

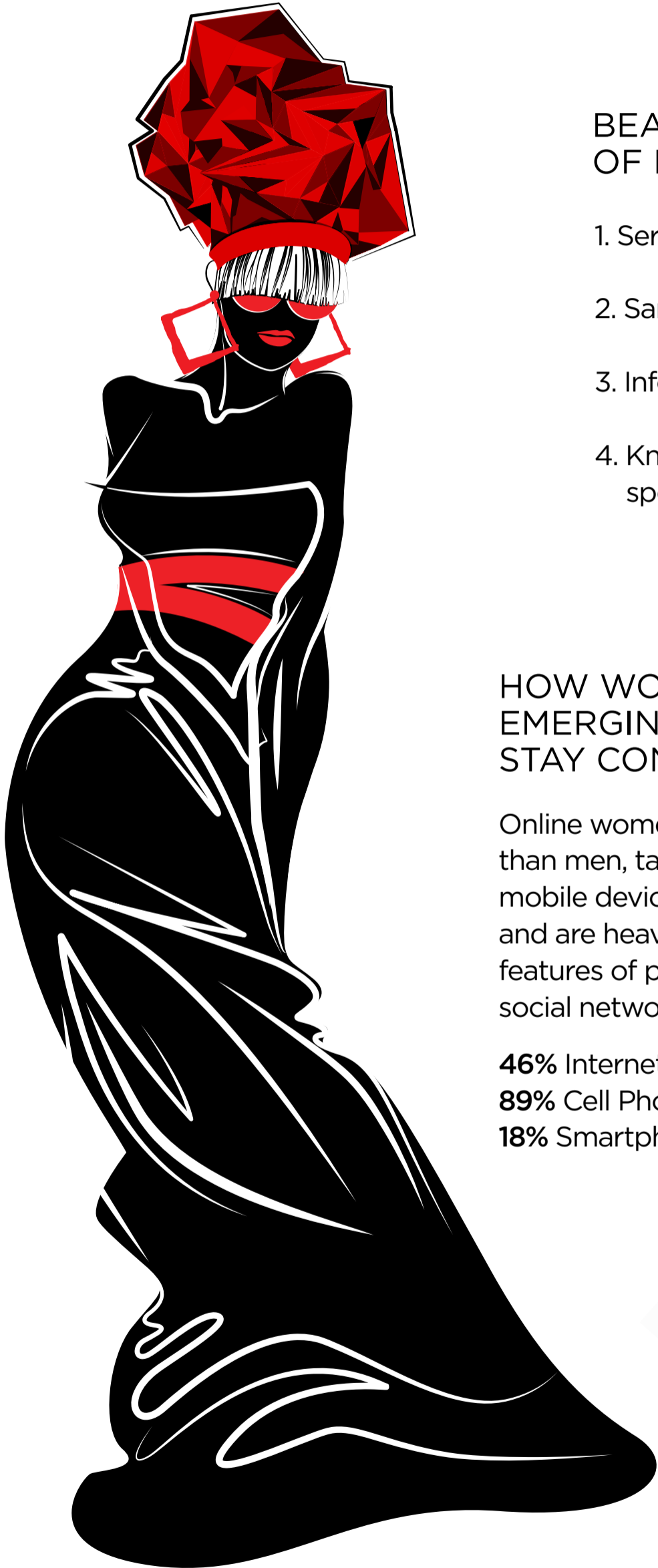
The SA

Digital Diva

Online & Beauty Habits
of Women

Red
Squartz

MAKE-UP • SKINCARE • FRAGRANCE



BEAUTY HIERARCHY** OF NEEDS

1. Service Please!
2. Sampling to try at home
3. Information & Tips
4. Knowledge about specials & new products



HOW WOMEN IN EMERGING MARKETS STAY CONNECTED ONLINE***

Online women are more engaged than men, talk and text on their mobile devices more than men and are heavier users of social features of phones (SMS, MMS, social networking).

- 46% Internet
- 89% Cell Phone
- 18% Smartphone



Online Habits of the High-flying *Digital Diva**

NUMBER OF
WOMEN WHO HAVE
SHOPPED ONLINE*

67% Shopped Online

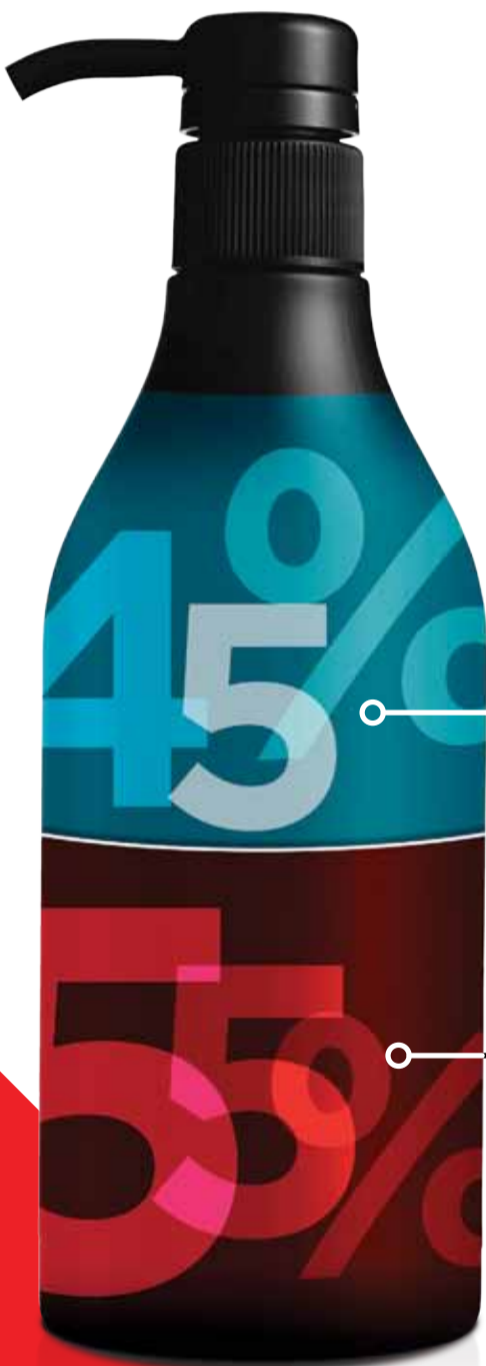
23% Never Shopped Online



PERCENTAGE WHO ACCESS
THE INTERNET MORE OFTEN
THAN TWICE A DAY*

45% Men

55% Women



CONNECTING
ONLINE*

37% 3G

62% ADSL

13% Dial Up / Pop



*Data taken from Top End Survey (20 000 respondents with a household income of R30 000+)

Digital Diva Market

COSMETICS AND PERSONAL CARE MARKET GROWING AT 12 % PER ANNUM IN SA**



DIGITAL DIVAS DRIVE DOLLARS***

53% of women would allocate additional income earned or expected over next 5 years to health / beauty items

71% of women make health/ beauty purchase activities and decisions

SOCIAL NETWORKING KEY TO WOMENS' ONLINE EXPERIENCE****

92% women share information about deals and positive experiences with friends and family

76% of women want to review products and services



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References:

* Data taken from Top End Survey (20 000 respondents with a household income of R30 000+) | ** Edcon 2011 Internal Study on Cosmetics and Personal Care Market, conducted by BCG
Nielsen Women of Tomorrow Study 2011 | *Ogilvy & Mather Chicago, WPP's Mindshare and Microsoft Advertising: Women in their Digital Domain Quantitative Study 2009