



COSMETICS AND SUSTAINABILITY - WHAT GERMANS THINK

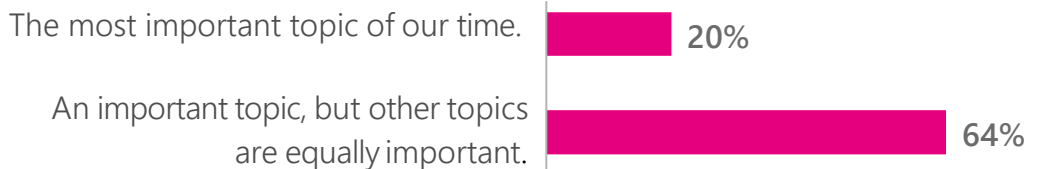
1. INTRODUCTION

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Climate crisis, drought, environmental pollution - there are many reasons why the topic of sustainability has gained relevance in politics, the media and the public. The fact is: Sustainability is one of "the" topics which moves people in Germany. But what exactly do they understand by sustainability? How do they approach the topic in their everyday lives, how do they implement sustainable practices? And: what does sustainability mean within the context of cosmetics? The independent market research agency rheingold salon was commissioned by the Competence Partner Beauty Care within the German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW) to conduct detailed research and take an indepth-psychological look at how women and men of all ages approach the topic of sustainability. The results show: In addition to changes in mindset, there is also a central inner conflict which many consumers face. In addition, the study provides answers as to what expectations people have of sustainable cosmetics and deciphers the motives for use behind them.

More than 1,120 women and men between the age of 16 and 69 were surveyed. The survey was geared to the average population and not to people who are particularly active in terms of the environment and sustainability.

Just a few years ago, people were able to mentally keep the topic of sustainability out of their lives, often even without a guilty conscience. That has changed. The majority of the population no longer wants to look away when it comes to sustainability. You no longer have to be an explicit environmental activist. For 84 percent, sustainability has become an important topic. For 20 percent of those surveyed, it is even the most important topic of our time. Younger people between the age of 18 and 29 prioritise the topic of sustainability even more, with 33 percent. However, the emphasis on importance does not always have major consequences for action. Although "only" 73 percent of older people believe that it is an important topic which must be dealt with, older people are more active in implementing sustainable behaviour in everyday life than younger people. This is reflected by the concrete ways of dealing with the topic of sustainability.



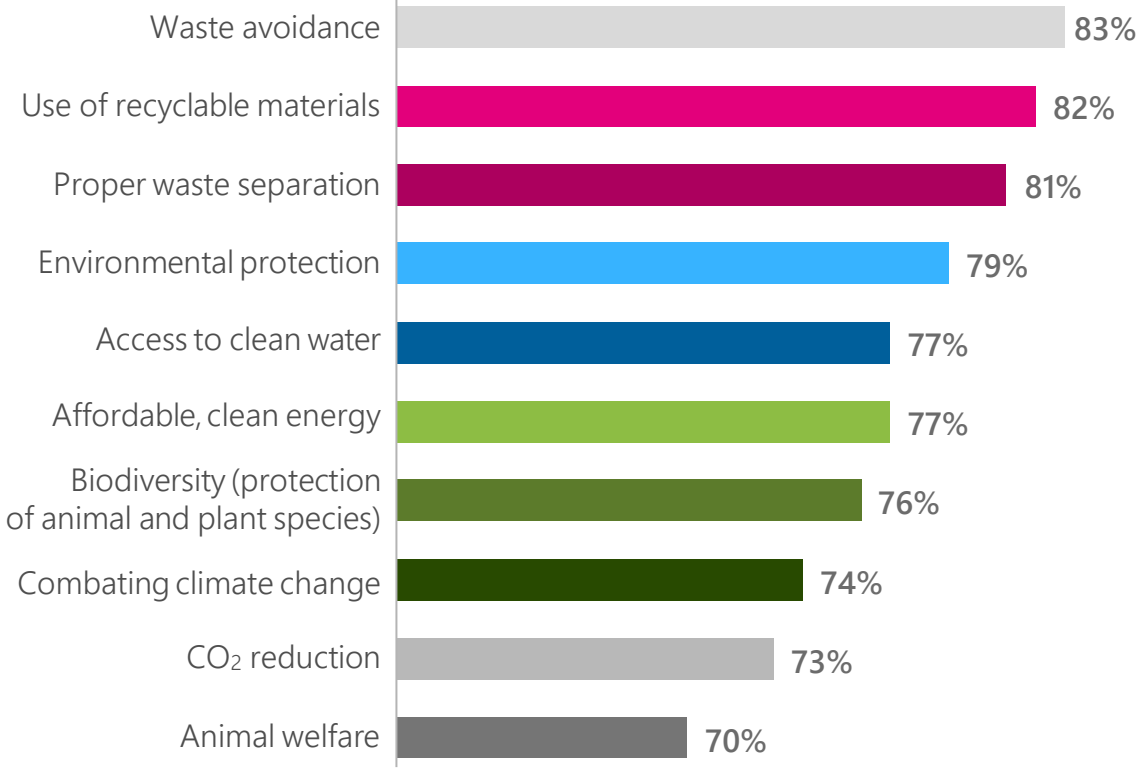
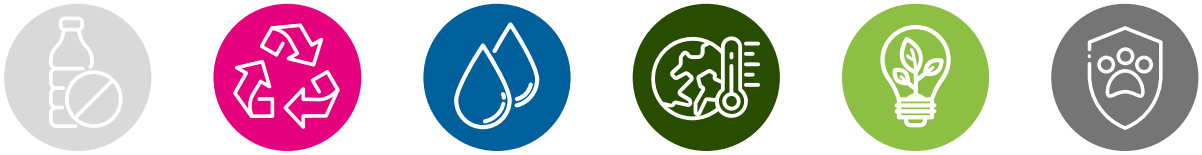
3. CONCERNS BECOME A CATALYST

The heat wave of last summer, heavy rain and flooding as well as the forest fires on our own doorstep are leading to ever growing personal concerns. Many found the heat unbearable - climate change can be felt and experienced first-hand. For 65 percent the topic of sustainability is increasingly important because of these direct effects on their personal lives.

For 61 percent of younger women in particular, sustainability has recently become more and more a topic close to their heart. But for 49 percent of young men, too, the topic is more important than it used to be. Overall, 45 percent, or almost half, of Germans are more involved in the topic than they used to be. The in-depth interviews showed that some have discovered a real meaning in life through the topic of sustainability.

4. MANY TOPICS - DIFFICULT TRANSITION

A real non-assisted concretisation of what sustainability actually means is nevertheless difficult for many. The topic is often not easy to grasp and explain for the respondents. When asked directly about specific areas, Germans associate a large number of topics with sustainability. The topic of waste is at the top of the list. In Germany, mountains of waste and the associated waste avoidance are seen as psychologically the most relevant symbols for the urgency of the topic: 83 percent feel that waste avoidance is central to the topic of sustainability. This is followed by the use of recycled or recyclable materials with 82 percent and proper waste separation with 81 percent. But respondents also find topics such as access to clean water, biodiversity, CO₂ reduction or animal welfare relevant. They each achieve values of more than 70 percent. By comparison, the fight against child labour (63 percent) or poverty prevention (58 percent) are significantly lower.



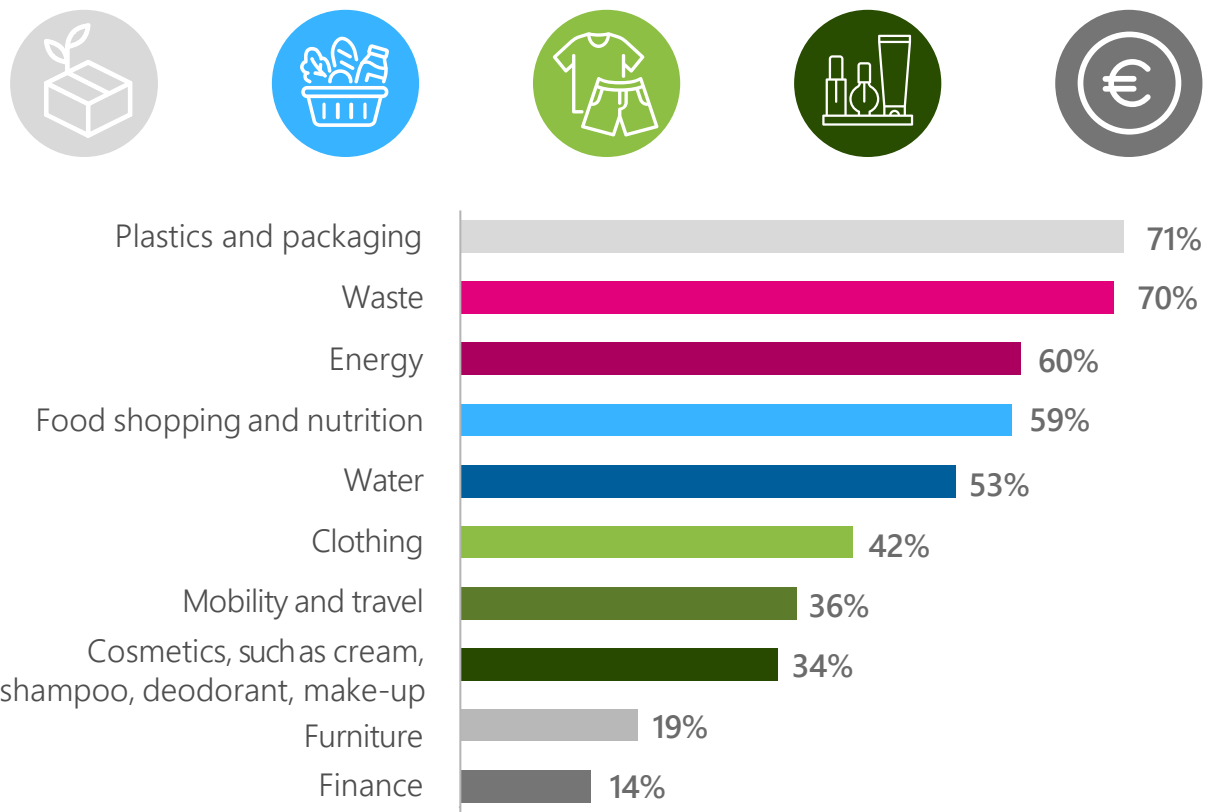
While many people find it difficult to define what sustainability means, it is even more difficult to make a consistent change in lifestyle. But: 54 percent of those surveyed still want to improve in terms of sustainability. The problem is that they do not always know how to do it.

5. INNER CONFLICT GROWS - RENUNCIATION IS NO SOLUTION

Not only has the importance of the topic grown, but also the inner conflicts: people feel the need to live more sustainably. However, very few respondents succeed in taking the big leap right away. They tend to approach the topic in small steps in everyday life. From most people's point of view, this can also make a difference. After all, they do not want to be "to blame" for a possible further worsening of environmental problems. Despite a guilty conscience, "renunciation" is for many not a viable path when it comes to sustainability. They prefer to focus on areas where they are already behaving sustainably or where a change in behaviour is not difficult for them.

Asked about changes in their behaviour, women list more areas of life in which they can easily switch: They name an average of five spheres of life in which they can behave more sustainably without having to renounce - for men, the average is four. 96 percent of the respondents state that they succeed in being (more) sustainable in at least one area of life. For 34 percent, it is even six to ten spheres.

The most frequently mentioned areas where people succeed in making a change are the following: 71 percent pay attention to plastic and packaging and 70 percent to avoiding waste. When it comes to food shopping and nutrition, 59 percent say they attach more importance to seasonal or "organic" products. And 60 percent want to save energy*. In addition, 42 percent pay attention to sustainability when it comes to clothing, 36 percent when it comes to mobility and travel, and 34 percent also look at sustainability when it comes to cosmetic products.



*The data were collected prior to the energy crisis.

6. SOLUTIONS FOR MORE SUSTAINABILITY

If renunciation is not a solution for most respondents - how then do people resolve the inner conflicts around sustainability? How do they approach the topic? How do they deal with sustainability in their everyday lives?

Five ways of dealing with the topic were identified in the study. Between 60 and 80 percent of people in Germany use one or more methods to appease their conscience or satisfy their emotional needs around sustainability. Differences between younger and older people as well as women and men are sometimes very marked.

6.1 REFRAIN: LESS IS MORE

There are many things which can be avoided or reduced without having to make major sacrifices: For example, many people can simply stop flying, driving, eating meat or buying clothes to appease their sustainability conscience. For 65 percent, simply not doing certain things, i.e. refraining from doing them, is a very good way to behave (more) sustainably. Strikingly, it is the older people (50 plus) and women who make an effort to "refrain". Thus, 66 percent of the over-50s want to fly less. Among the 18-to-29-year-olds, the figure is 53 percent. However, the older ones have probably already flown a lot more due to past air travel. 62 percent of the women surveyed are trying to drive less and use the bicycle, bus or train more often - compared to 48 percent of the men.

6.2 REINTERPRETING: IT WAS AND IS NOT ALL BAD

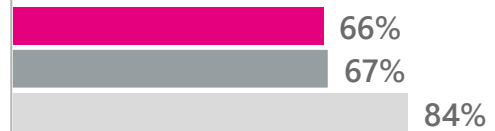
When reinterpreting, people assign a new meaning to something they do anyway or have always done. In the case of sustainability, for example, they subsequently classify something as sustainable behaviour, although it was not originally meant that way. 71 percent see sustainable aspects in what they do anyway or have always done. This makes this approach to sustainability the most common - and also the one that has the least to do with renunciation or real change. Older people in particular often point out, for instance, that they use clothes longer, repair more or take shorter showers to save water than young people.



Separating my waste has always been part of my life - that's nothing new for me.



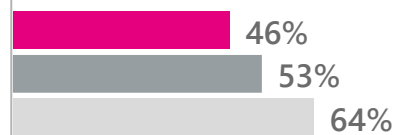
I have always tried to throw away as little as possible and to repair a lot.



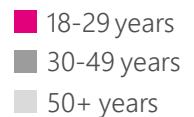
I always try to save water when brushing my teeth and taking a shower.



Products which I can buy next door are more sustainable than organic products for which I have to drive further.



If you regularly go on holiday only in Germany, e.g. for hiking or to travel to the seaside, then it is also okay sometimes to fly or go on a cruise.



6.3 FOCUSING: ONE THING IS BETTER THAN NONE

68 percent try to be sustainable in everyday life. However, they do not aspire to be perfect. Many prefer to focus on a single area that they feel confident in - because it is easier, involves little or no sacrifice or is particularly important to them personally. 55 percent state that they pay more attention to sustainability in one area and less in others. 49 percent feel that they cannot take care of everything when it comes to sustainability and therefore take care of one topic first.

This approach to sustainability is more common among younger people, for instance when dealing with their clothes. They then buy second-hand or more sustainable fashion. However, an actual check to see whether the products are really more sustainable is usually dispensed with. Among 18 to 29-year-olds, it is mainly men (51 percent) who focus on one area and want to do everything right - but they do not look so closely elsewhere. Among women, the figure is 35 percent.

6.4 NEW ORIENTATION & IMPROVEMENT: THE PATH IS THE GOAL

Many, especially the younger respondents, would like to become more sustainable, but they repeatedly reach points where they get the impression that it is not enough. After all, what seems good and right today may be pilloried again tomorrow on social media. 55 percent have the feeling that they never do enough. Nevertheless, many try to "stay on task" again and again and do it better. 65 percent of the respondents think that they should not give up on the topic of sustainability, even if they sometimes have doubts concerning their previous behaviour.

And 58 percent are constantly trying to improve and learn new aspects of sustainability. The only thing they want is more support in everyday life, for instance in the form of reliable information from the media or companies, so that they feel less uncertain about whether they are on the right track. Currently, 44 percent experience this feeling regularly.

6.5 COMPASSION: EMPATHY AS AN INTRINSIC DRIVER

Some, especially older respondents, are moved emotionally. They commiserate with stories about people, nature and animals and, at least in the short term, change their behaviour in certain areas. They see it as their personal duty to take responsibility, to inform themselves and to live more sustainably. 75 percent are shocked by images of plastic litter in the sea and therefore avoid plastic packaging as much as possible. With 83 percent, the over-50s are particularly concerned about this. Among 18- to 29-year-olds, this figure is 65 percent, and among 30- to 49-year-olds it is 68 percent.

Empathic sympathy means that renunciation is not experienced as such. By feeling that they are doing good through more sustainable behaviour, people have an additional inner benefit. This outweighs the renunciation that others would feel. 64 percent think that personal renunciation is a must, because otherwise animals, people and the environment will continue to be exploited. Nevertheless, the in-depth interviews clearly reveal that the respondents behave differently in most areas. The "real" compassion is more female: 50 percent of women abstain from consuming meat because they cannot bear animal suffering - among men the figure is 37 percent.

FORMS OF HANDLING AND SOLUTIONS IN AN AGE COMPARISON:



Reinterpreting

On closer inspection, I have been living sustainably in many respects for a very long time, such as saving water, repairing instead of throwing away, mainly environmentally friendly holidays.



Renunciation

For me, living more sustainably means not doing certain things more often, such as flying, driving, eating meat.



Reorientation & Improvement

When it comes to sustainability, you can't give up - even if there is constantly new information that makes you doubt your previous behaviour.



Compassion

Sustainability cannot be achieved without renunciation, because otherwise animals, people and the environment would continue to be exploited.



Focusing

You can't take care of everything when it comes to sustainability, so I'd rather take care of one area for the time being.



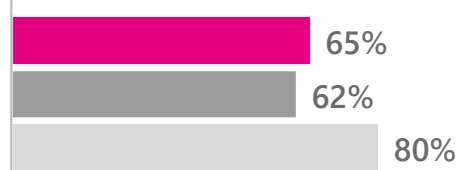
■ Total
■ Male
■ Female

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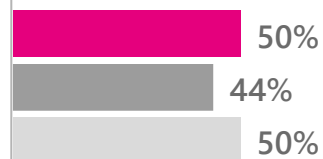
Compassion

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Focusing

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■ 18-29 years
 ■ 30-49 years
 ■ 50+ years

7. COSMETICS & SUSTAINABILITY - ALREADY A DREAM TEAM?

Cosmetics are not yet among the areas of everyday products which are closely linked to the topic of sustainability. Just 10 percent of German women and men consider sustainable action in this area to be important. And: 34 percent of those surveyed say they already pay attention to sustainability when it comes to cosmetic products, such as cream, shampoo, deodorant or make-up.

Many find it difficult to name specific areas of sustainability which are relevant in connection with cosmetic products. The topic of packaging comes most readily to mind: 71 percent of the respondents consider a cosmetic product to be sustainable if there is no additional outer packaging. For 68 percent, a cosmetic product is also sustainable if it is free of certain ingredients. And 66 percent consider a cosmetic product to be sustainable if it is only transported over a short distance before it is purchased. For 64 percent, cosmetic products are also sustainable if a seal certifies that the products are not tested on animals. With 70 percent agreement, this is even more important to women than to men (58 percent).

Topics such as fair working conditions, the fight against poverty or biodiversity, on the other hand, have hardly been relevant for the respondents in connection with cosmetics.

8. CAREFREENESS AND TOLERANCE - CENTRAL THEMES OF SUSTAINABLE COSMETICS

While packaging and waste play a role in almost all product areas of everyday life, the topic of ingredients is additionally of great importance in the cosmetics sector: 70 percent of those surveyed consider a cosmetic product to be sustainable if it contains natural ingredients. For 68 percent, it is sustainable if it consists only of natural ingredients. On closer examination, however, other factors are central when it comes to when a cosmetic product is sustainable and when it is not.

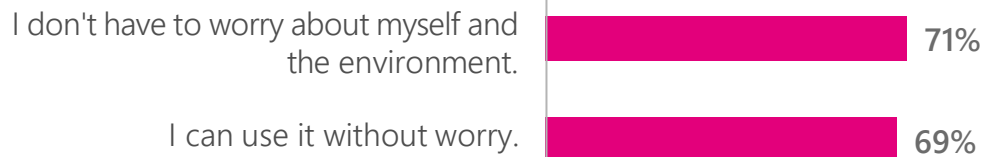
8.1 CAREFREENESS - WITHOUT WORRYING ABOUT YOURSELF AND THE ENVIRONMENT

It is important to 75 percent of the respondents that they can use cosmetic products without worrying and that the products have the promised effect. Carefree use of cosmetics is also a central criterion of sustainability for them: 71 percent consider a cosmetic product to be sustainable if they do not have to worry about themselves or the environment when using it. For the over-50s, the possibility of carefree use is even more important, with 80 percent. In comparison, the figure for 18- to 29-year-olds is 67 percent.

Part of the carefreeness is also that the products are safe and tested. 74 percent state

that it is important to them that cosmetic products are tested. This is especially important for the over-30s, with 76 percent. Among the 18- to 29-year-olds, the figure is 68 percent.

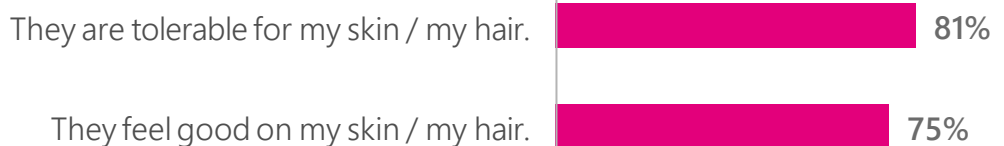
FOR ME, A COSMETIC PRODUCT IS SUSTAINABLE IF...



8.2 TOLERANCE - THE SKIN KNOWS WHAT IS SUSTAINABLY GOOD

Sustainability in cosmetics also means personal tolerance. The skin and health of the interviewees are in the foreground. Cosmetic products must treat and maintain these sustainably. With 81 percent, it is most important to the respondents that their cosmetic products are tolerable for their skin and hair. 75 percent also expect the product to feel good on the skin and hair.

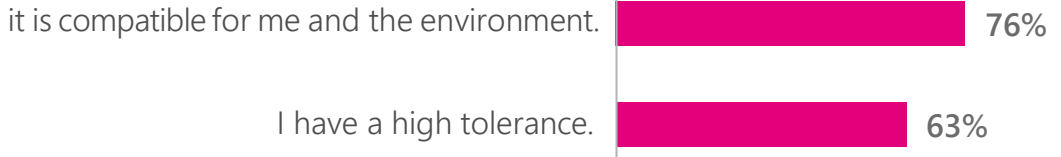
WHAT IS IMPORTANT WITH COSMETIC PRODUCTS IN GENERAL...



However, the carefree use comes to an end when the respondents notice intolerances during use. As soon as pimples, pustules, redness appear and they have the feeling that the skin no longer looks healthy, the respondents begin to look for more "tolerable" and, from their perspective, more sustainable alternatives.

Here it becomes apparent that the more extensively a product is applied, the more important its tolerance. Facial care products, for example, are examined much more critically in terms of tolerance than, for example, mascara or lipstick.

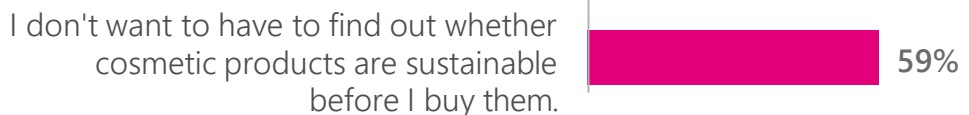
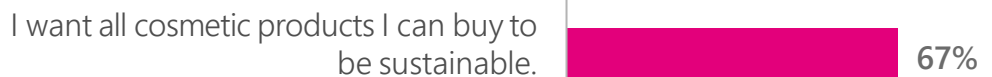
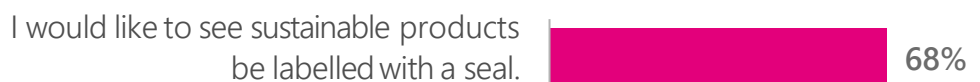
A COSMETIC PRODUCT IS SUSTAINABLE FOR ME, IF...



8.3 SEAL AND TRANSPARENT COMMUNICATION SECURE PRODUCTS

74 percent want cosmetic products to be tested and safe, and 75 percent want to be able to use them without worry. Most people also do this without checking further. In the in-depth interviews it becomes clear that they mostly rely on the quality of the cosmetic products.

And when it comes to sustainability, people would also like to see a carefree approach to cosmetics. 67 percent would like all cosmetic products to be sustainable and 59 percent do not want to have to find out whether cosmetic products are sustainable before buying them. People would simply like to be able to trust the cosmetic products. That is why 68 percent of people would like to see seals and labels. They serve as orientation and make it possible to see at a glance to what extent a product is sustainable. And besides, it also means no additional effort for consumers.



DESIRED ON TOP

Sustainability, as most people would like it, must not be at the expense of other "services" in cosmetics. Only about 45 percent of Germans would accept a reduction in product performance for a more sustainable product. However, 55 percent are willing to pay more for a sustainable product. Even when it comes to choice, sustainability does not mean renunciation or reduction for the respondents. In this sense, the sustainability of a cosmetic product is a relevant additional aspect - but it does not "replace" any other product performance.

10. CONCLUSION

As important as the topic of sustainability has become for people - they are often at odds with themselves. This starts with the concrete meaning of sustainability and continues with its implementation in everyday life. Many understand its relevance, but also don't really want to do without and then have a guilty conscience. In order to resolve these inner conflicts in everyday life, people have come up with approaches to sustainability - often quite subconsciously: Refraining, reinterpreting, focusing or optimising are currently popular ways of making life more sustainable.

Cosmetic products have a good starting point on the path towards more sustainability. Trust in the products is very high overall. Cosmetics can not only be used carefree but are also very well tolerated in sensitive areas of the body. This is important because whether a cosmetic product is perceived as sustainable depends for 75 percent of people on carefreeness in use and for 81 percent of people on the tolerance of the product. While topics such as packaging, plastic and waste are relevant to all sectors in terms of sustainability, the factors "carefree handling" and "tolerance" are the differentiating and relevant sustainability factors for the cosmetics market.

Even if sustainability topics in the field of cosmetics are not yet top of mind among Germans - they are increasingly gaining relevance. Already 67 percent want all cosmetic products to be sustainable to be able to use them in an even more carefree manner. And 55 percent are willing to pay a little more for more sustainable products. A no-go, however, is to forego performance and choice in favour of sustainability. Because people do not want to bend over backwards. Instead, they want cosmetic product manufacturers to take the pressure off them. They expect cosmetic products to be sustainable in general, and the industry and companies to provide transparent information on this.



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This study was conducted by Lönneker & Imdahl rheingold salon on behalf of the German Cosmetic, Toiletry, Perfumery and Detergent Association.

Competence Partner Beauty Care within the German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW)

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