

Cosmetics Europe
the personal care association

CONSUMER INSIGHTS 2017



Acknowledgements

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COSMETICS ARE AN IMPORTANT PART OF PEOPLE'S EVERYDAY LIFE



Foreword



The contribution of the cosmetics and personal care industry to Europe's economy is huge – we are a major exporter, a major employer, a major investor in research and development, and a byword for European quality. The European cosmetics market is the biggest in the world.

But our contribution is not limited to the economy. While the functional benefits of our products are well documented, there is growing evidence that cosmetics and personal care products have significant positive effects on something less tangible, but no less important – quality of life.

No industry can afford to ignore what consumers say. It is the insights of our consumers that help drive our industry forward. Prepared by Third-i on behalf of Cosmetics Europe, 'Consumer Insights 2017' sets out to discover what consumers from across Europe, in all age groups, men and women, really think about our products and their impact on factors such as self-esteem, well-being, and social interaction. And as consumers in our digital age demand accessible and accurate information, we asked about how we meet these needs too.

The results are revealing, and perhaps to some, surprising. They are a major step forward in our understanding of consumer perceptions in our sector. Far from being 'merely' superficial, it is clear that our products contribute in fundamental ways to improving the lives of the 500 million European citizens who use them every single day.

Our industry has safety, sustainability and innovation at its heart. As the survey testifies, the efficacy and quality of our products are strongly appreciated by consumers. But even more than this, it is now clear that cosmetic and personal care products have an important place in people's lives. I invite you to read on and learn more.

John Chave
Director-General
Cosmetics Europe

About this study

This report, prepared by Third-i on behalf of Cosmetics Europe, provides a snapshot at European level of consumer perceptions of the cosmetics and personal care industry.

Our research conducted an online survey to 4116 consumers in April 2017 across ten EU Member States from different regions (France, Germany, UK, Netherlands, Italy, Spain, Denmark, Sweden, Poland, and Bulgaria) to be able to draw conclusions at EU level. Respondents were representative of each country's gender distribution and age groups.

Full details of the study methodology can be found on page 25.

Executive Summary

In this major new study, consumers told us cosmetics and personal care products matter: **71% said they are important or very important in their daily lives**¹. Their positive perception extended across a range of goods - from oral, hair and skin care to sunscreens and other cosmetic and personal care products.

Most revealing however, is the **clear link consumers make between cosmetics and personal care products and quality of life**; 72% of consumers said that the cosmetics and personal care products they use improve their quality of life². This extended across every age group³ and is particularly strong among women⁴, depicting an industry aligned to consumer needs and providing an effective range of products to meet them.

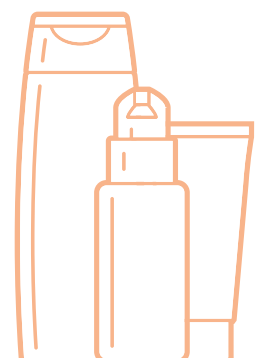
When asked to prioritise their **most important criteria of quality of life, consumers value good health and personal hygiene the most**⁵; and placed cosmetics and personal care products as key to achieving and maintaining them⁶. Consumers consider these most important to their quality of life - even above financial stability or a rewarding job - reflecting an emerging emphasis on well-being across society.

Consumer perception also supports wider current research that cosmetics and personal care products play **an important role in building up self-esteem and enhancing social interactions every day**. More revealing, however, is the strength of this connection. 80% of consumers identified cosmetics and personal care products as important or very important in building up self-esteem⁷. Interestingly, this perception was almost uniform across age brackets: everyone from young millennials to older age groups relying on products that matter to them to help enhance how they feel in their daily lives⁸.

Given the important role in consumers' quality of life, it is unsurprising that **68% of consumers consider cosmetics and personal care industry products important or very important to how they are perceived by others**⁹. Consumers also agree that cosmetics and personal care products help them to interact with others in the way that they want¹⁰.

In a science-driven and fast-paced industry that makes significant research and development investments to deliver on consumers' expectations and needs, **consumers appreciate innovation most as a tool to drive product quality and efficacy**¹¹. In terms of accessing and assessing product information on or off-line, **68% of consumers feel that they can access the information they are looking for**¹².

Feedback given to 'Consumer Insights 2017', suggests a positive relationship between consumers and cosmetics and personal care industry products they consider improve quality of life, build up self-esteem and enhance their social interactions.



1. Table 1, page 8 2. Figure 9, page 11 3. Figure 12, page 12 4. Figure 10, page 12 5. Figure 7, page 11 6. Figure 9, page 11 7. Figure 14, page 15
8. Figure 16, page 16 9. Figure 17, page 16 10. Figure 18, page 16 11. Figure 19, page 17 12. Figure 21, page 21

In short: what consumers told us...

IMPORTANCE AND QUALITY OF LIFE

Cosmetics and personal care products matter to European consumers and are held in high regard:



71%
of consumers see them as important or very important in their daily lives

72%

of consumers feel the cosmetics and personal care products they use improve their quality of life



SELF-ESTEEM AND SOCIAL INTERACTION

Consumers said cosmetics and personal care industry products have a positive effect on how they feel:

80%

identify them as important or very important in building up self-esteem



Consumers across all age brackets value products as important and effective in building up their self-esteem and enhancing their interaction with others

INNOVATION WITH PURPOSE

Consumers value the tangible results of an innovative industry, recognising and prioritising:



EFFICACY
86%



QUALITY
87%

What we asked consumers...

Our starting point was a desire to hear directly from European consumers about how they perceive and use cosmetics and personal care products in their daily lives. A deeper understanding of consumer perception will provide evidence to policy makers, industry and other key stakeholders, bringing new insight and perspective to how consumers relate to the cosmetics and personal care industry.

In addition, 'Consumer Insights 2017' focused on some previously unaddressed issues:

- How do consumers understand what the cosmetics and personal care industry comprises?
- What do consumers see as important when relating to cosmetics and personal care products?
- How do they feel cosmetics and personal care products and the industry meet their needs?
- Where do consumers find their information on cosmetics and personal care products?

A representative sample of over 4000 consumers in ten countries is a valuable addition to build on knowledge in this area, providing a bird's-eye view at European level. From a consumer evidentiary standpoint, these findings can inform European policy debate while also providing a basis for further investigation at national level.

To set the scope and gauge understanding of cosmetics and personal care products, consumers were asked which of the following they consider to be a type of cosmetics and personal care product. These questions aimed to encourage the respondent to think about their understanding of the products.

FIG 1: WHAT IS PART OF THE PERSONAL CARE AND COSMETICS INDUSTRY (IN %)

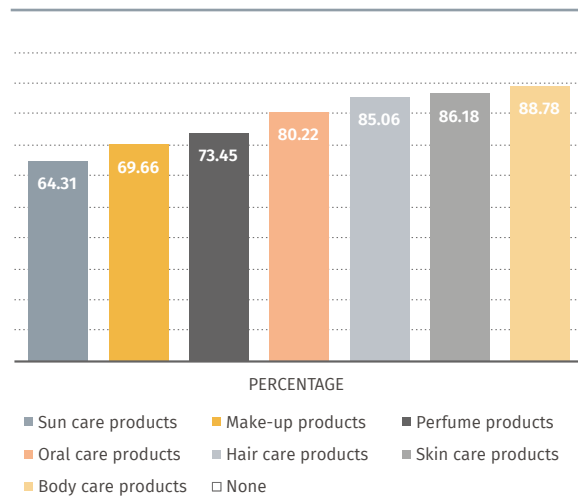
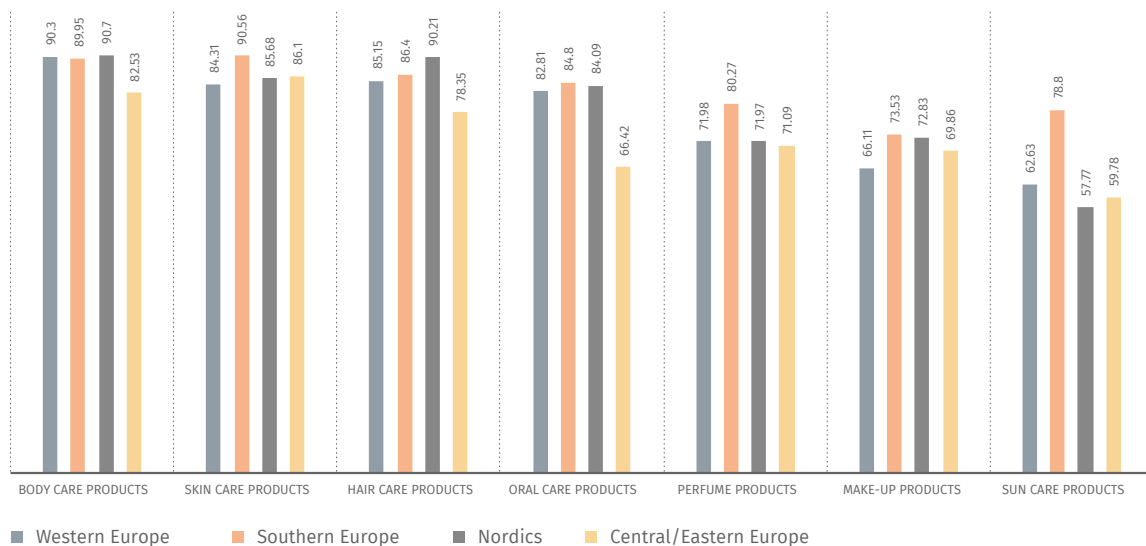


FIG 2: WHAT IS PART OF THE PERSONAL CARE AND COSMETICS INDUSTRY BY REGION (IN %)



What consumers told us in detail...

1. Important drivers of quality of life

Cosmetics and personal care products play a vital daily role in health and hygiene or simply to look good and feel more confident. Recent years have also seen a blurring of the lines between proactive healthcare and cosmetics and personal care products as consumers seek to take control of a better sense of well being.

Consumers expressed their perception of seven specific and recognised categories of cosmetics and personal care products - oral care, skin care, sun care, hair care, make-up, body care and perfumes. Despite a wide range of products, people understand and identify a cohesive cosmetics and personal care industry exists behind them. And what's more, they make a clear link between it and their ability to lead a healthy, hygienic and fulfilling life. 71% of consumers at European level view cosmetics and personal care products as important or very important to their daily lives (Table 1).

Consumers demonstrate a real sense of attachment and approval, with a high value attributed to cosmetics and personal care products are expressed across all age groups.

Oral care, comprising of items such as toothpaste, mouthwashes and dental floss are perceived as highest priority, with 94% judging them as important or very important to their daily lives, including a full 64% saying very important. This category is closely followed by body care products at 90% and hair care at 85% (Figure 3).

Within the high perceived importance, there are some understandable differences in use and attachment to different cosmetics and personal care products. Gender and geography work to shape how much value is attributed.



71%

of consumers see cosmetics and personal care products as important or very important in their daily lives

For instance, the greatest perception gap is found in make-up products. 15% of male respondents judge them important or very important (Figure 4), while 65% of female respondents perceive them as important or very important to their lives (Figure 5). Men also show themselves to be relatively ambivalent towards sun care products with only 44% seeing them as important or very important and still ranking perfumes and skin care in fifth (59%) and sixth (58%) place out of seven product categories (Figure 4). These figures are despite an increasing awareness and concern for their appearance amongst men; especially in the 45-64 age group as they lead increasingly active lifestyles and are more conscious about their appearance and health than earlier generations¹³.

Regional differences and frequency of use may also influence perceived value. Sun care products are considered by 75% of Southern European respondents to be important or very important in their daily lives, while only 32% of Nordic consumers agree (Figure 6).



FIG 3: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN YOUR DAILY LIFE (IN %)

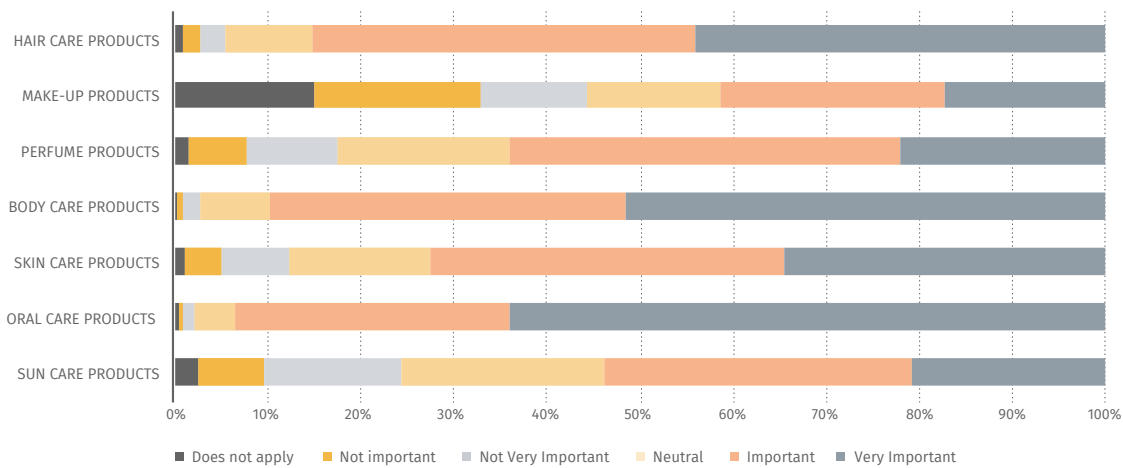


TABLE 1: SUMMARY OF IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN YOUR DAILY LIFE (IN %)

	Important	Very Important
Sun care products	33.0	20.8
Oral care products	29.6	64.0
Skin care products	38.0	34.5
Body care products	38.3	51.6
Perfume products	42.0	22.1
Make-up products	24.1	17.3
Hair care products	41.2	44.0
Average:	35.0	36.0
Total:		71.0

13. <http://go.euromonitor.com/white-paper-2017-top-10-global-consumer-trends-EN>



FIG 4: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN YOUR DAILY LIFE (MALE)

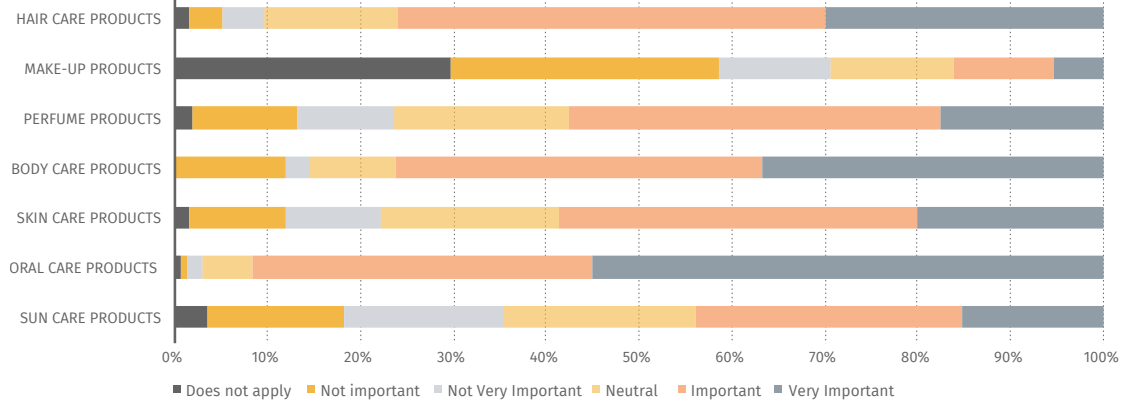


Fig 5: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN YOUR DAILY LIFE (FEMALE)

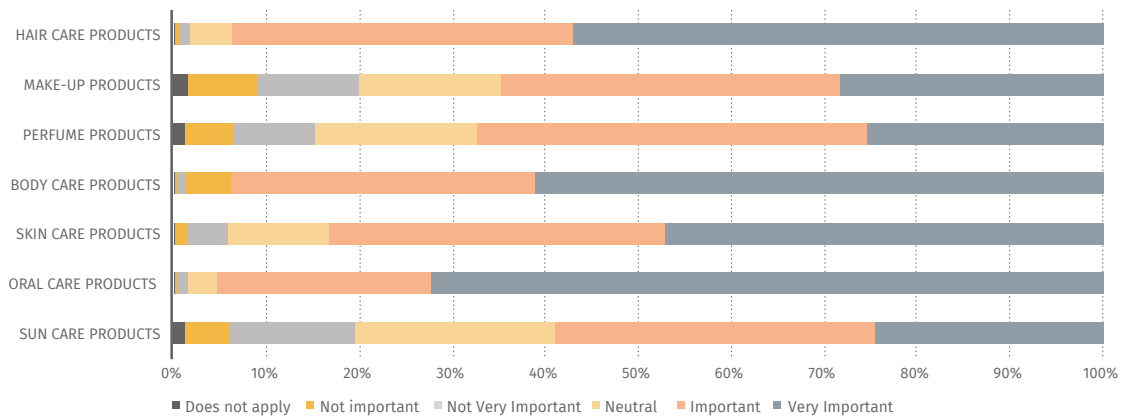
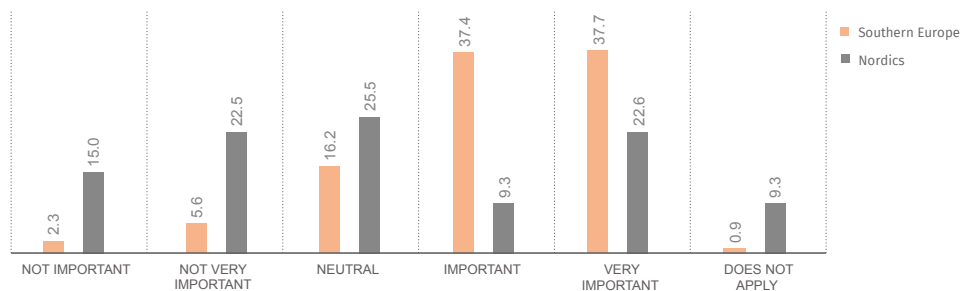


FIG 6: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN YOUR DAILY LIFE (IN %)



We know we value it and know we want more of it; but quality of life is a nuanced and far-reaching concept within our lives. When asked, consumers choose good health and personal hygiene as their most important quality of life criteria - placing them even above financial stability or a rewarding job.



EUROPEAN CONSUMERS PRIORITISE GOOD HEALTH AND PERSONAL HYGIENE AS THEIR MOST IMPORTANT DRIVERS OF QUALITY OF LIFE

A full 96% of consumers told us good health and a further 94% personal hygiene as important or very important to their quality of life. This placed them even above financial stability at 93% or a rewarding job for 79%. The emerging emphasis on well-being across society is underlined by these top two consumer priorities and further supported by 83% also citing confidence in appearance as important or very important (Figure 7).

Social bedrocks of quality of life - positive relationship with family and fulfilling social life - are both perceived as important, though family comes before friends. 91% considered a positive relationship with family important or very important compared to 85% for a fulfilling social life (Figure 7).

Consumers value a cosmetics and personal care industry able to understand and address these needs, with 71% stating cosmetics and personal care products are important or very important to improving their quality of life (Figure 8). This illustrates effective products that help achieve something they value highly - an impression that extends across all age groups (Figure 12) and is particularly strong among women (Figure 10). There is some hesitancy among male consumers, 25% of which who are neutral on this perception (Figure 11), which indicates a portion of the population where cosmetics and personal care products' importance in improving their quality of life is less marked.

On average, 72% of people across every age group made the connection between cosmetics and personal care products and quality of life (Figure 9). Showing a strong connection with every generation on this key issue reinforces the importance of cosmetics and personal care products in consumers' daily lives. Many people are adopting a more holistic approach to health and wellness issues, trying to pursue a more healthy lifestyle¹⁴ with a significant increase in over 60s keen to extend their active and healthy ageing. This said, it is the youngest age groups who perceive the greatest value, with 76% of 16-24 year olds and 79% of 25-34 age range considering cosmetics and personal care products important or very important to their quality of life, while 64% of those above 65 consider it to be so (Figure 12).

Each of us holds a unique perception of our position in life, culture and value system¹⁵, making consumer perception of cosmetics and personal care products in their quality of life prime candidate for continued investigation. Yet, looking at what consumers told us already reveals they see a clear link between cosmetics and personal care and improving their quality of life on a daily basis.

CONSUMER PERCEPTION REFLECTS AN EMERGING EMPHASIS ON WELL-BEING, PRIORITISING GOOD HEALTH AND IMPORTANCE OF PERSONAL HYGIENE IN ACHIEVING QUALITY OF LIFE AND VALUING CONFIDENCE IN APPEARANCE HIGHLY

14. <http://www.mintel.com/beauty-and-personal-care-trends/> 15. <http://www.who.int/healthinfo/survey/whoqol-qualityoflife/en/>

FIG 7: IMPORTANCE OF FACTORS IN IMPROVING YOUR QUALITY OF LIFE (IN %)

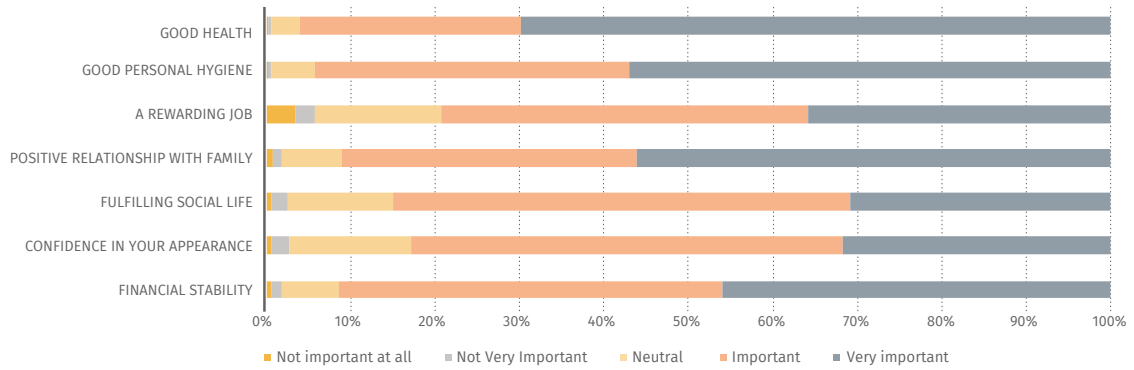
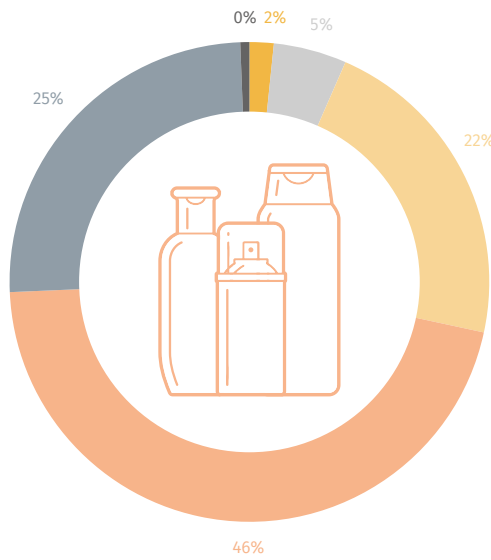
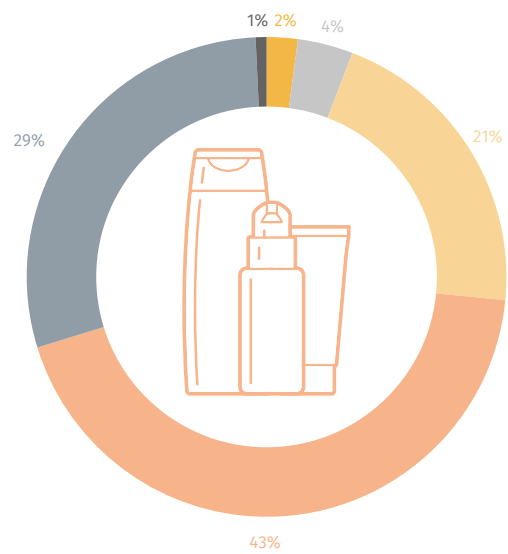


FIG 8: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN IMPROVING YOUR QUALITY OF LIFE



■ Not important at all ■ Important
■ Not very important ■ Very Important
■ Neutral ■ Does not apply

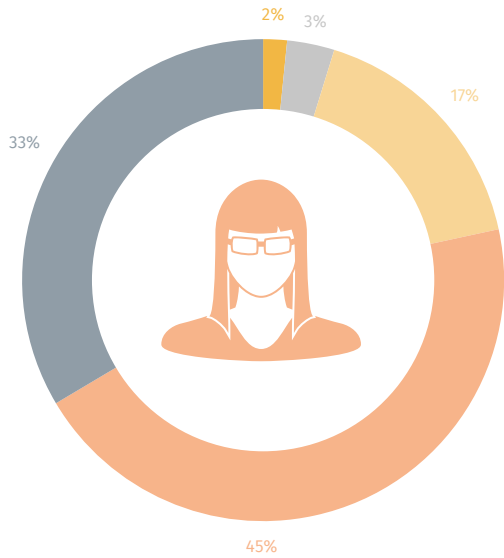
FIG 9: 'THE PERSONAL CARE AND COSMETIC PRODUCTS THAT I USE IMPROVE MY QUALITY OF LIFE'



■ Strongly disagree ■ Somewhat agree
■ Somewhat disagree ■ Strongly agree
■ Neither agree nor disagree ■ Does not apply

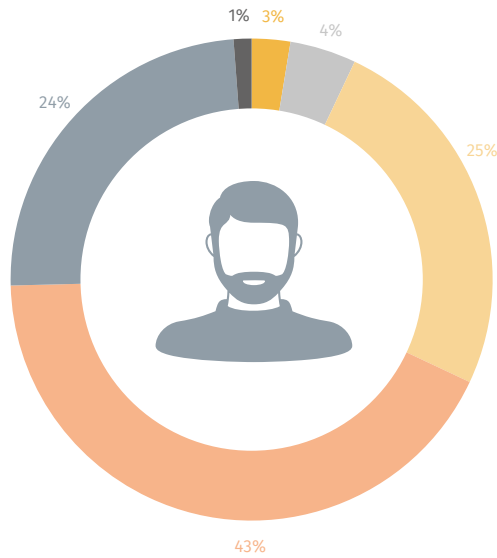
72% of consumers said the cosmetics and personal care products they use improve their quality of life

FIG 10: 'THE PERSONAL CARE AND COSMETIC PRODUCTS THAT I USE IMPROVE MY QUALITY OF LIFE' (FEMALE)



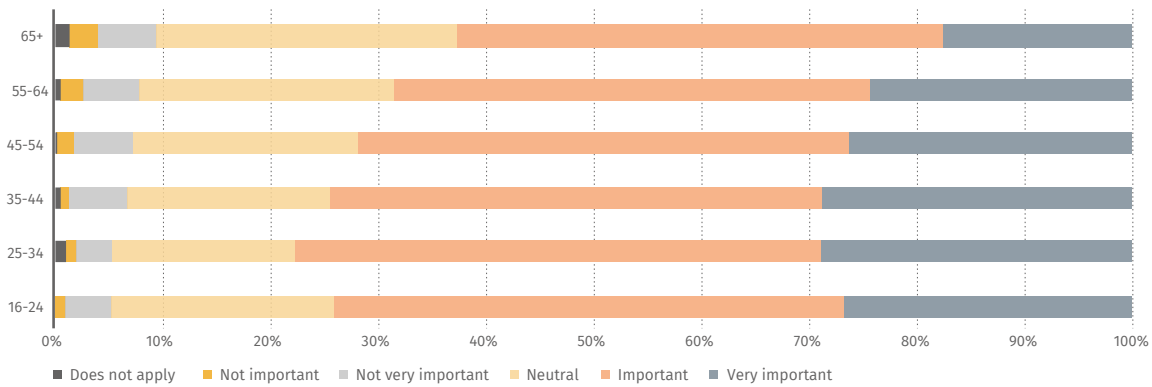
- Strongly disagree
- Somewhat agree
- Somewhat disagree
- Strongly agree
- Neither agree nor disagree

FIG 11: 'THE PERSONAL CARE AND COSMETIC PRODUCTS THAT I USE IMPROVE MY QUALITY OF LIFE' (MALE)



- Strongly disagree
- Somewhat agree
- Somewhat disagree
- Strongly agree
- Neither agree nor disagree
- Does not apply

FIG 12: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN IMPROVING QUALITY OF LIFE (BY AGE GROUPS IN %)





2. Enhancing self-esteem and social interaction

‘Consumer Insights 2017’ supports wider current research that cosmetics and personal care products play an important role in building up people’s self-esteem and enhancing their social interactions every day. 80% of consumers feel cosmetics and personal care products are important or very important to building up self-esteem (Figure 14).

More revealing, however, is the strength of this connection. Of those judging industry products important to enhancing self-esteem, 74% say they are effective at achieving this goal (Figure 15). This further supports the assertion of an industry providing a range of performing products meeting consumer needs. Once more, perception is almost uniform across age brackets: everyone from young millennials to older age groups relying on products that matter to them to help enhance how they feel in their daily lives (Figure 16). Rare that an industry is so closely related to by consumers at all stages of life.

Given the important role in supporting their quality of life – particularly in health and personal hygiene – and enhancing self-esteem and appearance, it is unsurprising that 68% of consumers consider cosmetics and personal care industry products important or very important to how they are perceived by others (Figure 17). 60% say cosmetics and personal care products help them to interact with others in the way that they want (Figure 18). Furthermore, consumers value confidence in their appearance as much as having a fulfilling social life, with both considered by 83% as important or very important (Figure 13).

In the UK, the Cosmetic, Toiletry and Perfumery Association (CTPA) has a long track record of exploring the link between self-esteem and people’s well-being with positive effects for our health, social interactions, role in civic society¹⁶ and published a dedicated piece on self-esteem in the workplace. Their reports identify multiple benefits, but also highlight research into the risk factors of low self-esteem in a range of social problems, such as teenage pregnancy and unemployment among young men. A 2015 study by the Fédération des Entreprises de la Beauté (FEBEA) showed over 60% of respondents identified that cosmetics have a positive impact on well-being, image, self-confidence and mood, with a large proportion (>40%) also identifying benefits in terms of social life, love life, family life, professional life and health¹⁷.

While ‘Consumer Insights 2017’ shows all age groups value cosmetics and personal care products to enhance self-esteem and social interaction, there is certainly further nuance behind this at different stages of life. A study by IKW, the German Cosmetic, Toiletry, Perfumery and Detergent Association, ‘Youth Undisguised’¹⁸, looked much closer at 14-21 year olds. Teenagers are one specific audience who can struggle with self-esteem and social interaction as they transition into adulthood. 73% of the polled young people considered body and beauty care to be very important in their life. The survey further asserts good looks give them the feeling of social acceptance, security and control over their emotions.



80%

identify cosmetics and personal care products as important or very important in building up self-esteem

16. <http://www.ctpa.org.uk/content.aspx?pageid=272> 17. <http://tinyurl.com/k5ppfen> 18. <http://www.ikw-youthstudy.org/>

FIG 13: IMPORTANCE OF FACTORS IN BUILDING UP SELF-ESTEEM (IN %)

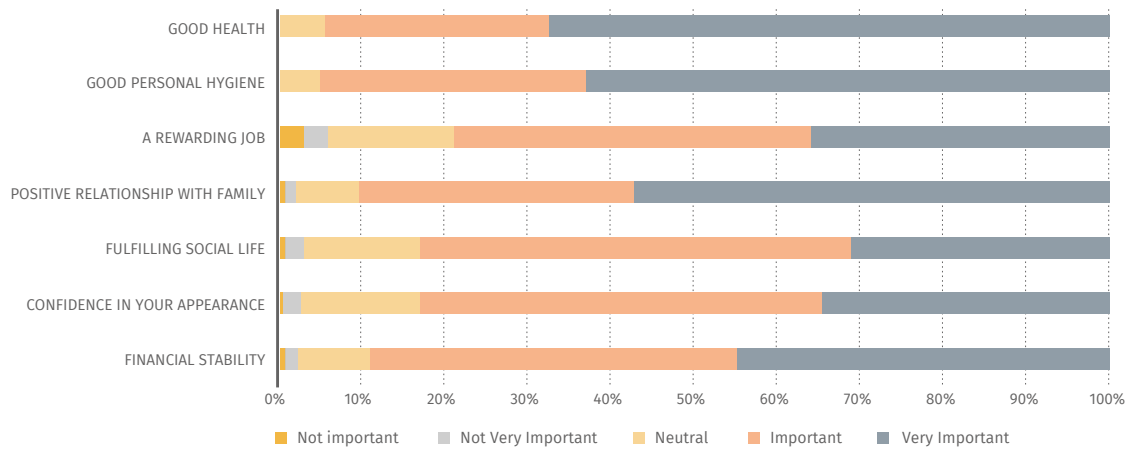
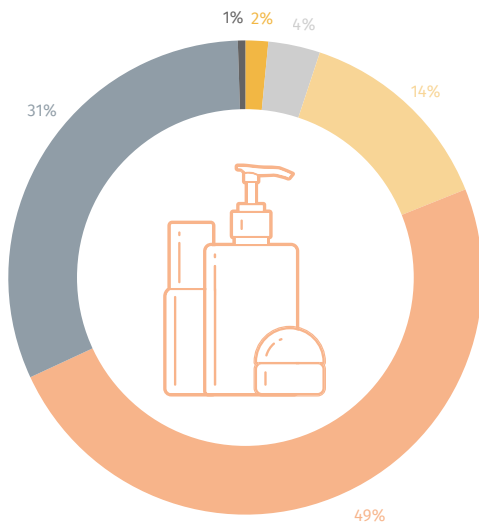
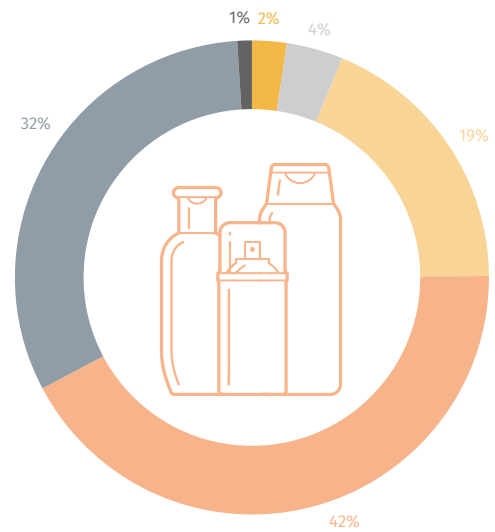


FIG 14: IMPORTANCE OF PERSONAL CARE AND COSMETICS PRODUCTS IN BUILDING UP SELF-ESTEEM



■ Not important at all
■ Important
■ Not very important
■ Very Important
■ Neutral
■ Does not apply

FIG 15: 'THE PERSONAL CARE AND COSMETIC PRODUCTS THAT I USE HELP ME TO BUILD UP MY SELF-ESTEEM'



■ Strongly disagree
■ Somewhat agree
■ Somewhat disagree
■ Strongly agree
■ Neither agree nor disagree
■ Does not apply



FIG 16: IMPORTANCE OF PERSONAL CARE AND COSMETIC PRODUCTS IN BUILDING UP SELF-ESTEEM (BY AGE GROUPS IN %)

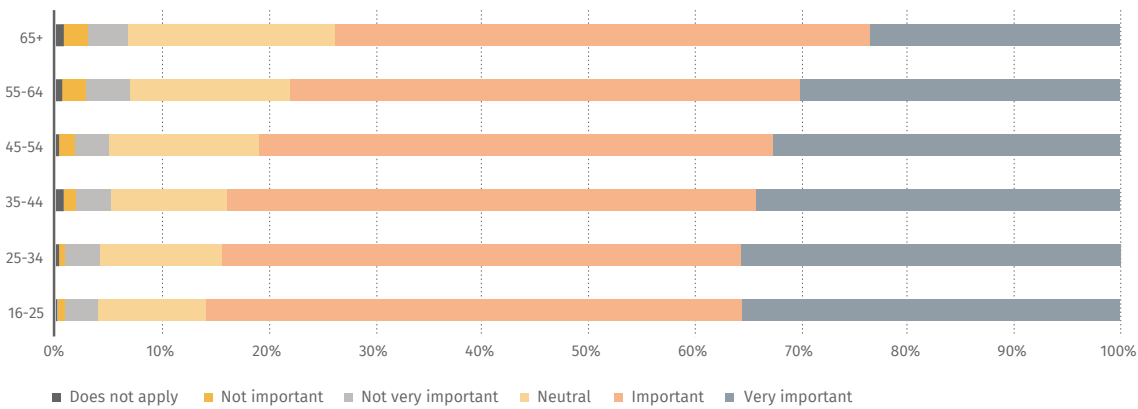


FIG 17: IMPORTANCE OF PERSONAL CARE AND COSMETICS PRODUCTS IN HOW I AM SEEN BY OTHERS

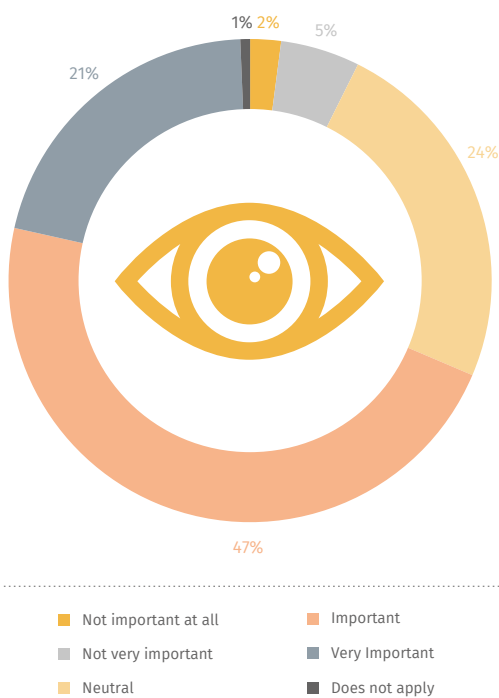
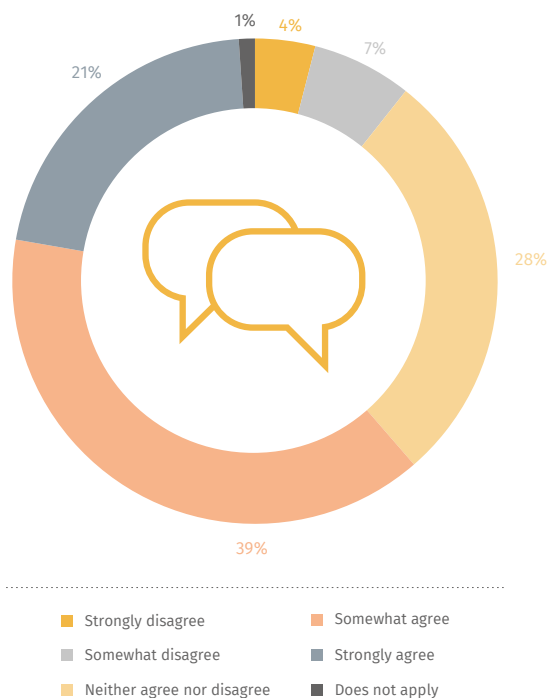


FIG 18: 'THE PERSONAL CARE AND COSMETIC PRODUCTS THAT I USE HELP ME TO INTERACT WITH OTHERS (I.E. FAMILY, FRIENDS, COLLEAGUES) IN THE WAY THAT I WANT'



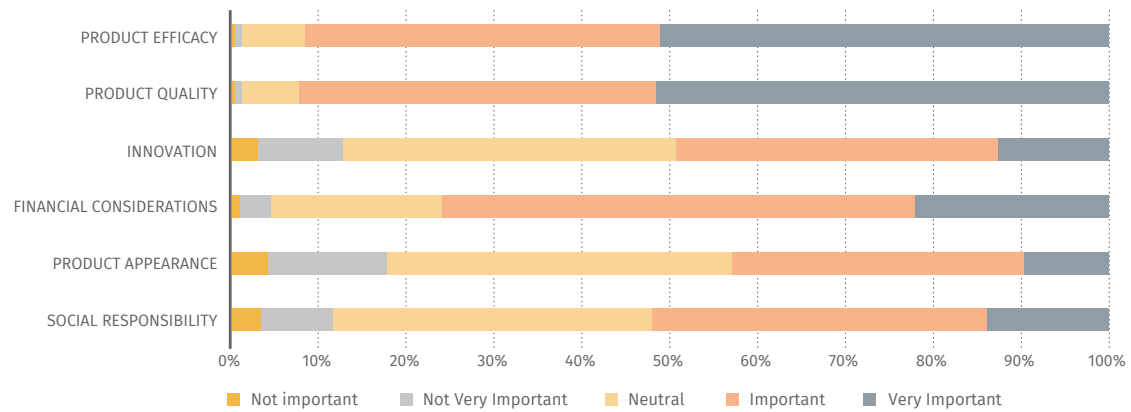
3. Innovation and information with purpose

Cosmetics and personal care is a fast-moving consumer industry founded on giving consumers access to safe, sustainable and innovative products. Much of this begins with the sector's 27,700 scientists and an annual research and development spend of €1.27 billion¹⁹, meticulously working to push innovation forward. Consumers told us they value the tangible results of an innovative industry, prioritising efficacy and quality above all.

Consumers appear to be assured of the cosmetic and personal care industry's ability to meet social responsibilities, although 52% of consumers judging this to be important or very important points to Europe's emerging environmental awareness and a growing trend for nature-inspired products (Figure 19).

When asked about what elements are most important when deciding to buy a cosmetics and personal care product, consumers rank efficacy 86% and quality 87% highest. Financial considerations at 68% is some way behind making up their top three. Innovation as an explicit process is chosen by 34% as important or very important (Figure 19).

FIG 19: IMPORTANCE OF ELEMENTS WHEN DECIDING TO BUY A PERSONAL CARE OR COSMETIC PRODUCT (IN %)



19. <https://www.cosmeticseurope.eu/about-us/we-care/innovation>

Consumers value the tangible results of
an innovative industry, prioritising:



EFFICACY
86%



QUALITY
87%





Technology is transforming the way consumers research, browse, buy and even use cosmetics and personal care products. Today, the diversification of digital and social media means consumers are involved and active in producing their own information, spreading, exchanging and consuming it. These are considerations for continuing to deliver the industry-wide commitment to effective and fair communication that enables informed decision-making.

Consumers told us that despite a multiplication of information sources and this evolving context, a positive 70% feel that they can easily access information on personal care and cosmetics products (Figure 20), and 68% agree that what they find is the information that they are looking for (Figure 21). With one foot either side of the digital divide, product packaging (54%) and websites (51%) are the most used sources of information (Figure 23).

As with many consumer-facing industries, social media such as YouTube, blogs and Instagram are highly consulted among younger users. Unsurprisingly, the youthful 16-24 age category is most active on these new social media platforms, with older audiences seeking a mix of on and offline information (Figure 22). In terms of gender, there is one notable preference for beauty blogs among those who seek information online, with 48% of females and only 22% of males using this as a source of information (Figure 24).

Among those seeking their information online, consumers have a clear enthusiasm for online ratings and reviews (59%) (Figure 25). A further 46% get information from friends and acquaintances using Facebook (Figure 25).

FIG 20: 'I FEEL THAT I CAN EASILY ACCESS INFORMATION ON MY PERSONAL CARE AND COSMETIC PRODUCTS'

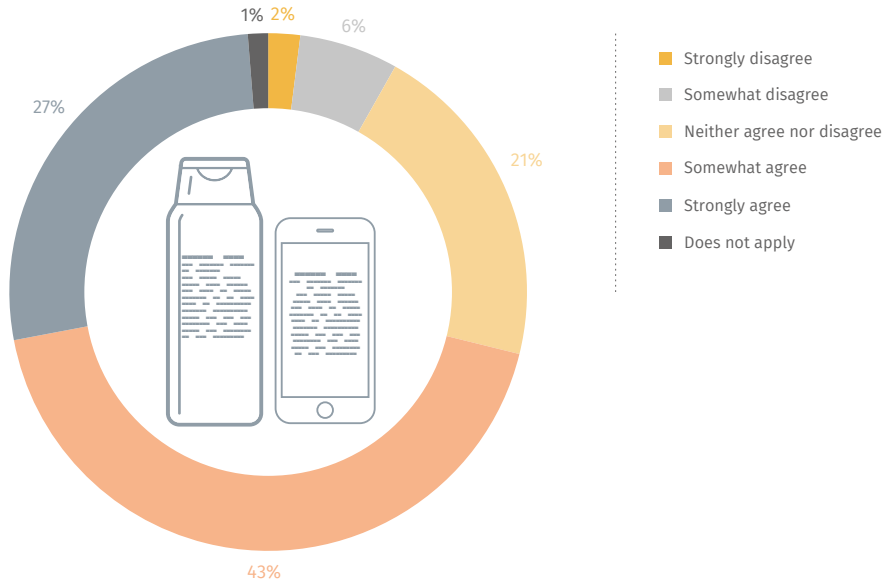
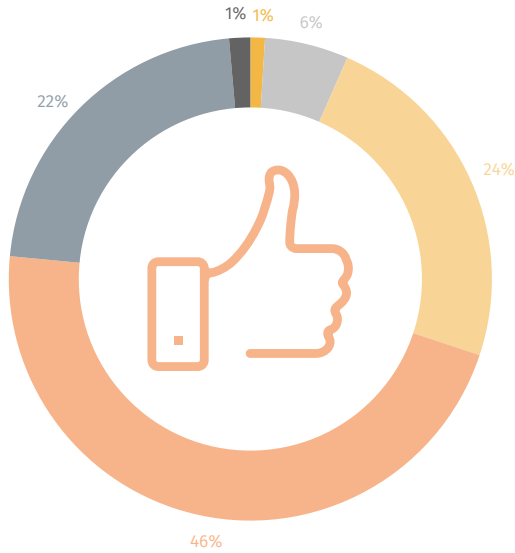


FIG 21: 'I BELIEVE THAT THE INFORMATION I CAN ACCESS ABOUT MY PERSONAL CARE AND COSMETIC PRODUCTS IS THE INFORMATION THAT I AM LOOKING FOR'



■ Strongly disagree ■ Somewhat agree
■ Somewhat disagree ■ Strongly agree
■ Neither agree nor disagree ■ Does not apply

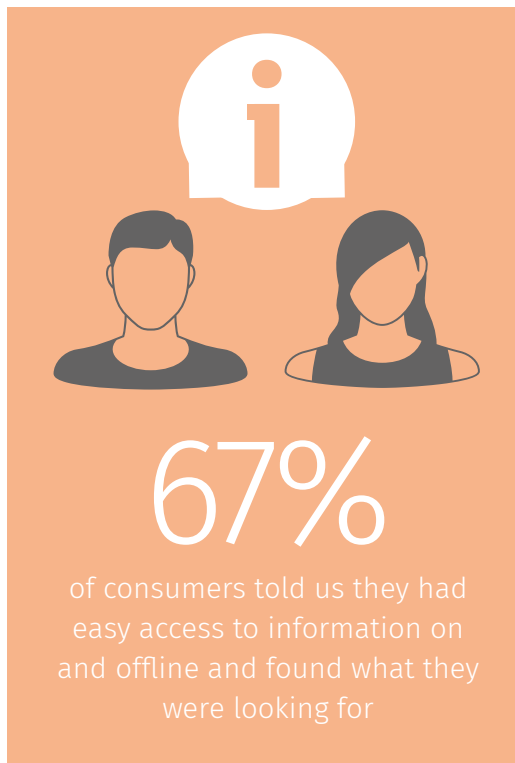


FIG 22: SOURCES OF INFORMATION BY AGE (IN %)

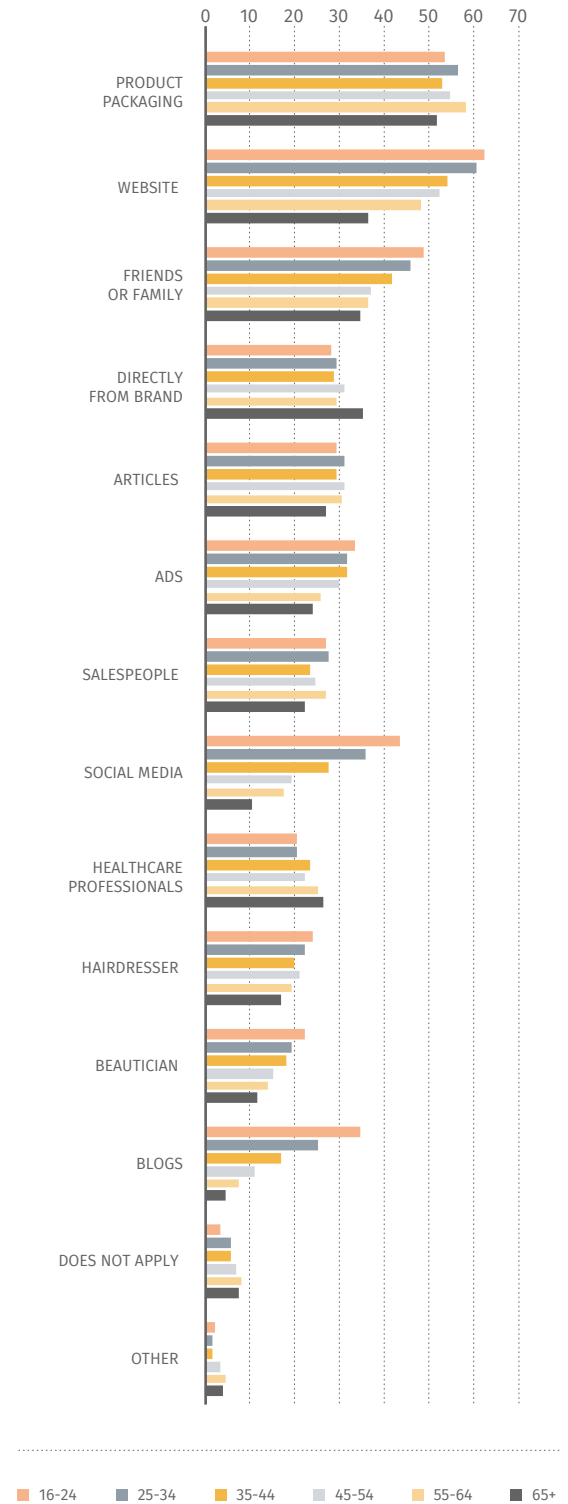


FIG 23: SOURCES OF INFORMATION ON PERSONAL CARE AND COSMETIC PRODUCTS (IN %)

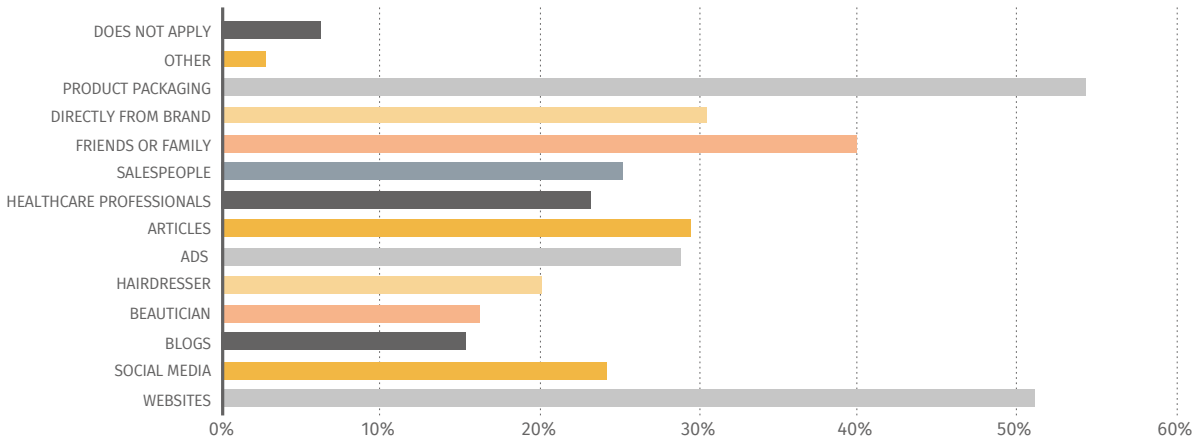


FIG 24: ONLINE SOURCES BY GENDER (OF RESPONDENTS WHO USE ONLINE SOURCES, IN %)

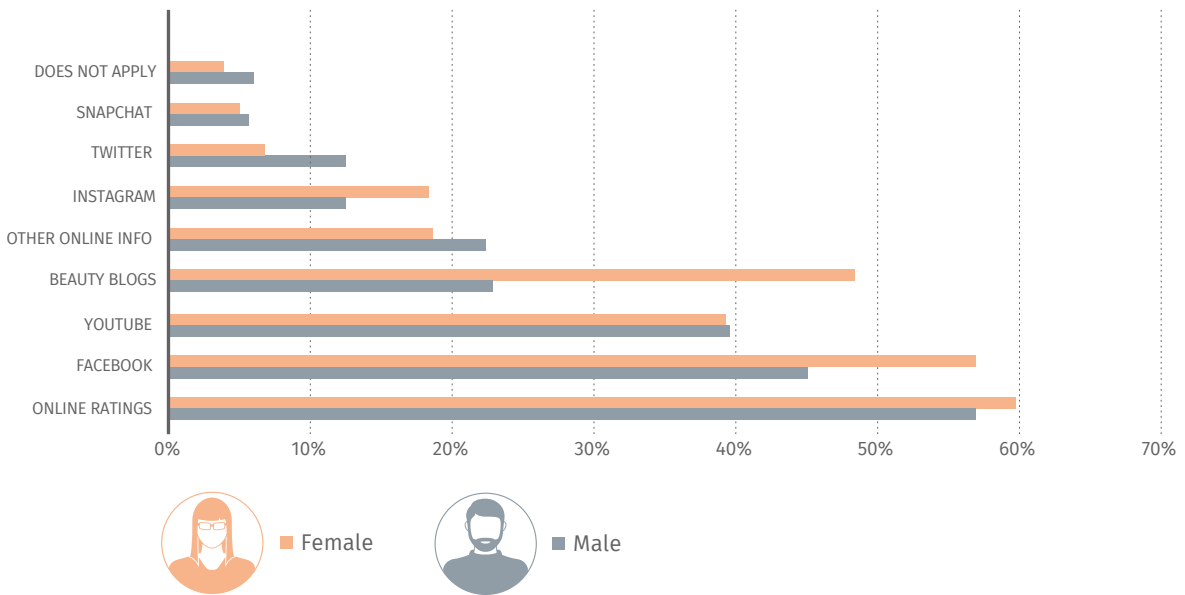
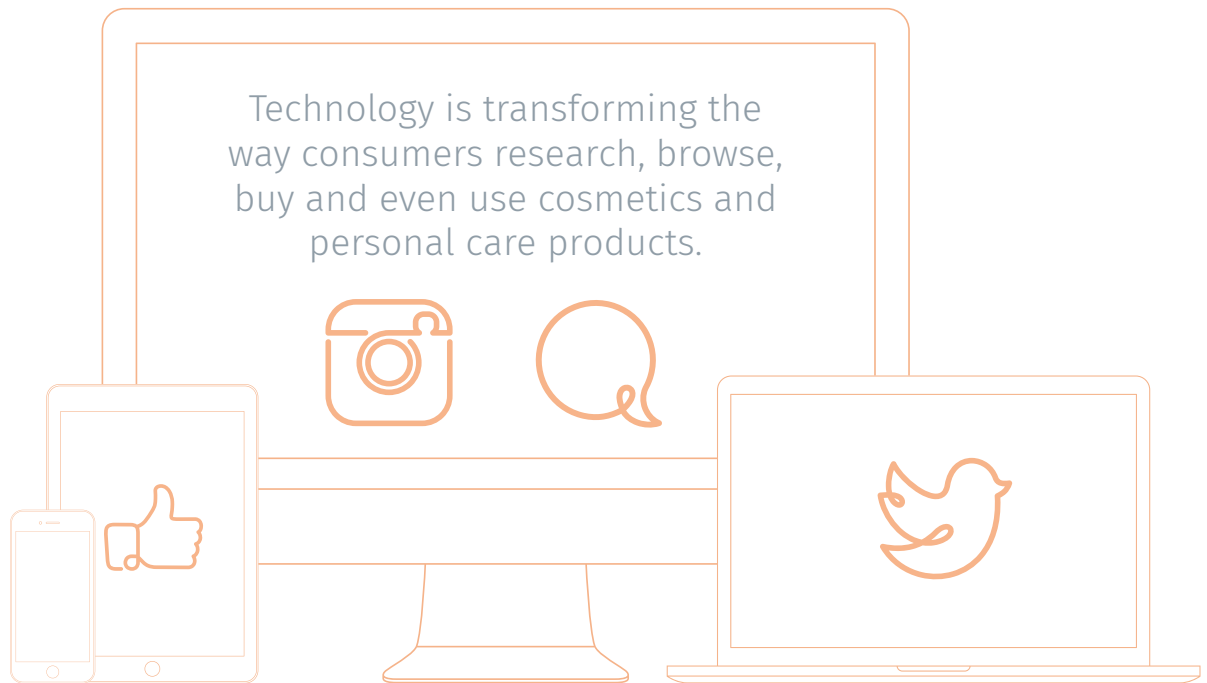
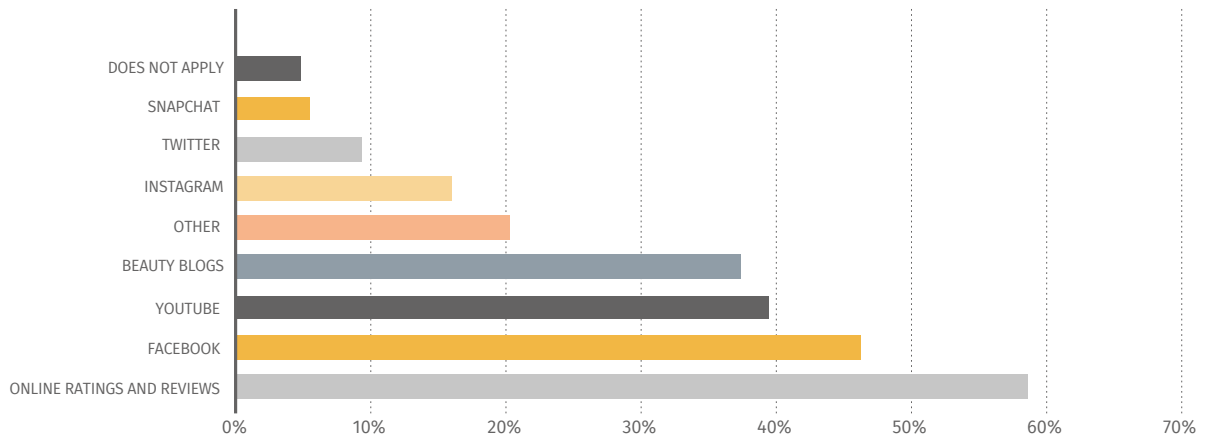


FIG 25: ONLINE CHANNELS USED TO ACCESS INFORMATION ON PERSONAL CARE AND COSMETIC PRODUCTS
(OF RESPONDENTS WHO USE ONLINE SOURCES, IN %)



Concluding remarks

'**Consumer Insights 2017**' raises several wide-reaching discussion topics for the cosmetics and personal care industry and associated stakeholders at a fascinating time of demographic, technological and societal change.

A primary new frontier of this report has been to explore consumer perceptions of quality of life. Much existing work on this issue has revolved around our respondents' number one priority, good health; and medical practitioners regularly use health-related quality of life indicators to assess their patients' well-being.

Today, the lines between cosmetics and personal care, proactive healthcare and disease management are blurring. Many consumers of all ages want to take charge of their own well being as part of a more **holistic approach** to health and trying to adopt a healthier lifestyle²⁰. Consumer preferences in this regard are driving new technologies, trends and behaviours to stay ahead of.

Cosmetics and personal care industry products can have a real impact on **quality of life**, especially in the elderly, to prevent more serious conditions emerging and boost their subjective sense of well-being. With the percentage of people aged over 60 expected to rise 13% between 2005-2020, the world is not only maturing in vast numbers; but people want to stay active and healthy longer than ever before.

At the other end of the scale, teenagers and millennials rate confidence in their appearance as more important than any other age group to their quality of life; and in an age when social media can magnify our perception and presentation of quality of life, self-esteem, confidence and motivation²¹.

Another element raised in '**Consumer Insights 2017**' is how consumers reach and appraise information about their cosmetic and personal care products. Effective and fair communication to enable informed decision-making is a cornerstone of trust with consumers and, in partnership with governments and regulators, this must continue to be the case in a digital age driven by online commerce.

These are just some of the issues where a continued understanding of consumer perceptions and joined-up thinking across stakeholders will be vital moving forward. Third-i and Cosmetics Europe look forward to the essential discussions and further investigation of these issues along the way.



20. <http://www.mintel.com/beauty-and-personal-care-trends/>

21. <https://www.theguardian.com/society/2015/sep/11/teens-social-media-night-risk-harm-mental-health-research>

Methodology

This report, prepared by Third-i on behalf of Cosmetics Europe, provides a snapshot at European level of consumer perceptions of the cosmetics and personal care industry.

Our research conducted an online survey of **4116** consumers in April 2017 across ten EU Member States from different regions (**France, Germany, UK, Netherlands, Italy, Spain, Denmark, Sweden, Poland, and Bulgaria**) to be able to draw conclusions at EU level. Respondents were representative of each country's gender distribution and age groups.

This quantitative online survey research aims to give consumers a voice, allowing each respondent to state what was important to them. The questionnaire consisted of multiple choice questions and statements, with agreement and rating scales, providing quantitative data on consumer perceptions of the cosmetics and personal care industry in Europe.

The survey examined consumer perception of the cosmetics and personal care industry in terms of what consumers value most highly and the role of cosmetics and personal care products in consumers' lives across four particular areas of importance: self-esteem, quality of life, information and social function. In the survey, respondents gave their opinions on how these elements were relevant to their lives based on their own perceptions of these concepts.

A multi-functional expert panel from within the cosmetics and personal care industry gave guidance on the definition and scope of the issue. The panel agreed on a research question and key areas of interest that were relevant to the topic, which guided the questionnaire design.

Primary data were analysed through exploratory analysis of data frequency to see general trends on the questions, exploration of demographic data on the variables, and cross-tables. It was important to ensure a transparent, rigorous and collaborative approach throughout the process of this research, from setting the framework to the analysis. Conservative estimates have been used throughout

to ensure that the conclusions drawn are not overstated. While the focus of this study has been on producing quantitative data on the perceptions of the consumers, some of the wider, qualitative benefits of the sector are brought up (i.e. where we would benefit from expanding to a qualitative analysis, in order to better understand certain aspects).

In terms of sampling errors, we have taken into consideration the sampling design by age and gender. However, potential research limitations needs to be considered. In terms of social-desirability bias, we are aware of respondent's' potential positive responses as a way to "please" the researcher. Additionally, the fact that this was an internet-based survey needs to be considered, as the respondents are more likely to be used to technology. We faced particular challenges in filling the demographic quotas in Bulgaria's male population aged 65+, and we surveyed four men across the other age categories in order to keep the gender balance of the country.

In terms of data sample quality, rigorous consistency and quality checks were ensured, including recruitment via proprietary, certified and qualified sources with digital fingerprinting and 2-factor authentication to confirm location, controlling for duplicate or fraudulent respondents and monitoring of speeding, straight lining and inattention.





71%
of consumers see
cosmetics and
personal care
products as important
or very important in
their daily lives



72%
of consumers feel
the cosmetics and
personal care
products they
use improve their
quality of life



80%
identify them as
important or very
important
in building up
self-esteem

We personally care