

Discover your *edge*

Wednesday, 8 March 2017

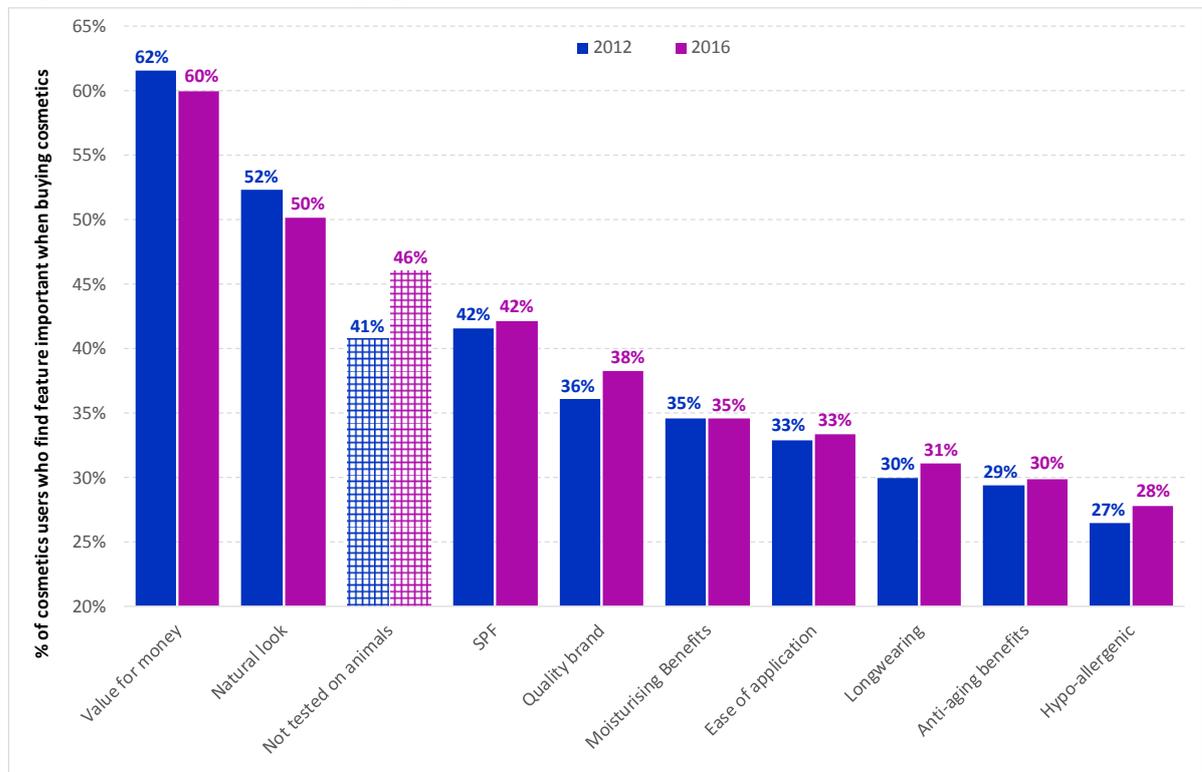
## New legislation banning sale of animal-tested cosmetics and skincare in line with public sentiment

As of July this year, the sale of cosmetics and other personal products tested on animals or containing animal-tested ingredients will be prohibited in Australia, following the introduction of new legislation by the Coalition (with support from the ALP, the Greens and the Animal Justice Party). The latest findings from Roy Morgan confirm that this move reflects growing concern among Aussie women that the make-up and skincare items they buy should be cruelty free.

Last year, 46% of Australian women who use cosmetics nominated 'Not tested on animals' as a feature important to them when purchasing make-up, up from 41% in 2012 (a proportional increase of 12%). During this time, it has overtaken 'Sun Protection Factor' (stable at 42%) in importance, and is currently just behind 'Natural look' (50%, down from 52%). 'Value for money' (60%) remains the top priority for consumers, but this has declined from 62% since 2012.

Of the 10 features that matter most to Aussie women when buying cosmetics, 'Not tested on animals' has gained the most ground.

### Important features when buying cosmetics: 2012 vs 2016



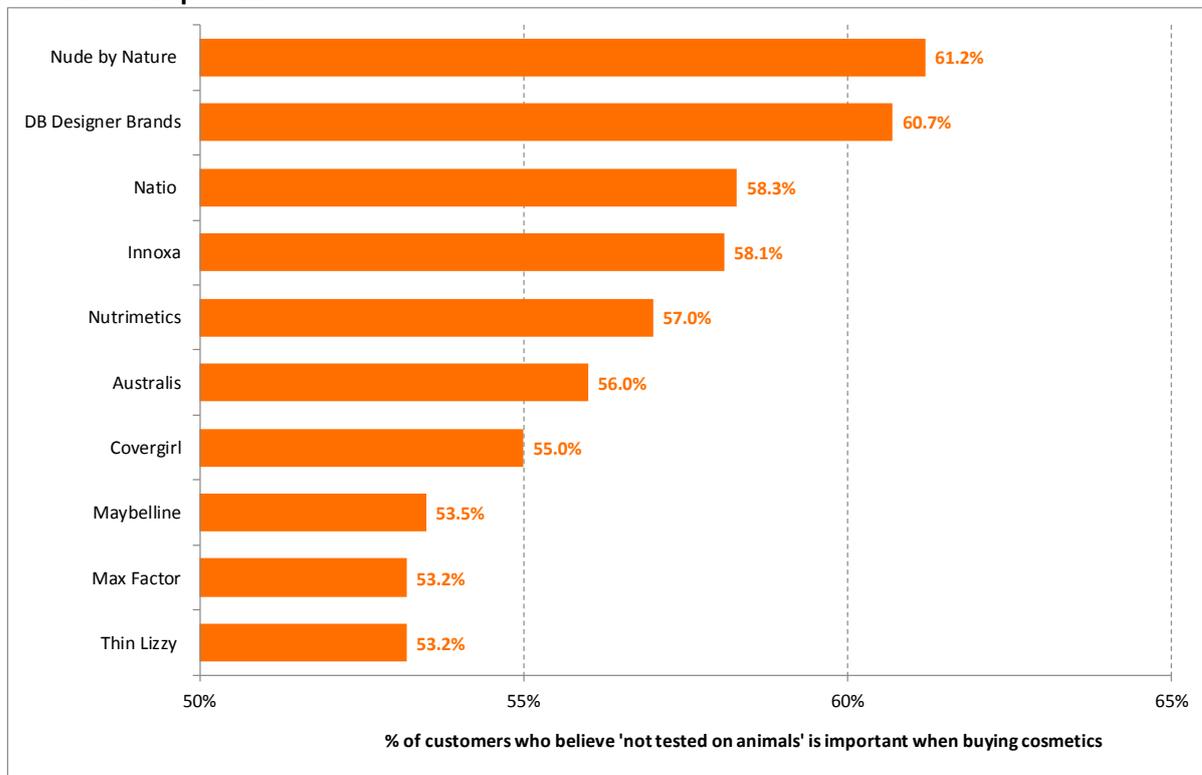
**Source:** Roy Morgan Single Source (Australia), Jan-Dec 2012 (n=8,306) and Jan-Dec 2016 (n=5,701). **Base:** Australian women 14+ who have ever used cosmetics. \*NB: these are the 10 most nominated features of 21 possibilities listed under the question, 'When purchasing cosmetics products, which of the following are important to you?'

## *Make-up brands with highest proportion of buyers who are concerned about animal testing*

Looking at the 10 brands most likely to be purchased by women who consider 'Not tested on animals' an important feature, it emerges that seven of them are well known to steer clear of animal testing and animal-tested ingredients, and, furthermore, are not sold in mainland China (where foreign cosmetics are required by law to undergo animal testing). Clearly, many of the women buying these products have educated themselves about which brands align with their values.

Among Australia's 10 best-selling cosmetics brands, only one (Nude by Nature) is widely known for its cruelty-free policies.

### **Top 10 cosmetics brands by increased likelihood of purchase when 'not tested on animals' is considered important**



**Source:** Roy Morgan Single Source (Australia) January-December 2016 (n=5,701). **Base:** Australian women 14+ who have ever used cosmetics.

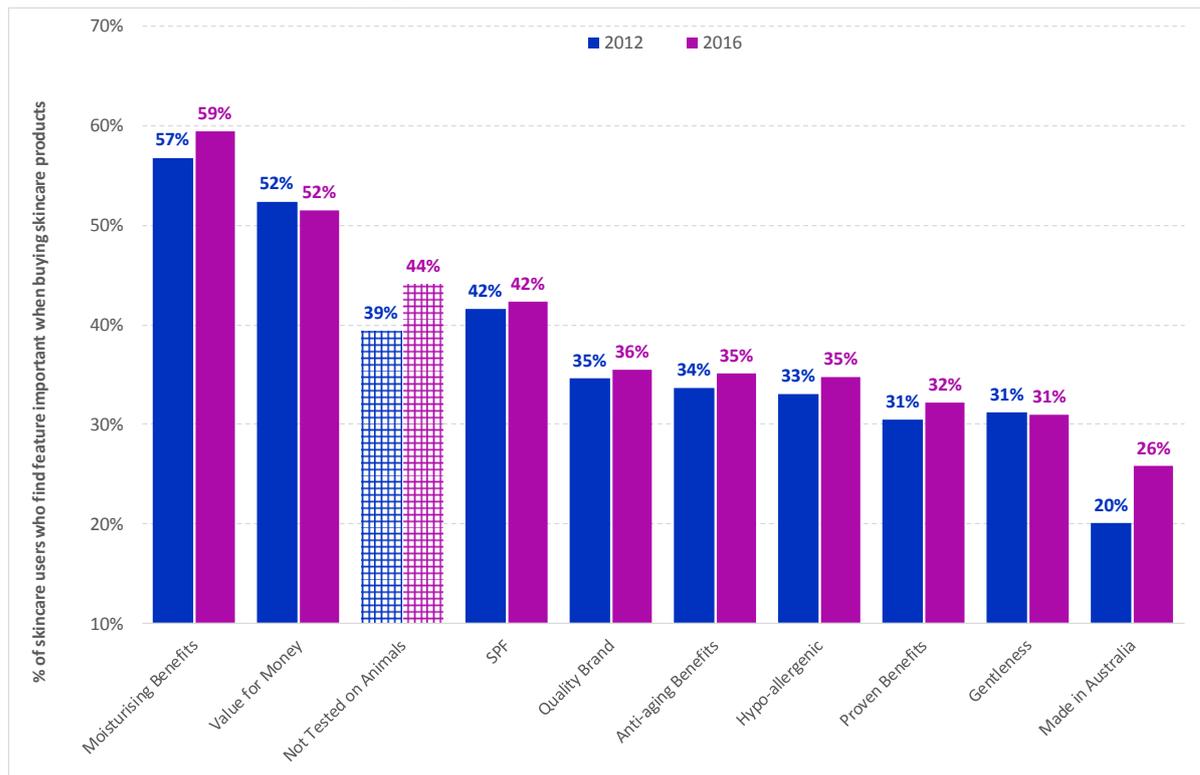
## *Skin care: a similar story*

Concern about animal testing is also becoming more widespread among Australian women when buying skincare products. Back in 2012, 39% of women who use skincare products agreed that it was important for the products they purchased to be cruelty free; this now sits at 44% (a proportional increase of 13%). As with cosmetics, 'Not tested on animals' has overtaken SPF (42%) over the last five years.

'Moisturising benefits' tops the list, considered by 59% of women to be important when buying skincare (up from 57%), followed by 'Value for money', unchanged at 52%. Besides the growing demand for products that aren't tested on animals, the other big shift in priorities when purchasing skincare has been a trend towards Australian-made products (26%, up from 20%).

This represents a golden opportunity for brands such as Sukin, Nutrimetics and Natio, which tick both boxes, being home-grown and not tested on animals.

### Important features when buying skincare: 2012 vs 2016



**Source:** Roy Morgan Single Source (Australia), Jan-Dec 2012 (n=8,580) and Jan-Dec 2016 (n=6,065). **Base:** Australian women 14+ who have ever used skincare. \*NB: these are the 10 most nominated features of 18 possibilities listed under the question, 'When purchasing skin care products, which of the following are important to you?'

### Norman Morris, Industry Communications Director, Roy Morgan Research, says:

*"The latest data from Roy Morgan shows a striking increase over the last five years in Australian women's awareness of animal testing when buying cosmetics and skin-care products. More and more women are placing importance on buying cruelty-free products, whereas their attitude towards other features such as value for money, SPF, natural look or quality brand have not shown such a marked change.*

*"Given this growing preference for cruelty-free products, the pending ban on personal products that are tested on animals (or contain ingredients that are animal-tested) couldn't be better timed. Brands that already fulfil these conditions stand to benefit immediately from the new law; others may need to overcome lingering associations with animal testing so as to thrive in this evolving market and attract consumers who may have avoided them for this reason in the past.*

*“Roy Morgan’s deep consumer data is an invaluable resource for cosmetics and skin-care brands that wish to better understand the women who buy their products, as well as those who buy their rivals’ products. Insights into the demographics, psychographics and behaviour of these women will then allow them to create a more relevant and targeted marketing strategy.”*

**For comments or more information about Roy Morgan Research’s personal products data, please contact:**

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**Related research findings**

Browse our Online Store for an extensive range of [cosmetics buyer profiles](#), [face care product buyer profiles](#) and [hand and body lotion buyer profiles](#).

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

**About Roy Morgan Research**

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years’ experience in collecting objective, independent information on consumers.

**Margin of Error**

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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