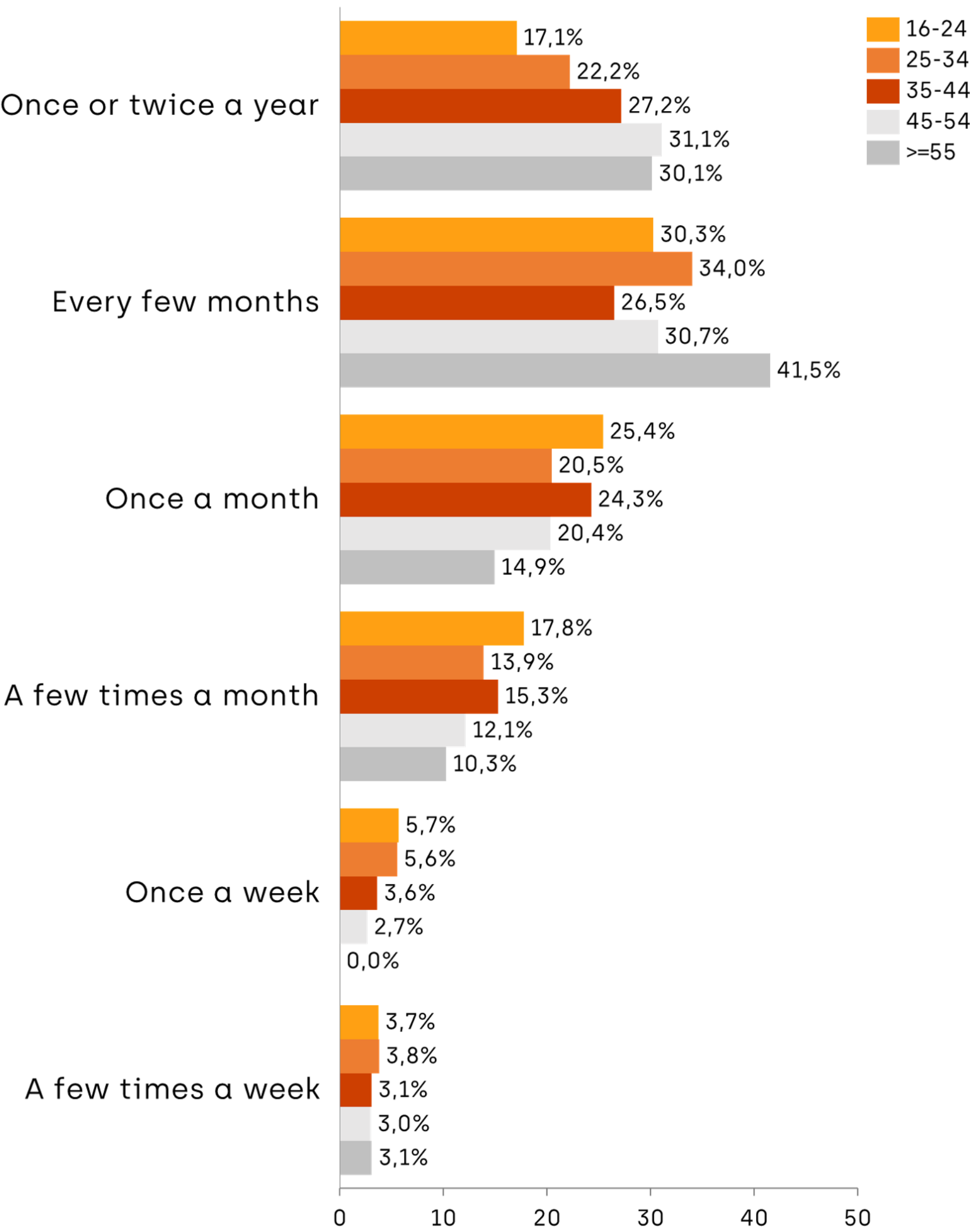


Key learnings

- The UK, France and Italy have the highest numbers of female consumers who have shopped online for cosmetics in the past 12 months, with 85.3%, 83.3% and 83.0%.
- Compared to Spain and Germany who only have 60.3% and 57.3%.
- All countries except Italy have the age category of 16-24 with the highest claims to have bought cosmetics. For Italy, it was ages 25-34 .
- 1/3 of UK women shop online for cosmetics mostly every few months.



How often would you say you buy cosmetics online? By age



Key learnings [continued]

- Women in France shop online for cosmetics mostly every few months (25.6%), followed closely by once a month (25.2%).
- Women in Spain shop online for cosmetics mostly once or twice or year (39.9%), followed by every few months or so (33.1%)
- 40.7% of women in Germany mostly buy cosmetics online every few month.
- Women in Italy mostly buy cosmetics online once a month (20.4%), followed closely by every few months (23.3%)
- 31.5% of all respondents who have bought cosmetics in the last 12 months buy cosmetics every few months. Compared to buying a few times a week 3.2%.

Insight Analysis:

What we learn from the first part of this research is that cosmetics are goods that tend to be bought occasionally rather than on a weekly or daily basis. This can be seen quite clearly in the fact that 31.5% of all the respondents who have bought cosmetics in the last 12 months buy cosmetics every few months, compared to buying a few times a week with 3.2%.



While it may seem obvious, this validates our perception that customers are constantly looking to expand their cosmetics collection on a rolling basis but with less frequency than everyday products (think the amount of time it takes to finish up their tube of product). Another trend that we see from this section of the survey is that the younger respondents were, the more likely they were to purchase cosmetics more often. Reasons for this could be based around cost, as potentially younger people are buying less expensive products in higher quantities or it could be the generational switch into shopping in a digital world.



The learnings from this data is useful in understanding the sales cycle for cosmetics brands in Europe in order to create a more effective selling environment. Moving on to part two, we'll have a look into where shoppers go online to find their beauty products.

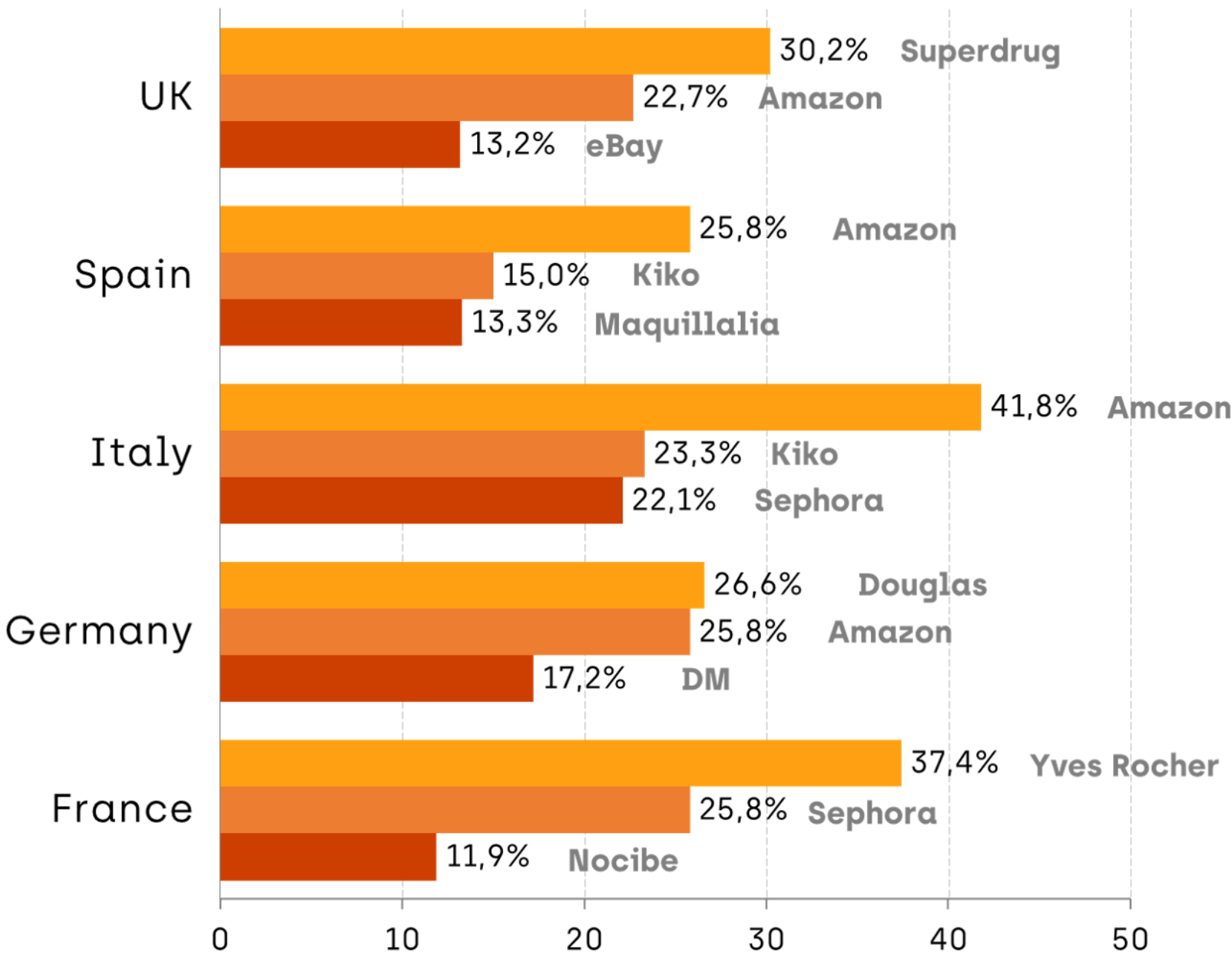
QUESTION 2

Where do customers purchase cosmetics online?

Key summary: European women tend to purchase their cosmetics products from big retail websites with various products more than from individual brand websites.

Key statistic: Amazon is one of the top three websites used to buy cosmetics online in all the countries surveyed except for France.

From which websites do you tend to make regular purchases of cosmetics?



Key learnings

- Amazon is the most popular online space to shop for cosmetics products online.
- Women tend to buy more from a big retailing website with various cosmetics options compared to the individual cosmetic brand website.
- There was a slight difference in the website top three for ages 16-24 most of the times compared to ages older than that who tended to have similar rankings. (Data in annex)
- Each country has a popular place for shopping for cosmetics products. (Data in annex)

Insight Analysis:

To understand where shoppers go when it comes to purchasing cosmetics, we asked our respondents to name their top online shops for placing beauty orders. It doesn't come as a surprise that Amazon was placed within the top three in the majority of the countries, with only France ranking it number 6. But they still included another well-known cosmetics retailer in their top 3: Sephora.

From these results, we can deduce that women are more interested in purchasing cosmetics from big retailing websites with various cosmetic options compared to individual brand websites. With more choice and the ability to make cross-brand purchases on one go, there are potential incentives for shopping with retailers, including delivery and shipping for only one order with multiple brands.

Plus, Amazon is known for its ease of purchase and returns, which brings customers back to the site. This is especially for cosmetics shoppers who already know what products they want to use. As devoted users of particular products, they simply want to enter a site that will make it easier to get exactly what they need for each part of their daily beauty routine.

We can also see cultural trends from this question, as each country had specific stores that continued to crop up in our results. A lot of these were specific retailers to each market, like Maquillalia (Spain), Superdrug (UK), and some well-known brand names like Yves Rocher & Nocibe (France). As well as Douglas & DM in Germany, Kiko in both Spain & Italy, and Sephora in Italy. Further on in our report, we hear from top Spanish cosmetics brand, Maquillalia, in a case study about their eCommerce efforts as an online cosmetics retailer.

Now that we understand where cosmetics are purchased, let's turn to the most insightful of our sections: What encourages online customers to buy cosmetics online?



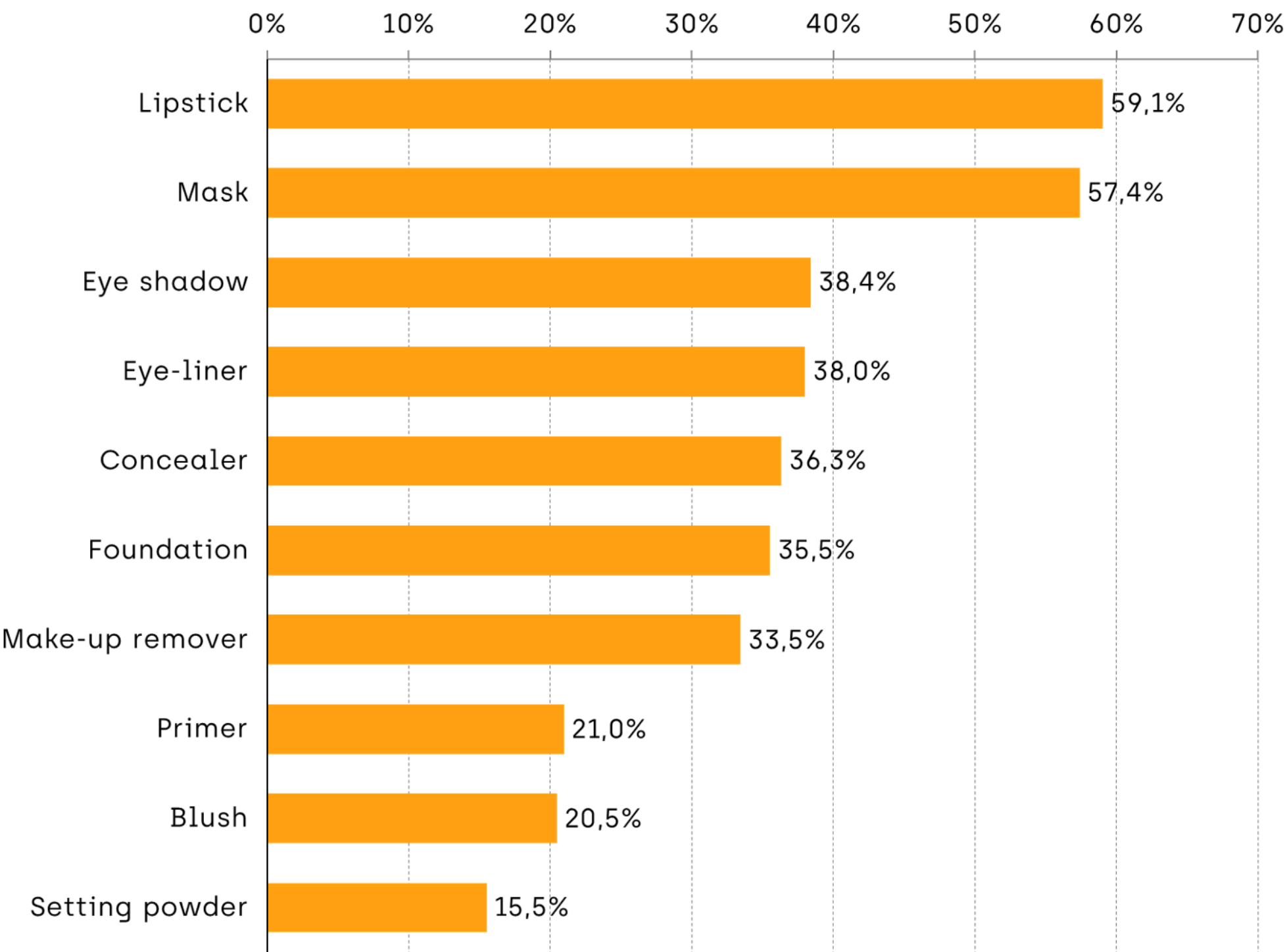
QUESTION 3

What products are customers interested in purchasing?

Key summary: Lipstick is the most popular product for purchasing online.

Key statistic: 30.4% of respondents considered sensitive skin products, followed closely by cruelty free products (30.1%), as the most important attributes when buying products online.

Which of these products would you say you buy regularly online?

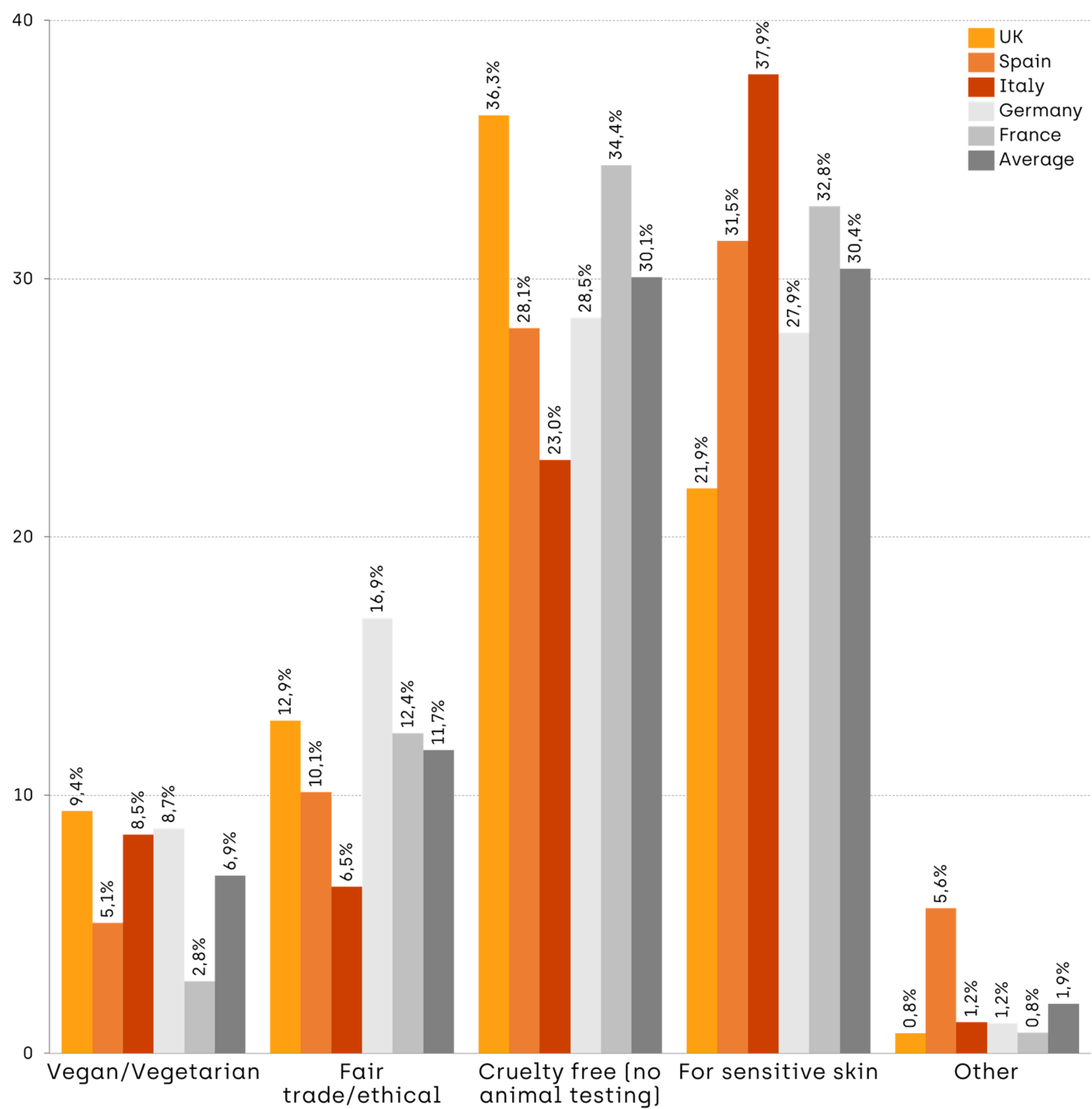


Key learnings

- 59.1% of respondents buy lipstick most regularly online, followed by face masks with 57.4%



Which of these product attributes do you think are the most crucial to have a good experience when buying cosmetics online?



Key learnings [continued]

- On average, respondents think that the most important product feature that helped their purchase was a sensitive skin product with 30.4%, followed closely by cruelty free with 30.1%.
- The least important product feature was vegan or vegetarian with 6.9%.
- Italy and Spain tended to focus highly on whether or not the product was for sensitive skin, when considering product features.
- UK, Germany, and France appear to prefer cruelty-free products.

QUESTION 4

What inspires customer to purchase cosmetics online?



To analyze the data for this part of the research to properly understand how to remedy challenges 3-5, we first look at the online shopping journey in general and what tactics brands use to enhance the buying process for cosmetic brands.

Then, we'll look more closely into the top trending features from our research to see how much of an impact they have on conversions, for example customer reviews and User Generated Content.

This part has been broken into 3 sections to give the clearest representation of the data:

- **Section 1:** Analysis of the overall online shopping experience for Cosmetics brands
- **Section 2:** Earned Content
 - Top Feature: User Generated Content [UGC]
 - Top Feature: Customer Service
- **Section 3:** Customer Service Features

QUESTION 4, SECTION 1

Analysis of the overall online shopping experience for Cosmetics brands

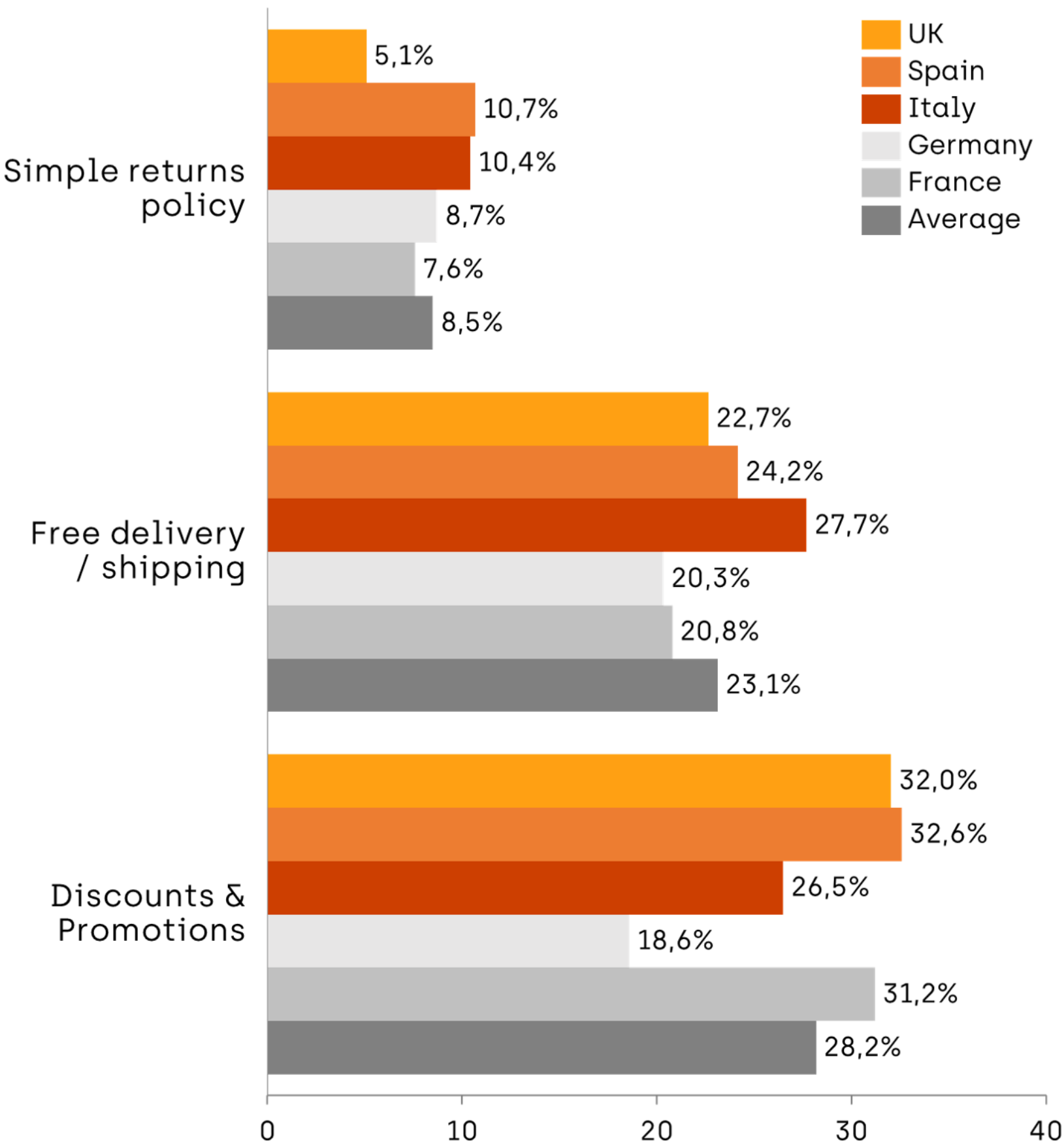
Key summary: All the countries tended to place more importance on the purchasing conditions rather than the website features when it came to having a good experience when buying cosmetics online.

Key statistic: When considering website features, UGC + star ratings scores the highest in all countries.



SHOPPING CONDITIONS

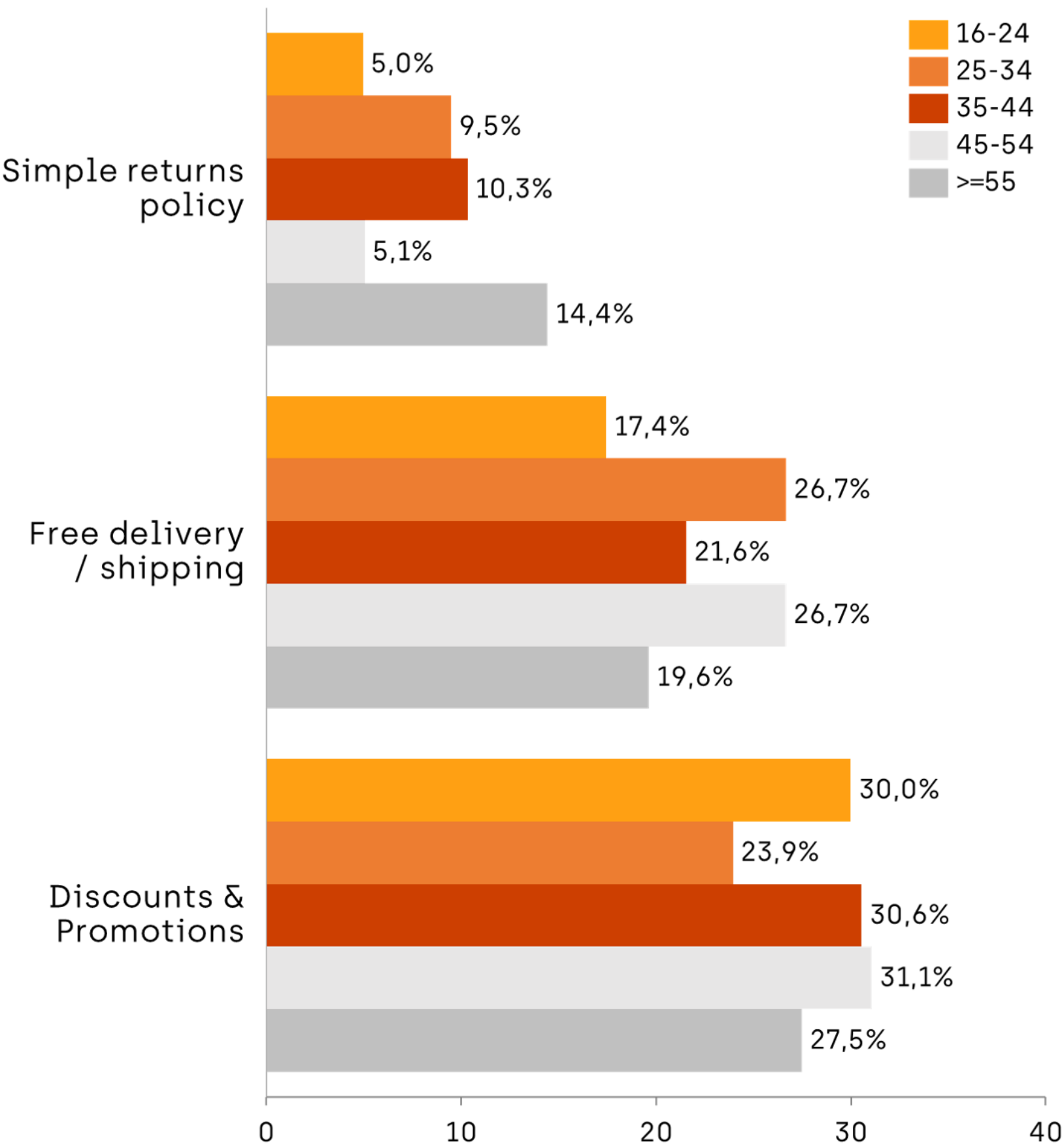
Which of these features do you think are the most crucial to have a good experience when buying cosmetics online?
By country



Key learnings

- The majority of respondents in all countries place importance on the features discounts & promotions and free delivery or shipping.

Which of these features do you think are the most crucial to have a good experience when buying cosmetics online?
By age

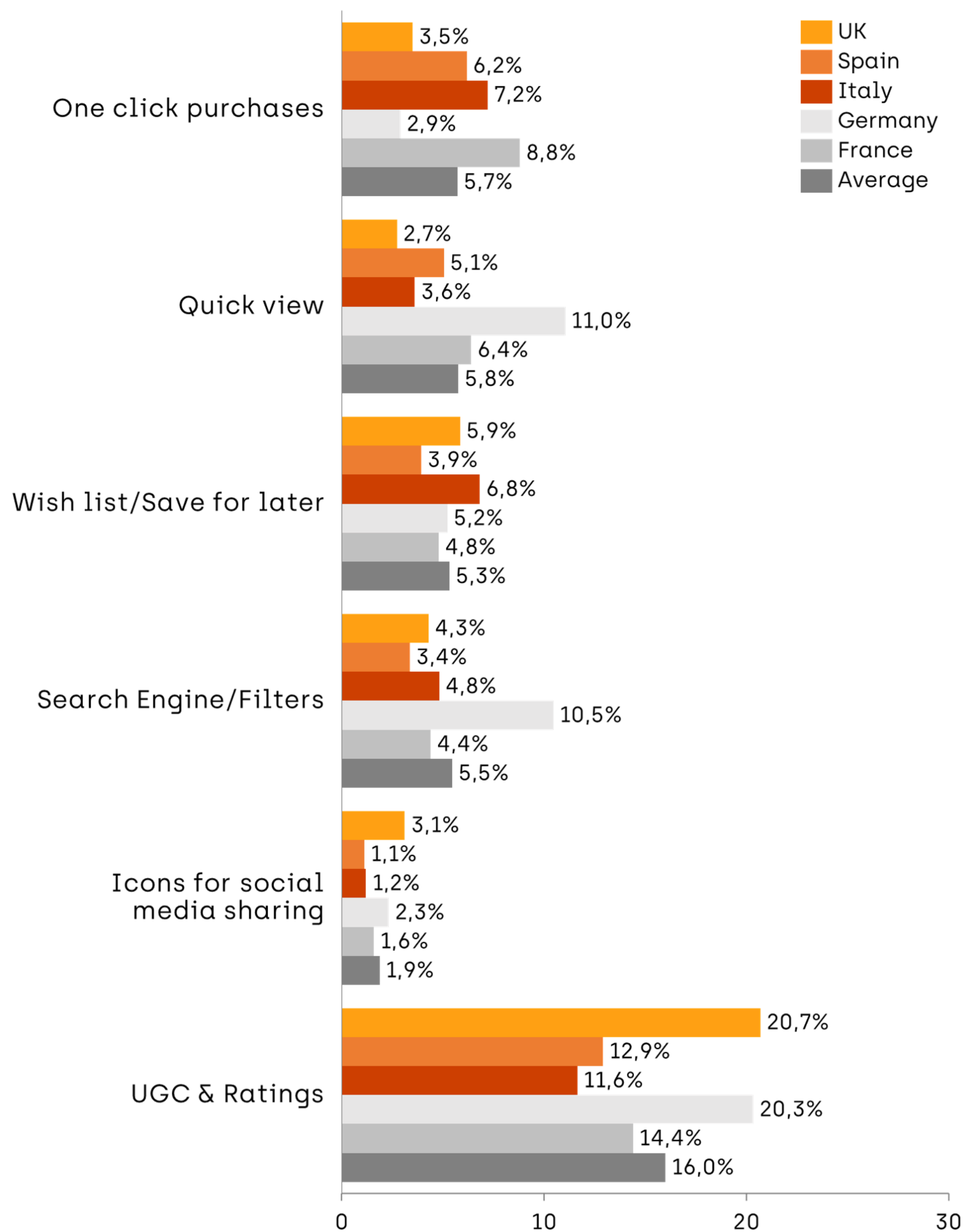


Key learnings

- The majority of respondents of all ages place importance on the features discounts & promotions and free delivery or shipping.
- The 55 and above age group find a simple returns policy more relevant than the other age groups.

GLOBAL SITE FEATURES

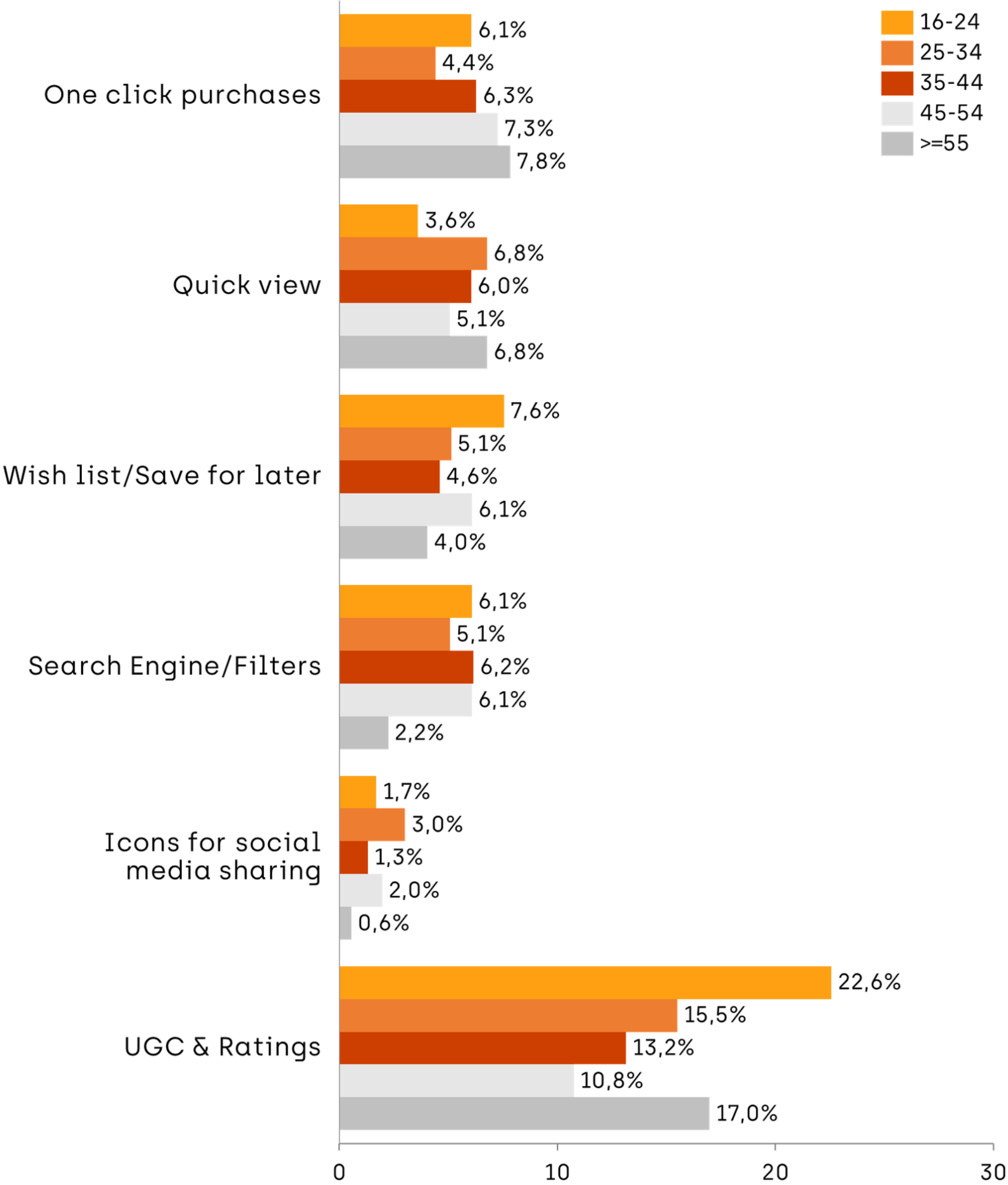
Which of these features do you think are the most crucial to have a good experience when buying cosmetics online?
By country



Key learnings

- Buttons for sharing on social media is not needed for making online purchase decision easier.
- UGC & Star Ratings are the highest scoring feature in all countries.

Which of these features do you think are the most crucial to have a good experience when buying cosmetics online? By age



Insight Analysis:

Based on the research, we can see that purchasing conditions are considered very important when shopping online. This is no surprise, as everybody loves a discount. That's why we see discounts & promotions as the top purchasing condition to have in the shopping journey, followed closely by free delivery. Discounts & promotions are a great way to pique customers' interest, but a crucial component is the conduit for promoting the campaign. For this reason, using other eCommerce features to promote your discounts can help you achieve even more

engagement.

Setting aside purchasing conditions to see what else your eCommerce team can do to enhance the flow of your page, we found that all countries rated the User Generated Content (UGC) + star rating feature as the most important overall for having a good experience when buying cosmetics online. Based on this survey, we can see that authentic customers opinions, recommendations, and visuals of real customers with products have an impact on sales and are crucial for the majority of respondents. Further on in our report, we'll go further in-depth on the significance of UGC and customer reviews.

Now we'll take a brief look at how framing the production of certain products can help sell cosmetics online.



QUESTION 4, SECTION 2

Earned Content

Key summary: Content created by users, both visual and written, was found to be a crucial aspect of the online shopping experience.

Key statistic: When considering website features, UGC + star ratings scored the highest in all countries.



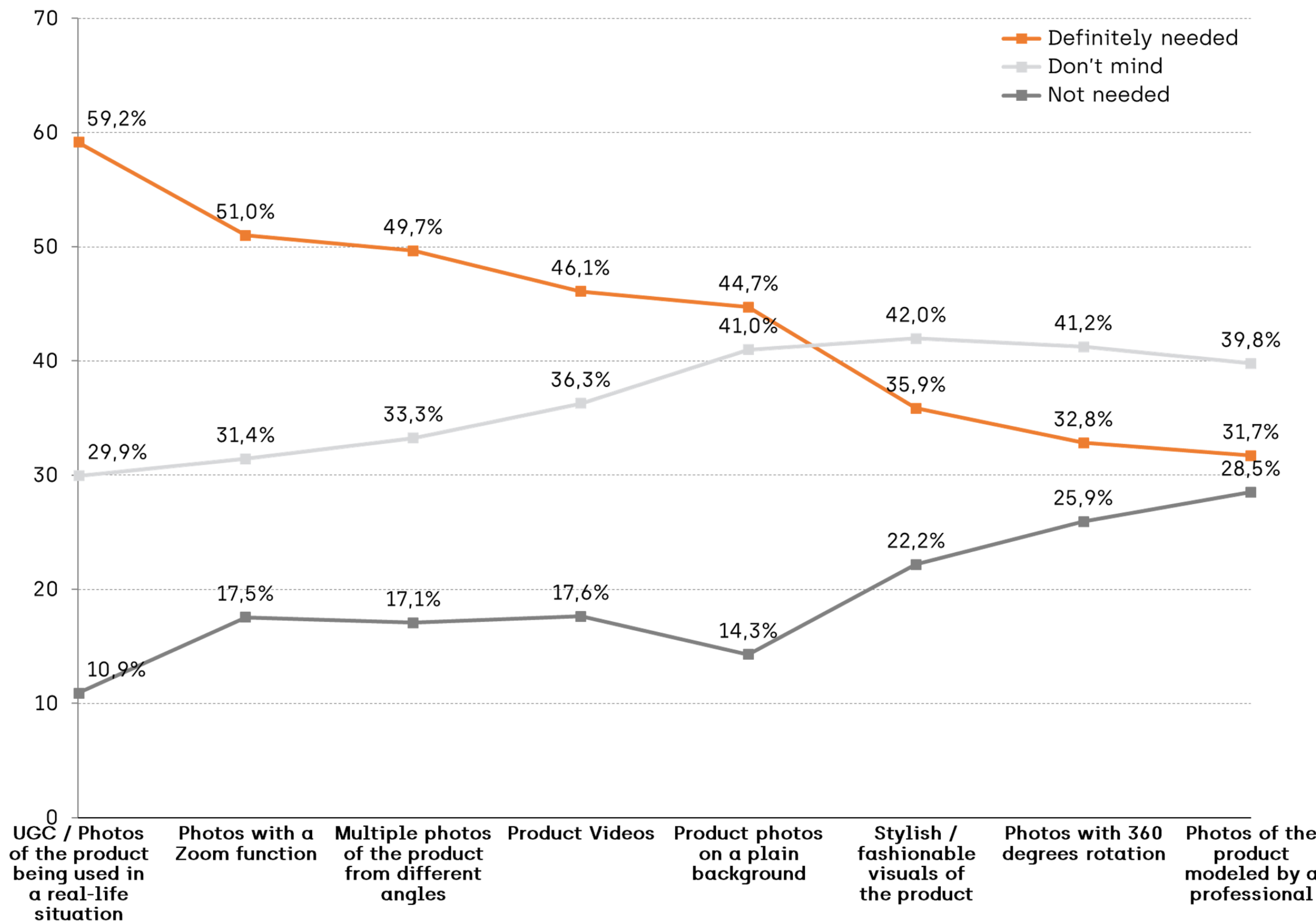
TOP FEATURE

User Generated Content (UGC)

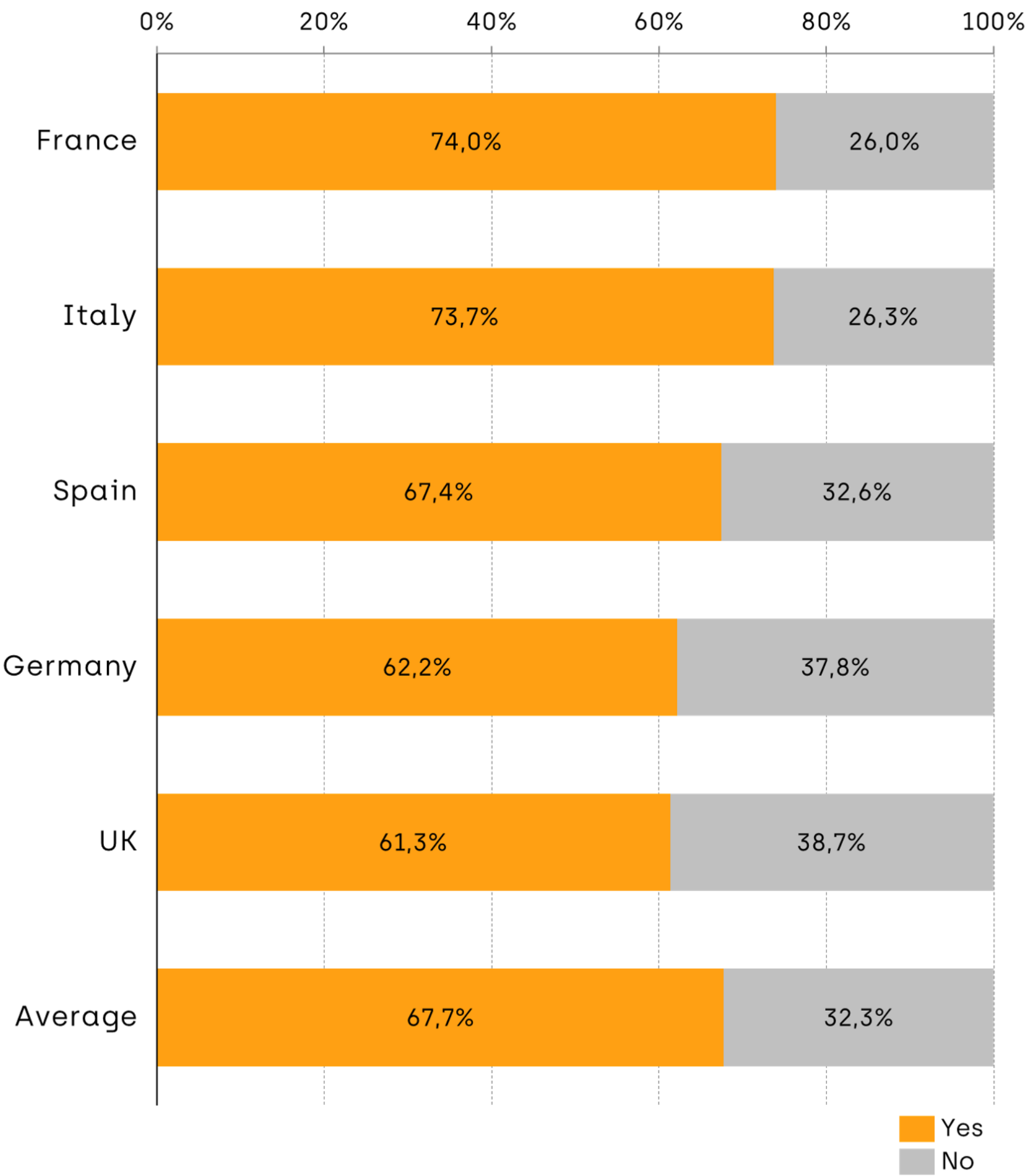
Key summary: Respondents claimed that customer photos and photos of the product being used in a real-life situation are definitely needed to make online purchase decisions.

Key statistic: 67.7% of consumers search for User Generated Content on social media before purchasing.

When looking at images or photos of cosmetics products online, which of these aspects do you need to help you make your purchase decision easier?



Do you search for UGC on social media before purchasing cosmetics online? By country

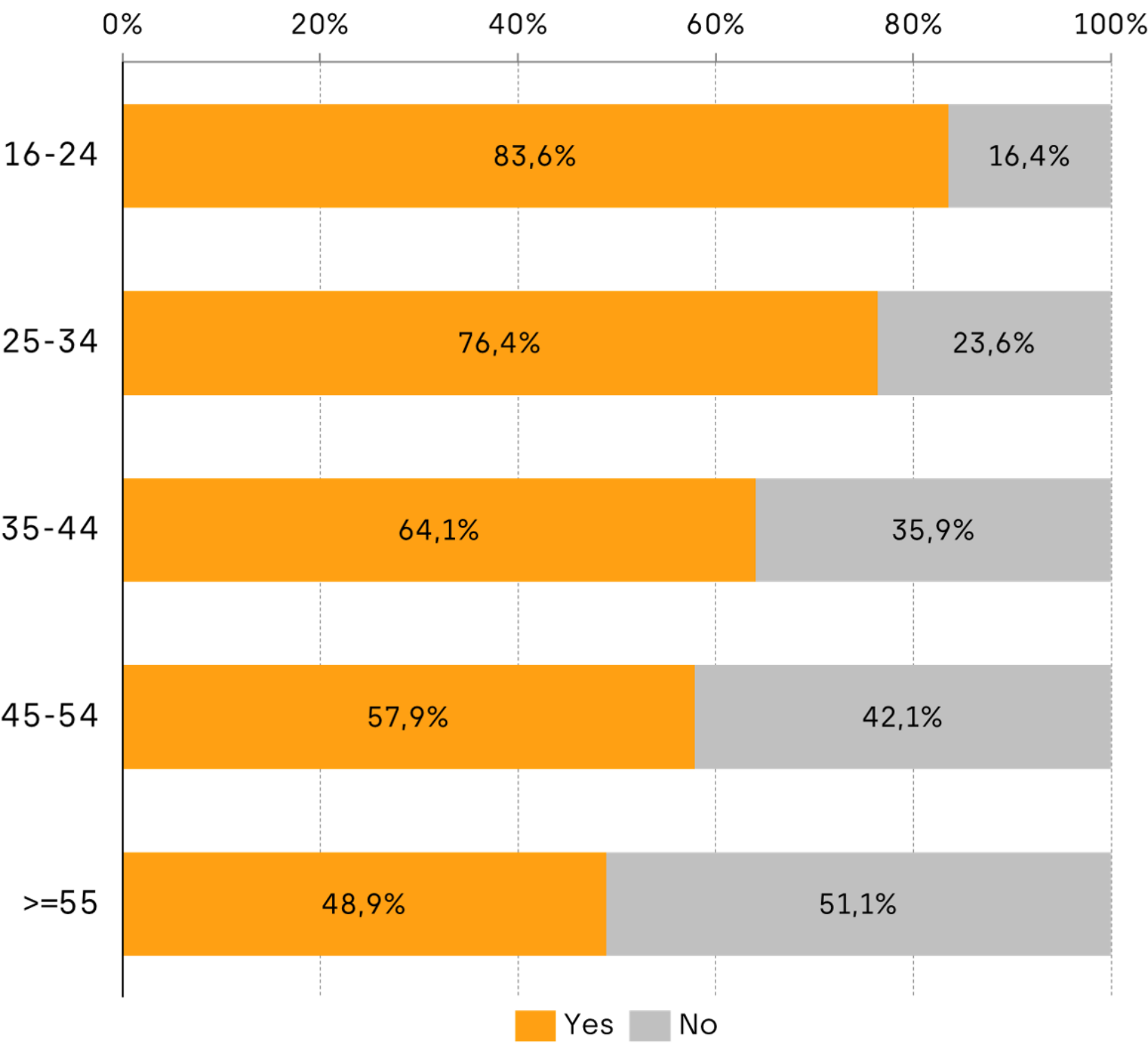


Key learnings

- UGC is rated as the highest out of all the aspects listed with 59.2% to help consumers with their purchase decision.
- The importance of UGC is highlighted when we look at the difference in necessity between UGC and photos modelled by professionals, which is 31.7%.
- By looking at the figures we can see that more than 2/3 of women searched for UGC on their social media sometimes before purchasing.
- France, closely followed by Italy, has the highest number of respondents usually searching for UGC on social media before purchasing online.



Do you search for UGC on social media before purchasing cosmetics online? By age



Key learnings [continued]

- UK has the least number of respondents who searched up UGC before purchasing online with 61.3%.
- The older the age, the less likely respondents felt that UGC aided in their purchase.

Insight Analysis:

Along similar lines as customer reviews, User Generated Content is a tool for eCommerce brands that helps aid the challenges that come up when selling cosmetics online. In the case of UGC, it speaks to all 3 of the challenges of this section, which we can clearly see reflected in the results of the survey.

We already know that UGC + star rating was placed as the top most important feature to have a good experience when shopping online. But we wanted to take a deeper look into why.

When asked which visual aids make the purchase decision easier, we see that UGC scores the highest, followed closely by product photos with zoom, followed closely by photos from different angles. What this tells us is that product photos aren't dying, they just simply aren't enough anymore to sell products effectively. Customers are interested in seeing products presented in multiple ways - staged by brands and being used by real people.

Interestingly, we see that images modelled by professionals scores only 31.7%. This demonstrates that shoppers are more interested in authentic content over staged and professionally shot images or videos. We can likely thank the role of social media for this phenomenon, which has shifted the tastes of users from overly-produced to more accurate.

When we start to look at UGC from an age perspective, we immediately note that older respondents were less interested in seeing this kind of content on eCommerce stores in every country. This can again be attributed to the social media generation, who has grown-up with seeing content of this nature on their feeds everyday.

Finally, when asked if respondents search for UGC on social media before making a purchase, we see that a majority of women answered that they did follow this practice. Italy and France were the most likely to search for customer content on social with 74% compared to the UK with 61.3%. Regardless, we can surmise that shoppers are interested in seeing this content before making a purchasing decision.

With this mind, eCommerce brands should be focusing their efforts on creating UGC, collecting it, and using it in their online store as visual reviews and product inspiration. This integration answers to all 3 of our challenges: showing customers how well a product works, teaching them how to use it, and inspiring them to continue coming back to the brand - and all through the eyes of the customer.

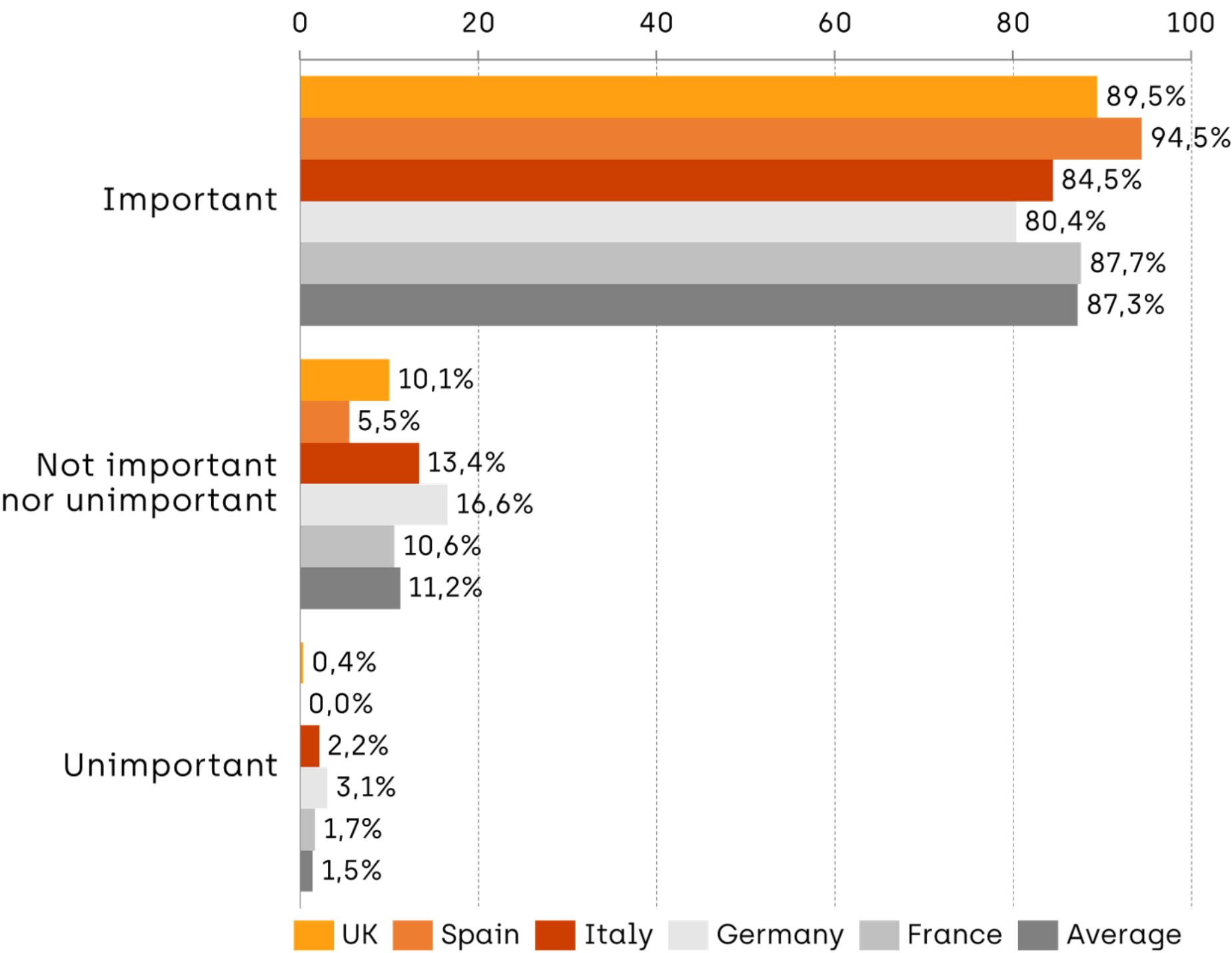
TOP FEATURE

Customer Reviews

Key summary: The younger the age, the more customers tend to read reviews.

Key statistic: 4.8% of all respondents claim to never read any customer reviews online. (Data in annex)

How important are customer reviews to you? By country

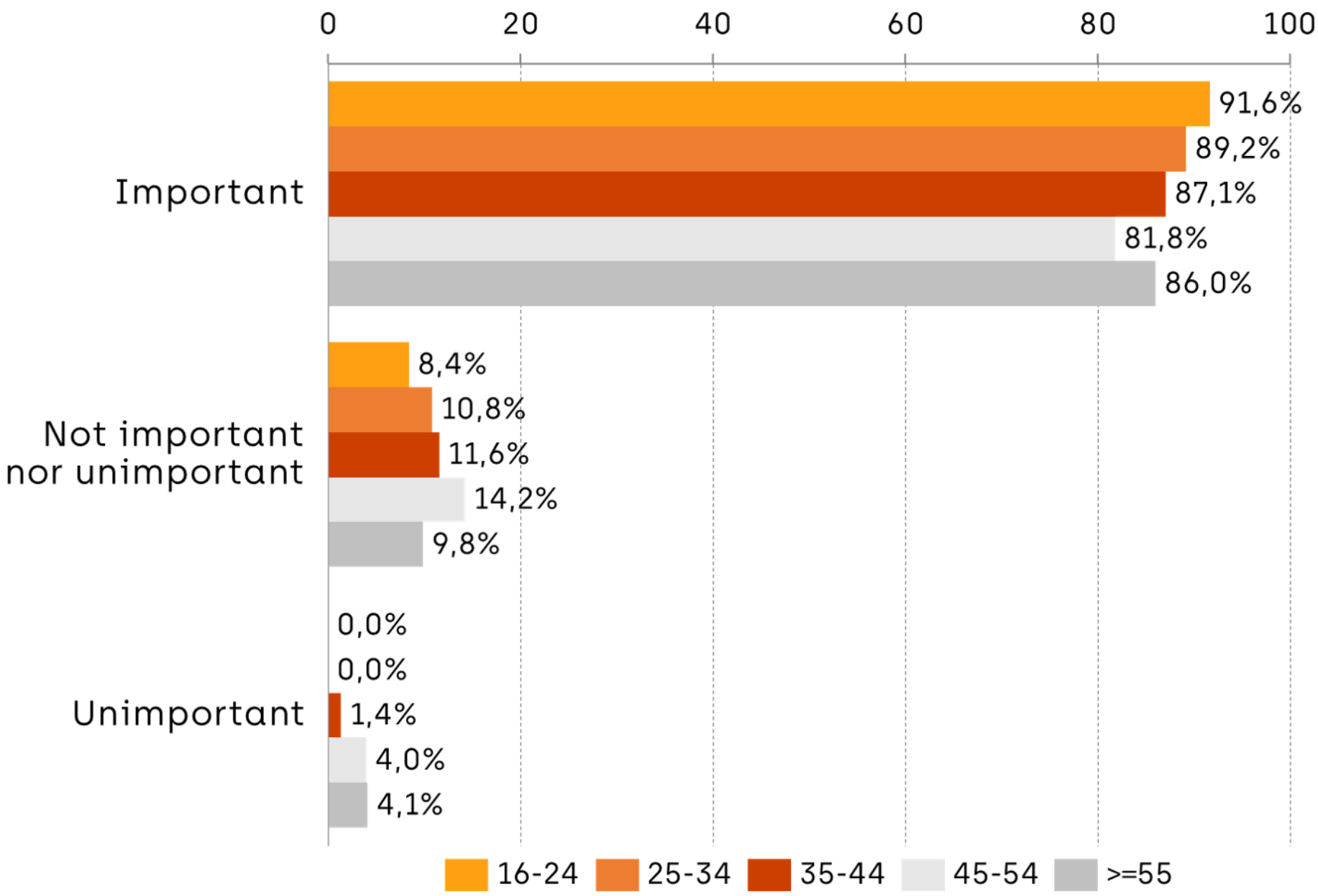


Key learnings

- The younger the age, the more customers tend to read reviews. (Data in annex)
- A majority of the respondents in all the countries tend to always read the review before purchasing. (Data in annex)



How important are customer reviews to you? By age



Insight Analysis:

When online customers can't touch or try a product for themselves, what can cosmetics brands do to encourage them to purchase? One theory is giving shoppers an idea of how well the product works through the eyes of other, verified customers. That's the idea with customer reviews, which were found to be a highly coveted part of the online buying process to respondents in this research.



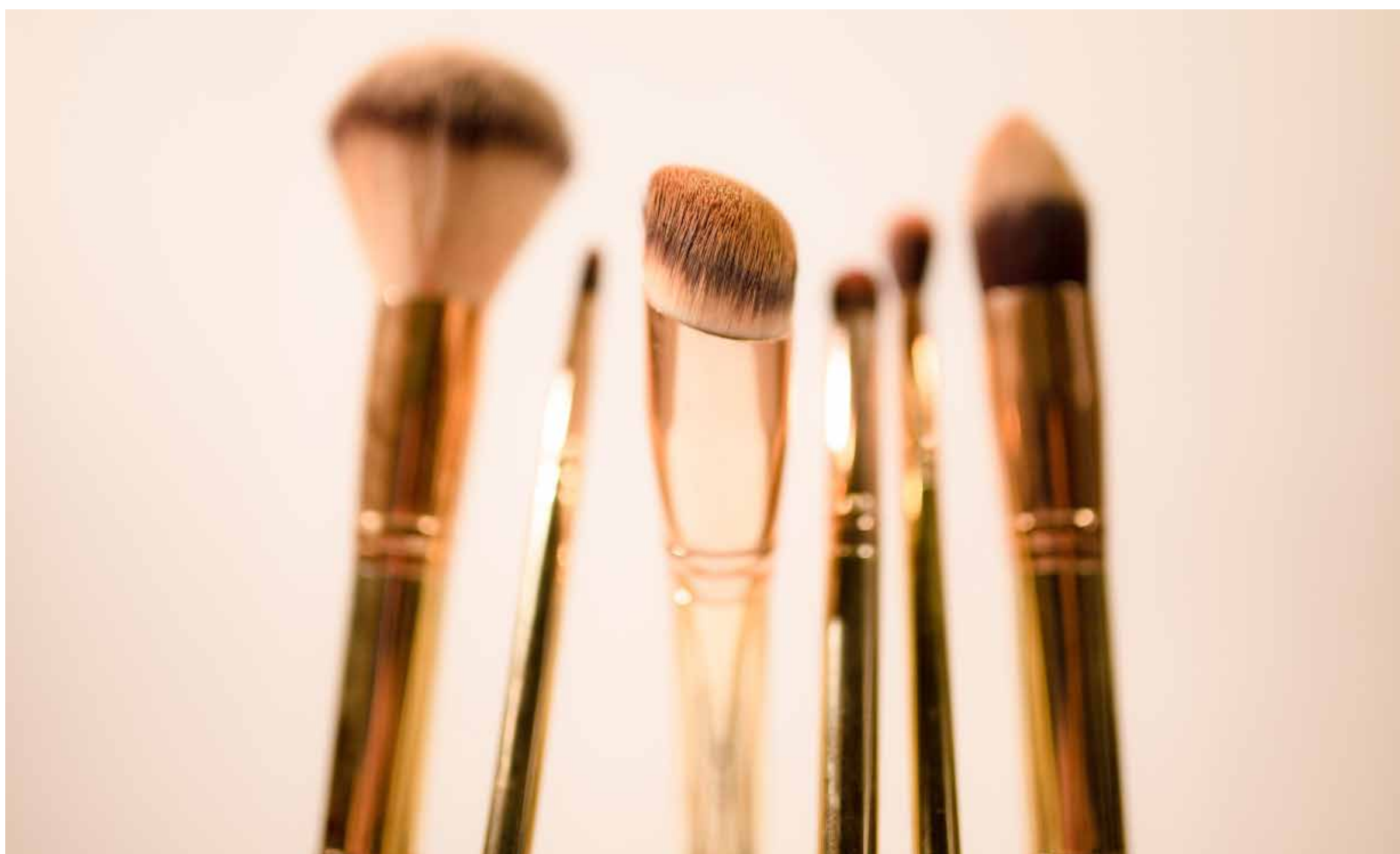
Key learnings [continued]

- A majority of the respondents in all countries think that customer reviews are quite important, followed by very important.
- UK and Spain has the most respondents claiming that customer reviews are very important to them.
 - These two countries claim that customer reviews are important, as no one responded with not that important and not at all important in the survey.

When asked about the importance of customer reviews, we found that a majority of respondents in all countries tend to always read the reviews before purchasing. Moreover, the same majority found customer reviews to be quite important, followed by very important for shopping online for cosmetics products. If we look more specifically at the UK and Spain, we see that the importance of customer reviews is even greater in these countries, as no one within our survey answered not that important and not at all important. Germany was the only country that found customer reviews to be less necessary to the online buying process, with 16.6% answering that they don't think customer reviews are important.

Looking at the role that age plays in this conversation, it's crucial to note that the younger the age of respondents, the more likely they were seek customer reviews. This could demonstrate the effects of the digital, social media generation, in which the responses of the rest of the world are only a click away. It would make sense then that younger ages would seek out this information, as it becomes an expected part of the process. In fact, not including reviews could appear like the brand is hiding something, and shoppers will instead turn to social media - where they may get distracted by a slew of other beauty products - to find their answers.

With these results, we can deduce that customers are looking for a trustworthy voice to inform their purchasing decisions. Knowing that paying customers are the most likely to provide unbiased perspectives, shoppers look for customer reviews to guide them. Following these survey results, it's clear that cosmetics brands could be losing business by not providing features that give customers the validation and social proof that it takes to make a purchase online. On that note, let's talk about another feature that can provide the same effect but through a visual format: User Generated Content.



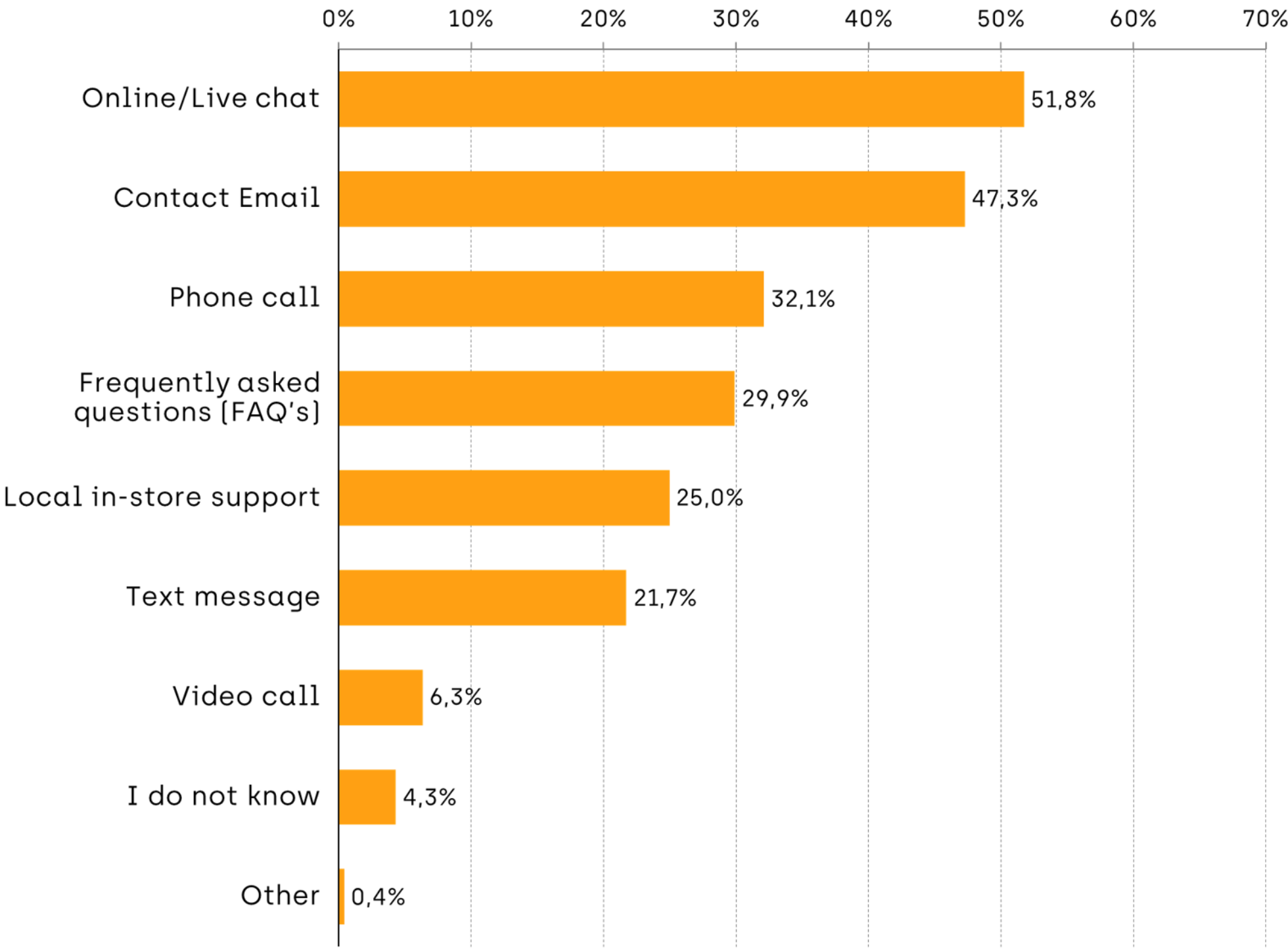
QUESTION 4, SECTION 3

Customer Service Functions

Key summary: Each country showed different results for contact features, which could be explained by cultural differences.

Key statistic: Over half of the respondents in all countries claimed online/live chat as their preferred form of help function.

What customer service function do you think should always be offered for online shopping?



Key learnings

- France, Italy, and Spain are the only countries that do not have a FAQ in their top three. Instead, they have phone call and local in-store support. (Data in annex)



Insight Analysis:

From our results, we see that the preferred customer service and contact functions varied from country-to-country. Perhaps the most likely reason for this is the difference in cultural expectations of communication. What we can see is where each country should focus their efforts and resources when responding to online customers.

One interesting trend that we see is that Italy was the only country that voted in-store support within their top 3 (data in annex), correlating with another result back in Part 3, Section 1. They disclosed a high interest in seeing product tutorials within eCommerce stores. With this data, we can infer that Italian shoppers are interested in verbal interaction with a representative of the brand.



One other insight we can pull from the data is that ‘instant’ responses are becoming more prevalent, through the use of the online/live chat. As over half of the respondents in all countries claimed this as their preferred help function, we can see that it’s not only a blossoming trend but one that deserves to be adopted by eCommerce brands.



Key learnings [continued]

- In the UK, France and Spain, they all have online/live chat on the top of their wanted function. (Data in annex)
- Germany and Italy place their importance on contact e-mail as the most wanted function. (Data in annex)
- Over half of respondents want to see live chat as a customer support feature.
- Cultural differences could have played a big part in the small differentiations in the sought after function.



CHAPTER 3

Using the results to improve eCommerce strategies

Moving forward from this report, there are a few major points that online cosmetic brands can bring into their eCommerce strategies to enrich their online shopping journeys and - ultimately - sell more. Here are our recommendations based on the results of the survey.

1

Develop your online strategy around the cosmetics sales cycle

Keeping in mind the frequency in which customers make online cosmetics purchases will help you create a strategy that attracts clients to come back on a rolling basis. We can see that customers tend to buy cosmetics monthly, rather than daily or weekly, meaning that there should be strategies in place to hold their attention until that next month comes around.

2

The retailer potential

Feel how you will about retailers, we can see that these spaces are stealing the spotlight in the eCommerce world. If your products are not already available through online retailers, it should be of increasing interest.

3

Turn to your customers to sell your products - Customer reviews and User Generated Content

Based on our results, we can conclude that customer reviews and User Generated Content are powerful features within eCommerce. They are the modern day version of word-of-mouth marketing that consumers are growing more accustomed to seeing while shopping online. Without these features, brands risk losing customers to other companies that provide more of the information that they need to make an informed purchase. Not having these features can make your brand appear untrustworthy or as if there's something to hide.

While it may seem like a big task, there are ways to streamline these strategies using tools like Trusted Shops (customer reviews) and Photoslurp (User Generated Content). Not only do platforms of this nature make it easier to perform these strategies, they also help to increase eCommerce revenue. We take a look at how this can look in practice with our case study in the next section of the report.

4

Share your brand's ethics policy with customers

If part of your business model is creating cruelty-free, recyclable products, then make sure your customers know about it. Based on our survey, we can extrapolate that customers are becoming more concerned about issues related to the environment and their own personal impact. Brands can show customers that they are like-minded by developing cruelty-free products and by demonstrating their efforts to support a cleaner earth.

5

Adopt instant online communication

Show customers that your brand is committed to reliable communication by incorporating a chat feature into your eCommerce store. While it does mean that your team will have to be prepared to answer questions at all times, our data shows that eCommerce customers are becoming more interested in seeing this kind of communication.

By even having it as an option on your eCommerce, you're telling website visitors that you are dependable and will respond in a timely manner. This sends a strong message from the start, even if they don't actually use the service. Plus, this can be quickly and simply done using a platform like Drift.



CHAPTER 4

What the Industry says

CASE STUDY

Maquillalia, 11.20% increase of conversion rate with authentic User Generated Content

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“Really, the marketing channels of before - tv ads, radio, etc. - have really lost some of their credibility in that people aren’t sure what’s real anymore. Today, people look for real opinions from real people, who identify with a specific way of life and follow it. So when customers create content, others believe it. They take it as a reference. We believe that this is really important, and it’s what we base practically our entire strategy on.”

Sara Varo, Marketing Manager,
Maquillalia



Over the past 10 years, Spain’s most prolific cosmetics retailer, Maquillalia, has been selling an extensive range of 15,000 different make-up products from over 200 different brands to their devoted base of eCommerce customers. Understanding the challenges that come with selling cosmetics online, they sought out new ways to attract eCommerce customers to increase sales.

What challenges are we specifically talking about in Maquillalia’s case? Namely that beauty products are very personal, and customers are not able to try the products on or see if they work with their skin-type before purchase.

Aware of these issues, Maquillalia has always been on the lookout for new ways to cater to the needs of eCommerce customers. Bringing together their desire to use the social media engagement that they see on networks like Instagram, while giving customers a better way to shop for cosmetics products online, they decided to leverage a User Generated Content strategy.

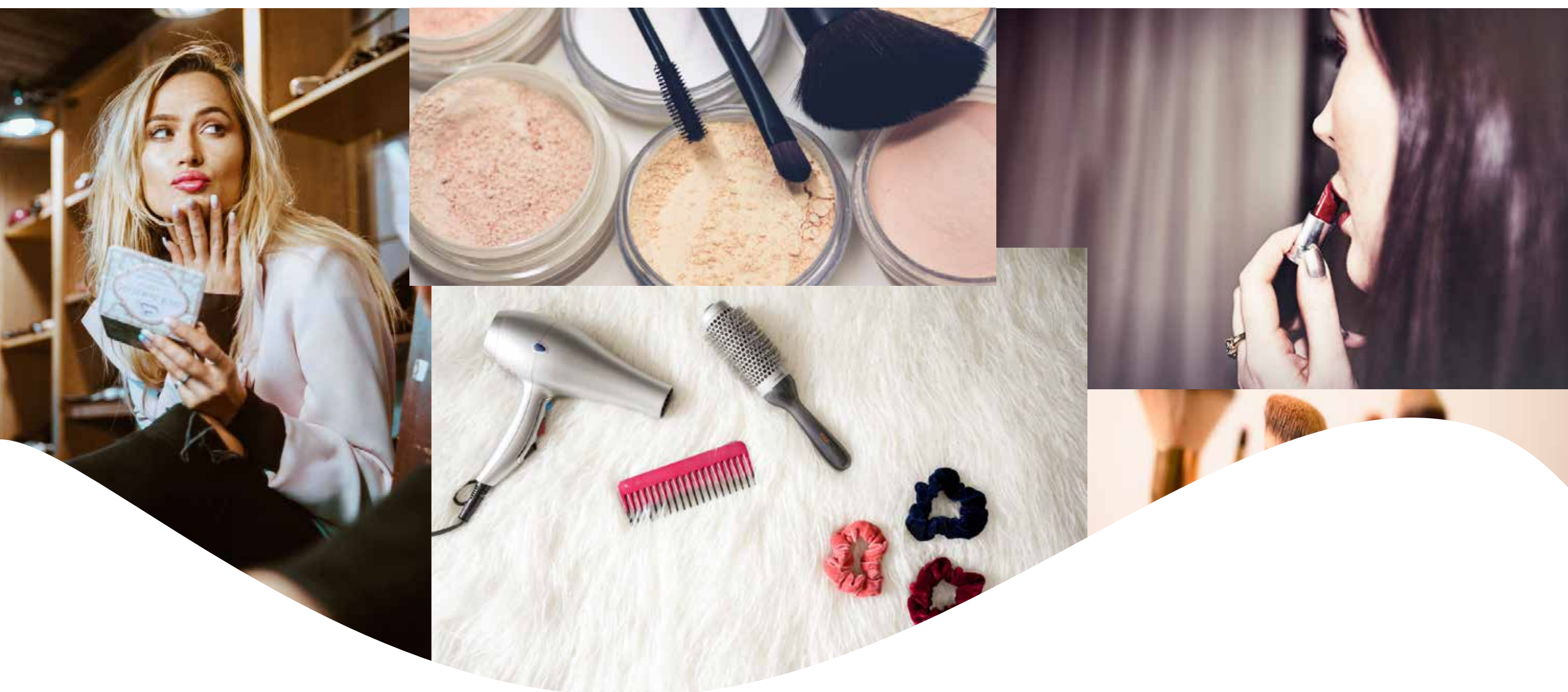


“We have a huge challenge, which is that people can’t touch or feel our product. We have to overcome this in some way, and User Generated Content is the way that we’re working to overcome this.”

Sara Varo, Marketing
Manager, Maquillalia

With authentic User Generated Content, the brand is able to show online shoppers how their products work through the eyes of other buyers. This not only gives credibility to the brand, but it also helps them to solve the greatest challenge of selling cosmetics products online: the customers’ inability to try the product for themselves.

Most importantly, the technology helps the brand improve their eCommerce performance. By integrating their UGC into galleries and carousels on their website, they’ve now seen an **11.20% increase of conversion rate**.



CHAPTER 5

Methodology

Zinklar is the SaaS platform that delivers results in real time and turns Market Research into an everyday solution for brands globally. The research was conducted in 5 different European countries amongst women aged 18 years and older. A 5 minute mobile only questionnaire asked consumers about their cosmetic usage, preference and purchasing habits in an online



Details

- 5 countries: UK, France, Spain, Germany and Italy
- 300 interviews per country
- 1,500 total respondents
- Surveyed on Mobile Only
- Women Aged 18+
- Nationally representative on age and region
- Agile Market Research, fieldwork date June 2019



Annex

Have you bought any cosmetics [make-up i.e. lipstick] online in the last 12 months?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 300
Yes	91,9%	88,7%	80,0%	83,8%	73,7%	85,3%
No	8,1%	10,3%	20,0%	16,2%	26,3%	14,3%
I do not know	0,0%	1,0%	0,0%	0,0%	0,0%	0,3%
Spain						n= 295
Yes	70,8%	69,4%	55,9%	52,1%	47,8%	60,3%
No	29,2%	29,4%	44,1%	47,9%	52,2%	39,3%
I do not know	0,0%	1,2%	0,0%	0,0%	0,0%	0,3%
Italy						n= 300
Yes	84,8%	87,8%	85,0%	84,0%	75,7%	83,0%
No	15,2%	12,2%	15,0%	16,0%	22,9%	16,7%
I do not know	0,0%	0,0%	0,0%	0,0%	1,4%	0,3%
Germany						n= 300
Yes	72,7%	64,7%	57,7%	57,6%	45,6%	57,3%
No	27,3%	33,3%	40,8%	42,4%	53,2%	41,7%
I do not know	0,0%	2,0%	1,4%	0,0%	1,3%	1,0%
France						n= 300
Yes	94,3%	84,0%	77,3%	81,3%	68,8%	83,3%
No	5,7%	16,0%	22,7%	18,8%	31,3%	16,7%
I do not know	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
TOTAL						n= 1495
Yes	82,9%	78,9%	71,2%	71,7%	62,3%	73,9%
No	17,1%	20,3%	28,5%	28,3%	37,2%	25,7%
I do not know	0,0%	0,8%	0,3%	0,0%	0,5%	0,4%



How often would you say you buy cosmetics (make-up) online?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 256
Once or twice a year	5,3%	10,5%	16,2%	25,8%	14,3%	12,9%
Every few months	26,3%	36,0%	32,4%	38,7%	64,3%	34,8%
Once a month	26,3%	25,6%	20,6%	16,1%	7,1%	22,3%
A few times a month	22,8%	17,4%	23,5%	12,9%	14,3%	19,5%
Once a week	8,8%	5,8%	5,9%	0,0%	0,0%	5,5%
A few times a week	10,5%	4,7%	1,5%	6,5%	0,0%	5,1%
Spain						n= 178
Once or twice a year	32,4%	39,0%	42,1%	56,0%	31,8%	39,9%
Every few months	41,2%	35,6%	26,3%	20,0%	40,9%	33,1%
Once a month	17,6%	18,6%	21,1%	20,0%	13,6%	18,5%
A few times a month	5,9%	6,8%	7,9%	4,0%	9,1%	6,7%
Once a week	2,9%	0,0%	0,0%	0,0%	0,0%	0,6%
A few times a week	0,0%	0,0%	2,6%	0,0%	4,5%	1,1%
Italy						n= 249
Once or twice a year	20,5%	23,3%	13,7%	20,6%	24,5%	20,5%
Every few months	17,9%	25,6%	13,7%	25,4%	32,1%	23,3%
Once a month	28,2%	11,6%	33,3%	25,4%	22,6%	24,5%
A few times a month	23,1%	16,3%	27,5%	14,3%	18,9%	19,7%
Once a week	5,1%	14,0%	2,0%	9,5%	0,0%	6,0%
A few times a week	5,1%	9,3%	9,8%	4,8%	1,9%	6,0%
Germany						n= 172
Once or twice a year	16,7%	18,2%	39,0%	18,4%	52,8%	30,2%
Every few months	41,7%	42,4%	36,6%	57,9%	25,0%	40,7%
Once a month	29,2%	21,2%	17,1%	21,1%	22,2%	21,5%
A few times a month	8,3%	15,2%	0,0%	2,6%	0,0%	4,7%
Once a week	4,2%	3,0%	7,3%	0,0%	0,0%	2,9%
A few times a week	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
France						n= 250
Once or twice a year	10,6%	20,3%	25,0%	34,6%	27,3%	20,8%
Every few months	24,2%	30,4%	23,5%	11,5%	45,5%	25,6%
Once a month	25,8%	25,3%	29,4%	19,2%	9,1%	25,2%
A few times a month	28,8%	13,9%	17,6%	26,9%	9,1%	20,0%
Once a week	7,6%	5,1%	2,9%	3,8%	0,0%	4,8%
A few times a week	3,0%	5,1%	1,5%	3,8%	9,1%	3,6%
TOTAL						n= 1105
Once or twice a year	17,1%	22,2%	27,2%	31,1%	30,1%	24,9%
Every few months	30,3%	34,0%	26,5%	30,7%	41,5%	31,5%
Once a month	25,4%	20,5%	24,3%	20,4%	14,9%	22,4%
A few times a month	17,8%	13,9%	15,3%	12,1%	10,3%	14,1%
Once a week	5,7%	5,6%	3,6%	2,7%	0,0%	4,0%
A few times a week	3,7%	3,8%	3,1%	3,0%	3,1%	3,2%



Which of these products would you say you buy regularly online?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK	n=					256
Lipstick	56,1%	53,5%	57,4%	58,1%	57,1%	55,9%
Eye-liner	36,8%	46,5%	52,9%	41,9%	35,7%	44,9%
Mask	70,2%	68,6%	64,7%	64,5%	64,3%	67,2%
Eye shadow	54,4%	31,4%	48,5%	51,6%	21,4%	43,0%
Foundation	63,2%	61,6%	55,9%	51,6%	78,6%	60,2%
Blush	28,1%	31,4%	33,8%	29,0%	42,9%	31,6%
Concealer	40,4%	36,0%	39,7%	32,3%	35,7%	37,5%
Setting powder	33,3%	31,4%	26,5%	29,0%	28,6%	30,1%
Make-up remover	36,8%	25,6%	35,3%	29,0%	14,3%	30,5%
Primer	38,6%	26,7%	26,5%	12,9%	14,3%	27,0%
Spain	n=					178
Lipstick	85,3%	66,1%	57,9%	44,0%	54,5%	63,5%
Eye-liner	29,4%	40,7%	18,4%	32,0%	54,5%	34,3%
Mask	41,2%	40,7%	34,2%	20,0%	36,4%	36,0%
Eye shadow	23,5%	25,4%	21,1%	12,0%	31,8%	23,0%
Foundation	29,4%	44,1%	34,2%	24,0%	27,3%	34,3%
Blush	14,7%	25,4%	31,6%	12,0%	31,8%	23,6%
Concealer	29,4%	47,5%	36,8%	20,0%	27,3%	35,4%
Setting powder	14,7%	18,6%	13,2%	0,0%	18,2%	14,0%
Make-up remover	32,4%	28,8%	23,7%	36,0%	27,3%	29,2%
Primer	8,8%	20,3%	15,8%	8,0%	9,1%	14,0%
Italy	n=					249
Lipstick	71,8%	69,8%	62,7%	65,1%	47,2%	62,7%
Eye-liner	28,2%	58,1%	37,3%	42,9%	15,1%	36,1%
Mask	66,7%	60,5%	58,8%	66,7%	54,7%	61,4%
Eye shadow	33,3%	37,2%	58,8%	42,9%	39,6%	43,0%
Foundation	56,4%	44,2%	64,7%	47,6%	35,8%	49,4%
Blush	25,6%	30,2%	35,3%	28,6%	20,8%	28,1%
Concealer	35,9%	41,9%	37,3%	36,5%	39,6%	38,2%
Setting powder	10,3%	11,6%	5,9%	11,1%	5,7%	8,8%
Make-up remover	25,6%	32,6%	41,2%	31,7%	49,1%	36,5%
Primer	23,1%	23,3%	33,3%	14,3%	17,0%	21,7%
Germany	n=					172
Lipstick	70,8%	54,5%	61,0%	52,6%	66,7%	60,5%
Eye-liner	29,2%	27,3%	53,7%	42,1%	44,4%	40,7%
Mask	45,8%	54,5%	51,2%	63,2%	58,3%	55,2%
Eye shadow	45,8%	36,4%	48,8%	42,1%	55,6%	45,9%
Foundation	12,5%	12,1%	12,2%	7,9%	5,6%	9,9%
Blush	12,5%	12,1%	12,2%	7,9%	11,1%	11,0%
Concealer	54,2%	57,6%	34,1%	26,3%	25,0%	37,8%
Setting powder	20,8%	12,1%	9,8%	10,5%	16,7%	13,4%
Make-up remover	20,8%	36,4%	29,3%	36,8%	25,0%	30,2%
Primer	37,5%	24,2%	43,9%	39,5%	36,1%	36,6%
France	n=					250
Lipstick	59,1%	57,0%	48,5%	42,3%	36,4%	52,8%
Eye-liner	28,8%	38,0%	30,9%	42,3%	36,4%	34,0%
Mask	69,7%	75,9%	63,2%	50,0%	54,5%	67,2%
Eye shadow	36,4%	40,5%	44,1%	23,1%	9,1%	37,2%
Foundation	31,8%	29,1%	17,6%	11,5%	9,1%	24,0%
Blush	7,6%	8,9%	10,3%	3,8%	0,0%	8,0%
Concealer	39,4%	32,9%	26,5%	46,2%	0,0%	32,8%
Setting powder	12,1%	17,7%	5,9%	7,7%	0,0%	11,2%
Make-up remover	39,4%	39,2%	38,2%	53,8%	45,5%	40,8%
Primer	9,1%	5,1%	4,4%	3,8%	0,0%	5,6%
TOTAL	n=					1105
Lipstick	68,6%	60,2%	57,5%	52,4%	52,4%	59,1%
Eye-liner	30,5%	42,1%	38,6%	40,2%	37,2%	38,0%
Mask	58,7%	60,0%	54,4%	52,9%	53,6%	57,4%
Eye shadow	38,7%	34,2%	44,3%	34,3%	31,5%	38,4%
Foundation	38,7%	38,2%	36,9%	28,5%	31,3%	35,5%
Blush	17,7%	21,6%	24,6%	16,3%	21,3%	20,5%
Concealer	39,8%	43,2%	34,9%	32,2%	25,5%	36,3%
Setting powder	18,3%	18,3%	12,2%	11,7%	13,8%	15,5%
Make-up remover	31,0%	32,5%	33,5%	37,5%	32,2%	33,5%
Primer	23,4%	19,9%	24,8%	15,7%	15,3%	21,0%



Which of these product features do you think are the most crucial to have a good experience when buying cosmetics online						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK	n=					256
Vegan/Vegetarian	12,3%	15,1%	2,9%	6,5%	0,0%	9,4%
Fair trade/ethical	12,3%	11,6%	17,6%	9,7%	7,1%	12,9%
Cruelty free (no animal testing)	42,1%	31,4%	29,4%	45,2%	57,1%	36,3%
For sensitive skin	28,1%	12,8%	27,9%	19,4%	28,6%	21,9%
Other	0,0%	2,3%	0,0%	0,0%	0,0%	0,8%
Spain	n=					178
Vegan/Vegetarian	5,9%	5,1%	5,3%	0,0%	9,1%	5,1%
Fair trade/ethical	8,8%	6,8%	13,2%	4,0%	22,7%	10,1%
Cruelty free (no animal testing)	35,3%	30,5%	26,3%	16,0%	27,3%	28,1%
For sensitive skin	32,4%	42,4%	18,4%	24,0%	31,8%	31,5%
Other	0,0%	6,8%	10,5%	0,0%	9,1%	5,6%
Italy	n=					248
Vegan/Vegetarian	7,7%	11,6%	11,8%	4,8%	7,5%	8,5%
Fair trade/ethical	10,3%	4,7%	3,9%	0,0%	15,1%	6,5%
Cruelty free (no animal testing)	25,6%	18,6%	17,6%	21,0%	32,1%	23,0%
For sensit ive skin	38,5%	37,2%	39,2%	40,3%	34,0%	37,9%
Other	0,0%	2,3%	0,0%	1,6%	1,9%	1,2%
Germany	n=					172
Vegan/Vegetarian	12,5%	6,1%	7,3%	7,9%	11,1%	8,7%
Fair trade/ethical	16,7%	24,2%	17,1%	13,2%	13,9%	16,9%
Cruelty free (no animal testing)	16,7%	33,3%	19,5%	34,2%	36,1%	28,5%
For sensitive skin	33,3%	27,3%	26,8%	18,4%	36,1%	27,9%
Other	0,0%	0,0%	2,4%	0,0%	2,8%	1,2%
France	n=					250
Vegan/Vegetarian	1,5%	3,8%	4,4%	0,0%	0,0%	2,8%
Fair trade/ethical	13,6%	12,7%	11,8%	11,5%	9,1%	12,4%
Cruelty free (no animal testing)	39,4%	22,8%	38,2%	38,5%	54,5%	34,4%
For sensitive skin	31,8%	39,2%	25,0%	30,8%	45,5%	32,8%
Other	1,5%	1,3%	0,0%	0,0%	0,0%	0,8%
TOTAL	n=					1104
Vegan/Vegetarian	8,0%	8,3%	6,3%	3,8%	5,5%	6,9%
Fair trade/ethical	12,3%	12,0%	12,7%	7,7%	13,6%	11,7%
Cruelty free (no animal testing)	31,8%	27,3%	26,2%	31,0%	41,4%	30,1%
For sensitive skin	32,8%	31,8%	27,5%	26,6%	35,2%	30,4%
Other	0,3%	2,5%	2,6%	0,3%	2,8%	1,9%

Which of these purchasing options do you think are the most crucial to have a good experience when buying cosmetics online						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK	n=					256
Simple returns policy	3,5%	5,8%	2,9%	6,5%	14,3%	5,1%
Free delivery/shipping	17,5%	25,6%	22,1%	22,6%	28,6%	22,7%
Discounts/promotions	33,3%	27,9%	32,4%	45,2%	21,4%	32,0%
Spain	n=					178
Simple returns policy	5,9%	11,9%	10,5%	0,0%	27,3%	10,7%
Free delivery/shipping	14,7%	23,7%	28,9%	40,0%	13,6%	24,2%
Discounts/promotions	47,1%	23,7%	42,1%	24,0%	27,3%	32,6%
Italy	n=					249
Simple returns policy	2,6%	7,0%	15,7%	11,1%	13,2%	10,4%
Free delivery/shipping	20,5%	25,6%	19,6%	38,1%	30,2%	27,7%
Discounts/promotions	25,6%	25,6%	25,5%	25,4%	30,2%	26,5%
Germany	n=					172
Simple returns policy	8,3%	15,2%	12,2%	0,0%	8,3%	8,7%
Free delivery/shipping	20,8%	24,2%	19,5%	21,1%	16,7%	20,3%
Discounts/promotions	16,7%	12,1%	22,0%	18,4%	22,2%	18,6%
France	n=					250
Simple returns policy	4,5%	7,6%	10,3%	7,7%	9,1%	7,6%
Free delivery/shipping	13,6%	34,2%	17,6%	11,5%	9,1%	20,8%
Discounts/promotions	27,3%	30,4%	30,9%	42,3%	36,4%	31,2%
TOTAL	n=					1105
Simple returns policy	5,0%	9,5%	10,3%	5,1%	14,4%	8,5%
Free delivery/shipping	17,4%	26,7%	21,6%	26,7%	19,6%	23,1%
Discounts/promotions	30,0%	23,9%	30,6%	31,1%	27,5%	28,2%



When looking at images or photos of cosmetics [make-up] products online, which of these aspects do you need to help you make your purchase decision easier?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
TOTAL						
UGC / Photos of the product being used in a real-life situation					n=	1070
Definitely need	67,9%	64,9%	55,0%	61,0%	46,9%	59,2%
Don't mind	23,7%	28,8%	32,3%	24,9%	40,0%	29,9%
Not needed	8,4%	6,3%	12,7%	14,1%	13,1%	10,9%
Photos with a Zoom function					n=	1062
Definitely need	48,1%	49,5%	53,0%	54,9%	49,6%	51,0%
Don't mind	34,6%	34,7%	30,4%	25,7%	31,8%	31,4%
Not needed	17,3%	15,8%	16,6%	19,4%	18,6%	17,5%
Multiple photos of the product from different angles					n=	1070
Definitely need	58,1%	52,0%	46,9%	47,5%	43,8%	49,7%
Don't mind	26,0%	36,4%	39,0%	31,1%	33,8%	33,3%
Not needed	15,8%	11,6%	14,2%	21,5%	22,3%	17,1%
Product Videos					n=	1068
Definitely need	49,5%	42,8%	45,0%	43,2%	50,0%	46,1%
Don't mind	38,4%	44,1%	35,3%	34,7%	28,9%	36,3%
Not needed	12,0%	13,1%	19,8%	22,2%	21,1%	17,6%
Product photos on a plain background					n=	1049
Definitely need	44,8%	42,2%	36,8%	50,6%	49,2%	44,7%
Don't mind	38,7%	41,8%	51,2%	36,8%	36,5%	41,0%
Not needed	16,5%	16,0%	12,0%	12,6%	14,3%	14,3%
Stylish/fashionable visuals of the product					n=	1064
Definitely need	39,7%	37,1%	39,0%	36,4%	27,1%	35,9%
Don't mind	37,9%	44,3%	40,9%	38,6%	48,1%	42,0%
Not needed	22,4%	18,6%	20,1%	25,0%	24,8%	22,2%
Photos with 360 degrees rotation					n=	1055
Definitely need	33,8%	34,9%	32,1%	35,4%	27,8%	32,8%
Don't mind	42,3%	43,3%	42,9%	40,6%	37,3%	41,2%
Not needed	23,9%	21,8%	25,0%	24,0%	34,9%	25,9%
Photos of the product modeled by a professional					n=	1049
Definitely need	34,7%	34,7%	30,5%	29,8%	28,8%	31,7%
Don't mind	41,2%	42,4%	45,0%	41,5%	28,8%	39,8%
Not needed	24,1%	22,9%	24,5%	28,7%	42,4%	28,5%

Which of these features do you think are the most crucial to have a good experience when buying cosmetics online						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 256
One click purchases	3,5%	0,0%	5,9%	6,5%	7,1%	3,5%
Quick view	3,5%	2,3%	2,9%	0,0%	7,1%	2,7%
Wish list/Save for later	8,8%	4,7%	5,9%	6,5%	0,0%	5,9%
Search Engine/Filters	5,3%	3,5%	5,9%	3,2%	0,0%	4,3%
Icons for social media sharing	1,8%	7,0%	0,0%	3,2%	0,0%	3,1%
User Generated Content & Ratings	22,8%	23,3%	22,1%	6,5%	21,4%	20,7%
Spain						n= 178
One click purchases	5,9%	6,8%	7,9%	4,0%	4,5%	6,2%
Quick view	2,9%	5,1%	5,3%	4,0%	9,1%	5,1%
Wish list/Save for later	2,9%	5,1%	0,0%	8,0%	4,5%	3,9%
Search Engine/Filters	2,9%	5,1%	0,0%	8,0%	0,0%	3,4%
Icons for social media sharing	0,0%	0,0%	2,6%	4,0%	0,0%	1,1%
User Generated Content & Ratings	17,6%	18,6%	2,6%	8,0%	13,6%	12,9%
Italy						n= 249
One click purchases	7,7%	4,7%	11,8%	7,9%	3,8%	7,2%
Quick view	2,6%	7,0%	2,0%	3,2%	3,8%	3,6%
Wish list/Save for later	12,8%	11,6%	7,8%	1,6%	3,8%	6,8%
Search Engine/Filters	5,1%	7,0%	2,0%	4,8%	5,7%	4,8%
Icons for social media sharing	2,6%	0,0%	3,9%	0,0%	0,0%	1,2%
User Generated Content & Ratings	20,5%	11,6%	11,8%	7,9%	9,4%	11,6%
Germany						n= 172
One click purchases	4,2%	3,0%	0,0%	2,6%	5,6%	2,9%
Quick view	0,0%	18,2%	9,8%	10,5%	13,9%	11,0%
Wish list/Save for later	4,2%	3,0%	4,9%	10,5%	2,8%	5,2%
Search Engine/Filters	12,5%	6,1%	17,1%	10,5%	5,6%	10,5%
Icons for social media sharing	4,2%	3,0%	0,0%	2,6%	2,8%	2,3%
User Generated Content & Ratings	29,2%	15,2%	14,6%	23,7%	22,2%	20,3%
France						n= 250
One click purchases	9,1%	7,6%	5,9%	15,4%	18,2%	8,8%
Quick view	9,1%	1,3%	10,3%	7,7%	0,0%	6,4%
Wish list/Save for later	9,1%	1,3%	4,4%	3,8%	9,1%	4,8%
Search Engine/Filters	4,5%	3,8%	5,9%	3,8%	0,0%	4,4%
Icons for social media sharing	0,0%	5,1%	0,0%	0,0%	0,0%	1,6%
User Generated Content & Ratings	22,7%	8,9%	14,7%	7,7%	18,2%	14,4%
TOTAL						n= 1105
One click purchases	6,1%	4,4%	6,3%	7,3%	7,8%	5,7%
Quick view	3,6%	6,8%	6,0%	5,1%	6,8%	5,8%
Wish list/Save for later	7,6%	5,1%	4,6%	6,1%	4,0%	5,3%
Search Engine/Filters	6,1%	5,1%	6,2%	6,1%	2,2%	5,5%
Icons for social media sharing	1,7%	3,0%	1,3%	2,0%	0,6%	1,9%
User Generated Content & Ratings	22,6%	15,5%	13,2%	10,8%	17,0%	16,0%



Do you search for User Generated Content [UGC] on social networks before purchasing cosmetics products? For example, images or photos on Instagram						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 256
Yes	68,4%	64,0%	52,9%	67,7%	42,9%	61,3%
No	31,6%	36,0%	47,1%	32,3%	57,1%	38,7%
Spain						n= 178
Yes	76,5%	79,7%	57,9%	52,0%	54,5%	67,4%
No	23,5%	20,3%	42,1%	48,0%	45,5%	32,6%
Italy						n= 247
Yes	82,1%	88,4%	88,2%	65,6%	50,9%	73,7%
No	17,9%	11,6%	11,8%	34,4%	49,1%	26,3%
Germany						n= 172
Yes	100,0%	72,7%	53,7%	57,9%	41,7%	62,2%
No	0,0%	27,3%	46,3%	42,1%	58,3%	37,8%
France						n= 250
Yes	90,9%	77,2%	67,6%	46,2%	54,5%	74,0%
No	9,1%	22,8%	32,4%	53,8%	45,5%	26,0%
TOTAL						n= 1103
Yes	83,6%	76,4%	64,1%	57,9%	48,9%	67,7%
No	16,4%	23,6%	35,9%	42,1%	51,1%	32,3%

How important are customer reviews to you?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 248
Important	96,4%	88,4%	84,6%	85,7%	100,0%	89,5%
Not important nor unimportant	3,6%	11,6%	13,8%	14,3%	0,0%	10,1%
Unimportant	0,0%	0,0%	1,5%	0,0%	0,0%	0,4%
Spain						n= 109
Important	100,0%	92,3%	90,0%	92,3%	100,0%	94,5%
Not important nor unimportant	0,0%	7,7%	10,0%	7,7%	0,0%	5,5%
Unimportant	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Italy						n= 232
Important	86,5%	89,7%	91,8%	78,0%	79,2%	84,5%
Not important nor unimportant	13,5%	10,3%	8,2%	16,9%	16,7%	13,4%
Unimportant	0,0%	0,0%	0,0%	5,1%	4,2%	2,2%
Germany						n= 163
Important	83,3%	84,8%	81,6%	81,1%	71,0%	80,4%
Not important nor unimportant	16,7%	15,2%	13,2%	16,2%	22,6%	16,6%
Unimportant	0,0%	0,0%	5,3%	2,7%	6,5%	3,1%
France						n= 235
Important	91,9%	90,7%	87,3%	72,0%	80,0%	87,7%
Not important nor unimportant	8,1%	9,3%	12,7%	16,0%	10,0%	10,6%
Unimportant	0,0%	0,0%	0,0%	12,0%	10,0%	1,7%
TOTAL						n= 987
Important	91,6%	89,2%	87,1%	81,8%	86,0%	87,3%
Not important nor unimportant	8,4%	10,8%	11,6%	14,2%	9,8%	11,2%
Unimportant	0,0%	0,0%	1,4%	4,0%	4,1%	1,5%

Do you read any customer reviews before purchasing cosmetics [make-up] or skin care products online?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK						n= 256
Yes, always	77,2%	61,6%	41,2%	41,9%	35,7%	55,9%
Yes, sometimes	21,1%	38,4%	54,4%	48,4%	57,1%	41,0%
No, never	1,8%	0,0%	4,4%	9,7%	7,1%	3,1%
Spain						n= 112
Yes, always	60,0%	65,9%	57,1%	46,2%	50,0%	58,9%
Yes, sometimes	40,0%	29,3%	38,1%	53,8%	50,0%	38,4%
No, never	0,0%	4,9%	4,8%	0,0%	0,0%	2,7%
Italy						n= 247
Yes, always	59,0%	72,1%	64,7%	47,5%	39,6%	55,5%
Yes, sometimes	35,9%	18,6%	31,4%	49,2%	50,9%	38,5%
No, never	5,1%	9,3%	3,9%	3,3%	9,4%	6,1%
Germany						n= 172
Yes, always	58,3%	60,6%	43,9%	34,2%	36,1%	45,3%
Yes, sometimes	41,7%	39,4%	48,8%	63,2%	50,0%	49,4%
No, never	0,0%	0,0%	7,3%	2,6%	13,9%	5,2%
France						n= 250
Yes, always	59,1%	67,1%	47,1%	46,2%	18,2%	55,2%
Yes, sometimes	34,8%	27,8%	45,6%	50,0%	72,7%	38,8%
No, never	6,1%	5,1%	7,4%	3,8%	9,1%	6,0%
TOTAL						n= 1037
Yes, always	64,0%	65,2%	49,4%	43,2%	37,3%	54,2%
Yes, sometimes	32,7%	31,2%	45,0%	52,7%	53,2%	41,0%
No, never	3,3%	3,5%	5,6%	4,1%	9,5%	4,8%



Which customer service or help function do you think should always be offered for online shopping?						
	Age					
	16-24	25-34	35-44	45-54	>=55	TOTAL
UK	n=					256
Online/Live chat	75,4%	61,6%	57,4%	58,1%	35,7%	61,7%
Phone call	21,1%	26,7%	25,0%	25,8%	7,1%	23,8%
Video call	1,8%	8,1%	4,4%	9,7%	0,0%	5,5%
Text message	19,3%	18,6%	16,2%	32,3%	28,6%	20,3%
Contact Email	43,9%	45,3%	48,5%	64,5%	71,4%	49,6%
Local in-store support	29,8%	22,1%	17,6%	35,5%	21,4%	24,2%
Frequently asked questions (FAQ's)	33,3%	19,8%	41,2%	41,9%	50,0%	32,8%
Other	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
I do not know	3,5%	1,2%	4,4%	0,0%	7,1%	2,7%
Spain	n=					178
Online/Live chat	76,5%	69,5%	65,8%	60,0%	40,9%	65,2%
Phone call	58,8%	40,7%	44,7%	64,0%	54,5%	50,0%
Video call	2,9%	0,0%	7,9%	4,0%	4,5%	3,4%
Text message	17,6%	15,3%	7,9%	8,0%	9,1%	12,4%
Contact Email	52,9%	49,2%	31,6%	64,0%	27,3%	45,5%
Local in-store support	35,3%	32,2%	18,4%	36,0%	27,3%	29,8%
Frequently asked questions (FAQ's)	38,2%	25,4%	13,2%	28,0%	9,1%	23,6%
Other	0,0%	0,0%	2,6%	4,0%	0,0%	1,1%
I do not know	0,0%	3,4%	0,0%	0,0%	4,5%	1,7%
Italy	n=					247
Online/Live chat	51,3%	58,1%	54,9%	45,9%	39,6%	49,4%
Phone call	30,8%	18,6%	27,5%	24,6%	39,6%	28,3%
Video call	7,7%	9,3%	3,9%	4,9%	9,4%	6,9%
Text message	46,2%	39,5%	21,6%	16,4%	15,1%	25,9%
Contact Email	48,7%	53,5%	52,9%	47,5%	50,9%	50,6%
Local in-store support	48,7%	30,2%	23,5%	21,3%	37,7%	31,2%
Frequently asked questions (FAQ's)	35,9%	30,2%	11,8%	24,6%	30,2%	25,9%
Other	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
I do not know	0,0%	7,0%	2,0%	6,6%	3,8%	4,0%
Germany	n=					172
Online/Live chat	33,3%	42,4%	41,5%	21,1%	30,6%	33,7%
Phone call	29,2%	36,4%	24,4%	31,6%	27,8%	29,7%
Video call	8,3%	6,1%	7,3%	5,3%	5,6%	6,4%
Text message	29,2%	24,2%	29,3%	21,1%	25,0%	25,6%
Contact Email	58,3%	51,5%	43,9%	76,3%	44,4%	54,7%
Local in-store support	25,0%	15,2%	14,6%	21,1%	30,6%	20,9%
Frequently asked questions (FAQ's)	37,5%	45,5%	34,1%	36,8%	38,9%	38,4%
Other	0,0%	0,0%	2,4%	0,0%	0,0%	0,6%
I do not know	8,3%	9,1%	4,9%	2,6%	8,3%	6,4%
France	n=					250
Online/Live chat	51,5%	63,3%	42,6%	26,9%	18,2%	48,8%
Phone call	25,8%	27,8%	30,9%	30,8%	36,4%	28,8%
Video call	12,1%	8,9%	10,3%	7,7%	0,0%	9,6%
Text message	24,2%	26,6%	25,0%	23,1%	9,1%	24,4%
Contact Email	27,3%	34,2%	41,2%	57,7%	18,2%	36,0%
Local in-store support	13,6%	19,0%	22,1%	15,4%	36,4%	18,8%
Frequently asked questions (FAQ's)	34,8%	27,8%	25,0%	23,1%	36,4%	28,8%
Other	0,0%	0,0%	1,5%	0,0%	0,0%	0,4%
I do not know	9,1%	3,8%	8,8%	7,7%	0,0%	6,8%
TOTAL	n=					1103
Online/Live chat	57,6%	59,0%	52,4%	42,4%	33,0%	51,8%
Phone call	33,1%	30,0%	30,5%	35,3%	33,1%	32,1%
Video call	6,6%	6,5%	6,8%	6,3%	3,9%	6,3%
Text message	27,3%	24,8%	20,0%	20,2%	17,4%	21,7%
Contact Email	46,2%	46,7%	43,6%	62,0%	42,5%	47,3%
Local in-store support	30,5%	23,7%	19,3%	25,8%	30,7%	25,0%
Frequently asked questions (FAQ's)	36,0%	29,7%	25,0%	30,9%	32,9%	29,9%
Other	0,0%	0,0%	1,3%	0,8%	0,0%	0,4%
I do not know	4,2%	4,9%	4,0%	3,4%	4,8%	4,3%

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Thank you for your interest in our data report. For further information feel free to contact us.

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