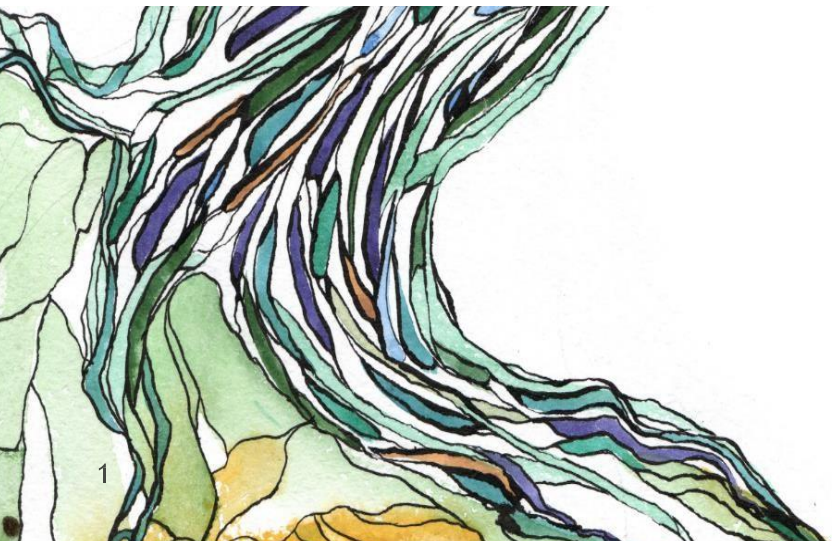
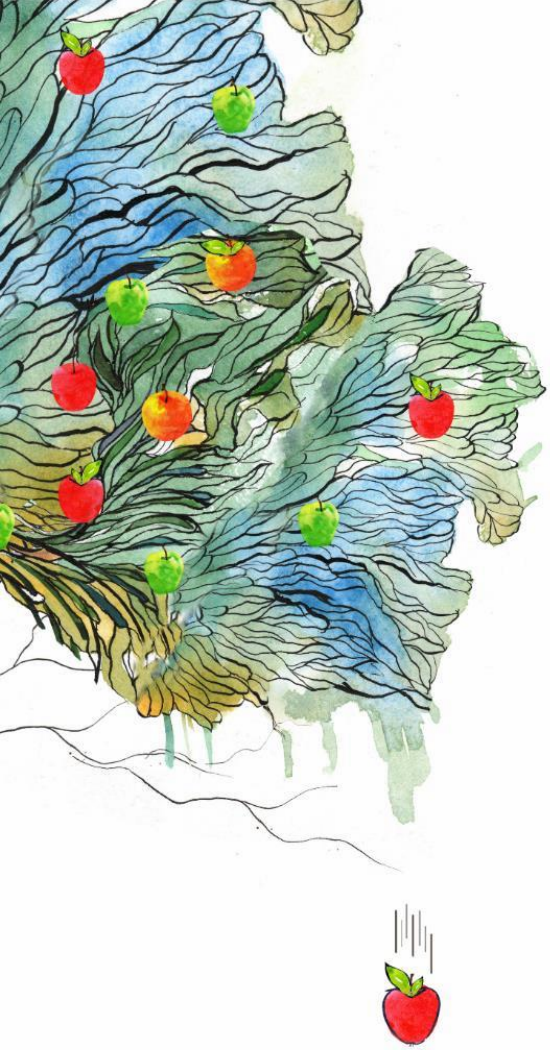


Organic/Natural Cosmetics Quantitative Research Report
January, 2022

XSIGHTS
Araştırma ve Danışmanlık A.Ş.





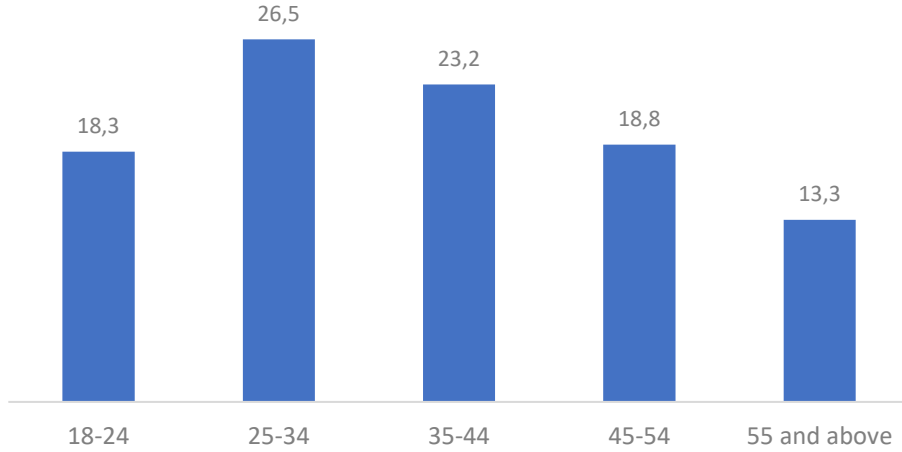
AIM OF THE RESEARCH & METHODOLOGY

The well-known dermocosmetics brand in Poland, would like to enter into market in Turkey, for that reason, has been in need of a research regarding the cosmetics industry in Turkey. In this sense, it has been prepared a questionnaire form with 45 questions including some headings such as the frequently used products of the target group in Turkey, their expectations from the products, frequently preferred products of them and through in which channel they have purchased the products. The questionnaire form has been consisted of four sections including skin care, hair care products and skin and hair care products for children.

In this research, primary data collection tool was used and data was collected from 400 participants between 5 and 18 December through online and face-to-face survey application, in İstanbul, Ankara and İzmir which are the first three biggest cities of Turkey, and data analysis were carried out after quality control of data. In this report, the results of these analyses presented.

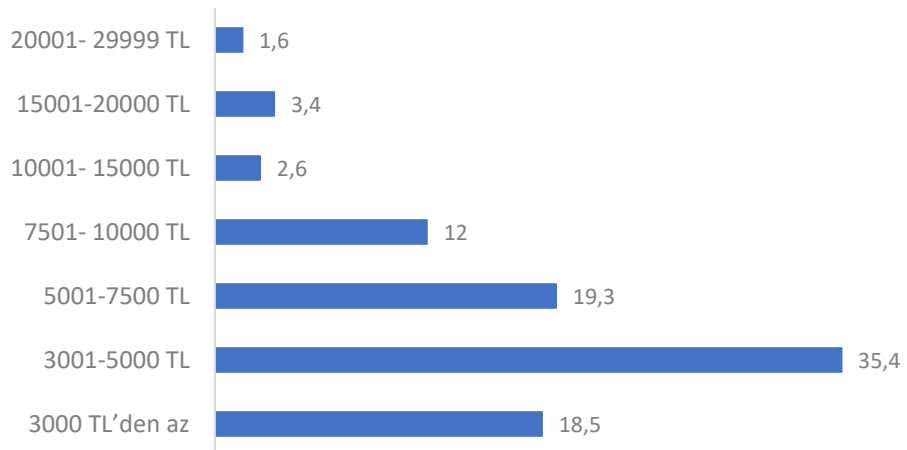
Sample

Age (%)



Ort. 36,9

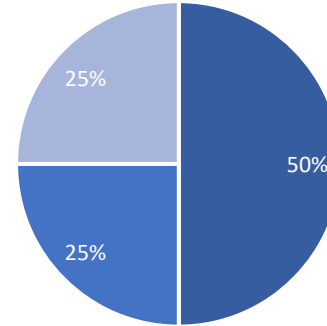
Monthly Income (%)



Mean 5.984 TL

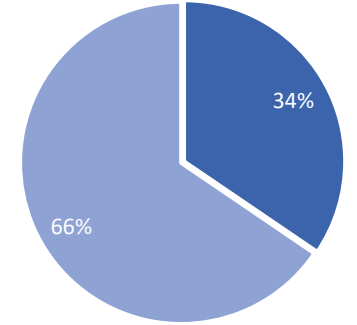
City of Residence (%)

■ İstanbul ■ İzmir ■ Ankara



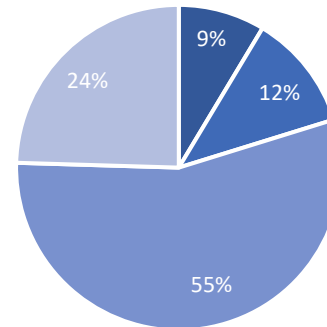
State of Having a Child (%)

■ Yes ■ No



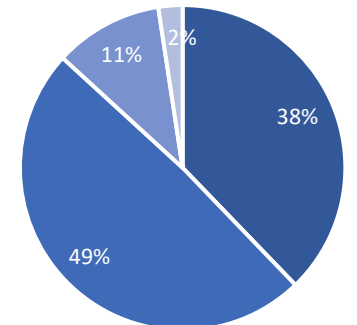
SES (%)

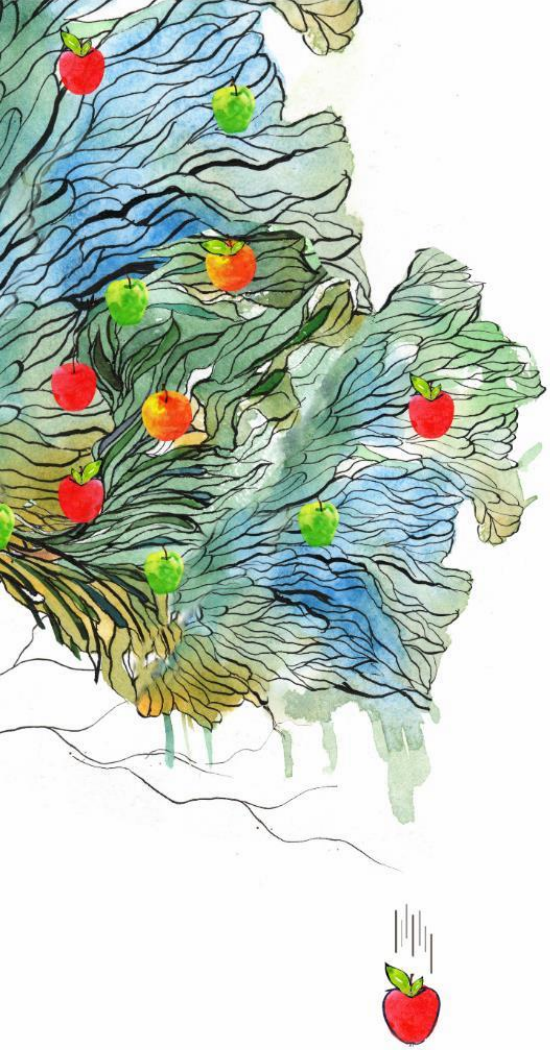
■ A ■ B ■ C1 ■ C2



Number of Child (%)

■ 1 ■ 2 ■ 3 ■ 4





FINDINGS

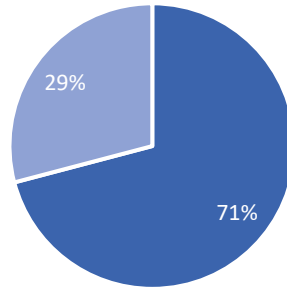
Organic/Natural Skin Care Products

The Use of Organic/Natural Skin Care Product

The rate of the participants who regularly use organic/natural skin care product is 71%. When examined the participants constantly using skin care products according to age groups, the highest rate is 55 years and above group with %93,9.

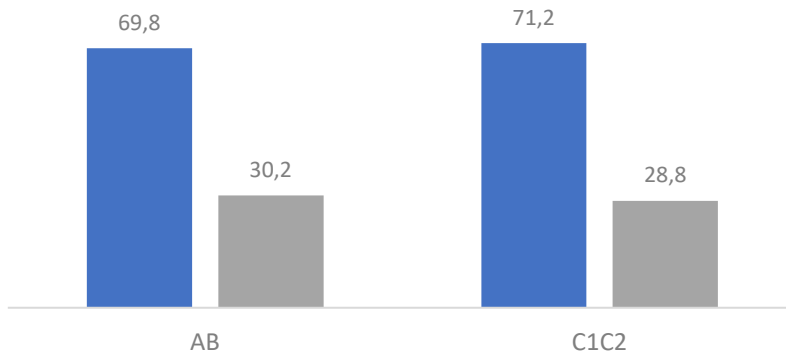
The State of Use of Organic/Natural Skin Care Product

■ Yes ■ No



According to SES, The Use Of Frequently Used Skin Care Products (%)

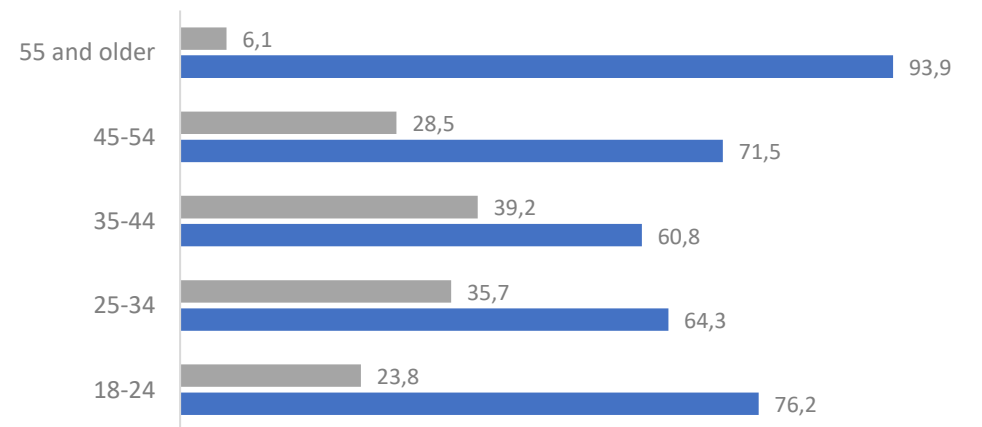
■ Yes ■ No



N:400

According to Age, The Use Of Frequently Used Skin Care Products (%)

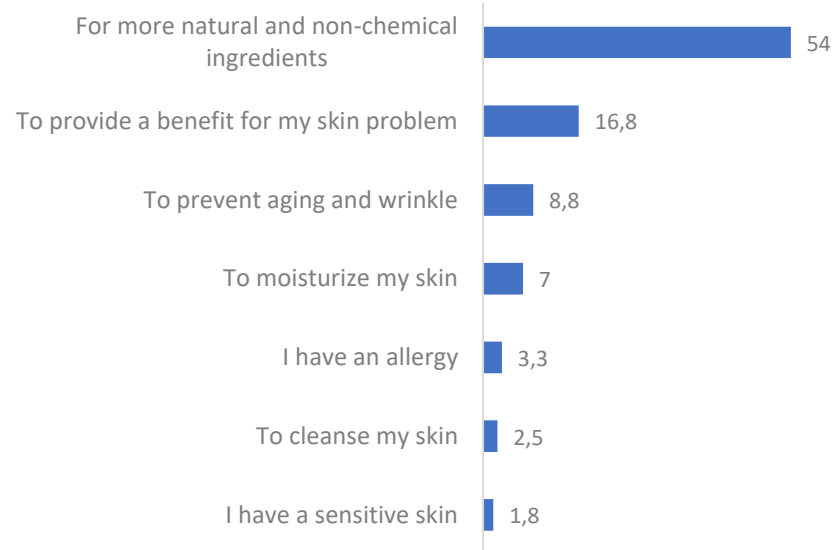
■ No ■ Yes



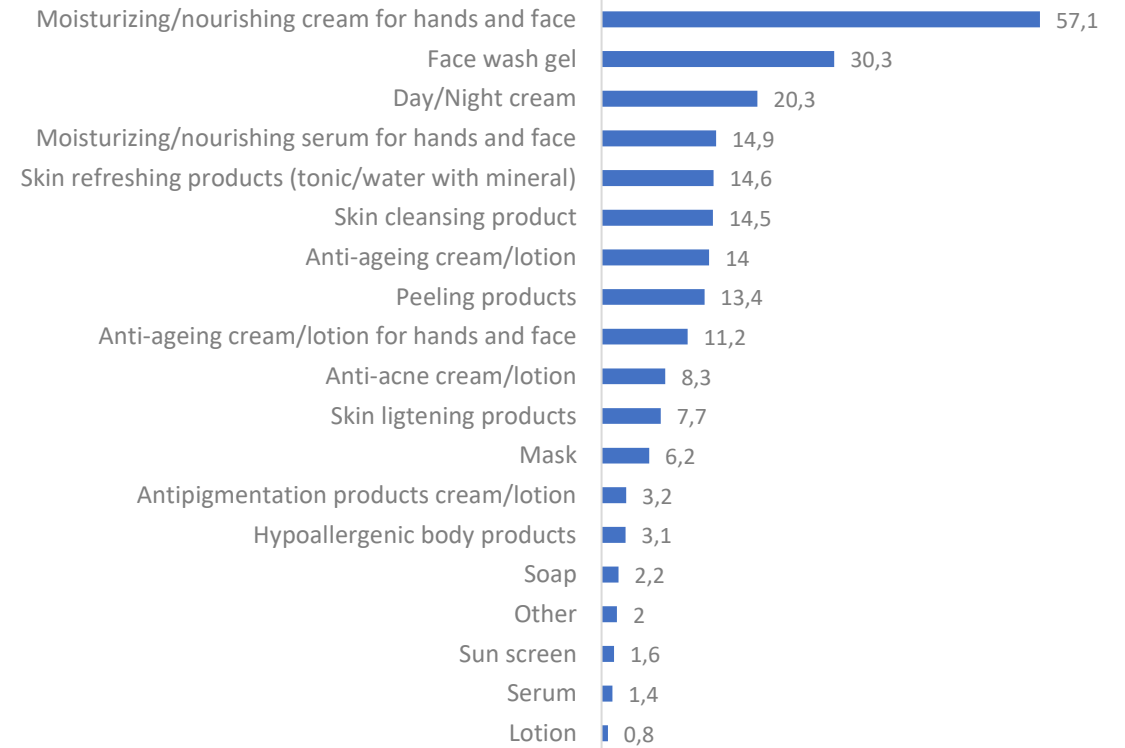
The Use of Organic/Natural Skin Care Product

More than half of the participants (54%) prefer them due to being more natural and chemicals free products. One of the most commonly used of organic/natural products is moisturizing/nourishing cream for hands and face with %57.

The Reasons For Using Organic Skin Care Products (%)



The Most Regularly Used Organic/Natural Skin Care Product



N:284

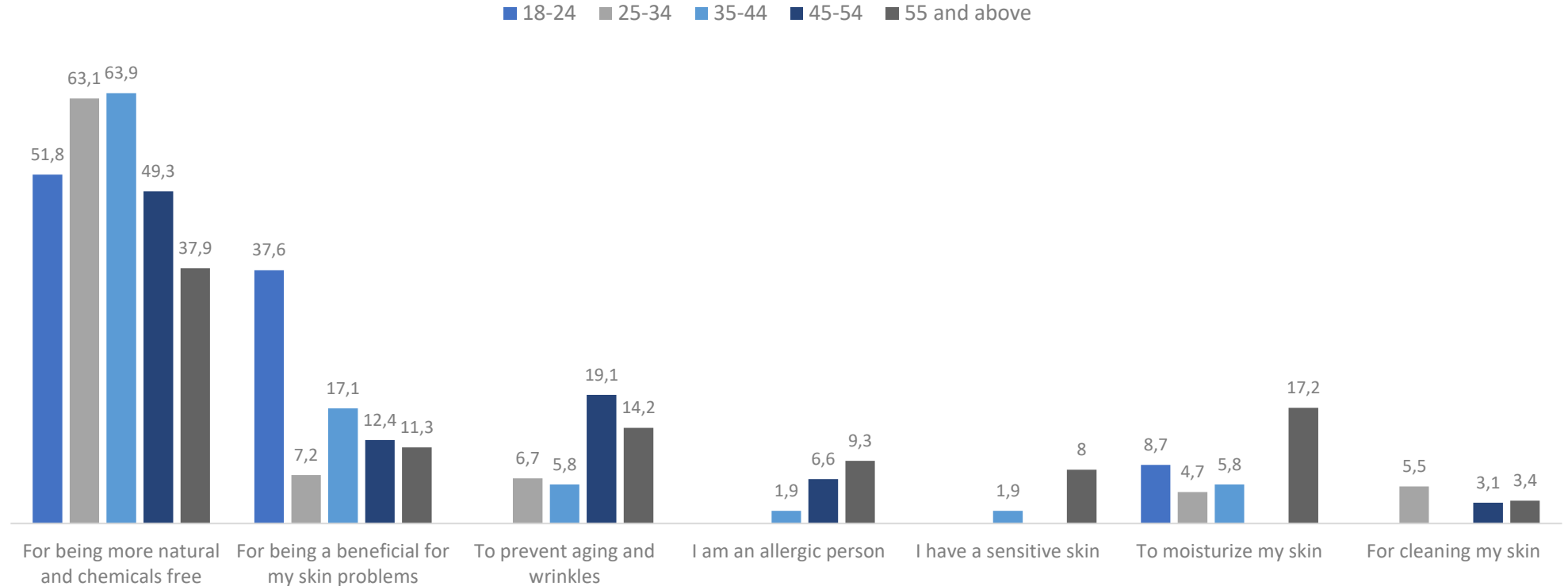
S2.What is your reason for choosing organic skin care product?

S3.What are the organic skin care/skin cares products you use regularly?

The Use of Organic/Natural Skin Care Product

The participants of 45-54 age group (%19,1) significantly differ from the participants of 18-24 age group (%6,7) due to the reason of preventing aging and wrinkle. The participants of 18-24 age group (%37,6) significantly differ from the age group of 25-34 participants (%7,2) in the aspect of the being beneficial for the skin problems than the other reasons.

The Reasons For Using Organic/Natural Skin Care Products According to Age

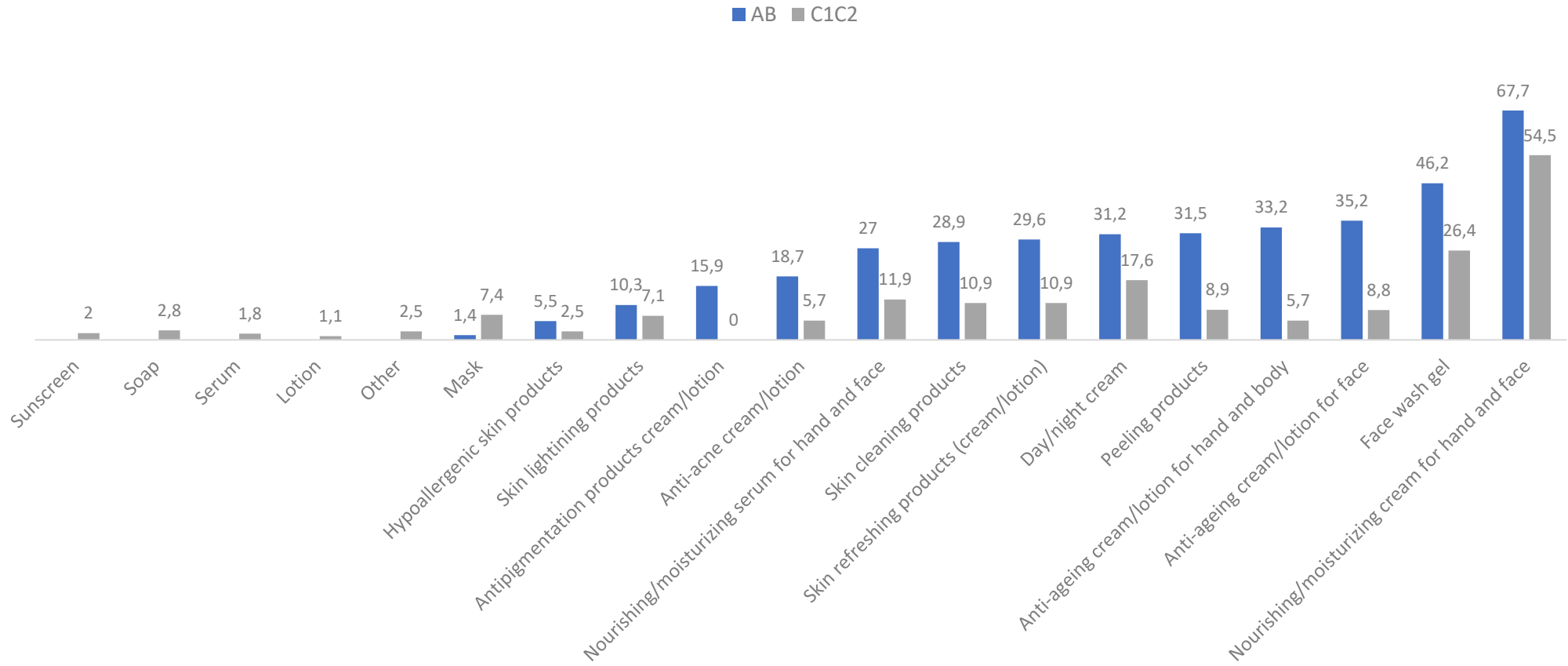


N:284

The Use of Organic/Natural Skin Product

The rates of use based on the products AB and C1C2 groups significantly differ in all products except moisturizing/nourishing cream for hands and face and skin lightening products.

Skin Care Products Used According to SES



N:284

The Use of Organic/Natural Skin Product

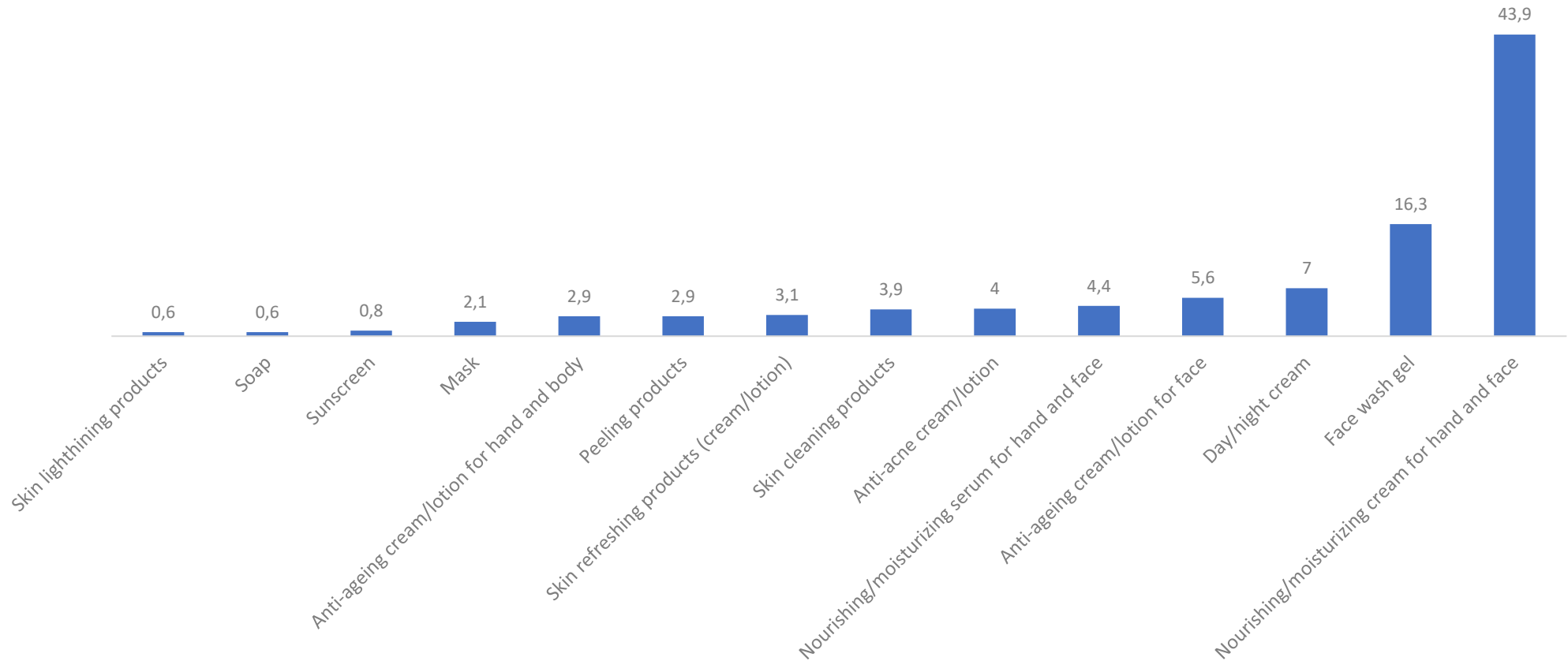
The values marked in red below indicate that the rate of age group for the relevant product significantly differs across all groups. According to the fact, for instance; while the rate of use for skin lightning products significantly differs between 25-34 and 35-44 age groups, the use of night/day creams in 25-34 age group significantly differs from the other groups.

	%				
Organic Skin Care Product	18-24	25-34	35-44	45-54	55 and above
Anti-aging cream/lotion for face	3	13,1	26,5	17,9	9,3
Anti-aging cream/lotion for hand and body	10,3	6,2	17,1	16,7	6,3
Anti-acne cream	13,9	9,2	14		3,2
Antipigmentation products	3	3,9	8,3		
Nourishing/Moisturizing cream for hand and face	56,3	53,5	66,4	52,8	57,1
Nourishing and moisturizing serum for hand and face	24,7	10,2	21,2	9,1	9,3
Face wash gel	27,7	35	41,8	9,2	36,6
Peeling products	9,2	17,2	27,6	6	4,7
Skin lightning products		20,5	14		
Skin refreshing products (tonic/water with mineral)	11,8	19,6	22,5	9	8
Skin cleansing products	9,2	22,9	26	4,5	6,6
Night/day cream	6,2	30,7	19,7	25,1	17,2
Hypoallergenic body products		4,7	5,5	4,5	
Sunscreen		6,6			
Soap		3,4	4,2		3,4
Mask	6,2		8,2	6	12,6
Serum				3,1	4,7
Lotion	4,3				

The Use of Organic/Natural Skin Care Product (General)

The most frequently used organic/natural skin care product is nourishing/moisturizing cream for hand and face with %43,9. This is followed by face wash gel with %16,3 and night/day cream with %7.

Most Frequently Use Organic/Natural Skin Care Product (%)



The Reasons For Using Organic/Natural Skin Care Product

Anti-aging cream for face is mostly used to prevent wrinkle (%70,1). Anti-aging cream for hand and face used to prevent wrinkle as well (85,7). While anti-acne cream is mostly used to prevent acne problems , Nourishing/moisturizing cream and serum for hand and face used to moisturize the skin (%61,5; %49,5).

	%							
	To prevent acne problem	To prevent wrinkle	To provide color balance For tightening skin pores on skin	To prevent deformations on skin skin	To moisturize the skin	For cleansing skin	Need/Health	
Anti-aging cream/lotion for face		70,1	14,8	9,8	14,6	24,3	15,1	
Anti-aging cream/lotion for hand and body		85,7	20,7			14,3		
Anti-acne cream/lotion	35,3	28,2	14,6		28,2			21,9
Nourishing/Moistur izing cream for hand and face	4,6	24,5	8,5	7,8	19,8	61,5	21,9	17,5
Nourishing/moistur izing serum for hand and face	18,2	18,7	39,8	9	12,6	49,5	12,6	13,5
Face wash gel	8,4		10,9	2,3	21	19,7	59,9	8,6
Peeling products			38,5			38,5	48,1	51,9
Skin lightening products*					100			
Skin refreshing products (tonic and water with mineral)		26,3					27,4	46,3
Skin cleaning products	13,8	13,8	27,6	13,8	13,8	49,2	79,3	20,7
Night/day cream	15,7	25,9	24,7	15,8	7,9	45,2	24,3	11,8
Sunscreen*					100		100	
Mask					59			41

*N<4

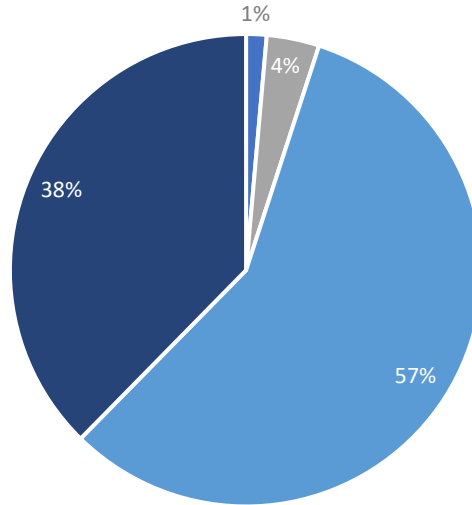
S5.Can I learn why you prefer the organic skin care product you use most often?

En Sık Kullanılan Organik/Doğal Cilt Bakım Ürününden Duyulan Memnuniyet (Genel)

%57 of the participants stated that they are satisfied with the mostly used organic/natural skin care products. The rate of participants indicating extremely satisfied is %38. While total satisfaction rate is %94,9, its mean is 4,31/5.

Satisfaction with The Mostly Used Organic/Natural Skin Care Products (General) (%)

■ Not Satisfied ■ Neutral ■ Satisfied ■ Extremely Satisfied



Total Satisfaction (%)	94,9
Total Dissatisfaction (%)	1,4
Mean/5	4,31

N:284

The Reason of Being Satisfied with The Most Frequently Used Organic/Natural Skin Care Product (Product-Based)

Among the most frequently used products, participants mostly satisfy with nourishing/moisturizing serum with mean of 4,69 / 5. The lowest mean of dissatisfaction is anti-aging cream/lotion and mask with 3,59/5.

Organic/Natural Skin Care Products	Total Satisfaction(%)	Total Dissatisfaction (%)	Mean/5
Anti-aging cream/lotion for hand and body	79,3	20,7	3,59
Mask	59	0	3,59
Anti-aging cream/lotion for face	90,2	0	4
Skin lightining cream*	100	0	4
Sunscreen*	100	0	4
Face wash gel	89,6	0	4,19
Skin refreshing products (tonic/ water with mineral)	100	0	4,19
Skin cleaning product	100	0	4,35
Peeling products	100	0	4,38
Nourishing/moisturizing cream for hand and face	96,9	1,9	4,39
Night/day cream	100	0	4,58
Anti-acne cream	100	0	4,65
Nourishing/moisturizing serum for hand and face	100	0	4,69

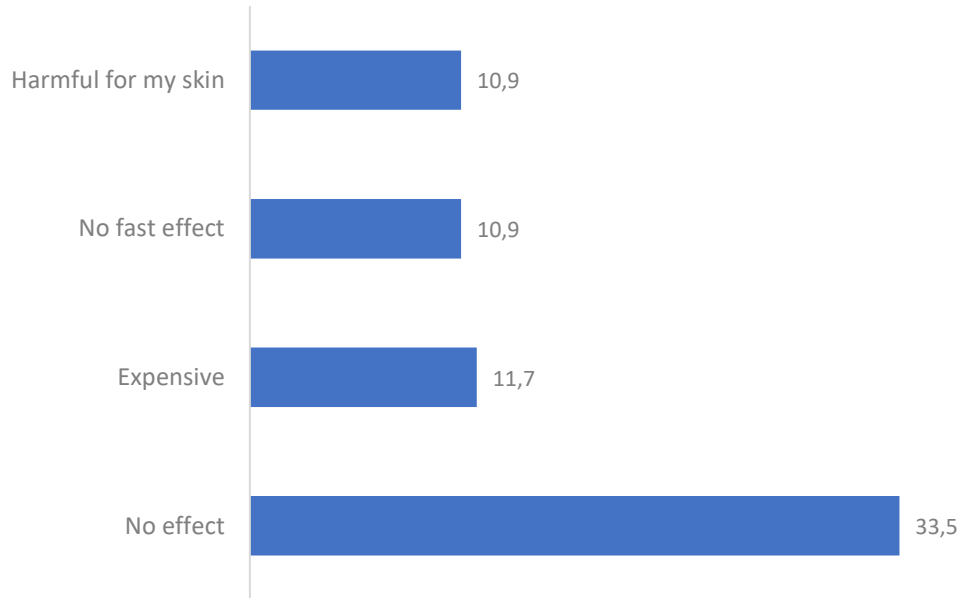
*N<4

S6.Could you please rate your satisfaction with the organic skin care product you use most often?

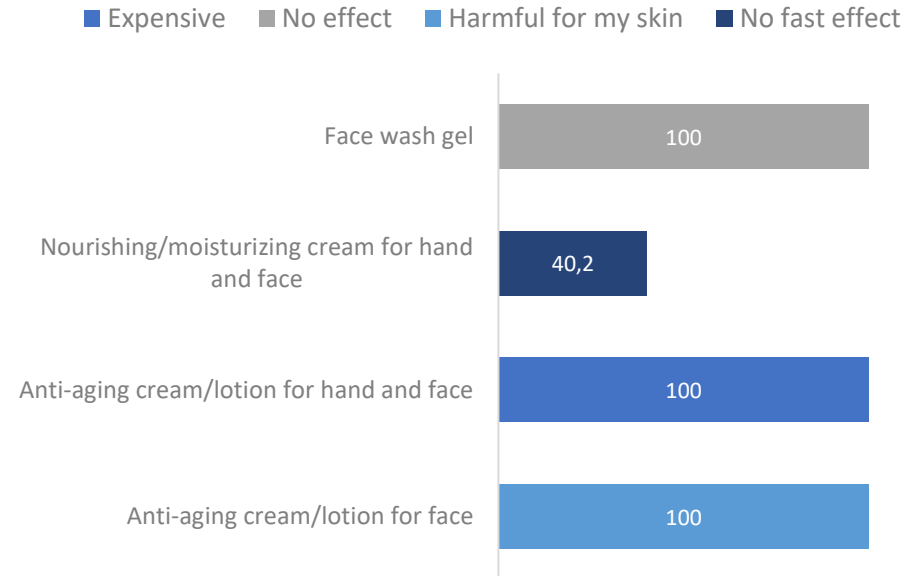
The Reason of Being Dissatisfied with The Most Frequently Used Organic/Natural Skin Care Product

Participants state that they dissatisfy with the product (%33,5) because they can not see the effect of the product they use the most. This is followed by the fact that the product is expensive with %11,7 and does not affect quickly and harms skin with (%10,9).

The Reason of Being Dissatisfied with The Most Frequently Used Organic/Natural Skin Care Product (General) (%)



The Reason of Being Dissatisfied With The Most Frequently Used Organic/Natural Skin Care Product (Product-Based)(%)

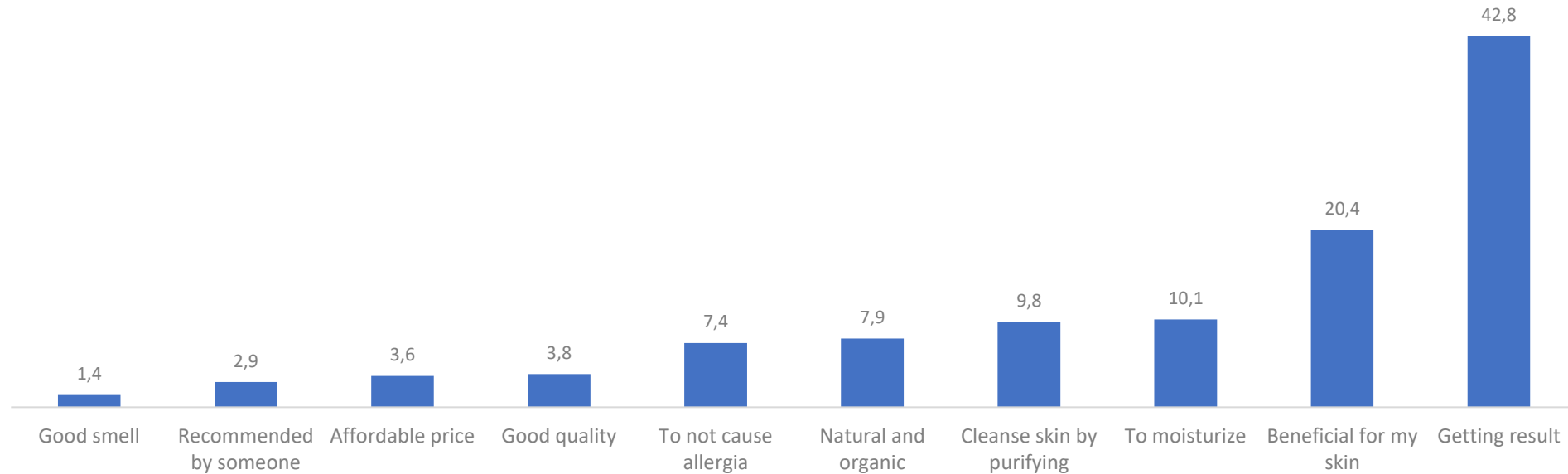


N:284

The Reason of Being Satisfied with The Most Frequently Used Organic/Natural Skin Products (General)

In general, among the reasons of being satisfied with the most frequently used organic/natural skin care product , the highest reason indicated is getting results (%42,8). This is followed by showing the skin well with %20,4 and moisturizing the skin with %10,1.

The Reasons of Being Satisfied With The Most Frequently Used Organic/Natural Skin Products (General) %



N:280

The Reason of Being Satisfied with The Most Frequently Used Organic/Natural Skin Products (Product-Based)

Getting results from the used products, except sunscreen and skin lightening products, is one of the reasons being satisfied for all products. In anti-aging cream/lotion for face and hand, the most frequently said reason of the participants is that the product show their skin well (%45; %54,9). Getting result in anti-acne creams is the most frequently said reason (%35,3).

Organic/Natural Skin Care Products	%									
	To get results	To Show my skin well	For being natural and organic	Affordable price	To not occur allergic reaction	To cleanse my skin by purifying	To moisturize skin	For being of high quality	To be recommen ded	Good smell
Anti-aging cream/lotion for face	15,1	45					14,6			25,2
Anti-aging cream/lotion for hand and face	27,1	54,9		12,5				27,1		
Anti-acne cream/lotion	35,3				14,6			21,9		
Nourishing/moisturizing cream for hand and face	47,4	21,5	7,8	1,9	5,7	3,2	14,6	3,2	3,9	
Nourishing/moisturizing serum for hand and face	18,2	32,2		9	28		12,6		28	
Face wash gel	31,4	11,1	8,5	5,2	8,2	33,5	8,8			
Peeling products	51,9	9,6				38,5				
Skin lightening products*					100					
Skin refreshing products	72,6					27,4	27,4			
Skin cleaning products	45,5	41,6		10,1		20,7				
Night/day products	50,8	17,3	31,4	11,8				12,2		
Sunscreen*		100								
Mask	59		41							

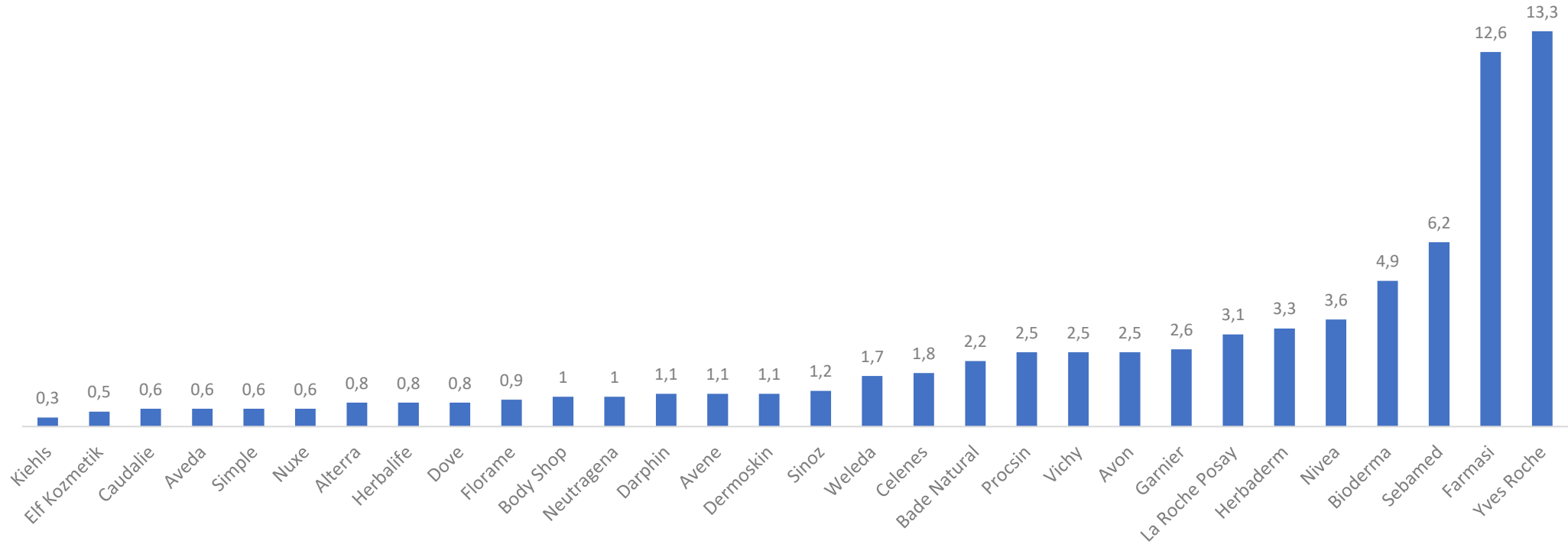
*N<4

S8.What is the reason you are satisfied with the organic skin car product you use most often?

The Most Frequently Used Organic/Natural Skin Care Brand (General)

The most frequently used organic/natural skin care brand is Yves Roche with %13,3, it is followed by Farmasi with %12,6 and Sebamed with %6,2.

The Most Frequently Used Organic/Natural Skin Care Brand (General) (%)



N:284

The Most Frequently Used Organic/Natural Skin Care Brand (Product-Based)

	%													
	Anti-aging cream/lotion for face	Anti-aging cream lotion for hand and face	Anti-acne cream	Nourishing/moisturizing cream for hand and face	Nourishing/Moisturizing serum for hand and face	Face wash gel	Peeling products	Skin lightening products *	Skin refreshing products	Skin cleaning products	Night/day products	Sunscreen*	Mask	
Weleda	20,5								19					
Caudalie					12,6									
Bade Natural				1,7		8,8								
Darphin			28,2											
Aveda				1,3										
Elf Kozmetik				1,2										
Alterra											11,8			
Celenes				2,8		3,3								
Herbaderm				3,8		10								
Procsin				2,1	9	7								
Florame						5,4								
Yves Roche	19,6	9,9		2	18,2	28,5			26,3	13,8	15,8	100	59	
Simple				1,3										
Nuxe		19,3												
Sebamed				5,1	28	2,3	9,6	100	27,4		8,8			
Vichy	14,8			3,8										
La Roche Posay				5,9						13,8				
Kiehls						1,7								
Avene	9,7					3,4								
Bioderma		14,3		8,9							7,8			
Dermoskin						7								
Body Shop			14,6	0,9										
Farmasi	10,5			14,8	18,7		76,9			30,1	17,9			
Herbalife										21,6				
Sinoz				1,3	13,5									
Dove						5								
Garnier		42,2		1,9		3,6								
Nivea			21,9	1,9		3,8					17,6			
Avon				5,6										
Neutrogena				2,2										

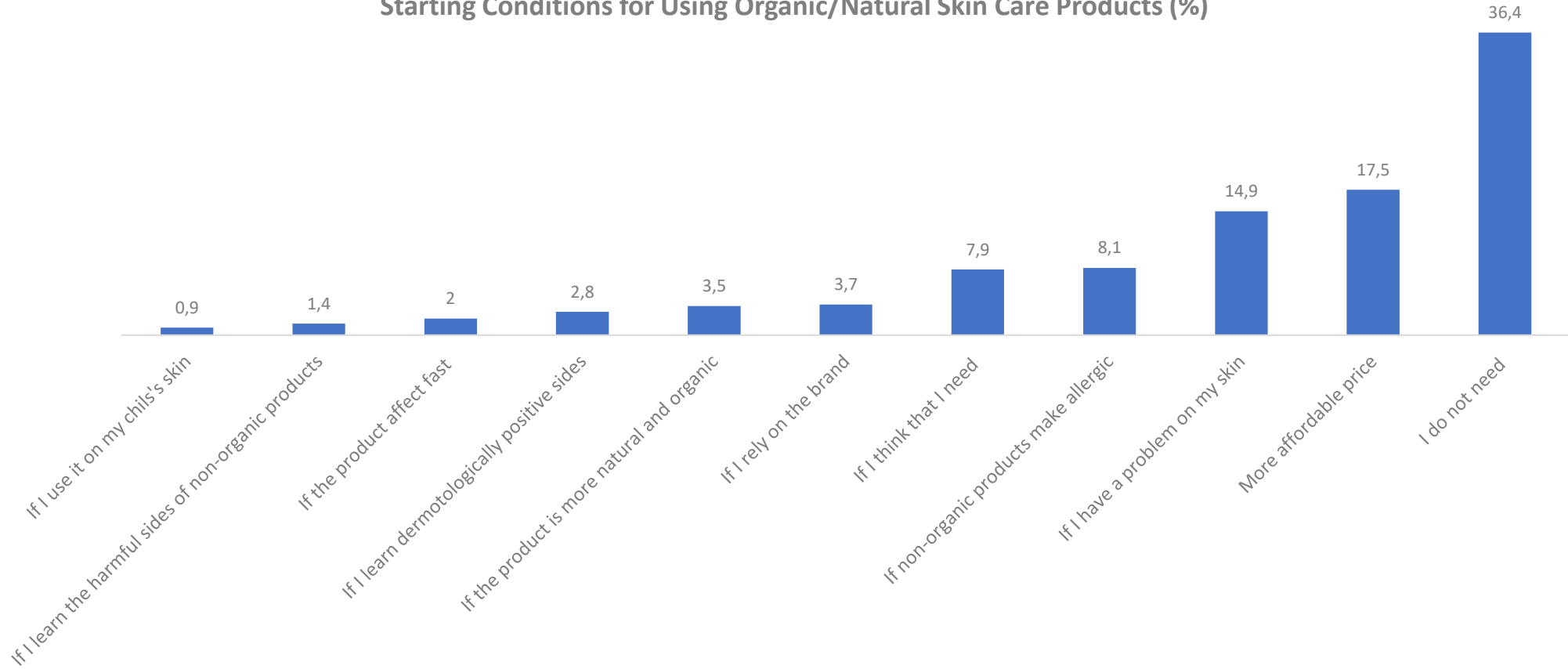
*N<4

S9.What is your most used organic skin care product brand?

Starting Conditions for Using Organic/Natural Skin Care Products

While %36,4 of the participants indicate that they do not need to use the organic/natural skin care products, %17,7 of the participants mention that they would start to use organic/natural skin care products if their prices were cheaper, %14,9 of participants state that they would use if they face with any problem on their skin.

Starting Conditions for Using Organic/Natural Skin Care Products (%)

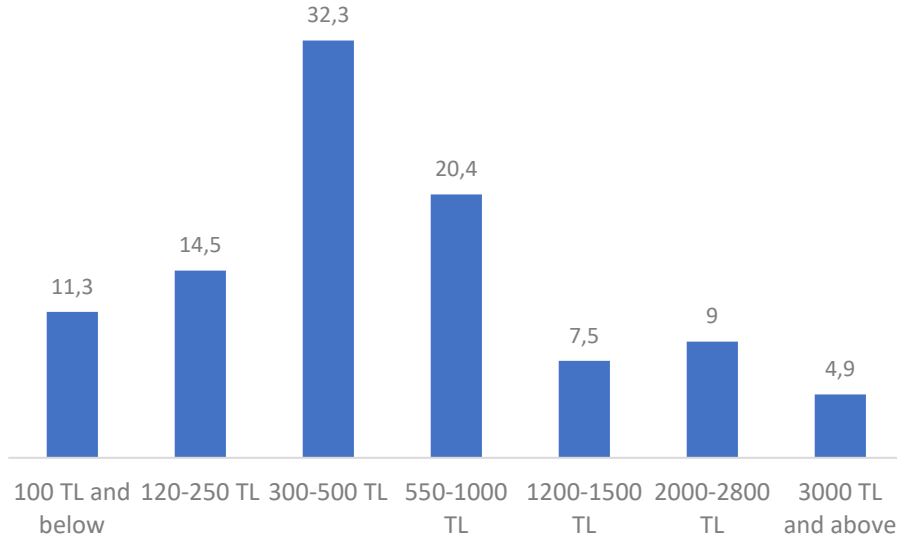


N:116

Amount of Annual Expenditure on Organic/Natural Skin Care Products (General)

The average annual expenditure on organic/natural skin care products is 867 TL. The group indicating that they spend between 300-500 TL annually is the highest rate with 32.3%. This is followed by the group spending 550-1000 TL with 20.4%.

Annual Expenditure on Organic/Natural Skin Care Products (General)



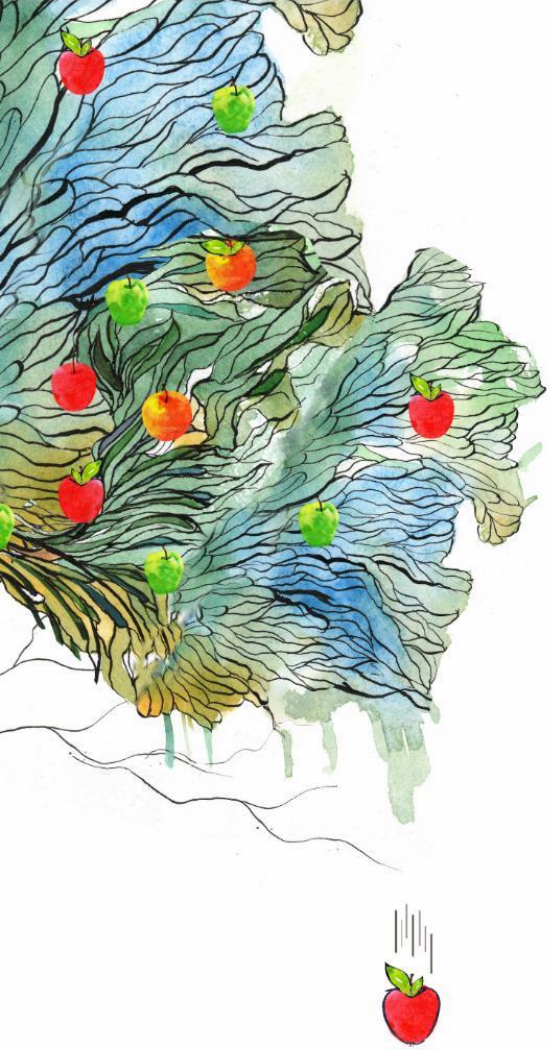
The Average Annual Expenditure 867 TL

N:284

Maximum Amount to be Paid for Organic/Natural Skin Care Products (Product Based)

The participants state that they would spend at most 374 TL for nourishing/moisturizing cream for hand and face with 374 TL and this product is the one which participants ready to spend more among the other products. Anti-acne cream /lotion is at the last placed with 117 TL.

	100 and below	120-250 TL	300-500 TL	550-1000 TL	1200-1500 TL	2000-2800 TL	Average
Anti-acne cream lotion	69,3	20,4	10,2				117 TL
Antipigmentation products cream/lotion	70,4	12,3	17,4				123 TL
Skin lightening products	66,1	26,9	7,1				129 TL
Face wash gel	58,8	28,7	12,5				135 TL
Peeling products	50,5	33,2	16,4				137 TL
Hypallergenic body products	54,6	45,4					141 TL
Skin cleaning products	49,7	32,9	17,4				147 TL
Skin refreshing products	53	29,6	13,3	4			208 TL
Nourishing/moisturizing serum for han and face	35,7	36,1	22,8	5,4			226 TL
Night/day cream	24,9	50,6	20,3	4,8			248 TL
Anti-aging cream for face	30,1	33,6	26,4	9,9			265 TL
Antiaging cream for hand and face	37,4	22,5	29,9	10,1			297 TL
Nourishing/moisturizing cream for hand and face	39,4	20,9	20,8	12,4	2,4	1	374 TL



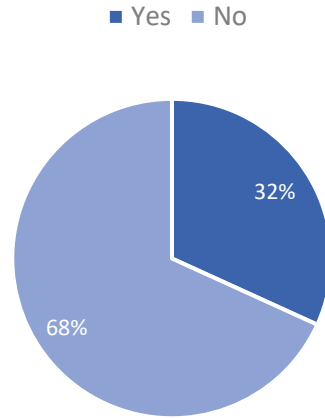
FINDINGS

Organic/Natural Hair Care Products

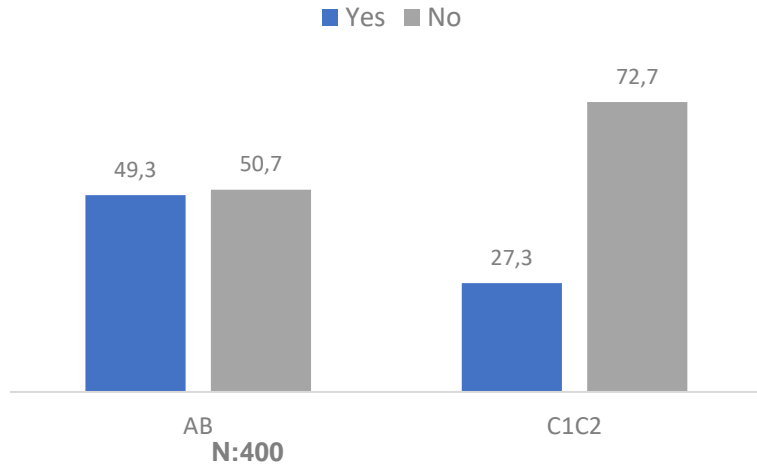
The Use of Organic/Natural Hair Care Product

The rate of the participants using organic/natural hair care product is %68. The usage rate of the participants from AB (%49,3) significantly differed from C1C2 participants (%27,3). The highest rate in use of organic hair care products belongs to the age group of 35-44 (%45,9). This is followed by 25-34 age group with %39,4 usage rate. The usage rates of this two age groups significantly differ from the others.

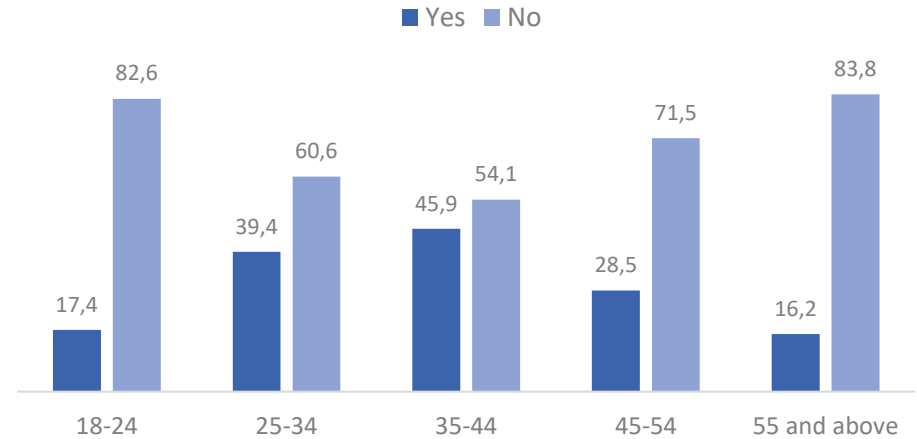
The Use of Organic/Natural Hair Care Products (%)



According to SES, The Use Of Organic/Natural Hair Care Products (%)



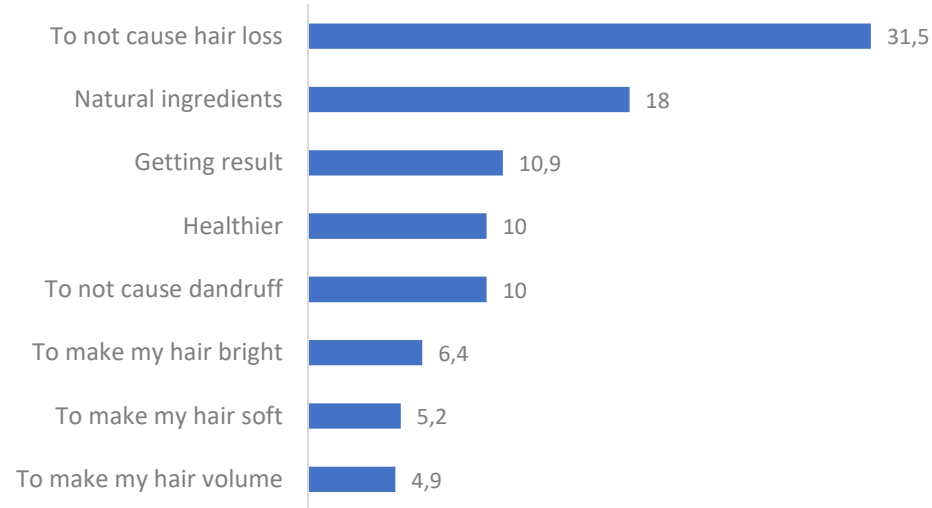
According to Age, The Use Of Organic/Natural Hair Care Products (%)



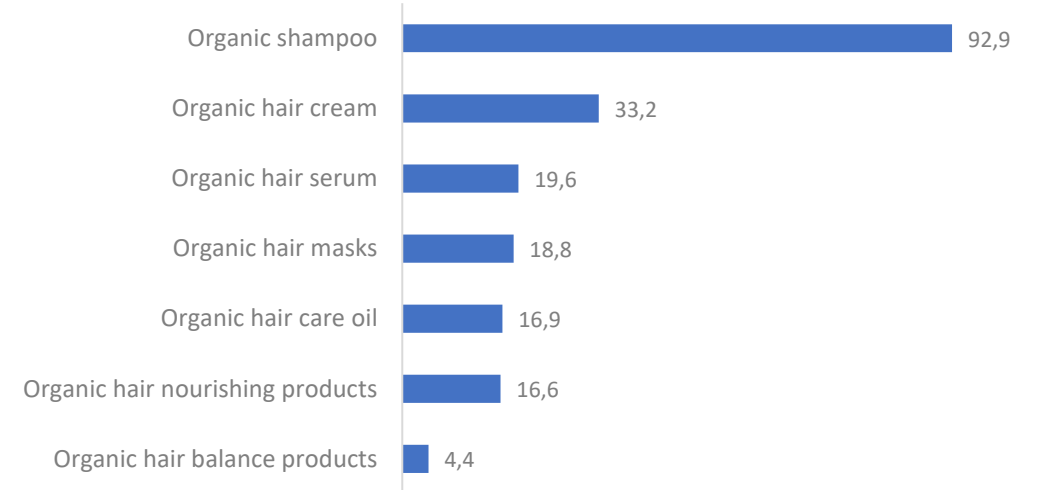
The Use of Organic/Natural Hair Care Product

Among the preference reasons of participants for organic /natural hair care products, the highest rate belongs to the reason of not causing hair loss with %31,5 . Among the organic/natural hair care products used constantly, the highest rate is organic shampoo with 92.9%, followed by organic conditioner with 33.2% and organic hair serum with 19.6%.

The Reasons For Using Organic/Natural Hair Care Product



The Most Often Used Organic/Natural Hair Care Products



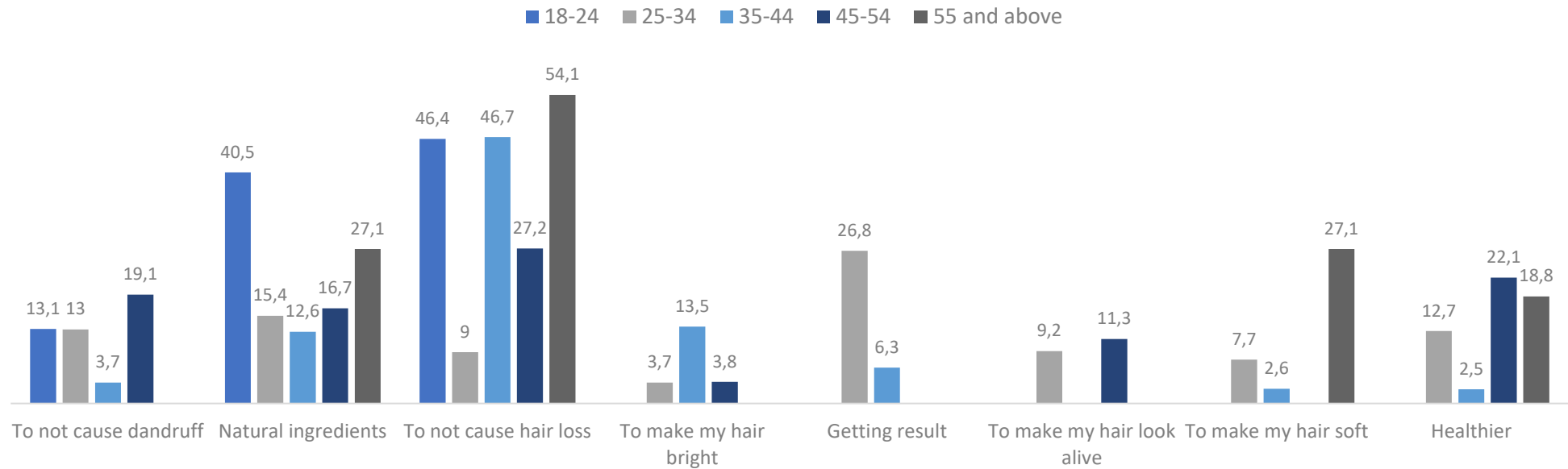
N:127

S14. What is the reason for using organic shampoo/hair care product?
S15. What is the organic shampoo/hair care product/products you use regularly?

The Use of Organic/Natural Hair Care Product

No hair loss (46.7%), which the 35-44 age group considered as one of the reasons for using organic/natural hair care products, differs significantly from the 25-34 age group (9%).

The Reasons for Using Organic Hair Care Product According to Age Groups (%)

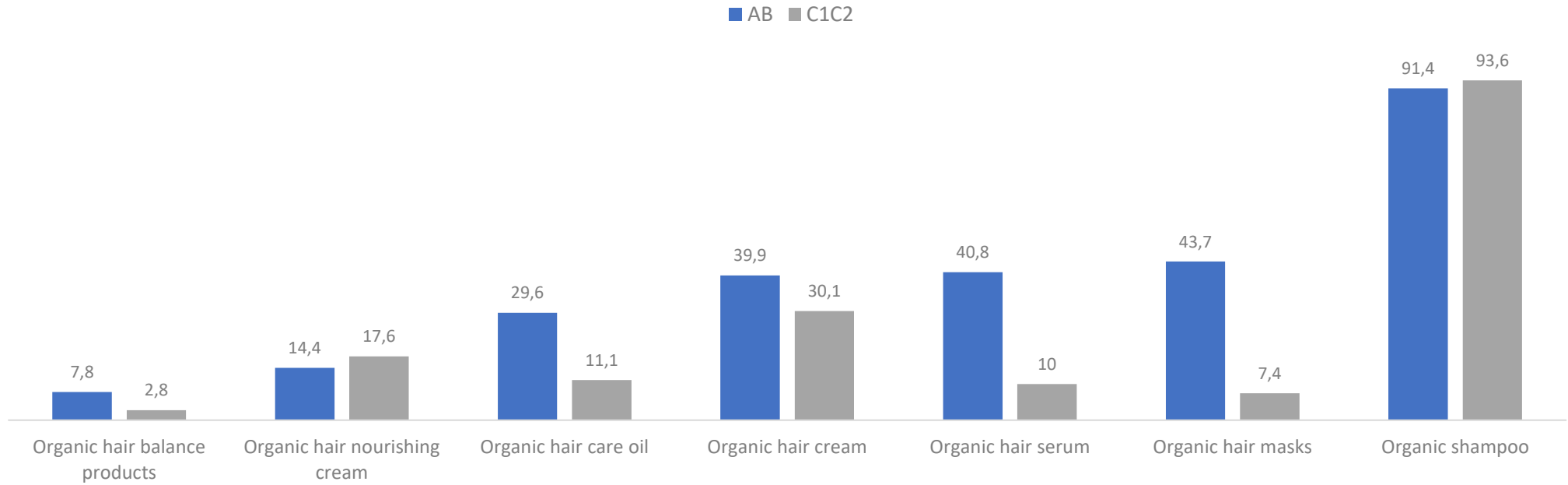


N:127

The Use of Organic/Natural Hair Care Product

The usage rates of organic hair serum (40.8%) and hair mask (43.7%) of the AB group participants differ significantly compared to the usage rate of C1C2 group.

The Used Organic Hair Care Products According to SES



N:127

The Use of Organic/Natural Hair Care Product

Distribution rates of organic shampoo, which is the most preferred organic/natural hair care product, by age groups; 81% in the 18-24 age group, 92.3% in the 25-34 age group, 93.8% in the 35-44 age group, 96.2% in the 45-54 age group and 100% in the 55 and over age group. As the age gets older, the rate of use of organic/natural shampoo also increases.

Organic/Natural Hair Care Products	18-24	25-34	35-44	45-54	55 and above
Organic shampoo	81	92,3	93,8	96,2	100
Organic hair cream	13,1	24,3	43,7	36	45,9
Organic hair nourishing products		30,5	13,8	11,3	
Organik hair balance products	19		7,3		
Organic hair serum	13,1	32,8	22,5		
Organic hair mask	13,1	29,1	20,8	5,4	
Organic hair care oil		26,5	22,6	3,8	

The Use of Organic/Natural Hair Care Product

The most frequently used organic/natural hair care product is organic shampoo with %75,6, the following rate is %7,2 of hair cream.

The Most Often Used Natural/Organic Hair Care Products (%)



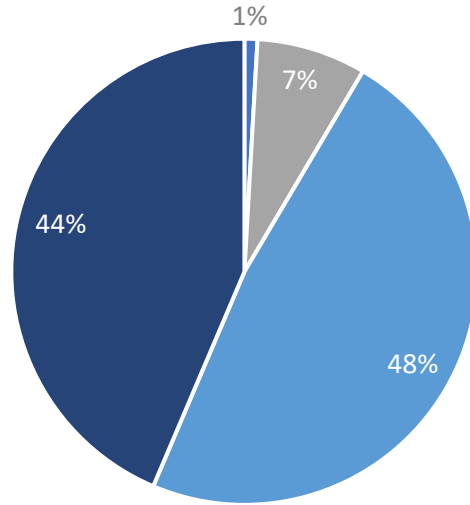
N:127

Being Satisfied With The Most Frequently Used Organic/Natural Hair Care Product (General)

While %44 of the participants indicate that they are extremely satisfied with the frequently used organic/natural hair care products, %48 out of them state that they are satisfied with them. Total satisfaction rate is %91,5 and 4,34/5.

Being Satisfied With The Most Often Used Organic/Natural Hair Care Product (General)

■ Not Satisfied ■ Neutral ■ Satisfied ■ Extremely Satisfied



Total Satisfaction(%)	91,5
Total Dissatisfaction(%)	0,9
Mean/5	4,34

N:127

Being Satisfied With The Most Frequently Used Organic/Natural Hair Care Product (Product-Based)

While organic hair mask is in the first place with a mean of 5/5 in the satisfaction with the frequently used organic/natural hair care products, organic hair serum has the lowest satisfaction mean with 3,63/5.

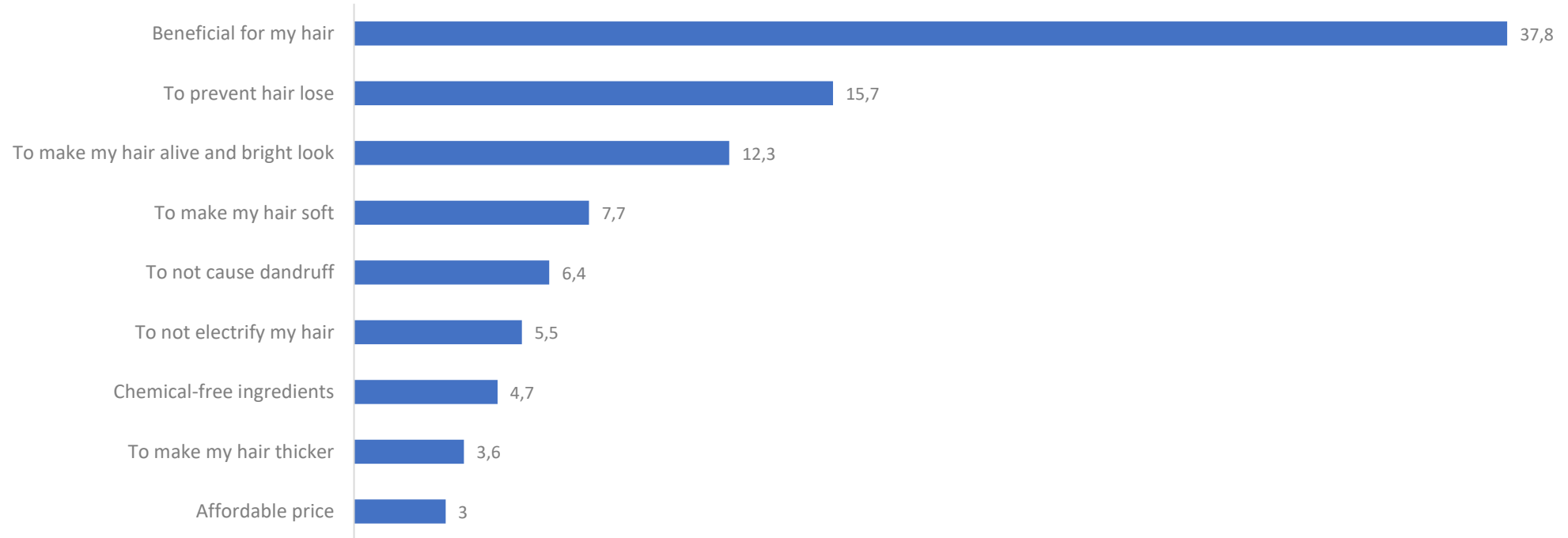
	Organic Hair Serum	Organic hair care oil	Organic nourishing hair products*	Organic hair cream	Organic shampoo	Organic hair balance products	Organic hair mask*
Total Satisfaction(%)	63,4	85,8	100	100	91,6	100	100
Total Dissatisfaction(%)					1,2		
Mean/5	3,63	3,86	4	4,25	4,41	4,61	5

*N<4

The Reason For Being Satisfied With The Most Frequently Used Organic/Natural Hair Care Product

Among the reasons for being satisfied with the most frequently used organic/natural hair care products, the most popular reason is being beneficial for hair with %37,8. This followed by preventing hair loss with %15,7 and providing volume and bright look for hair with %12,3.

The Reason For Being Satisfied With The Most Frequently Used Organic/Natural Hair Care Product (%)



N:127

The Reason For Being Satisfied With The Most Frequently Used Organic/Natural Hair Care Product (Product-Based)

While the most favorite feature in organic shampoo is to provide benefit for hair (%40,3) the most favorite issue in hair cream is to provide volume and bright look for hair with %35,6. The most popular issue in organic hair balance products is to prevent hair loss (%100); preventing hair loss and providing softness in organic hair serum (%37,1); providing benefit for hair in organic hair masks (%100) and in hair care oil (%79,8).

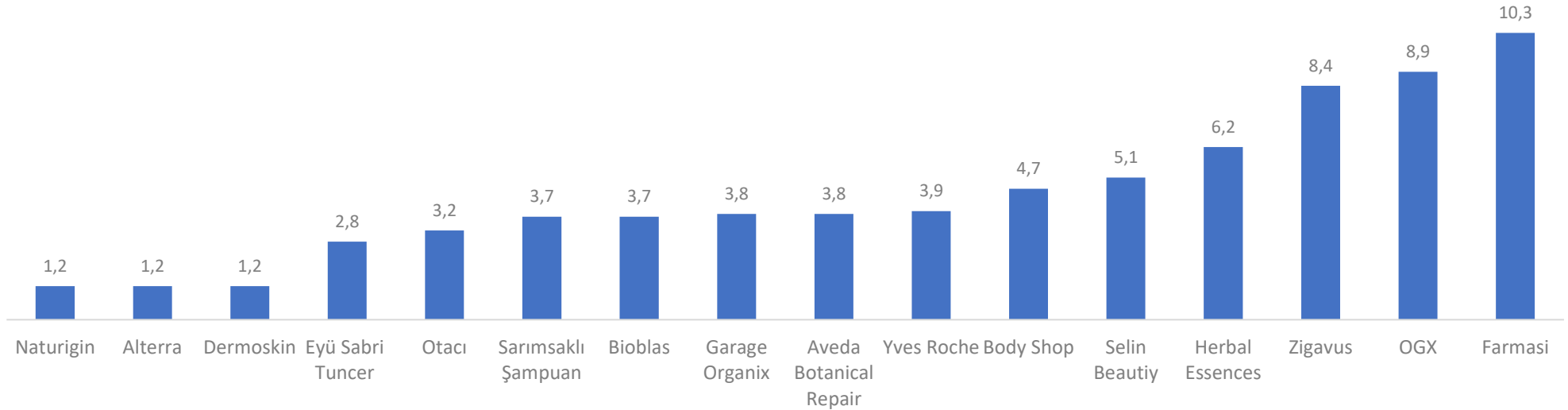
	Organic Shampoo	Organic hair cream	Organic hair nourishing cream*	Organic hair balance cream	Organic hair serum	Organic hair masks*	Organic hair care oil
For being beneficial for hair	40,3				26,4	100	79,8
To prevent hair lose	14,9			100	37,1		
To provide volume and bright look for hair	12,7	35,6					
To prevent dandruff	8,3						
To provide soft ness	5,9	26,4			37,1		
To thicken my hair	4,7						
Chemical free	5	12,6					
Affordable price	4						
To prevent electrified hair	4,8	25,4					
No answer	3,3		100		36,6		

*N<4

The Most Frequently Used Organic/Natural Hair Care Brand (General)

The most frequently used organic natural hair care brand is Pharmacy with %10,3 it is followed by OGX (%8,9) and Zivagus (%8,4).

The Most Frequently Used Organic/Natural Hair Care Brand (General) (%)



N:127

The Most Frequently Used Organic/Natural Hair Care Brand (Product-Based)

The most preferred brand in organic hair care products is Farmasi with %13,5; in organic hair cream Herbal Essences with %35,6; in organic nourishing care products is Garage Organix (%100); in organic hair balance products is Eyüp Sabri Tuncer (%60,7); in organic hair serum is Herbal Essences (%36,3); organic hair masks is Aveda (%100) and in organic hair care oil is Dermoskin (%20,5).

Hair Care Brands	Organic Shampoo	Organic hair cream	Organic hair nourishing cream *	Organic hair balance products	Organic hair serum	Organic hair masks*	Organic hair care oil
Alterra	1,6						
Ashley Joy							
Aveda Botanical Repair	3,3					100	
Bioblas	4,9						
Body Shop	4,9	12,6					
Dermoskin							20,5
Eyüp Sabri Tuncer	1,2			60,7			
Farmasi	13,5						
Garage Organix	1,7		100				
Herbal Essences	1,6	35,6			36,6		20,2
Marc Antony							
Naturigin				39,3			
OGX	10,1						20,2
Otacı	4,1						
Parmel's							
Sante							
Sarımsaklı Şampuan	4,8						
Selin Beautiy	6,6						
Yves Roche	4				26,4		
Ziaja							
Zigavus	7,4	26,4					14,2
Hatırlamıyorum	13,1						

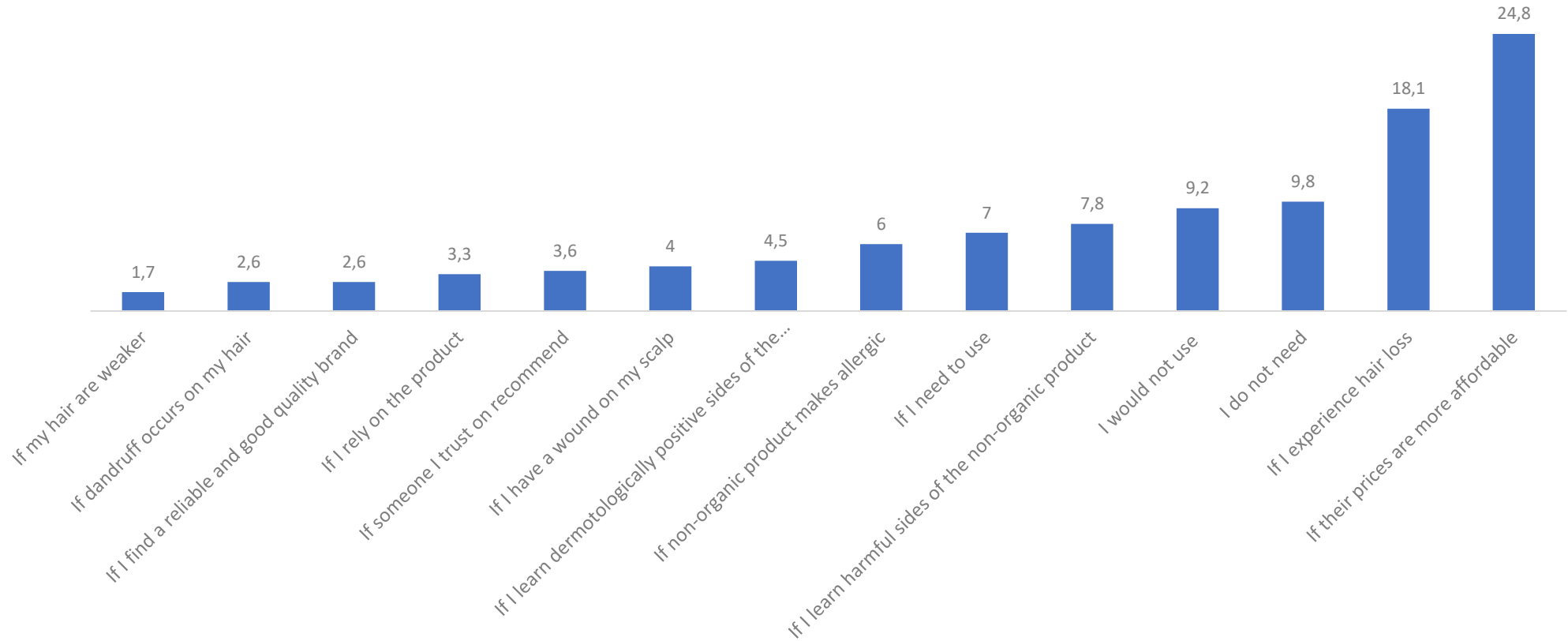
*N<4

S20. What is the shampoo/hair care product that you frequently use?

Starting Conditions for Using Organic/Natural Hair Care Products

Participants mostly state that they would start to use organic/natural hair care products if their prices were more affordable (%24,8). This is followed by if I experience hair loss with %18,1.

Starting Conditions For Using Organic/Natural Hair Care Products (%)

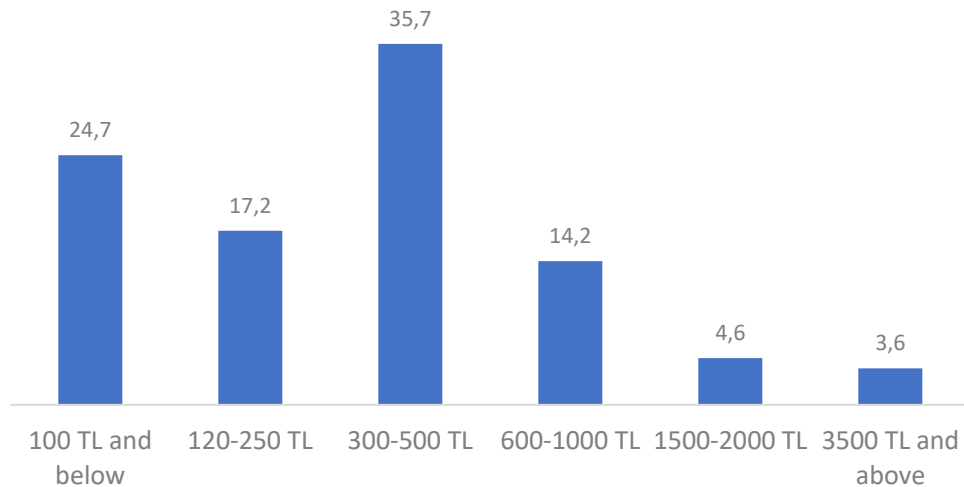


N:273

Amount of Annual Expenditure For Organic/Natural Hair Care Product

An average amount of annual expenditure for organic/natural hair care product is 606 TL. The group spending 300-500TL for the products has the highest rate with %35,7.

Annual Expenditure For Organic/Natural Hair Care Products (%)



Annual Average Expenditure
606 TL

N:127

S22. How much TL do you approxiametly spend for the organic shampoo/ hair care products in a year?

The Maximum Amount To Be Paid For Organic/Natural Hair Care Products (Product-Based)

While the product that the participant indicated that they would pay the most on an average basis was organic shampoo with 256 TL, the product that they would be paid the least was organic hair care oil with 135 TL.

The Maximum Amount To Be Paid	Organic Shampoo	Organic Hair Cream	Organic hair nourishing cream	Organic hair balance products	Organic hair serum	Organic hair masks	Organic hair care oil
100 TL and below	44,2	56,3	66,5	28,2	55,5	62,9	62,5
120-250 TL	26,1	21,2	7,4	71,7	12,6	13	23,2
300-500 TL	17,2	19,9	14,6		32,2	17,7	14,4
600-1000 TL	11,1	2,7	11,5			6,5	
1500-2000 TL	1,4						
Average	256 TL	175 TL	220 TL	163 TL	187 TL	186 TL	135 TL

Preference Criteria Of Organic/Natural Skin/Hair Care Products

When the most popular issue in preference criteria for organic/natural skin/hair care products is being organic with %42,8, this is followed by relevancy with skin type with %31,1 and being effective with %23,8. While %48,9 of the participants indicate that they have a tendency to prefer a global brand rather than a local brand, %78,92 out of them state that they show a tendency to try different products from the brand that they satisfied with , %53,1 indicate that they would try samples of the same product from different brands.

Preference Criteria of Organic/Natural Skin/Hair Care Products (%)



	Total Agree(%)	Total Disagree(%)	Mean /5
I have a higher tendency to prefer an overseas brand instead of local brand	48,9	25,7	3,34
I tend to try different products from the brand that I like	78,9	9,3	4,16
I tend to try samples of the same products from different brands	53,1	25,8	3,42

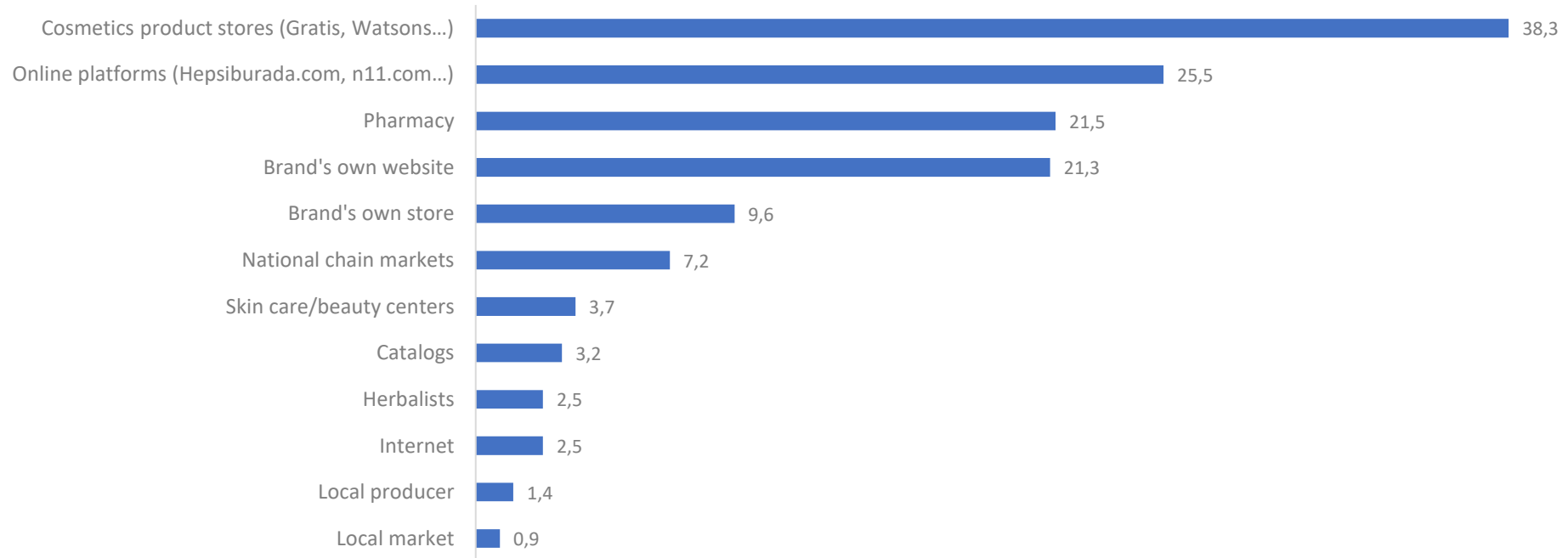
N:292

S25. What is your preference criteria for the organic skin care/hair care products that you use?
S26. Please evaluate items below ranging from 1 (Completely disagree) to 5 (Completely agree) regarding the organic skin care/hair care product consumption

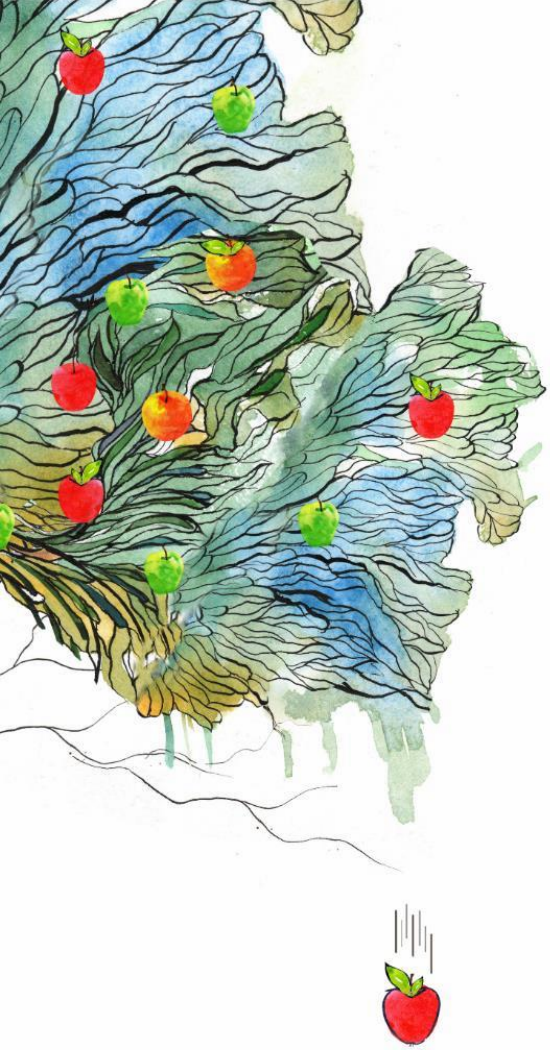
The Places Being Purchased For Organic/Natural Skin/Hair Care Products

%38,3 of the participants has purchased organic/natural skin/hair care products in cosmetics product stores. This is followed by online platforms with %25,5 and pharmacy with %21,5.

The Places Being Purchased Organic/Natural Skin/Hair Care Products (%)



N:292



FINDINGS

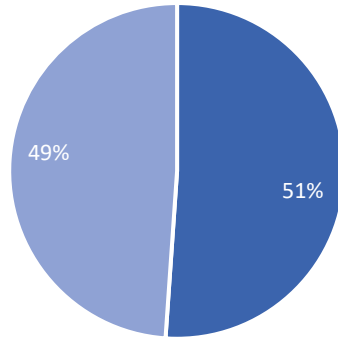
Child Skin/Hair Care Products

The Use of Organic/Natural Child Skin Care Product

51% of the participants use organic/natural child skin care products. While these products are used by 59.4% of the people in the AB group, they are preferred by 47.5% of the people in the C1C2 group.

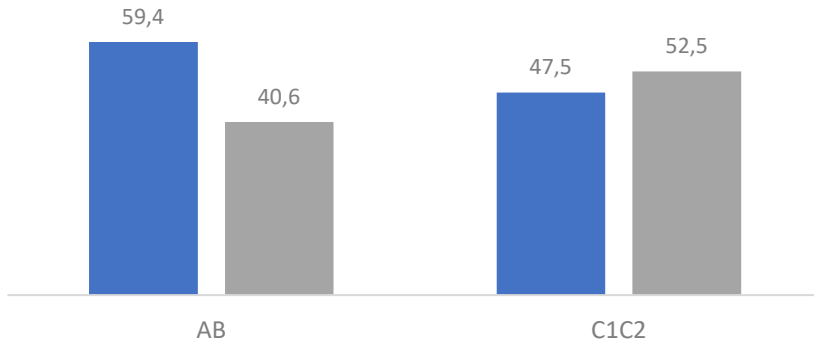
The Use of Organic/Natural Child Skin Care Product (%)

■ Yes ■ No



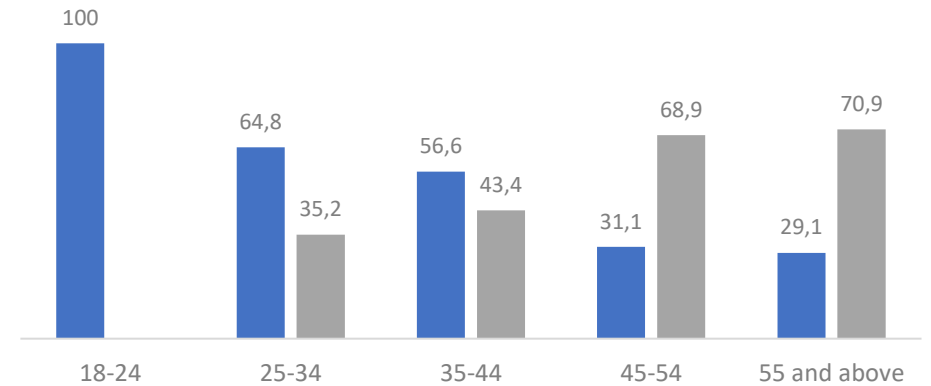
According to SES, The Use of Organic/Natural Child Skin Care Production (%)

■ Yes ■ No



According to Age, The Use of Organic/Natural Child Skin Care Production (%)

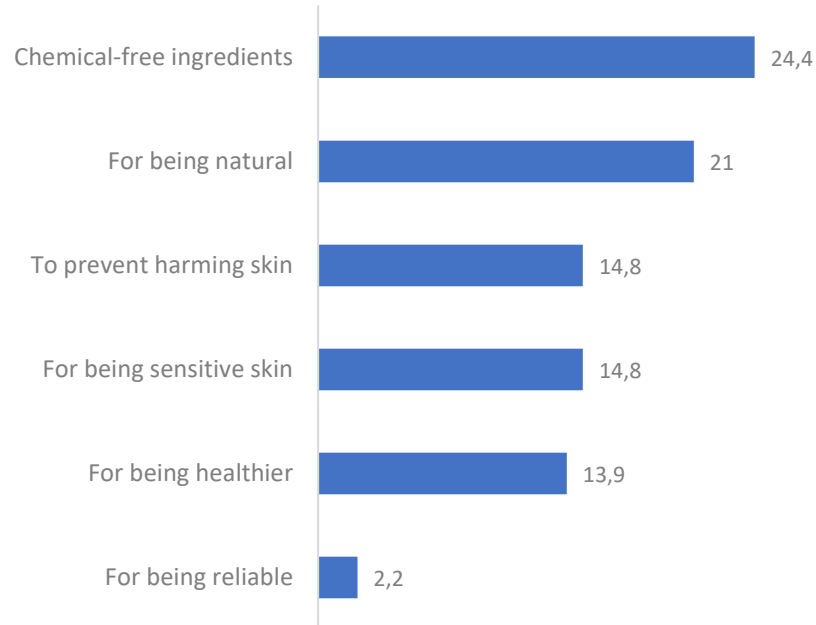
■ Yes ■ No



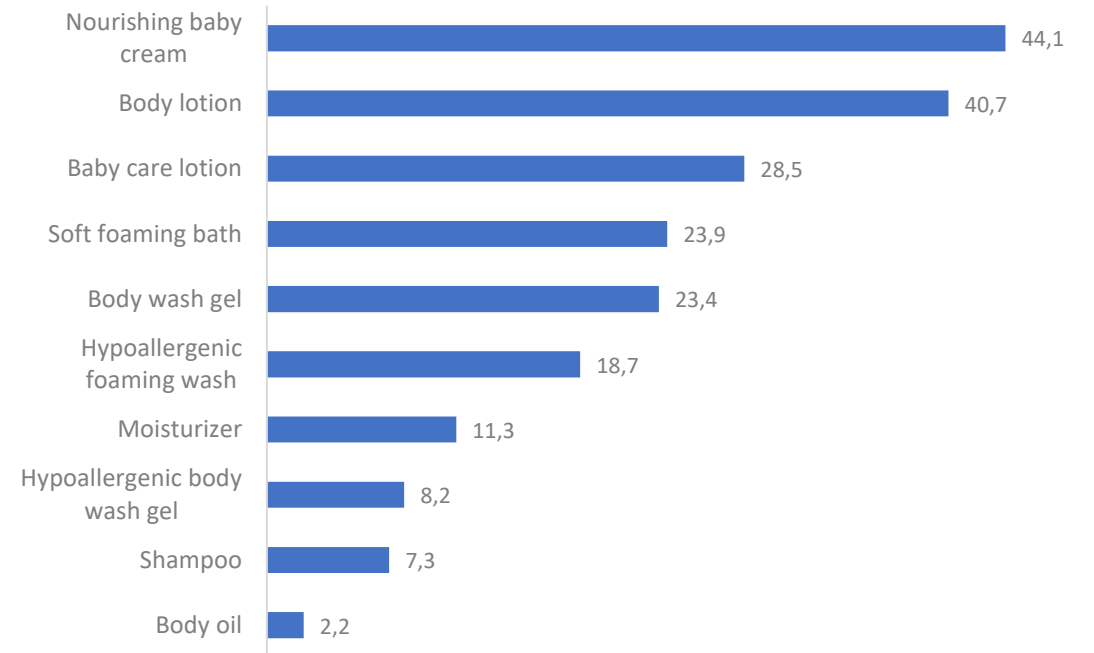
The Use of Organic/Natural Child Skin Care Product

The most frequently indicated reason for using organic/natural childcare products is that it does not contain chemical content with 24.4%. The most used organic/natural child skin care product is nourishing baby cream with 44.2%.

The Reasons for Using Organic/Natural Child Skin Care Product (%)



The Used Organic/Natural Child Skin Care Products (%)



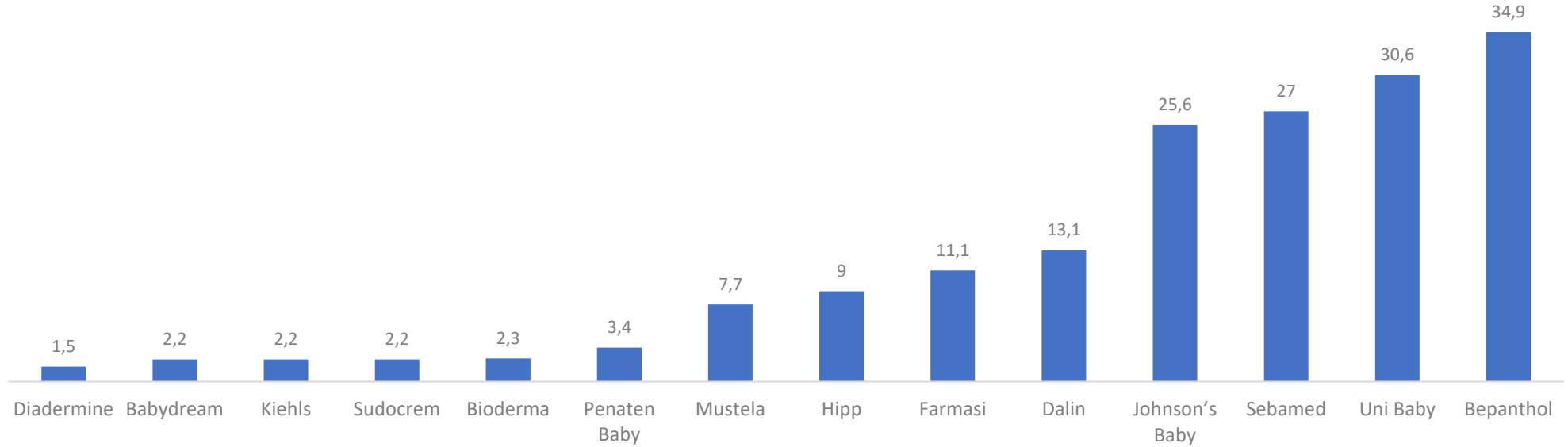
N:71

S29. What is your reason for choosing organic product for your baby?
S30. What is the organic skin care product that you used for your baby/child?

The Preferred Organic/Natural Child Skin Care Product Brand(General)

The organic/natural children's skin care product brand most preferred by the participants for their children is Bepanthal with 34.9%, followed by Uni Baby with 30.6% and Sebamed with 27%.

The Preferred Organic/Natural Child Skin Care Product Brand (%)



N:71

The Preferred Organic/Natural Child Skin Care Product Brand (Product-Based)

The percentages of the preferred brands based on the product are given in the table below. For instance; while the most preferred brand in hypoallergenic body wash gels is Bepanthol with 80.5%, Uni Baby is 65.5% in hypoallergenic foaming wash.

Brands	%								
	Hypoallergenic body wash	Hypoallergenic foaming wash	Soft foaming bath	Body lotion	Body wash gel	Nourishing baby cream	Baby care lotion	Body Oil*	Shampoo Moisturizer
Babydream				5,4					
Johnson's Baby	53,8	29,5	47,6	26,8	37,2	27,9	23,6		33,6
Penaten Baby			14,3		14,6				
Dalin	53,8	11,7	9,3	15,4	17,5	20,4	23,9		33,6
Hipp	26,7	11,7		22		5	23,6		
Bübchen									
Chicco									
Uni Baby	53,4	65,5	38,1	44,3	48,2	48,6	71,8		
Bepanthol	80,5	41,1	9,3	24,4	9,3	62,8	40,9	66,4	30,1
Sebamed	53,8	37,7	9,3	22,8		44	40,9	45,4	19,5
Beeo									
Kiehls	26,7	11,7		5,4		5	7,7		
Weleda									
Farmasi	19,5	26,3		11,2		7,5	21,6		
Sudocrem						5			
Mustela				13,1		8,9	5,4	100	
Diadermine						3,5		21	
Bioderma									20,2

*N<4

The Satisfaction With Organic/Natural Child Skin Care Product According to Brands

When the level of satisfaction is evaluated out of 5 based on the brand, the most satisfied brand is Penaten Baby with 5/5. The level of satisfaction of the most preferred brand Bepanthol is 4,42/5

Brands	Total Satisfaction (%)	Total Dissatisfaction (%)	Mean/5
Kiehls*			3
Johnson's Baby	85	6,4	3,97
Babydream*	100		4
Dalin	83,3		4,19
Hipp	75,6		4,26
Uni Baby	77,9		4,3
Bepanthol	100		4,42
Sebamed	100		4,65
Penaten Baby*	100		5

*N<4

The Maximum Amount to Be Paid For Organic/Natural Child Skin Care Products (Product-Based)

The product that the participants would pay the most is the hypoallergenic body wash gel with an average of 318 TL while they would pay the least is the soft foaming bath that with an average of 44 TL.

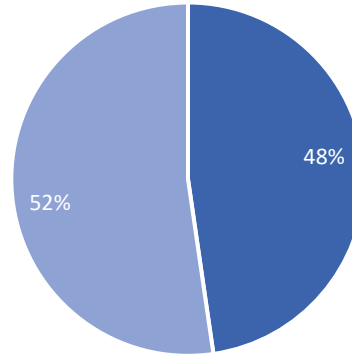
The maximum amount to be paid	Hypoallergenic body wash gel	Hypoallergenic foaming body wash	Body lotion	Nourishing baby cream	Baby care cream	Body wash gel	Soft foaming bath
100 TL and below	27,1	79,8	67,2	64,7	69,8	80,1	100
150-250 TL	53,4	11,7	18,5	28,3	17,1	9,3	
300-500 TL		8,5	8,2	3,6	13,2	10,5	
600-1000 TL	19,5		6,1	3,5			
Average	318 TL	157 TL	130 TL	121 TL	110 TL	92 TL	44 TL

The Use of Organic/Natural Child Hair Care Product

%48 of the participants has been used organic/natural child hair care product. The usage rate of these products for AB income group (%54,1) has significantly higher than C1C2 income group (%45).

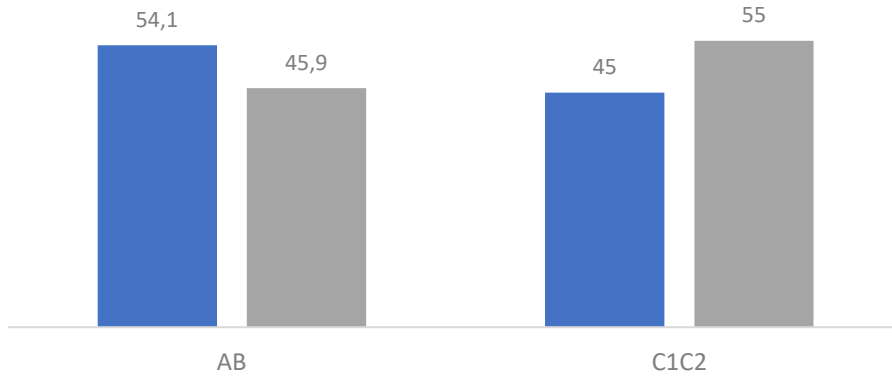
The Use of Organic/Natural Child Hair Care Product (%)

■ Yes ■ No



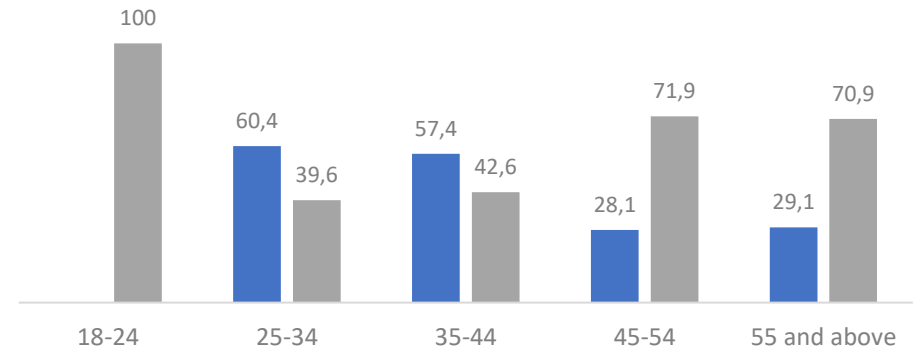
According to SES, The Use of Organic/Natural Child Hair Care Product (%)

■ Yes ■ No



According to Age, The Use of Organic/Natural Child Hair Care Product (%)

■ Yes ■ No



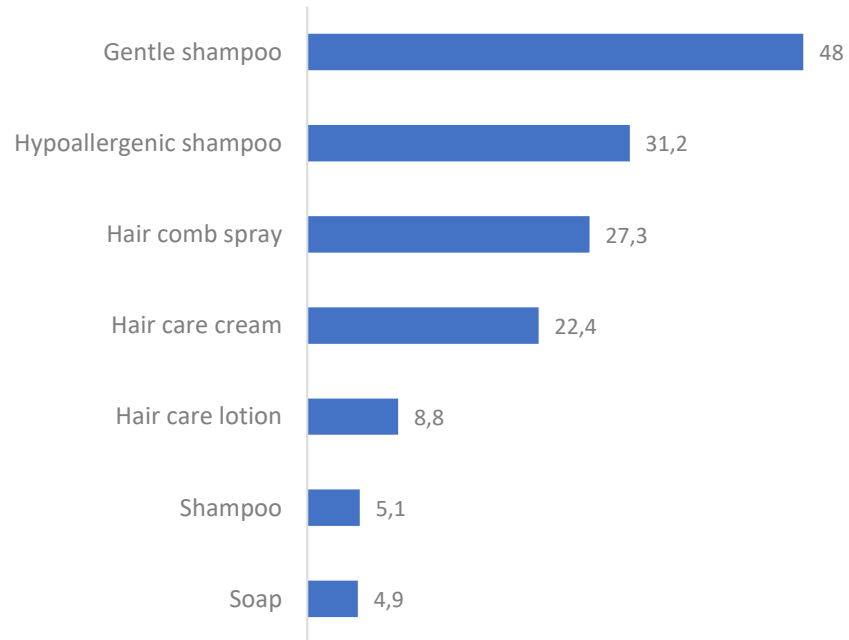
N:138

S28Do you use organic hair care product for your baby/child?

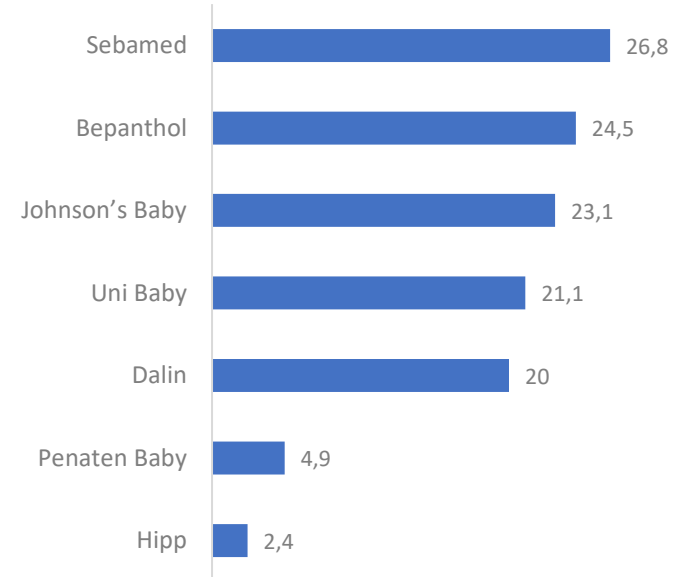
The Use of Organic/Natural Child Hair Care Product

The most frequently used organic/natural child hair care product is gentle shampoo with %48 and the most preferred brand is Sebamed (%26,8).

The Used Organic/Natural Child Hair Care Products (%)



The Preferred Brand For Organic Natural Hair Care Products(%)



N:66

S35. What are the hair care products that you used for your baby/child?

S36. What is the organic hair care product brand that you preferred for your baby/child?

The Preferred Brand For Organic/Natural Child Hair Care Product (Product-Based)

The rate of preferred brands based on the product given in the table below. According to the fact, for instance, the most preferred brand is Uni Baby in gentle shampoo with %40,4; Johnson's Baby in hair care lotion with %67; Sebamed in hair care cream with %44,9; Johnsons's Baby in hair comb spray with %58,6 and Sebamed in hypoallergenic shampoo with %66,3.

Brands	Gentle Shampoo	Hair Care Lotion	Hair Care Cream	Hair Comb Spray	Hypoallergenic shampoo
Johnson's Baby	33,1	67	22,4	58,6	15,6
Penaten Baby	10,2				
Dalin	31,8	66,5	32,9	18,2	
Hipp	4,9	33,5			
Bübchen					
Chicco					
Uni Baby	40,4				12,8
Bepanthol	20,1	33	21,1	35,1	42,1
Sebamed	9,8	66,5	44,9	26,4	65,3

Satisfaction Level According to Brands For Organic Natural Child Hair Care Products

When their level of satisfaction with organic/natural child hair care brands is evaluated, it is seen that Sebamed is the most satisfied brand with the mean of 4,69/5. It is followed by Dalin with 4,67/5 and Bepanthol with 4,61/5.

	Penaten Baby*	Hipp*	Johnson's Baby	Uni Baby	Bepanthol	Dalin	Sebamed
Total Satisfaction(%)	100	100	100	88,7	100	100	100
Mean./5	4	4	4,32	4,43	4,61	4,67	4,69

*N<4

The Maximum Price to Be Paid For Organic/Natural Child Hair Care Products (Product- Based)

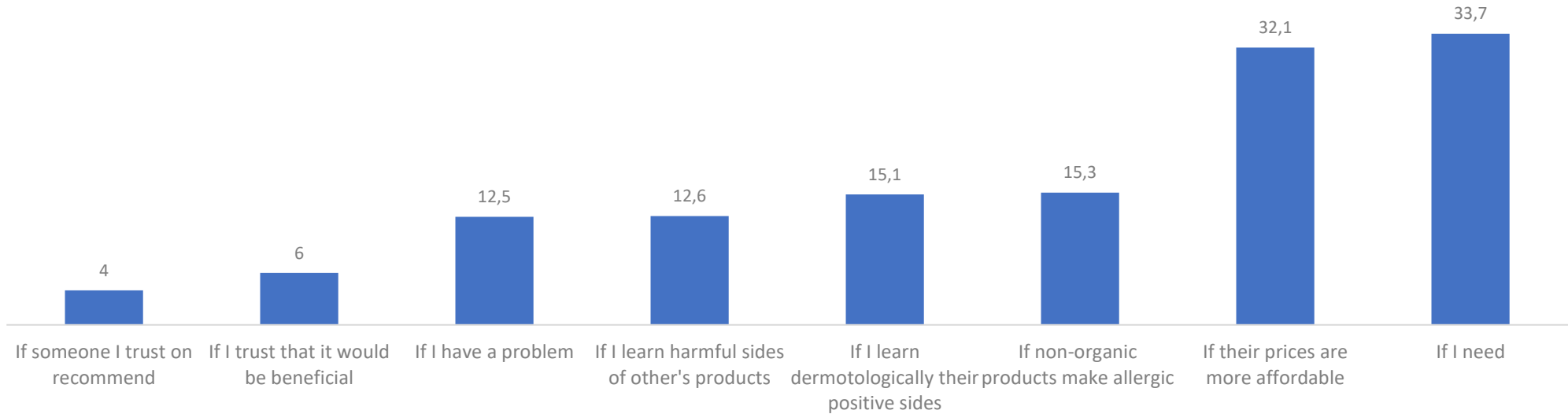
The product with the highest average price in the ranking list in terms of the products to be paid at maximum is hypoallergenic shampoo with 182 TL and hair comb spray belongs to the lowest price to be paid with 61 TL.

The maximum amount to be paid	Hair comb spray	Hair care lotion	Gentle shampoo	Hair care cream	Hypoallergenic shampoo
100 TL and below	90,5	80,7	73,3	69,4	65,2
150-250 TL	9,5	19,2	17,9	11,8	15,6
300-500 TL			5,5	18,8	11,4
600-1000 TL			3,4		7,8
Average	61 TL	98 TL	114 TL	163 TL	182 TL

Starting Conditions for Using Organic/Natural Child Skin/Hair Care Products

While %33,7 of the participants state that they will start to use organic/natural child skin/hair care products if they need them, %32,1 out of them indicate that if their prices would be more affordable, they will start to use them.

Starting Conditions For Using Organic/Natural Child Skin/Hair Care Products (%)



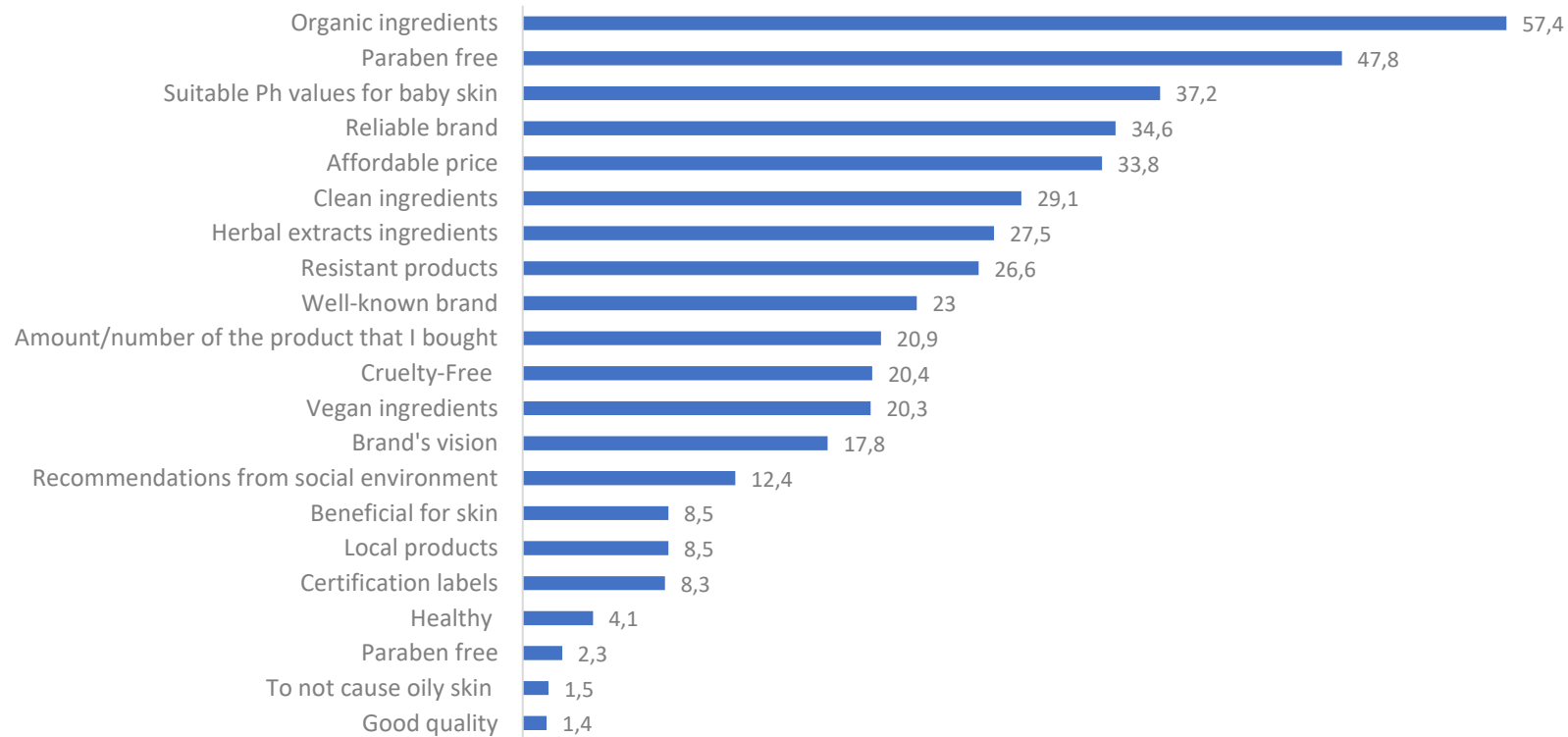
N:78

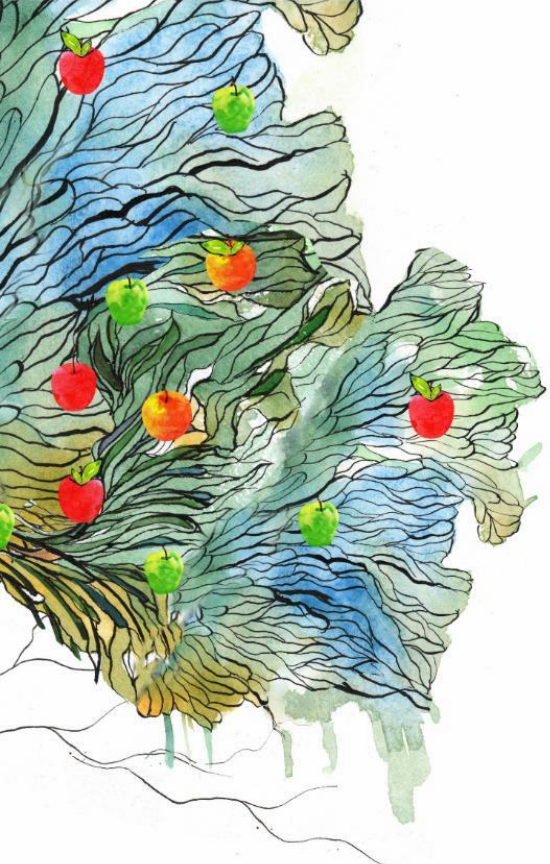
S40. What if happen you start using organic skin care/hair care products for your baby/child?

Preference Criteria for Organic/Natural Child Skin/Hair Care Products

The most common issue among preference criteria for organic/natural child skin/hair care products is being organic with %57,4. This is followed by being paraben free with %47,8 and their pH values are appropriate for baby skin with %37,2.

Preference Criteria for Organic/Natural Child Skin/Hair Care Products (%)





FINDINGS

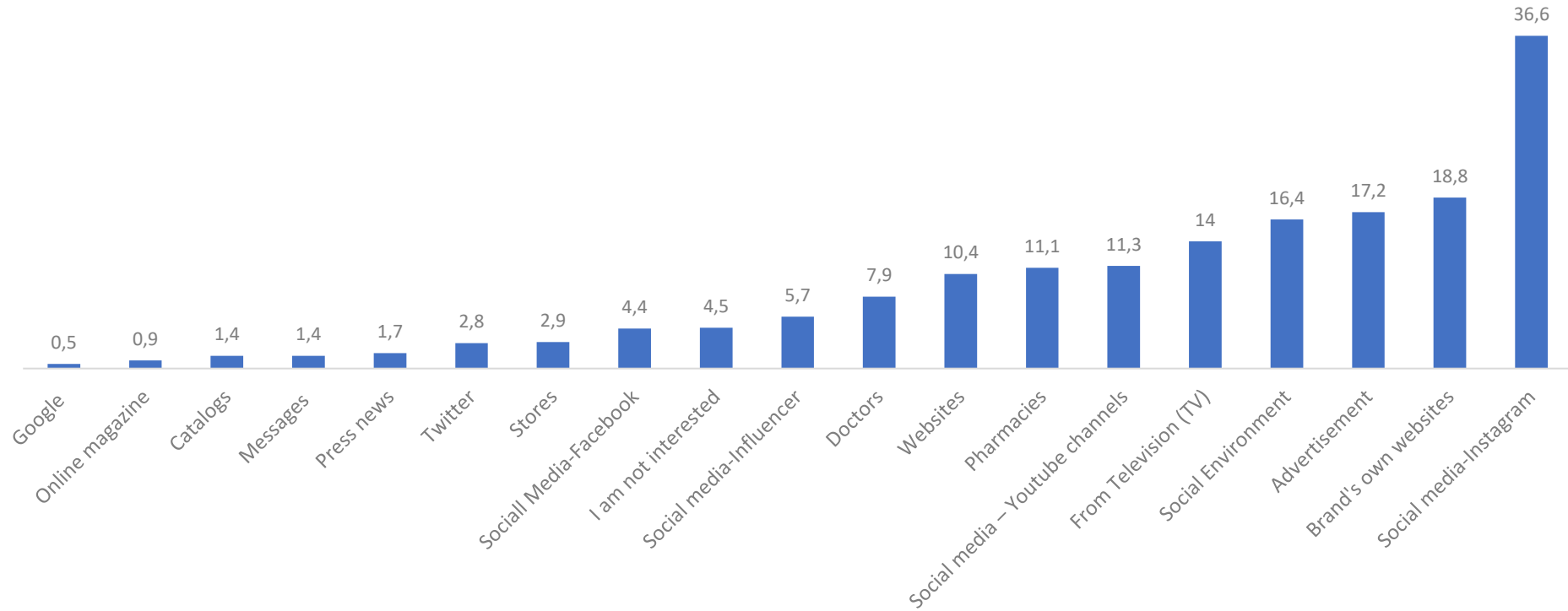
Cosmetics Industry



News Resources Regarding The Cosmetics Industry

The participants has followed news about the cosmetics industry through social media (Instagram) with the highest percentage (36,6%). This is followed by the brand's own websites with % 18,8 and advertisements with %17,2.

News Resources Regarding The Cosmetics Industry

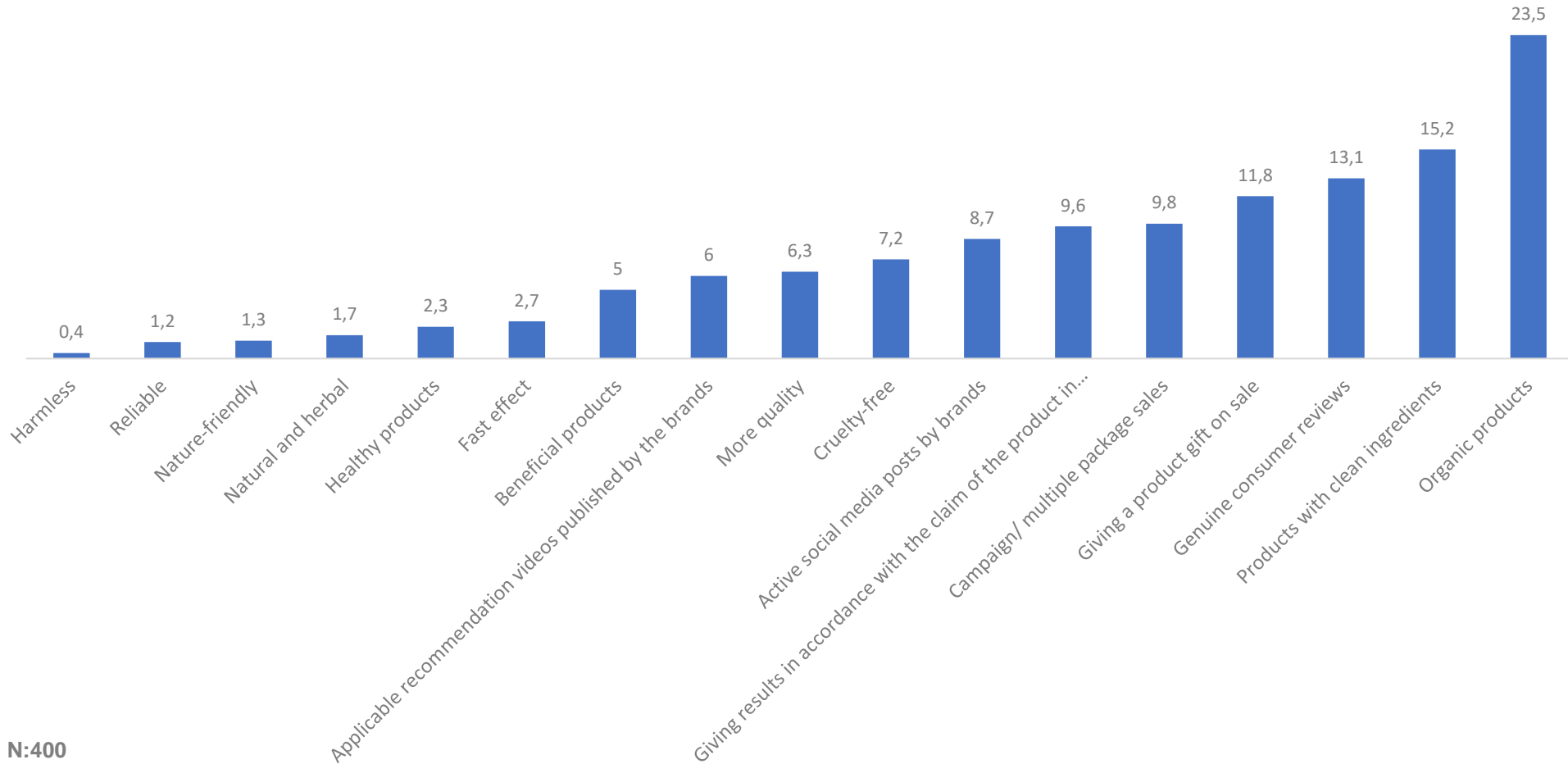


N:400

Expectations From The Cosmetics Industry

The most common expectation from the cosmetics industry is to produce more organic products with 23.5%. This is followed by the demand of clean ingredients with 15%, and genuine consumer reviews with 13%.

Expectations From the Cosmetics Industry (%)

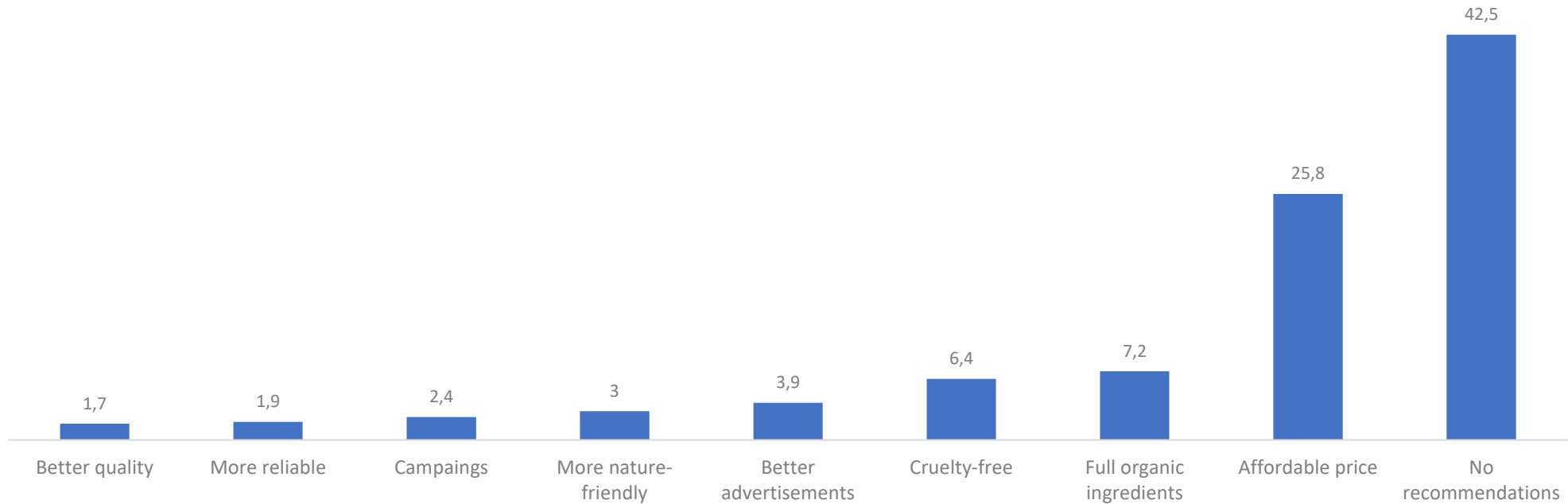


N:400

Recommendations For The Cosmetics Industry

In the recommendations for the cosmetics industry, the most popular recommendation is affordable price with %25,8. This is followed by being organic (%7,2) and cruelty-free (%6,4).

Recommendations For The Cosmetics Industry (%)



N:400

Executive Summary

- The highest rate among the reasons for using organic/natural skin care product is being more natural and chemical free. While this reason for organic/natural hair care products is not to cause hair loss (%31,5), for organic/natural childcare products is not to contain chemical ingredients (%24,4).
- The most constantly used product among the organic/natural skin care products is nourishing/moisturizing cream for hand and face (%57,1). This product does not differ for the most frequently used product (%43,9). In this group, the most preferred brand is Yves Roche with %13,3.
- The most constantly used product (%92,9) and the most frequently used product (%76,5) among the organic/natural hair care products is organic shampoo and the most preferred brand is Farmasi with %10,3 for this group of product.
- While the most used skin care product for child is nourishing baby cream with %44,1, the most frequently used product is gentle shampoo among hair care products (%48). The most preferred brand in skin care is Bepanthol with %43,9 and in hair care is Sebamed with %26,8.
- Satisfaction level regarding the most often used organic/natural skin care products is 4,31/5; for organic/natural hair care products is 4,34/5; for organic/natural child skin care products is 4,19/5 and for hair care products is 4,38/5.
- The reason of being satisfied with organic/natural skin care products is getting result with the highest rate (%42,8), in hair care products is to provide benefit for hair (%37,8).
- Among the starting conditions for using organic/natural skin care products, affordable price has the highest rate (%17,5), this condition does not also differ for organic/natural hair care products (%24,8). The most popular factor among the starting condition for using organic/natural childcare products is need with %33,7.

Executive Summary

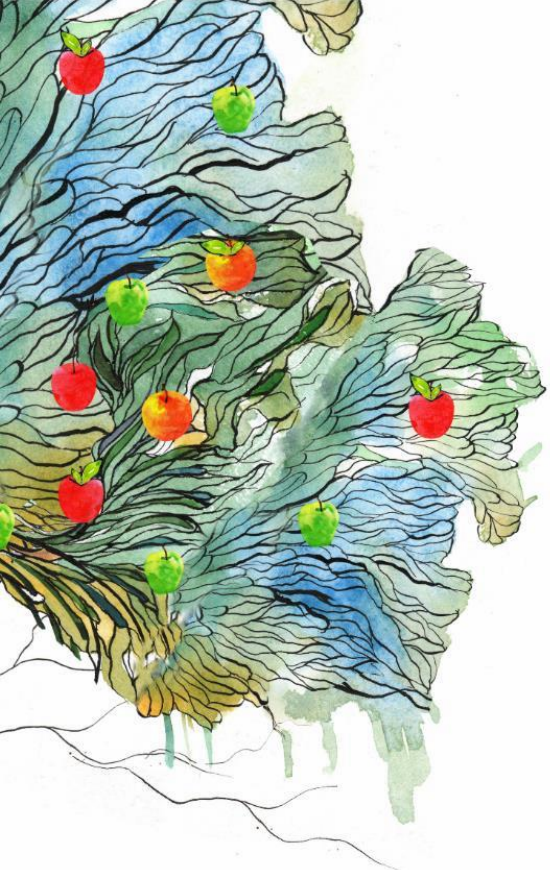
- While the first preference criteria for organic/natural skin and hair care products is being organic with %42,8, this is respectively followed by relevance with skin type (%31,1) and being effective (%23,8). The first three preference criteria for organic/natural childcare products is; organic structure of the product (%57,4), not containing paraben (%47,8) and Ph values suitable for baby skin (%37,2).
- The average expenditure annually for organic/natural skin care products is 867 TL; for organic/natural hair care products is also 606 TL.
- In the channels where organic/natural skin and hair care products are purchased, cosmetic product stores come first (38.3%). This is followed by online platforms with %25,5 and pharmacy with %21,5.
- The resource where the participants getting information regarding cosmetics industry is Instagram with the highest rate (%36,3). This is followed by websites of the brands with %18,8 and advertisements with %17,2.
- The most popular expectation from the cosmetics industry is to produce organic products (%23,5). This is followed by producing clean ingredients with %15,2 and having the genuine consumer reviews with %13,1.
- The expectations of the participants from cosmetics industry are more affordable price (%25,8), having completely organic ingredients (%7,2) and being cruelty-free (%6,4).

Action Plan

- 1) There is no significant difference between the AB income group and the C1C2 income group in the use of organic/natural skin care products. Therefore, determining the target group according to SES for these products is not necessary issue to be prioritized as the first place in the action plan. In terms of age group, target group is 55 and above. When evaluated according to age groups , there is a decrease older than 18-24 age group in the use of these products, however, an increase trend starts again with 45-54 age group.
- 2) SES should be considered as an essential issue by determining the target group in organic/natural hair care products. It is seen that AB income group significantly differ from C1C2 income group in the use of the products. Therefore, the target group for these products mostly is AB income group. In the hair care products, according to age group, the target group follow a trend as similar as skin care products do. While the target audience is also 55 and above group, after 18-24 age group, there is a decrease in the use, however, there is an increase trend with the age group of 45-54.
- 3) According to SES, the primary target group for organic/natural child skin and hair care products is also AB income group.
- 4) When the most common preference reasons and the satisfaction reasons of the participants regarding skin and hair care products, a brand which is planning to enter Turkey's market should highlight the clean ingredients and effectiveness of their products. For organic/natural childcare products, the brand should point out clean ingredients, paraben free status and suitable Ph values with baby skin of their products.

Action Plan

- 5) The most frequently used product considering the product-based groups, in skin care products is nourishing/moisturizing cream for hand and face; in hair care products is shampoo; in child skin care products is nourishing baby cream and in child hair care products is gentle shampoo. By focusing on these products, potential for being successful would be increased in Turkey's market.
- 6) When examined participant's satisfaction levels based on the product, the lowest level of satisfaction among skin care products is anti-aging cream for hand and body and mask. Also, the lowest average level of satisfaction among hair care products is organic serum and organic hair care oil. Therefore, the chance of competition for these products would be higher than other products.
- 7) The tendency of the participants (with adding participants who are neutral) to prefer a global brand instead of a local brand is %74,3. In this sense, the features like being a global brand and the successful sales figures and preference rates in global level would play an important role in promotion campaign in Turkey for a newcomer brand and these factors would positively effect on sales figures.
- 8) The first three channels to be preferred as a sale channel are respectively cosmetics product stores, online platforms and pharmacy.
- 9) When the resources that the participant's preferred to be informed regarding the cosmetics industry are considered, Instagram and the brand's own website should be used for either promotion and also sales.



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