

Personal Hygiene

Indonesia '26



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Research Objectives

- Understand personal care usage habits across hair, face, body, oral care, fragrance, and makeup categories
- Explore purchase behavior, decision-making roles, and spending patterns for personal care products
- Identify brand usage, information-seeking behavior, and factors influencing trial of new products
- Assess the role of halal values, religious considerations, and lifestyle context in personal care choices

Methodology

Survey
Computer – assisted personal interviewing (CAPI)

Period of Research

November 2025

Participant Criteria

- Male & Female
- 17 - 45 years old
- SES A-B

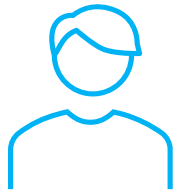
Sample Area

Urban & Rural (Across Indonesia)

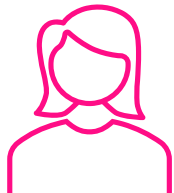
Respondent Profile

base: all, n = 376

Jenis Kelamin



51%



49%

Education



Junior/Senior High School	85%
Higher Education (College/University)	15%

Age



17 - 24 y.o.	30%
25 - 34 y.o.	36%
35 - 45 y.o.	34%

Main Decision Maker



Main decision maker	97%
Co-decision maker	3%

Domicile (Island)



Sumatera	22%
Jawa	56%
Others	22%

Urbanisation



Urban	59%
Rural	41%

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Key Insights

Behaviour (Routines & Purchase Patterns)

Indonesians display highly self-directed and digitally enabled hygiene routines, with predictable repurchase cycles and selective experimentation driven by age and channel access.

Channel Preference

- Personal hygiene purchases are dominated by e-commerce (75%), with minimarkets still highly relevant (59%), particularly among men (64%).
- Social commerce reaches 38%, peaking among 17–24-year-olds (54%)

Decision Ownership

- A vast majority act as main decision-makers (79%), peaking among 25–34-year-olds (90%).
- Purchases typically cover 2.6 household members.

Repurchase Rhythm

- The dominant repurchase cycle is monthly (37%), especially among men (45%).
- Younger adults (25–34) skew toward shorter 2-week cycles (58%).

Information & Evaluation Behaviour

Participants evaluate personal hygiene products in a highly rational and trust-led manner, prioritizing official certification, halal assurance, and social proof before trial.

Label Scrutiny

- A strong majority actively read packaging: 42% always read carefully, while another 31% read selected details.
- Women (51%) and 17–24-year-olds (56%).

Trust Signals

- The most checked information is BPOM certification (75%), followed by halal status (62%).
- Ingredient-related cues matter to nearly half, with natural ingredients (47%) and ingredient lists (46%) gaining traction.

Pre-Purchase Research

- 65% purchased new products in the past 4 weeks.
- Key triggers include influencer reviews/unboxings (39%), social media exposure (34%), and price comparisons (34%).

Category Usage Anchors

Participants' hygiene routines remain essentials-led and functional, with selective investment in treatment products perceived as necessary rather than optional.

Daily Essentials Dominate

- Usage is anchored around non-negotiables: toothpaste (99%), deodorant/antiperspirant (81%), and body lotion (74%).
- Spending mirrors this, with body lotion recording the highest average spend among body care items.

Selective Routine Expansion

- Treatment-oriented products are added selectively: hair masks/treatments (48%), conditioners (44%), and hair vitamins (42%).

Functional Simplicity

- Routines remain streamlined and functional, prioritizing cleansing, odor control, and protection over multi-step complexity.
- Advanced or decorative categories (e.g., nail care).

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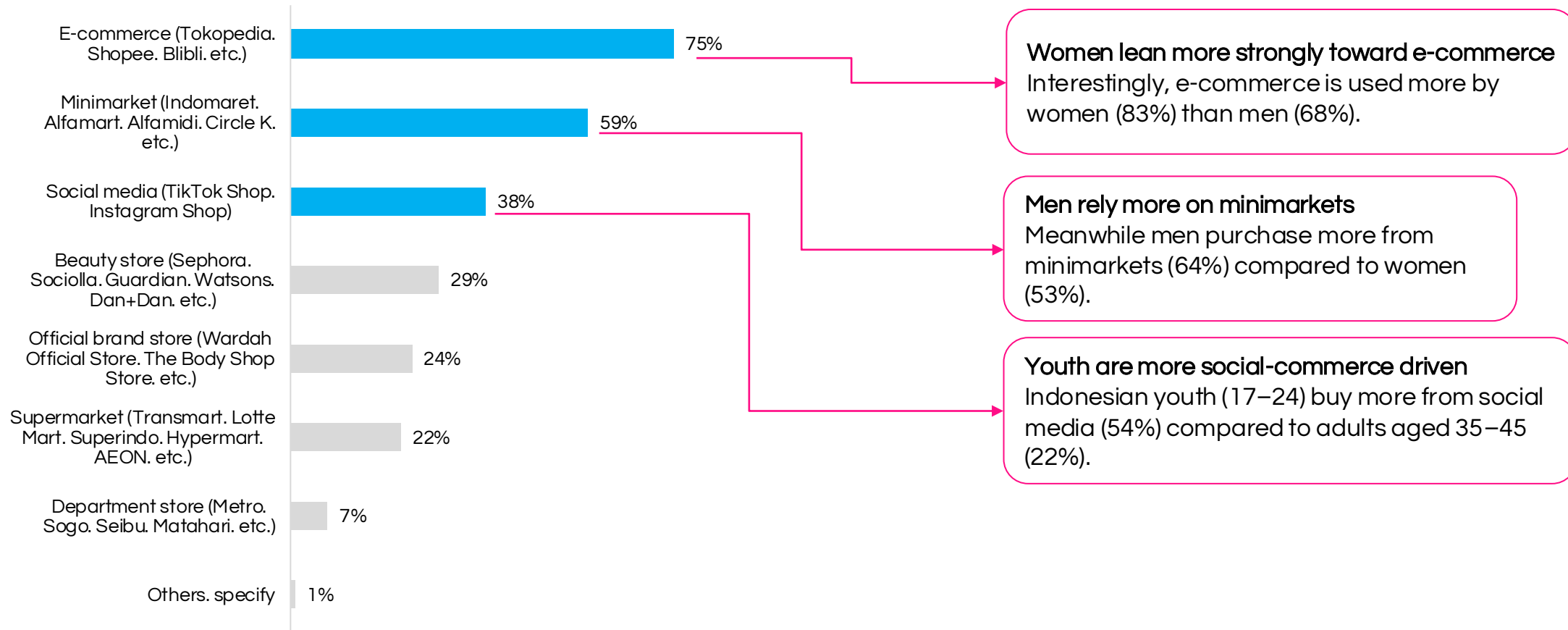
Makeup



E-commerce leads personal care purchases, while men and youth use more convenience channels

Purchase Locations for Hair, Face, and Body care

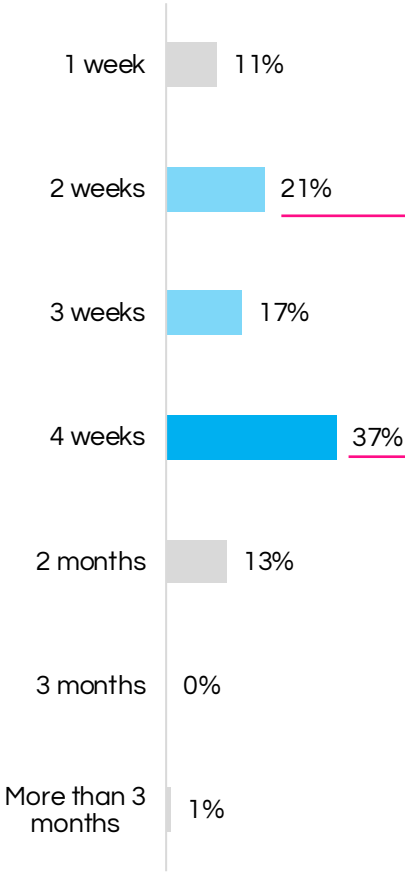
n = 376, base: all



Personal hygiene products are typically repurchased monthly, covering an average of 2.6 household members

base

Personal Care Purchase
Frequency
n = 94, base: all

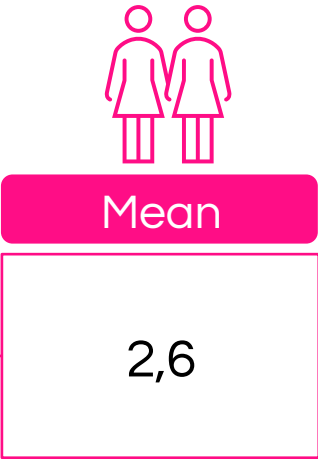


Younger adults replenish more frequently
Consumers aged 25–34 y.o. lean more toward a two-week cycle at 58%. while older consumers (35–45 y.o.) show a stronger tendency toward monthly buying (50%).

Monthly repurchase is the main pattern
Four weeks is the most common purchase cycle, chosen by 37% of Indonesians, especially among men at 45%.

Personal care products serve more than 1 user
The main personal care product covers an average of 2.6 household members, with men reporting slightly broader household coverage than women, at 2.7 versus 2.4.

People Covered By Main Personal
Care Product
n = 94, base: all



qw09b From the personal care product you use most frequently that you selected above, for how many people do you usually purchase this product?
qw09c For that usage, how often do you usually purchase this product?

Women and youth check labels more carefully, while urban consumers tend to skim

Packaging Information Attention (First-Time Purchase)

n= 270; base: all



I always read it
carefully

42%



I read some parts

31%



I only glance at
some information

19%



I never read it

7%

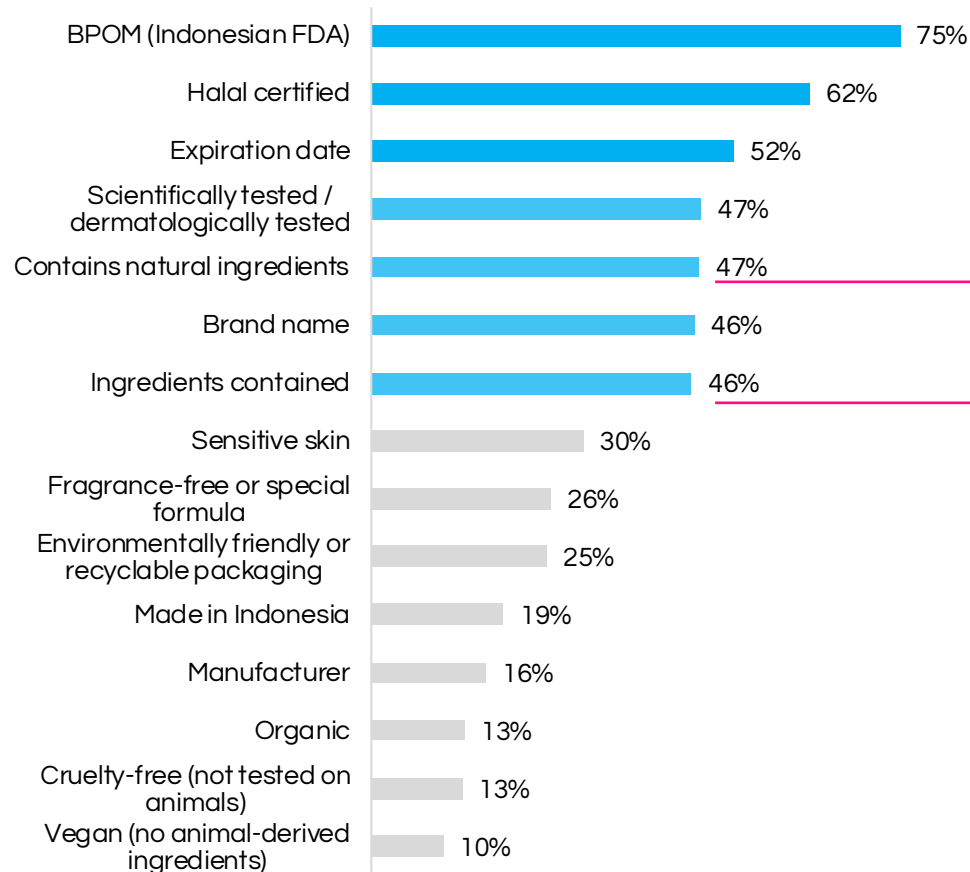
Label checking is a common buying habit
Many Indonesians consistently read labels carefully when buying personal hygiene items. This is stronger among women than men, at 51% versus 35%, and highest among younger consumers aged 17–24 at 56%.

Urban consumers are more likely to skim
Urban consumers are more likely to only glance at label information than rural consumers, at 24% versus 14%, suggesting that key benefits need to be communicated quickly and clearly.

Consumers prioritize safety, halal, and expiry information when buying personal care products

Product Information Considered In Personal Care Purchases

n = 251, base: all



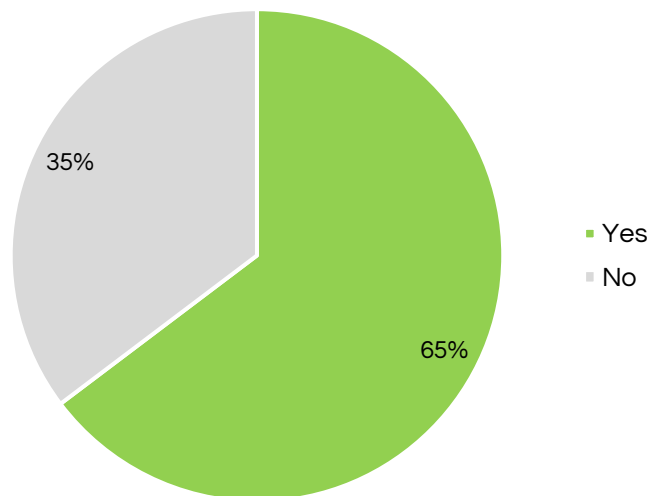
Ingredients matter, especially for women and young adults

Ingredient-related information is also important. With 47% checking natural ingredients and 46% checking ingredient lists, especially among women at 54% and consumers aged 25–34 at 53%.

Most Indonesians actively research before purchasing, with social media exposure, reviews, and price comparisons shaping their choices

New Personal Care Product Trial

n = 376, base: all



Pre-Purchase Actions For New Products

n = 243, base: those who purchase a new product



In the past 4 weeks, 65% of Indonesians purchased new personal hygiene products, showing high curiosity to try new products.

Before buying new products, consumers most commonly rely on social media exposure (34%), influencer reviews or unboxings (39%), and price comparisons across e-commerce platforms (34%) with women driving much of this pre-purchase behavior.

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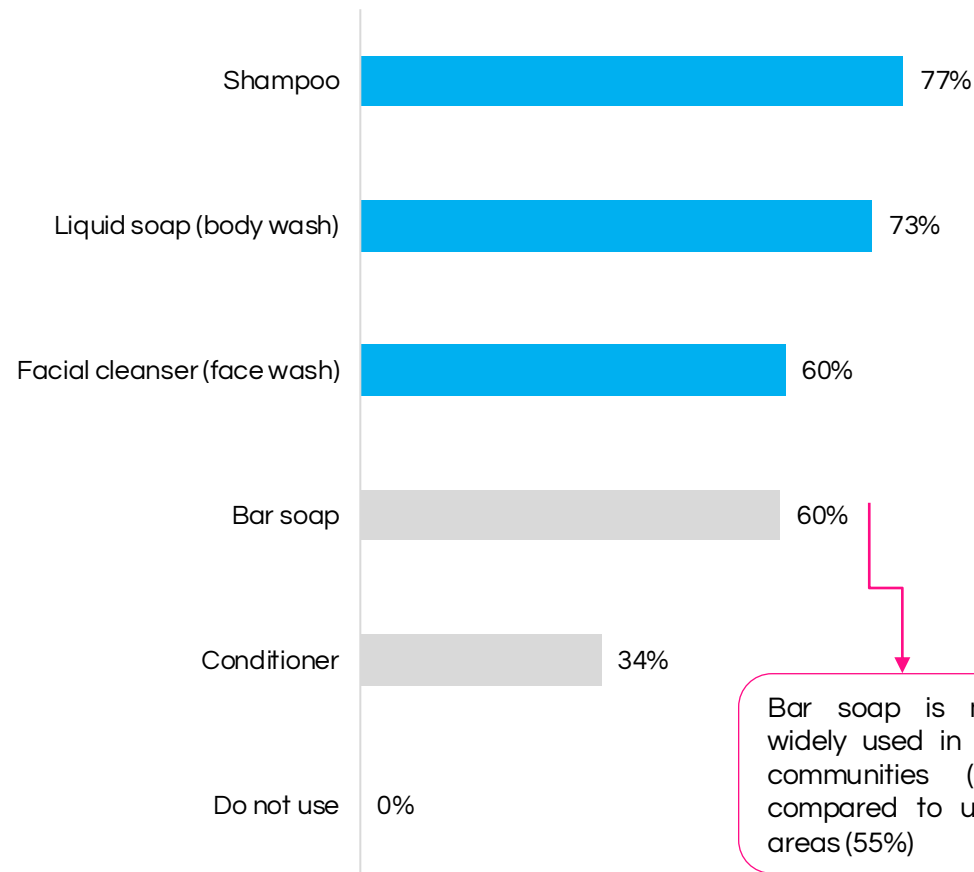
07

Makeup



For bodycare, Indonesians rely most on basic cleansing products like shampoo, while treatment-oriented hair products are added selectively

Shower Products
n = 376; base: all



Bar soap is more widely used in rural communities (67%) compared to urban areas (55%)

Share of Wallet Per Month
n = 376; base: all

	Total	Female	Male
Liquid soap (body wash)	Rp 13.502	Rp 15.329	Rp 11.786
Facial cleanser (face wash)	Rp 13.179	Rp 15.312	Rp 11.141
Shampoo	Rp 12.533	Rp 13.217	Rp 11.862
Conditioner	Rp 5.969	Rp 9.111	Rp 2.962
Bar soap	Rp 5.742	Rp 5.620	Rp 5.863

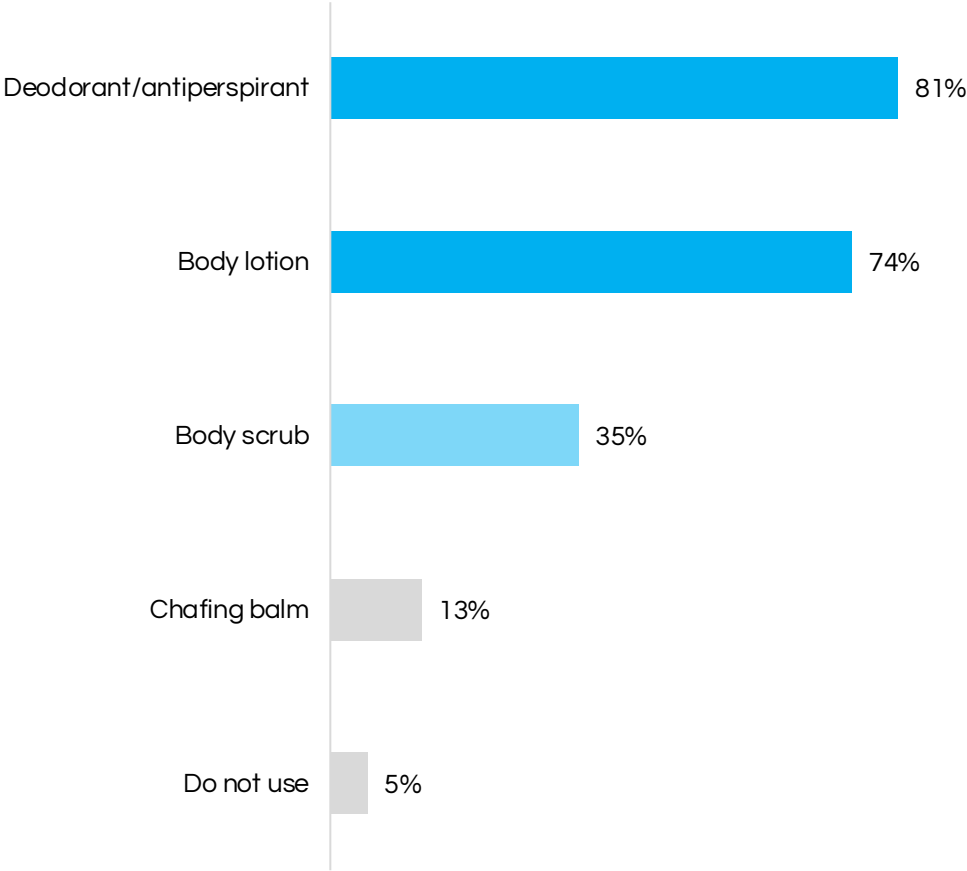
Shampoo is the default hair product in the shower, used by 77% of Indonesians in the past 4 weeks, whereas only 34% also use conditioner. Conditioner usage is notably higher among women (47% vs 21% of men) and among those with university education (52%)

As average personal spending is highest for liquid soap, especially among women (Rp13.502).

Body care routines among Indonesians are anchored around daily essentials like deodorant and body lotion



Body Care Products
n = 376; base: all



Share of Wallet Per Month
n = 376; base: all

	Total	Female	Male
Body lotion	Rp 13.861	Rp 18.316	Rp 9.655
Deodorant/antiperspirant	Rp 11.783	Rp 10.511	Rp 12.983
Body scrub	Rp 6.495	Rp 9.983	Rp 3.080
Chafing balm	Rp 2.036	Rp 2.661	Rp 1.427

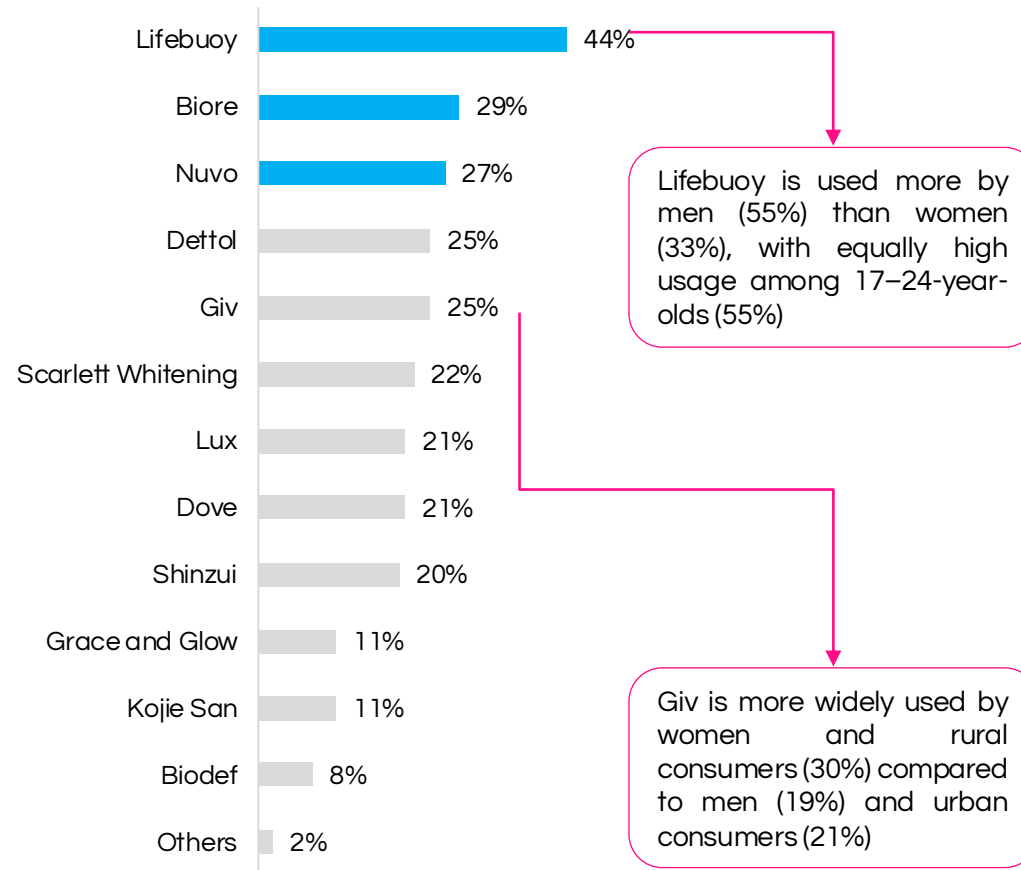
Deodorant/antiperspirant (81%) and body lotion (74%) are the most regularly used body care products, indicating that odor control and skin moisturization are core needs across Indonesians, with body lotion usage especially high among women (90%).

This is reflected in spending patterns, where body lotion records the highest average expenditure (Rp 13.861 overall) and is driven strongly by women, who spend nearly double men (Rp 18.316 vs Rp 9.655).

Body care brand usage in Indonesia is led by mass, widely available brands

Body Care Brands Used in Past 4 Weeks

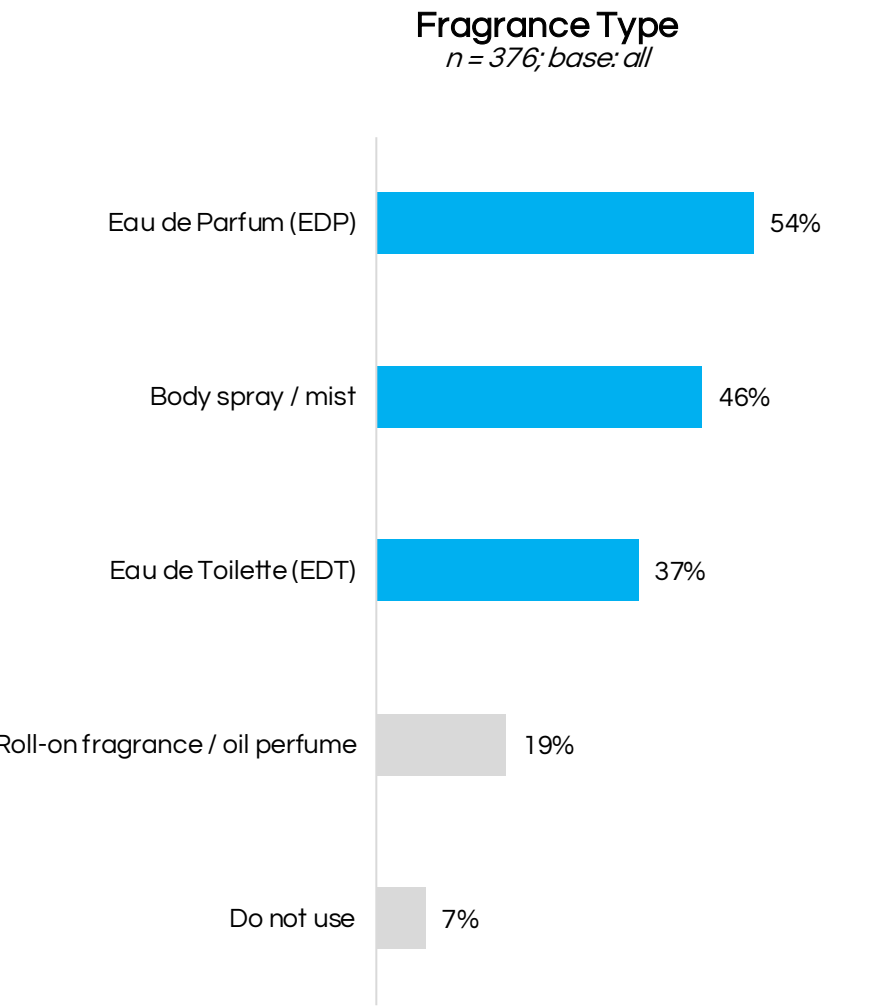
n = 376; base: all



Lifebuoy is the most widely used body care brand, with 44% of Indonesians reporting usage in the past 4 weeks. Female consumers show stronger engagement with beauty and whitening-oriented brands, such as Scarlett Whitening (32% of women vs 12% of men) and Shinzui (27% vs 14%).

Other mass brands like Biore (29%), Dove (21%), and Dettol (25%) maintain solid penetration across segments, reflecting a competitive landscape where everyday hygiene brands dominate while beauty-led brands differentiate through targeted appeal.

Indonesians most often choose longer-lasting fragrance types for daily use, while lighter formats such as body spray complement routines



Share of Wallet Per Month
n = 376; base: all

	Total	Female	Male
Eau de Parfum (EDP)	Rp 14.247	Rp 15.231	Rp 13.296
Body spray / mist	Rp 8.659	Rp 10.007	Rp 7.384
Eau de Toilette (EDT)	Rp 5.944	Rp 5.477	Rp 6.383
Roll-on fragrance / oil	Rp 3.686	Rp 3.823	Rp 3.553

Eau de Parfum (EDP) is the most commonly used fragrance type, with 54% of Indonesians using it most often. Body spray is also widely used (46%), reflecting its role as a practical option for reapplication and casual use across genders.

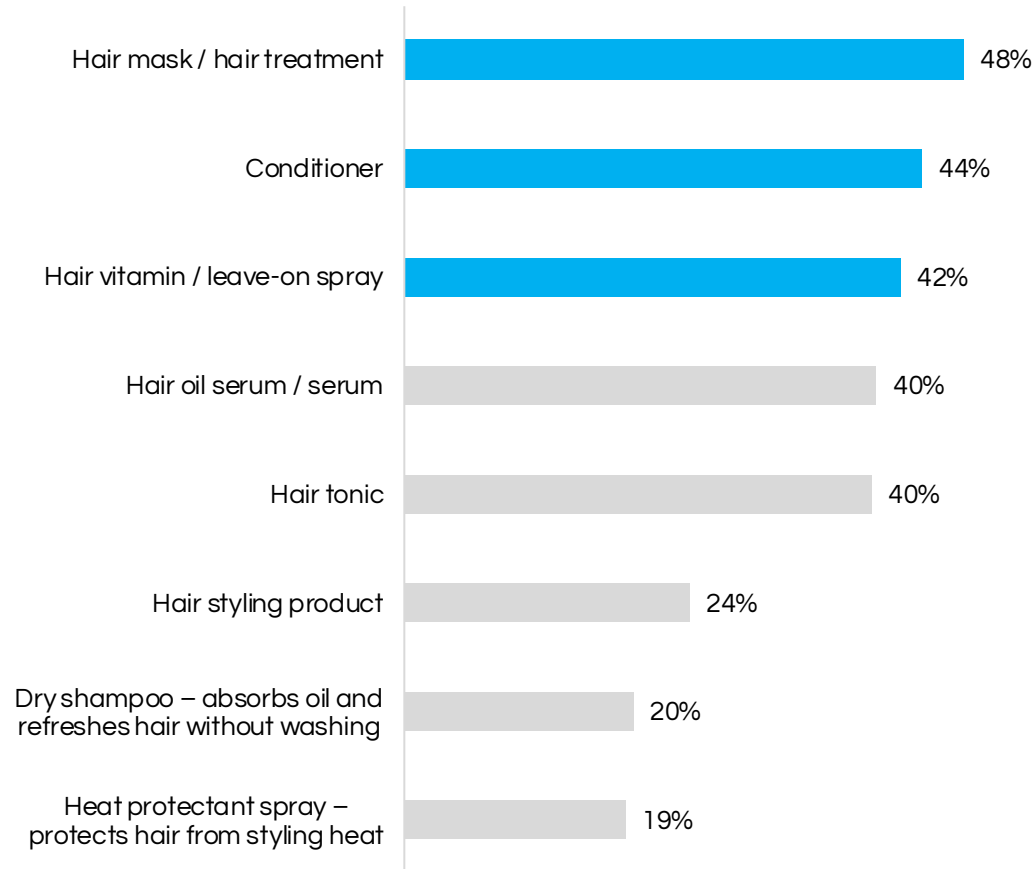
Spending is highest on Eau de Parfum (EDP), with Indonesians spending an average of Rp 14.247, reinforcing its role as the primary and most valued fragrance type. Body spray/mist follows at Rp 8.659, showing that while it is widely used for daily refreshment, it is positioned as a more affordable, supplementary option.

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Indonesians across the country primarily rely on core hair care and treatment products, with hair masks, conditioners, and hair vitamins forming the backbone of their hair care routines

Hair Product
n = 327; base: all



Share of Wallet Per Month
n = 376; base: all

	Total		Female		Male	
Conditioner	Rp	25.285	Rp	39.487	Rp	7.957
Hair vitamin / leave-on spray	Rp	7.493	Rp	9.749	Rp	5.380
Hair mask / hair treatment	Rp	5.421	Rp	8.459	Rp	2.578
Hair oil serum / serum	Rp	5.353	Rp	7.454	Rp	3.370
Hair tonic	Rp	5.280	Rp	7.797	Rp	2.813
Dry shampoo	Rp	4.648	Rp	4.767	Rp	4.531
Hair styling product	Rp	3.703	Rp	4.146	Rp	3.272
Heat protectant spray	Rp	2.586	Rp	3.936	Rp	1.281

On average, close to half of Indonesians use hair masks or hair treatments (48%), making this the most commonly used hair product, followed closely by conditioners (44%) and hair vitamins or leave-on sprays (42%). This indicates a strong orientation toward hair nourishment and repair rather than purely styling-driven needs.

While usage levels are relatively comparable across these three product types, average personal spending is highest for conditioners, particularly among women, suggesting conditioners are perceived as a more essential and higher-value product within daily hair care routines.

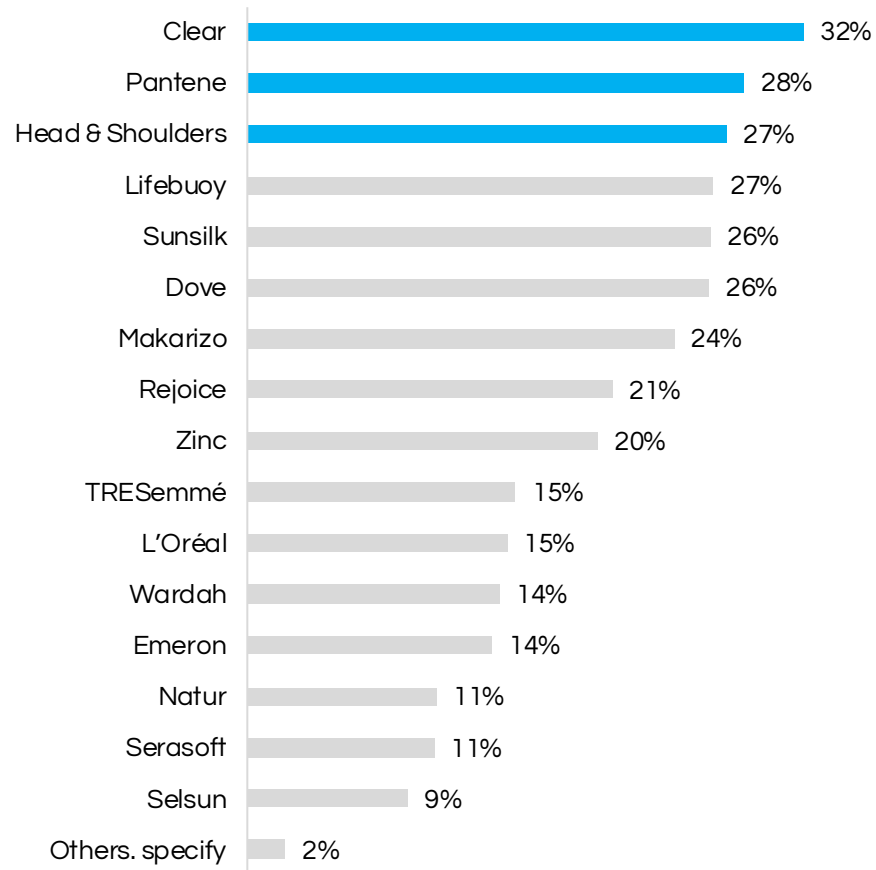
\$QW04_mr In the past 4 weeks, what types of hair care or styling products did you use, if any?

QW09 Based on the needs of {QW09b} people in your household, with usage over {QW09c}, what is the average amount you usually spend for each of the products below? – Hair product

Indonesian Hair Care Is Led by Familiar, Mass-Market Brands with Broad Everyday Usage

Currently Used Hair Care Brands

n = 376, base: all



Across Indonesia, hair care routines are dominated by well-established, mass-market brands that are widely available and trusted. Clear emerges as the most commonly used hair care brand (32%), followed closely by Pantene (28%) and Head & Shoulders (27%).

Beyond the top three, usage remains relatively spread across other mainstream brands such as Lifebuoy, Sunsilk, Dove, and Makarizo (each around 24–27%), indicating a highly competitive and fragmented market where consumers are comfortable rotating between multiple brands rather than committing to a single one.

Currently Used Hair Care Brands - Cross tabs

	Gender			Age			Island			Urbanisation		Education	
	Total	Female	Male	17-24 y.o.	25-34 y.o.	35-45 y.o.	Sumatera	Jawa	Others	Urban	Rural	SMP/SMA sederajat	Universitas
Clear	32%	29%	35%	34%	29%	33%	40%	28%	32%	24%	43%	29%	47%
Pantene	28%	30%	27%	34%	25%	27%	34%	28%	23%	29%	28%	26%	39%
Head & Shoulders	27%	22%	33%	23%	30%	28%	30%	27%	24%	26%	28%	26%	35%
Lifebuoy	27%	21%	32%	33%	20%	27%	27%	25%	30%	25%	29%	25%	34%
Sunsilk	26%	26%	26%	32%	22%	26%	26%	28%	22%	28%	24%	27%	22%
Dove	26%	32%	21%	30%	28%	22%	34%	25%	21%	25%	28%	26%	31%
Makarizo	24%	28%	21%	31%	25%	18%	30%	23%	21%	26%	22%	22%	37%
Rejoice	21%	22%	20%	32%	13%	19%	19%	21%	22%	20%	22%	20%	25%
Zinc	20%	20%	20%	21%	20%	19%	29%	22%	7%	21%	18%	21%	12%
TRESemmé	15%	22%	9%	17%	17%	11%	19%	14%	15%	17%	13%	14%	23%
L'Oréal	15%	18%	11%	20%	12%	13%	15%	11%	25%	13%	17%	13%	27%
Wardah	14%	21%	8%	15%	13%	15%	18%	13%	14%	12%	17%	12%	29%
Emeron	14%	18%	10%	15%	12%	15%	16%	15%	10%	7%	23%	13%	22%
Natur	11%	13%	8%	12%	11%	9%	8%	9%	18%	8%	14%	10%	18%
Serasoft	11%	14%	7%	16%	8%	9%	8%	9%	16%	8%	14%	8%	25%
Selsun	9%	10%	8%	16%	7%	6%	9%	6%	18%	7%	12%	8%	16%
Others. specify	2%	2%	2%	3%	4%	0%	2%	1%	5%	2%	2%	2%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	323%	348%	298%	384%	296%	297%	365%	305%	325%	299%	356%	302%	445%
	376	185	191	112	136	127	82	211	84	222	154	321	55
	376	194	182	112	168	96	74	226	76	222	154	318	58

Alpha 5% significantly higher than other categories

Alpha 5% significantly lower than other categories

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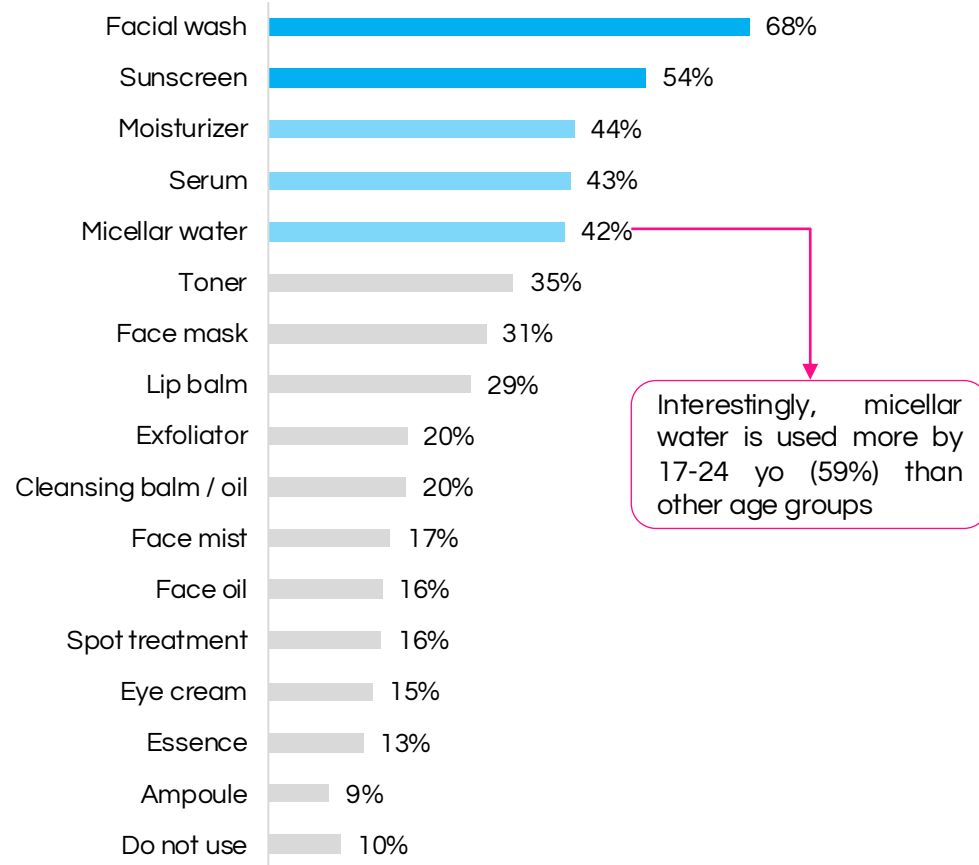
07

Makeup



Facial care routines among Indonesians are built around essential cleansing and protection products

Skincare Product
n = 376, base: all



Share of Wallet Per Month
n = 376; base: all

	Total	Female	Male
Sunscreen	Rp 12.628	Rp 17.367	Rp 8.246
Facial wash (face cleanser)	Rp 11.889	Rp 13.237	Rp 10.612
Serum	Rp 10.376	Rp 15.670	Rp 5.439
Moisturizer	Rp 9.715	Rp 13.419	Rp 6.420
Micellar water	Rp 7.789	Rp 12.193	Rp 3.608
Toner	Rp 6.682	Rp 11.020	Rp 2.689
Face mask	Rp 4.486	Rp 6.775	Rp 2.273
Lip balm	Rp 4.482	Rp 8.368	Rp 722
Cleansing balm / cleansing oil	Rp 3.281	Rp 4.212	Rp 2.388
Exfoliator / facial scrub	Rp 3.168	Rp 4.642	Rp 1.778
Face mist	Rp 3.061	Rp 4.411	Rp 1.759
Spot treatment	Rp 3.019	Rp 4.266	Rp 1.831
Face oil	Rp 2.802	Rp 2.623	Rp 2.981
Essence	Rp 2.661	Rp 4.508	Rp 896
Eye cream	Rp 2.607	Rp 4.330	Rp 961
Ampoule	Rp 1.651	Rp 1.991	Rp 1.326

Facial wash is the most commonly used facial care product, with 68% of Indonesians using it in the past 4 weeks, followed closely by sunscreen (54%). Usage of treatment products such as serum (43%), moisturizer (44%), and face mask (31%) is notably higher among women compared to men. This pattern is reflected in spending, where sunscreen (Rp 12.628) and facial wash (Rp 11.889) command the highest average expenditure

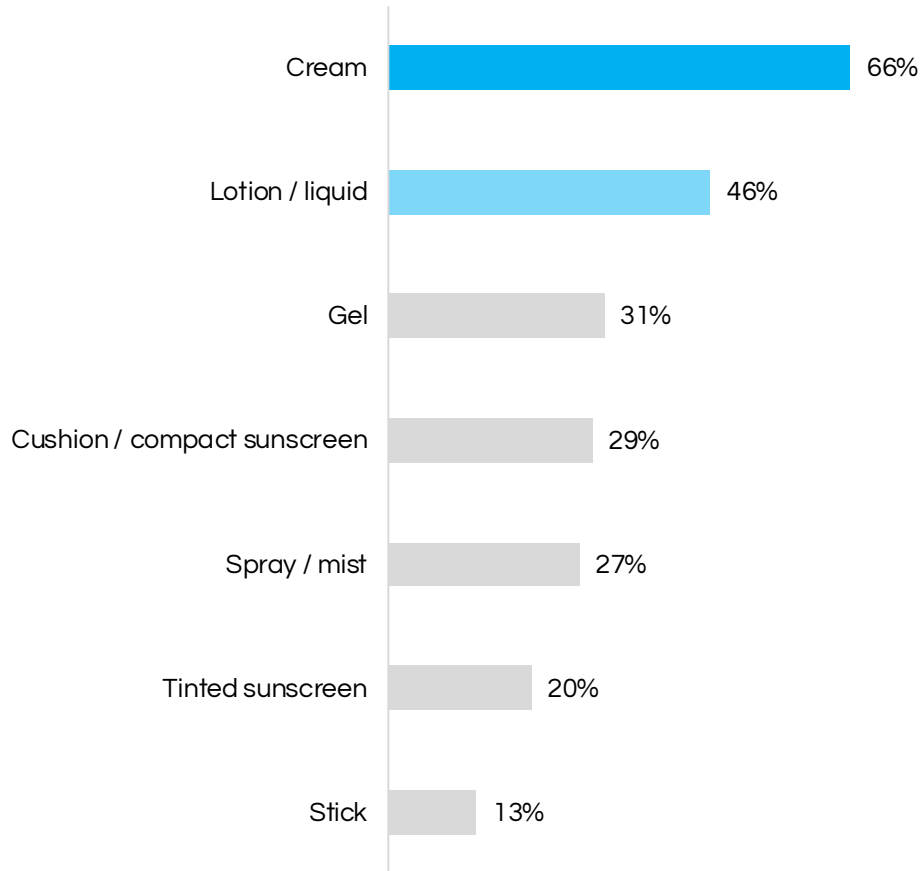
\$QW05_mr In the past 4 weeks, which of the following skincare products did you use?

QW09 Based on the needs of {QW09b} people in your household, with usage over {QW09c}, what is the average amount you usually spend for each of the products below? – Skincare

Indonesians most commonly rely on classic cream sunscreen formats

Sunscreen Texture Used

n = 214, base: those who use sunscreen



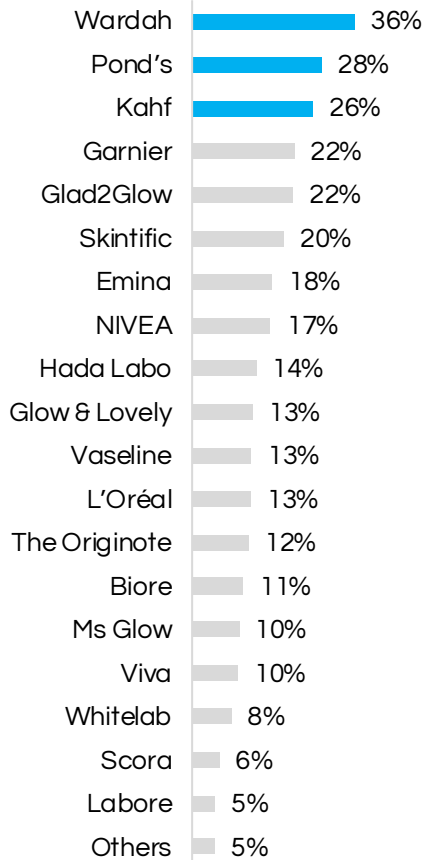
Cream sunscreen is the most widely used format, with 66% of Indonesians using it in the past 4 weeks. Lotion/liquid (46%) and gel (31%) follow.

More modern formats such as spray/mist (27%), cushion/compact sunscreen (29%), and tinted sunscreen (20%) remain niche overall, but show stronger uptake among women and younger consumers.

Facial care brand usage in Indonesia is led by a widely trusted and established brands

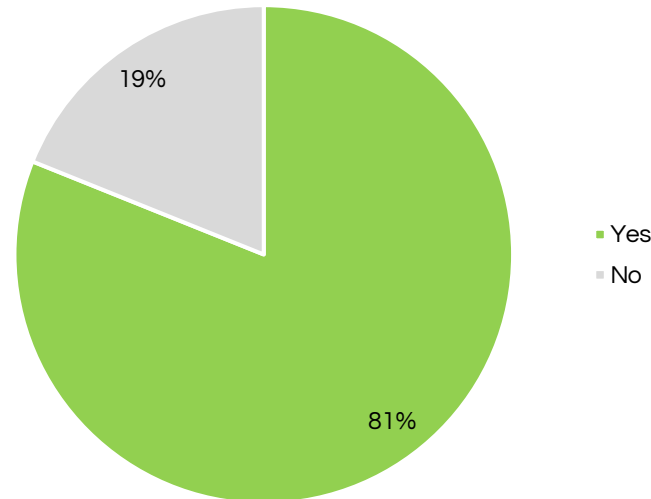
Current Use Skincare Brands

n = 376, base: all



Use Of Skincare Products For Men

n = 191, base: male who use skincare



Among Indonesians overall, Wardah stands out as the most widely used facial care brand (36%), driven strongly by women (50%), alongside other female-skewed brands such as Glad2Glow (22%) and Emina (18%).

In contrast, men show a clear preference for male-oriented brands, with Kahf used by 42% of men.

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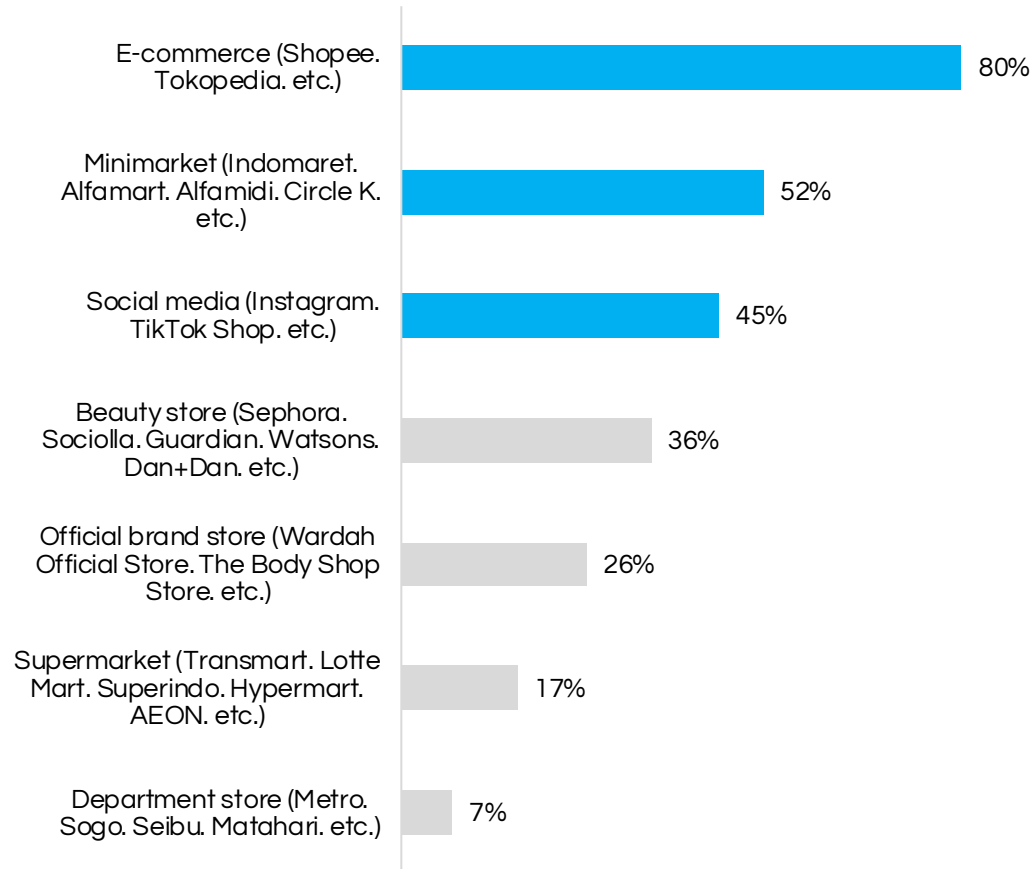
Makeup



Online channels dominate makeup purchases among Indonesian women

Makeup Purchase Locations

n = 185, base: female

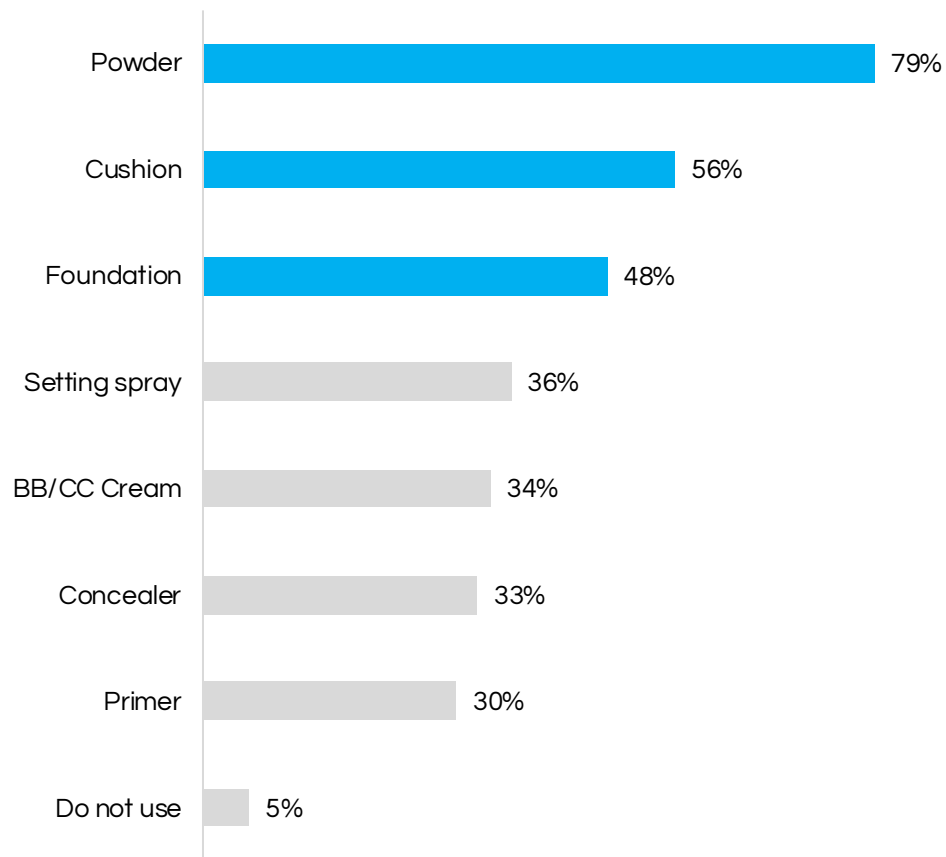


Among Indonesian women, makeup purchasing over the past four weeks is heavily driven by online channels, with e-commerce platforms emerging as the primary destination (80%). This is followed by minimarkets (52%) and social media-based commerce such as Instagram and TikTok Shop (45%), highlighting the strong role of convenience and digital access in everyday beauty shopping.

Offline channels continue to play a supporting role, particularly beauty specialty stores (36%) and official brand stores (26%)

Among Indonesian women, makeup routines are anchored in base makeup essentials, with powder, cushion, and foundation

Makeup Products
n = 185, base: female



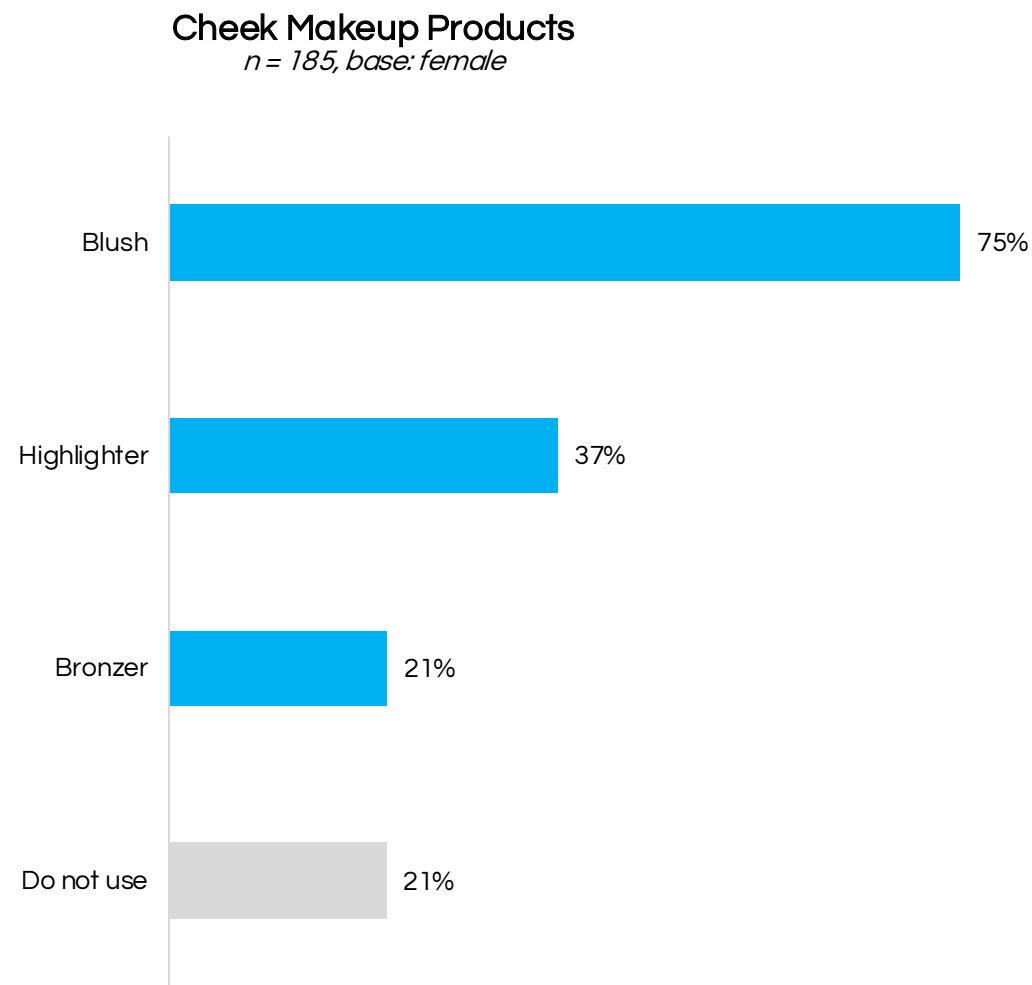
Share of Wallet Per Month
n = 185, base: female

	Total		Female	
Cushion	Rp	23.870	Rp	23.870
Powder	Rp	22.167	Rp	22.167
Foundation	Rp	14.408	Rp	14.408
Setting spray	Rp	9.079	Rp	9.079
Concealer	Rp	8.909	Rp	8.909
BB/CC Cream	Rp	8.647	Rp	8.647
Primer	Rp	7.216	Rp	7.216

Nearly 8 in 10 women use powder (79%), making it the most widely used makeup product, followed by cushion (56%) and foundation (48%). This highlights a strong preference for products that deliver coverage, complexion correction, and ease of daily.

While usage is highest for powder, average personal spending is highest for cushion products, particularly among women, indicating that cushions are perceived as a higher-value, performance-driven item within the base makeup category.

For Indonesian women, blush leads cheek makeup usage, while other products remain secondary.



Share of Wallet Per Month
n = 185, base: female

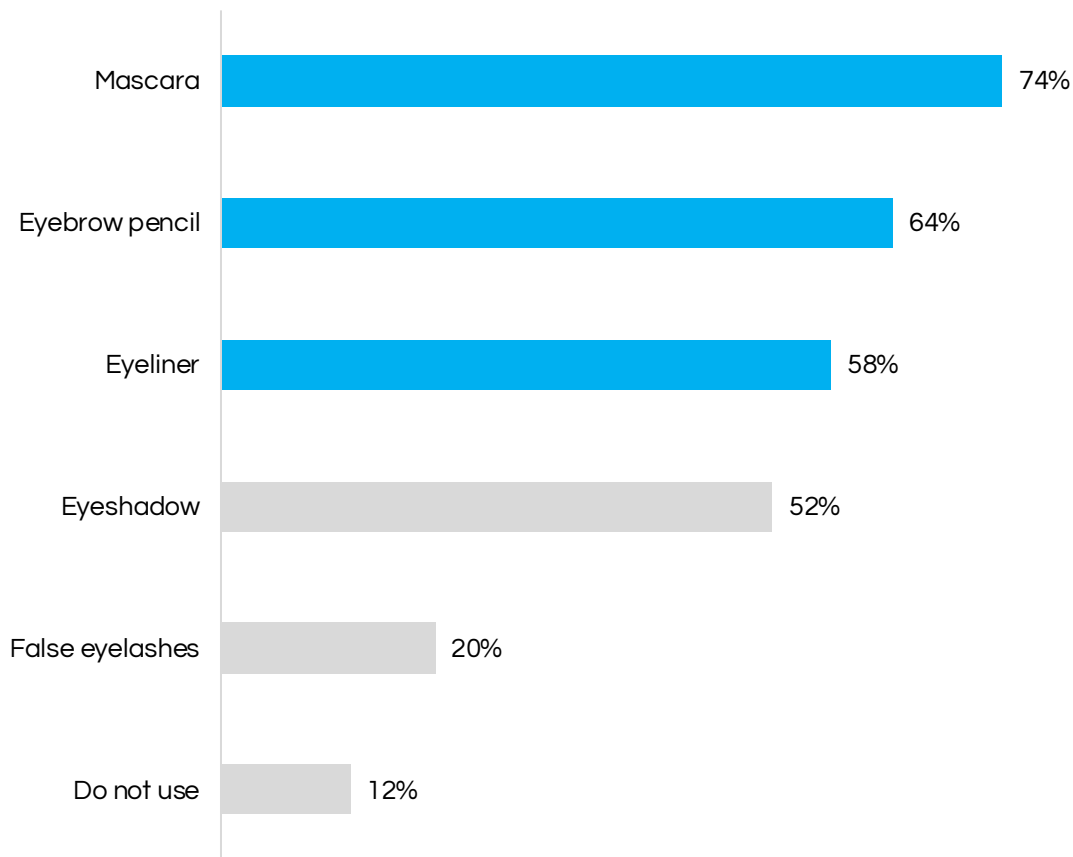
	Total		Female	
Blush	Rp	16.069	Rp	16.069
Highlighter	Rp	7.642	Rp	7.642
Bronzer	Rp	4.978	Rp	4.978

Blush clearly dominates usage, with 75% of women use in the past four weeks, positioning it as a near-essential product for daily makeup. In comparison, highlighter reaches a smaller segment (37%), while bronzer remains more niche (21%), suggesting these products are used selectively rather than routinely.

In line with usage patterns, average personal spending is highest for blush, reinforcing its role as both the most frequently used and the most valued product within the cheek makeup category among women.

Among Indonesian women, everyday eye makeup centers on mascara, eyebrow pencil, and eyeliner.

Eye Makeup Products
n = 185, base: female



Share of Wallet Per Month
n = 185, base: female

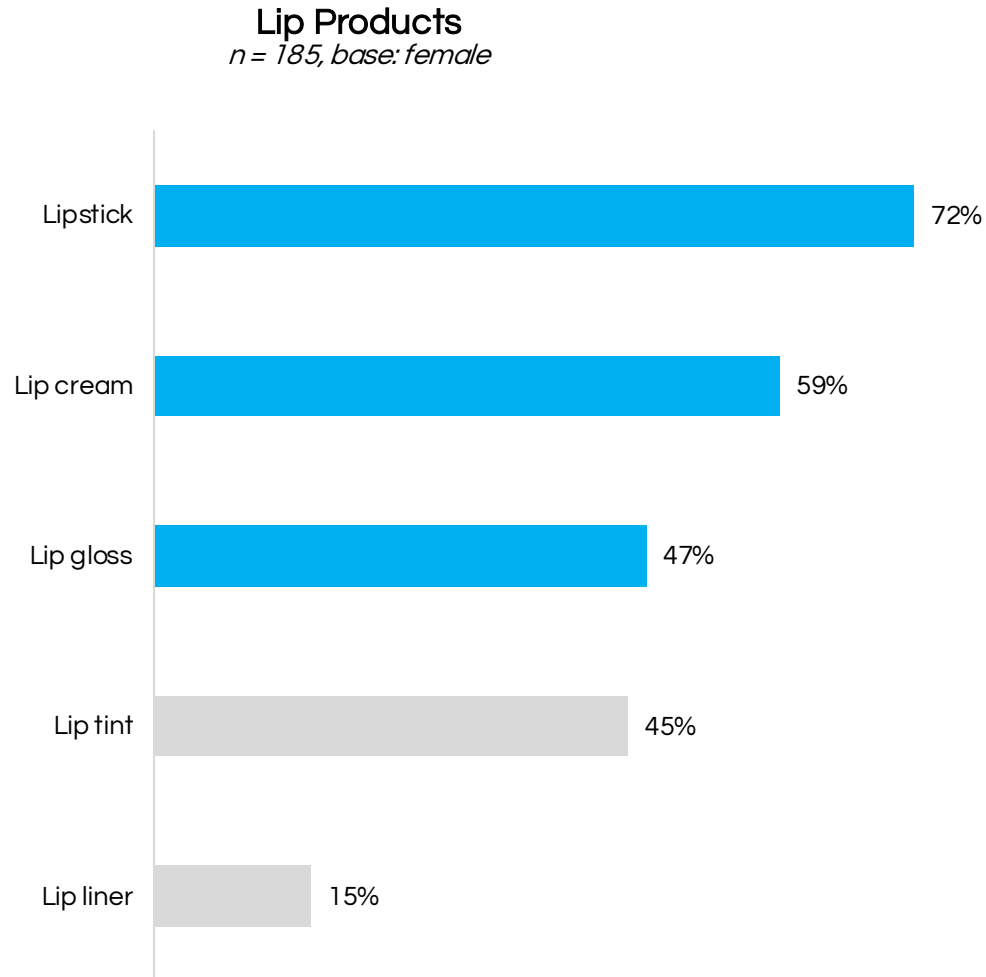
	Total	Female
Mascara	Rp 16.331	Rp 16.331
Eyeliner	Rp 12.209	Rp 12.209
Eyeshadow	Rp 11.358	Rp 11.358
Eye eyebrow pencil	Rp 9.897	Rp 9.897
False eyelashes	Rp 2.380	Rp 2.380

Overall, eye makeup usage prioritizes definition and expressiveness over embellishment.

Mascara (74%), eyebrow pencil (64%) and eyeliner (58%), highlighting the importance of eye definition in daily makeup routines.

From a spending perspective, mascara also attracts the highest average personal spending among women, reinforcing its position as the most valued eye makeup product. Eyeliner and eyeshadow follow as mid-tier spending categories, while eyebrow pencil, despite high usage, is treated more as a functional staple rather than a premium item.

For Indonesian women, lip makeup routines are centered on versatile, everyday products, with lipstick and lip cream leading regular usage.



Share of Wallet Per Month
n = 185, base: female

	Total	Female
Lipstick	Rp 19.142	Rp 19.142
Lip cream	Rp 13.115	Rp 13.115
Lip tint	Rp 10.289	Rp 10.289
Lip gloss	Rp 9.860	Rp 9.860
Lip liner	Rp 3.083	Rp 3.083

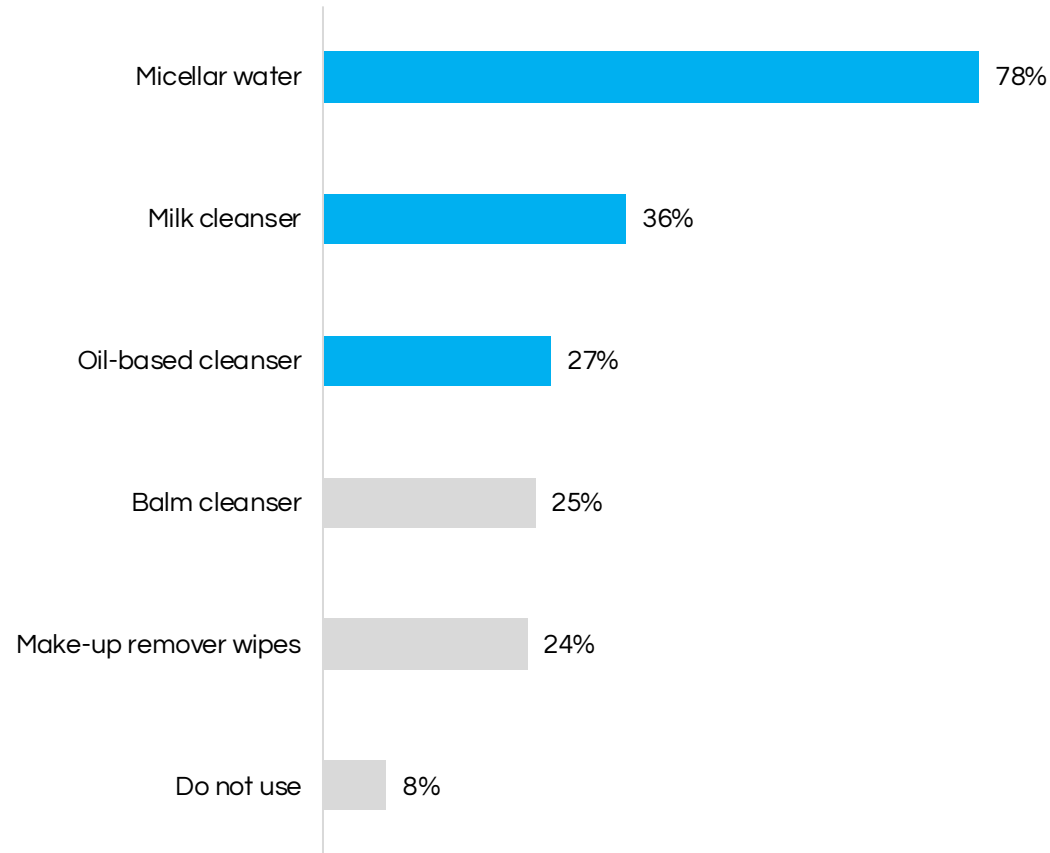
Lipstick (72%), lip cream (59%), highlighting strong reliance on pigmented, everyday lip products. Lip gloss (47%) and lip tint (45%) play more complementary roles, while lip liner remains niche (15%), indicating that most women prefer simple, low-step lip routines.

From a spending, lipstick also commands the highest average personal spending among women, reinforcing its position as the most valued lip product. Lip cream follows, suggesting a balance between affordability and performance, while lip tint and lip gloss see lower average spend.

Micellar water dominates makeup removal in Indonesian women's everyday routines

Makeup Removers Products

n = 185, base: female



Share of Wallet Per Month

n = 185, base: female

	Total		Female	
Milk cleanser	Rp	19.992	Rp	19.992
Micellar water	Rp	16.122	Rp	16.122
Oil-based cleanser	Rp	6.367	Rp	6.367
Balm cleanser	Rp	4.897	Rp	4.897
Make-up remover wipes	Rp	4.272	Rp	4.272

Overall, makeup removal routines among Indonesian women are strongly anchored around micellar water (78%). Usage declines sharply across other formats, with milk cleansers used by around a third of women (36%), followed by oil-based cleansers (27%), balm cleansers (25%), and makeup remover wipes (24%).

From a pricing perspective, different remover formats occupy distinct roles. Micellar water remains widely adopted as an accessible, everyday solution, while products such as milk cleansers and oil-based cleansers tend to sit at higher price tiers.

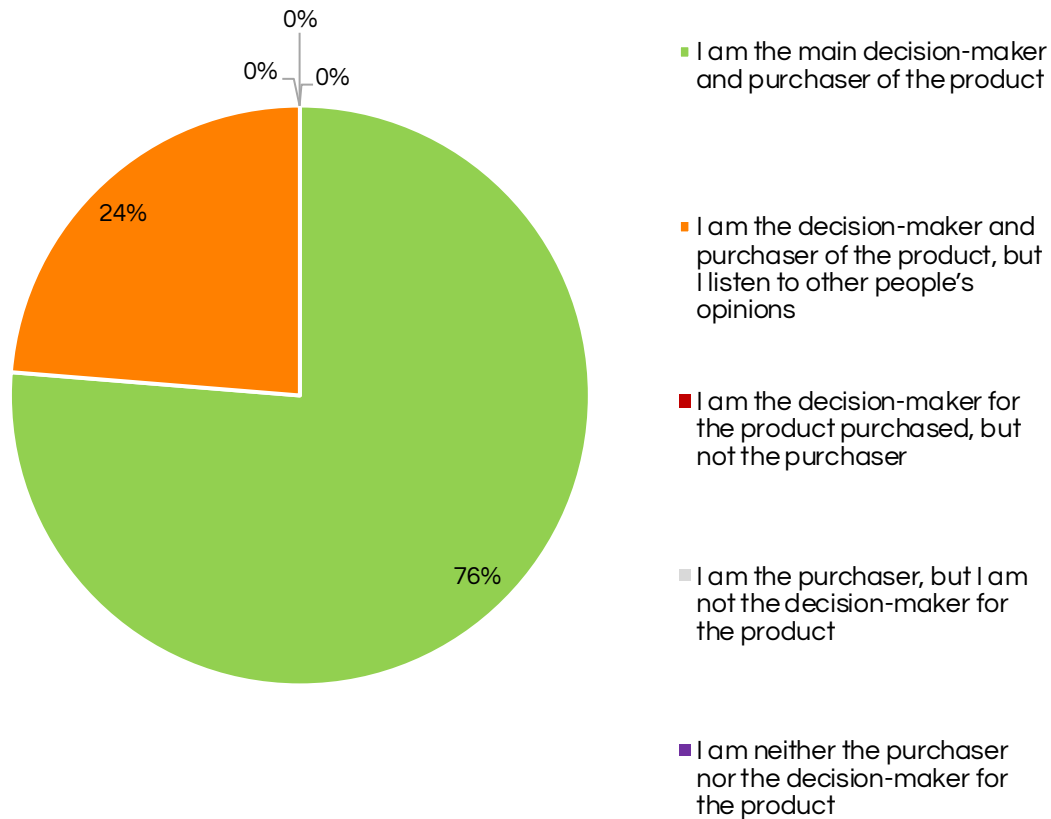
Makeup Purchase Locations - Cross tabs

	Gender			Age			Island			Urbanisation		Education	
	Total	Female	Male	17-24 y.o.	25-34 y.o.	35-45 y.o.	Sumatera	Jawa	Others	Urban	Rural	SMP/SMA sederajat	Universitas
E-commerce	80%	80%	0%	77%	88%	74%	74%	82%	79%	85%	73%	81%	75%
Minimarket	52%	52%	0%	46%	51%	58%	55%	49%	56%	52%	50%	48%	67%
Social media	45%	45%	0%	67%	41%	26%	44%	44%	50%	42%	50%	42%	58%
Beauty store	36%	36%	0%	39%	33%	35%	44%	30%	45%	40%	30%	34%	44%
Official brand	26%	26%	0%	34%	21%	24%	35%	22%	31%	25%	28%	22%	43%
Supermarket	17%	17%	0%	25%	15%	8%	29%	9%	28%	13%	22%	10%	40%
Department store	7%	7%	0%	12%	3%	8%	10%	2%	23%	4%	12%	3%	22%
Others. specify	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	263%	263%	0%	300%	251%	233%	292%	238%	312%	261%	265%	240%	350%
	185	185	0	63	69	54	43	112	30	109	76	147	38
	194	194	0	55	100	39	33	136	25	155	39	157	37

- Alpha 5% significantly higher than other categories
- Alpha 5% significantly lower than other categories

Makeup purchases are predominantly self-driven among Indonesian women

Makeup Purchase Behavior
n = 31, base: female

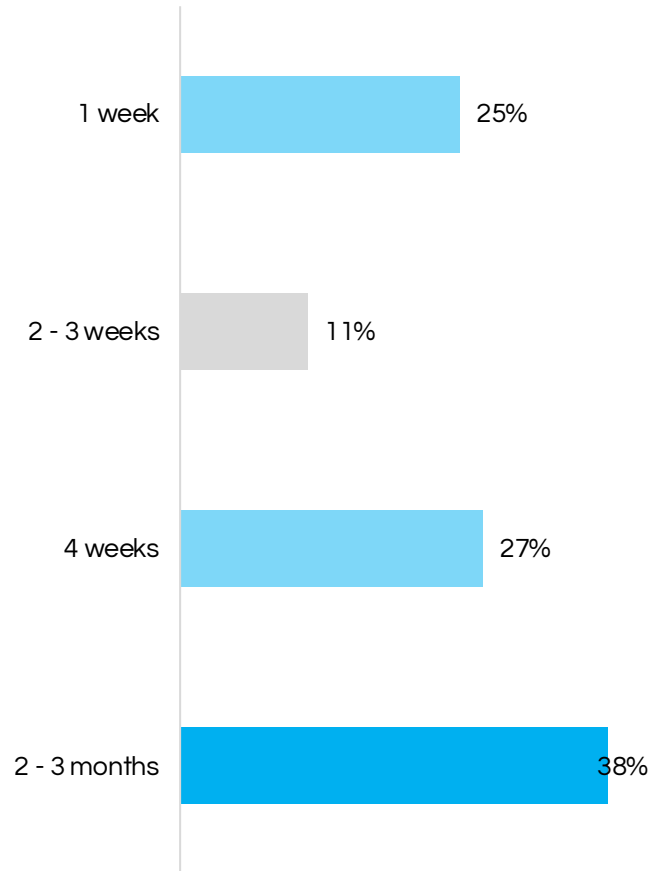


Among Indonesian women, makeup purchasing is largely self-directed, with over three-quarters acting as both the main decision-maker and purchaser (76%). This highlights a strong sense of autonomy and confidence in personal beauty choices.

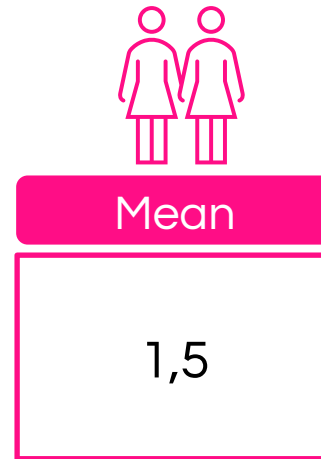
A smaller share (24%) still considers opinions from others before purchasing, indicating that social input plays a supporting role rather than a decisive one.

Makeup purchases are regular and primarily for personal use

Makeup Purchase Frequency
n = 31, base: female



People Covered By Main Makeup Product
n = 31, base: female



For Indonesian women, makeup products are mainly purchased for personal use, with an average of 1.5 people covered per purchase, indicating limited household sharing and a strong individual usage pattern.

In terms of frequency, purchases tend to follow a steady replenishment cycle rather than impulse buying. Around 38% restock their most-used makeup every two-three months, while 27% do so every four weeks, and 25% as often as weekly.

First-time makeup purchases are driven by high attention to packaging information

Packaging Information Attention (First-Time Purchase)

n= 129; base: female



I always read it
carefully

51%



I read some parts

28%



I only glance at
some information

18%



I never read it

3%

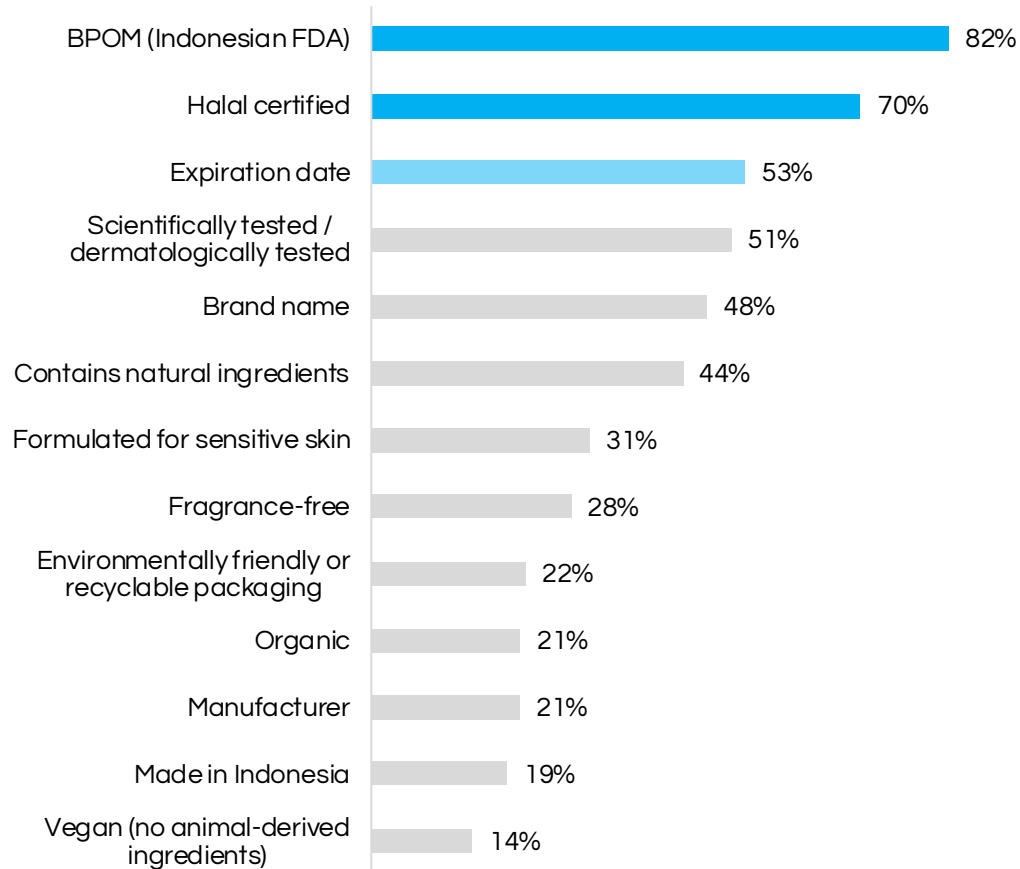
When purchasing makeup for the first time, Indonesian women show strong attentiveness to product packaging information. A majority (51%) say they always read the packaging carefully, indicating a high need for reassurance and clarity before trial.

An additional 28% read selected parts of the information, while 18% only glance at certain details. Very few (3%) never read packaging information at all. This highlights that packaging plays a critical role as a trust-building and decision-support tool, especially at the first point of purchase

Safety, Legitimacy, and Halal Assurance Dominate Makeup Information Checks

Makeup Product Information Considered

n = 125, base: female



When buying makeup, Indonesian women primarily focus on safety and regulatory assurance, with BPOM (Indonesian FDA) approval being the most checked information (82%), followed by halal certification (70%).

Beyond regulation, functional and risk-related details also matter, over half check expiration dates (53%) and whether products are scientifically or dermatologically tested (51%). Brand-related and ingredient cues such as brand name (48%) and natural ingredients (44%) play a secondary role.

Makeup Product Information Considered - Cross tabs

	Gender			Age			Island			Urbanisation		Education	
	Total	Female	Male	17-24 y.o.	25-34 y.o.	35-45 y.o.	Sumatera	Jawa	Others	Urban	Rural	SMP/SMA sederajat	Universitas
BPOM (Indonesian FDA)	82%	82%	0%	84%	87%	74%	75%	89%	73%	88%	76%	86%	67%
Halal certified	70%	70%	0%	70%	73%	65%	64%	76%	59%	70%	70%	75%	47%
Expiration date	53%	53%	0%	54%	62%	43%	52%	59%	39%	58%	48%	56%	43%
Scientifically tested	51%	51%	0%	47%	59%	48%	57%	48%	53%	48%	55%	51%	51%
Brand name	48%	48%	0%	47%	51%	45%	53%	42%	57%	51%	44%	46%	57%
Contains natural ingredients	44%	44%	0%	47%	47%	37%	32%	54%	34%	51%	36%	47%	35%
Formulated for sensitive skin	31%	31%	0%	33%	32%	27%	21%	33%	38%	33%	29%	28%	45%
Fragrance-free	28%	28%	0%	38%	20%	25%	26%	31%	25%	32%	25%	28%	32%
Environmentally friendly	22%	22%	0%	31%	22%	9%	8%	21%	42%	20%	24%	19%	36%
Organic	21%	21%	0%	7%	24%	38%	38%	8%	35%	14%	30%	18%	33%
Manufacturer	21%	21%	0%	20%	17%	28%	29%	11%	36%	14%	29%	15%	47%
Made in Indonesia	19%	19%	0%	24%	21%	12%	21%	12%	36%	12%	28%	15%	35%
Vegan	14%	14%	0%	5%	26%	13%	18%	12%	16%	14%	15%	15%	12%
Others. specify	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
None	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	506%	506%	0%	507%	541%	465%	496%	497%	542%	504%	509%	498%	539%
	125	125	0	47	42	36	32	67	26	68	57	100	25
	124	124	0	41	59	24	21	83	20	95	29	101	23

Alpha 5% significantly higher than other categories

Alpha 5% significantly lower than other categories