

PERSONAL GROOMING

A CANADIAN PERSPECTIVE
NOVEMBER 2006

About the Survey

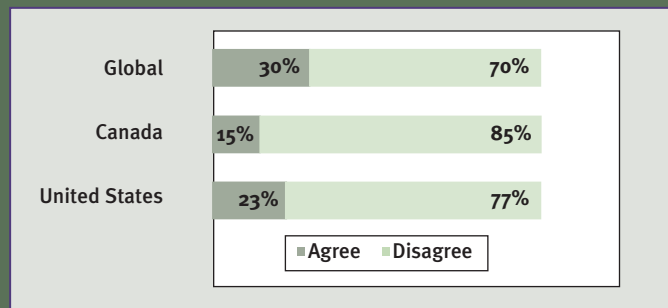
The Nielsen Global Omnibus surveys more than 26,000 Internet users around the world every six months - representing a global online population of close to one billion consumers. The survey gathers opinions over 47 countries across 15 time zones.



Everyday via every form of mass media, Canadian consumers are bombarded with messages concerning their personal appearance. There are more products and services available to aid Canadians in looking their best than ever before. Face Care products, one of the top selling categories in the Canadian grocery and drug retail market, by themselves account for over \$580 million annually, and are growing at a rate of 9% per year. Obviously, Canadians are willing to open their pocketbooks to purchase items that will help them to look their best.

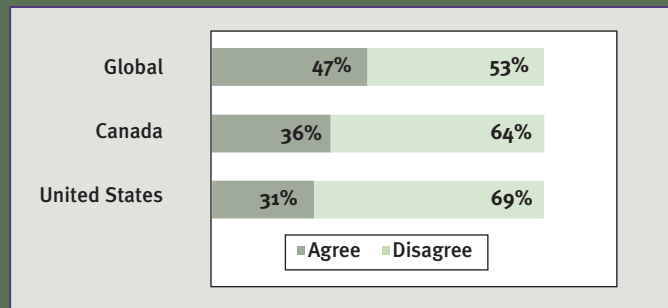
Along with their global counterparts, most Canadians (68%) believe that the pressure to look good is much greater than it was for their parents' generation. Despite the strength of the beauty aid categories in retail stores, and their perception of increased pressure to look good, 85% of the Canadian consumers surveyed do not believe they are spending more than they used to on beauty products and treatments. A much larger percentage of global respondents, almost one in three, stated that they are spending more on these items than they once did.

These days, to enhance my appearance, I spend much more than I used to on beauty products and treatments



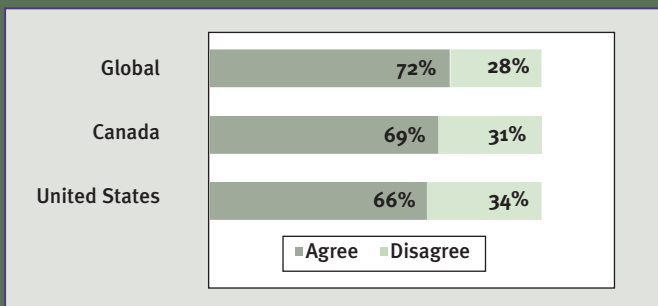
Almost half of global respondents indicated that they try to be stylish at all times. Canadians were less concerned, with just over one third of respondents indicating that they tried to look stylish at all times, and Americans indicated the least dedication to looking stylish.

I try to look stylish at all times

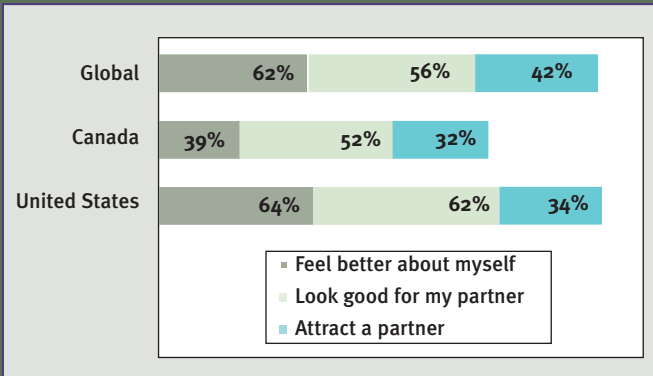


Canadians differ from their US and global counterparts when it comes to the main reason they invest in personal grooming. The primary reason for Canadians is to look good for their partners. In the United States and internationally, the primary reason for spending money on personal grooming is to feel better about one's self.

These days, the pressure to look 'good' is much greater than it was in our parent's generation

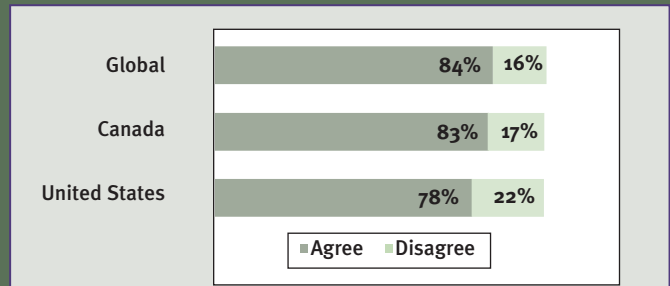


I invest in personal grooming to:

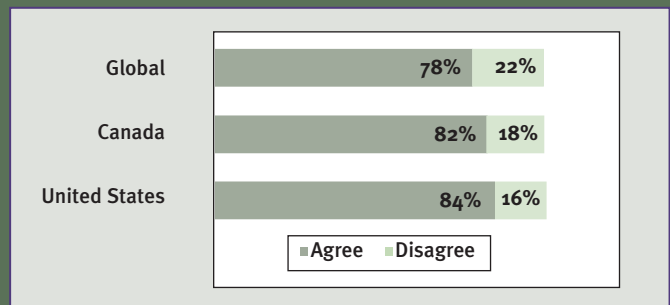


Canadians are less likely to spend time and money on grooming products and services than their international counterparts. The exception to this was body massage, which over 40% of Canadians indulge in at least once a year. Americans follow a similar pattern when it comes to choice of grooming products, although investment in hair care is far more common in the United States and internationally than in Canada. Americans do not enjoy body massage at nearly as high a rate as Canadians. However, when asked which grooming service they would spend more on if money were no object, body massage topped the list in the United States, Canada and internationally. 57% of Canadians responded that they would spend more on massage if they could.

Men are more interested in personal grooming than they used to be:



It is ok for men to spend time and money enhancing their appearance:



Most Canadians agree that the pressure to look good is stronger than it has been in the past. They also strongly believe that the trend toward better personal grooming is not just restricted to women. However, Canadians are still somewhat hesitant to increase their spending on personal grooming, and feel less compelled than consumers in some other countries to always appear stylish. Canadians invest in personal grooming primarily to please their partners, rather than to feel better about themselves. As the median age of Canadians continues to increase, and with an ever expanding focus on staying healthy and youthful, the investment in personal grooming products and services may also increase.

Invest in at least once a year:

	Global	Canada	United States
Skin Care Regimen	67	48	61
Facial Treatment	54	55	46
Manicure/Pedicure	44	36	39
Body Massage	40	41	28
Hair Removal	26	22	22
Exfoliation/Scrubs	38	27	38
Eye Brow/Eyelash Tinting/Shaping	31	24	29
Tanning (Spray, Lotion, Sunbed)	25	19	23
Teeth Whitening	39	34	27
Skin Whitening	15	2	8
Hair Care	81	63	81

Gender stereotypes are changing, and one of the places this is most evident is in the area of personal grooming. The vast majority of Canadian respondents agree that men are more interested in personal grooming than they used to be, and that it is ok for men to spend time and money enhancing their appearance. Americans were not quite as definite about this gender based trend as were Canadian or global respondents. While they strongly believed that it was ok for men to invest in their appearance, they were less sure than Canadians that men were actually more interested in personal grooming than they used to be.

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