

Personal care market in customer's eyes

MARINA PELLEGRINO¹, RAMONA SERATI²
 1. Product Manager Formula Protection - ROELMI HPC
 2. Global Marketing Manager - I.T.M. S.r.l.



Marina Pellegrino is graduated in Biological Science (Ecotoxicology background). Experienced from academia (Insubria University, Varese) and industry (THOR specialties) in microbiology, she joined ROELMI in 2015, dealing with Cosmetic Formula Protection. Three years later, she advanced to the position of Product Manager. During her time at ROELMI, Marina became member of EFFCI Preservative Working Group.

"Home sweet home" is the best feeling ever, especially coming back from summer holidays. Just the time to set end-of-holidays-sadness aside, in favour of that reassuring feeling of safety and protection we have while entering in our beloved home. Safety and protection make us feel better, it's undeniable; it is the same with cosmetics! Safety of a personal care formula is the key and basic parameter for the development of inventive products. Safety of cosmetics lies also in the selection of the most suitable preservative system: **a properly preserved product is a safe product**, this is the positive message I sustain daily, it's my job, my mission! The type of message I wish end users to be aware of.



I think nowadays it may not be that easy for an average cosmetic customer. There are plenty of messages, claims, inputs reaching consumers: the packaging's label is a new media, that goes directly in customers' hands, bringing a lot of information and messages (1). The feeling is that these inputs are maybe too many, sometimes misleading and thus possible cause of uncontrolled decision-making process, driven only by the claims; sometimes the customer does not have all the tools to correctly interpret these messages, or worse, he thinks he knows how to manage them, but actually he doesn't.

Let's compare to pharma market. In the purchase of a pharma product, customer decision is quite fast. It is reported that the majority of pharma purchases are made on urgency basis and driven by doctors' suggestions (2); that is logic: the consumer has a problem and he looks for an effective solution that can be as fast as possible. Here, the marketing influence is very limited. Now let's go back to Cosmetics, where it seems that the predominant influence on the purchasing process is in marketing hands. That is evident: personal care labels are becoming more and more wealthy in claims, to satisfy increasingly demanding customers. We are well aware that pharma and cosmetics are not the same type of product, acting differently on diverse targets. Nevertheless, we do recognize the quality and efficacy of both. Therefore, if the customer chooses a pharma for its efficacy and safety, why shouldn't he do the same with cosmetics? Despite a personal care product is not a medicine - no doubt about this - also with cosmetics we should focus more on product's substance, than on its form. By selling cosmetics only through claims and labels, we are running the risk of decreasing their value. Let's focus on substance over form, we have valid products in our hands!

Probably, as Personal Care producers, we should ask ourselves if we are playing unfair, taking advantage of consumers' lack of knowledge, to drive their choice through misleading marketing claims. We use labels to bombard customers with messages; are we sure that end users will properly read and interpret all this information? Will purchase be consciously done?

In the top 5 European Cosmetic markets, 35% of consumers avoid purchasing facial skin care products containing Parabens, this is particularly relevant in France and Italy where the number reaches 54% and 46% respectively (3). Data are impressive and I wonder whether this people's choice is conscious or not. I have doubts believing that all these consumers do know what Parabens are. On the contrary, I have been led to believe that their choice is influenced by the so-called *Framing Effect* -the ways in which alternatives are presented strongly influence the final choice- (4): *without something* makes people perceiving this *something* as dangerous and to be avoided.

THE QUESTIONNAIRE

To solve the above doubts and to have a general overview about personal care average consumers, we prepared a simple questionnaire that we submitted to a heterogeneous group of 357 people, considered a representative sample in regards to Personal Care end users (Table 1)

Gender	Women	68%
	Men	32%
Age	13-25	15%
	26-45	53%
	46-60	23%
	>60	9%
Education degree	Basic	14%
	Medium	42%
	Superior	43%
Employment	Medical/Scientific	8%
	Personal Care	11%
Type of Personal Care user	Basics user	17%
	Average user	60%
	Heavy user	23%

Table 1. Composition of interviewed sample.

First, we analysed **parameters driving the purchase**. According to the results, *Price* is the predominant factor among available options; it is followed by marketing drivers such as *Brand* and *General Label Information* (product activity/efficacy) which are considered as important as *Medical/Dermatological suggestions*. Afterward, we have *Word-of-mouth/web comments*, which is followed by *Specific Ingredients Absence* and *INCI Composition*; these two are not yet in the top list of parameters driving the purchase, but interestingly more influential than *Traditional Advertisement*. This simple analysis partially draws the emerging profile of the modern personal care buyer: he is becoming more and more interested in what he uses, he is thirsty for information, he wants to know what's inside the products. In lights of this, we investigated **end users' self-evaluation about their personal care knowledge**; here what we saw: the majority of interviewees (60%) consider to have a medium level of personal care knowledge, declaring they do their best to read up about their purchase; a relevant piece of the cake (32%) considers its personal care knowledge poor, admitting they purchase following word-of-mouths, price or habits. Only 6% thinks it has an advanced personal care knowledge. Consequently, we focused on the nearly 70% of the sample, self-assessed as medium-high personal care knowledge. For us, it was curious to know their **sources of information**. As showed in Table 2, among available options, the web rules the roost alone with 40% of preferences (personal web researches/beauty blogs). Another popular source are professionals' suggestions (i.e. hairdressers, beauticians, ...), which are more consulted than medical/dermatological indications. At the very bottom, Cosmetic Regulations and official scientific opinions (i.e. SCCS - CIR safety assessments).

Web Personal Research	27%
Personal Care Blogs	13%
Cosmetic Professionals (hairdressers, beauticians, etc)	29%
Experts (Doctors, Dermatologists)	25%
Regulations, certified scientific opinions	6%

Table 2. Sources of information for the self-assessed medium-high knowledge.

Assumed that consumers are thirsty for information, it is evident they go for the easiest and fastest; they probably do not focus on sources reliability, in favour of easily accessible information, simple to be understood and immediate, as the web and a chat with the trusted hairdresser/beautician can be. To understand whether the reported sources give consumers the right knowledge, we posed a couple of questions; first we focused on **Preservatives**. It is well recognized that in other markets, i.e. food, preservatives are perceived as the nasty ingredients (5), at the same time, their absence in cosmetics is often and wrongly perceived as an indicator of naturalness (3). In lights of this, we asked to the sample what, according to their knowledge, a Personal Care Preservative is, giving some options; the results are reported in Table 3.

More than half of the sample has correct knowledge, while 22% admits not knowing what a preservative is. Only 17% has a wrong understanding. Thus, it would seem that preservatives demonization is a phenomenon affecting more B2B than B2C. This is possibly due to the fact that marketing tends to demonize single molecules and not general class of ingredients (i.e. *Paraben free*; *Alcohol free*; *Palm oil free*), and

it is also proved by the most common use of *Paraben Free* claim than *Preservative free*, which is more generic (6).

Fundamentals ingredients to avoid microbial spoilage	61%
Don't know	22%
Don't know, better to avoid	5%
Dangerous ingredients to be avoided	8%
Ingredients to preserve hair/skin	4%

Table 3. What is a personal care preservative, according to the sample.

We were curious to know whether the "Paraben Phenomenon" is really so perceived by end customers, or if, as insider, we are maybe exaggerating it. 70% of the interviewed states to have heard about Parabens; it seems to be confirmed: the Paraben phenomenon has really reached the average end user.

The second question we posed, in order to verify the sample cosmetic knowledge, was right about **Parabens**. Table 4 shows interviewed knowledge, according to options we gave.

Approved and safe preservatives	50%
Ingredients belonging to Paraffin family	20%
Ingredients causing cancer, to be avoided	16%
Don't know	14%

Table 4. What Parabens are, according to the sample.

The scenario is quite varied: on one hand 50% of the sample do know what parabens are, on the other hand the remaining half is quite confused: they have no knowledge, or wrong knowledge or worse they perceive these safe ingredients as extremely dangerous. The questionnaire has definitely been a motivating task, that enabled us to obtain several information about the average consumer. Wanting to draw the 3.0 end user profile, it is evident he tends to make conscious choices and to be informed; he thinks to have a proper knowledge and he prefers immediate, fast and easy to be understood sources of information, not posing too much attention on their reliability; at the end, his Personal Care knowledge resulted discrete, even if the questionnaire gave visibility to a considerable part of the sample having no knowledge, or wrong knowledge or worst they have been brought up to perceive some ingredients, that are safe according to state-of-the-art, as extremely dangerous.

THE WORTHY COSMETIC: PROPER LABEL AND SAFE FORMULATION

Taking into consideration the above reported end user profile, however in general, we believe it is imperative, as Personal Care producers, to develop and place on the market finished products which are ethical and rigorously produced. We spoke about Preservatives, assessing them as the foundation for development of safe formulas. How to effectively preserve a cosmetic, keeping an eye open on safety and economical sustainability? Simple shrewdness can help.

First, *quality of the molecules* to be used, so to achieve good antimicrobial efficacy, decreasing the dosage and any potential safety issue; second, *union makes strength*: synergistic combination of preservatives/booster can enhance the activity by decreasing the amount of needed molecules; Third: *rigorous dosage*, as the efficacy of preservative is dose dependent, no need to waste or overdose molecules in the formula. *Et voilà!* The safe, effective and economically sustainable preservative system has been accomplished!

We also discussed about the increasing power of cosmetic packaging, particularly of the label. We asked ourselves about the way we use marketing claims, to assess whether they are forcing uncontrolled customer's choice. Marketing can be bad, but of course it can be good as well, depending on how we decide to use it. Starting from July 2019, Annexes III and IV of the Technical Document On Cosmetic Claims will apply. This means that some of the marketing rules will change, whether we like it or not: the use of *Free from* claims will have to follow the below reported principles (Table 5).

The responsible use of marketing in personal care products remains in producers' hands, we do believe it should respect the above-mentioned principles, not only regarding the *free from* claims, but also from a general point of view. We believe formulations should be developed according to technical rigour and ethical principles, and the same is for such an important cosmetic parameter as marketing is.

Principle:	Description	Example
Legal compliance	Prohibited/not suitable ingredients	Free from corticosteroids/preservatives (in fragrances)
Truthfulness	Ingredients present/released by other substances	Free from formaldehyde (if the product contains a Formaldehyde donor)
Honesty	Functional group of ingredients providing the claimed function/activity	Free from preservatives (if a molecule not listed in Annex V, but with proved antimicrobial activity, is present)
Fairness	Denigrating purposes, in relation to authorised substances	Free from Parabens
Evidential support	The absence of specific ingredients should be demonstrated	-
Informed decision-making	Free from claims are permitted when allowing an informed decision making	Free from animal derived substances is approved if intended for vegan products

Table 5. Summary, explanation and examples of Principles reported in Annex III of Technical Document On Cosmetic Claims.

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