

# Inclusive Beauty Drives Sales

An AI-Powered Road Map for the Beauty Industry



**SeeMe**  
INDEX

 **Circana**

## Introduction

The beauty industry has always had an outsized impact on inclusion because it sets a standard for beauty and influences how individuals perceive themselves. Today, many people still don't feel like they are represented in health and beauty ads, and 45% of Gen Z and 50% of millennials say they would [stop using a beauty brand](#) if it was not inclusive or socially responsible, according to one study. It's safe to say that consumer expectations about inclusivity — that is, the depiction of people of all genders, gender expressions, races, skin tones, ages, body sizes, abilities, and sexual orientations portrayed in an accurate and representative way — have never been higher. But being inclusive isn't just the "right thing to do." Because of work Circana has done with SeeMe Index, an organization that defines itself as a data-driven source of truth that helps empower brands and consumers to live inclusively, there's data that shows beauty brands with higher inclusivity scores on the [SeeMe Index for Beauty](#) grow faster than their less inclusive counterparts.

There are, of course, fundamentals such as product quality, distribution, pricing, marketing, and more that propel a brand's success. But measurable brand inclusivity hasn't been very tangible until now. By combining SeeMe Index's AI-powered brand inclusivity methodology alongside Circana's Complete Beauty sales data, it's possible to conclude that more inclusive brands drive sales. In particular, brands that have earned SeeMe Index's Certified Inclusive designation grow faster. Luckily, there are several steps brands can take to become more inclusive, and the good news is they don't have to start from scratch.



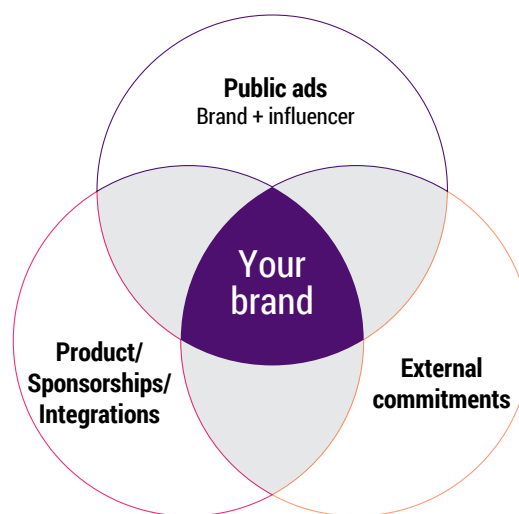
## Methodology

This report analyzes point of sale (POS) growth rates of 40 top beauty brands included in the inaugural 2023 SeeMe Index for Beauty to determine whether more inclusive brands grow faster than their less inclusive counterparts. Standardizing inclusivity measurement across brands in an industry creates the opportunity to establish benchmarks and raise the bar for the entire industry. To determine which 40 brands were in SeeMe's inaugural index, we utilized the following resources: Women's Wear Daily Inc.'s (WWD) 45 Most Powerful Brands in Beauty, WWD Top 100 Beauty Manufacturers, TribeDynamics CreatorIQ, and Spate.

SeeMe Index uses advancements in responsible AI to measure brands' inclusivity efforts on three consumer-facing components – public ads (supported by experts at Alltold), product positioning, and external commitments – across six key identity dimensions.



### Three consumer-facing components



### Across six identities

- 1 Gender expression
- 2 Skin tones and perceived ethnicity
- 3 Age
- 4 Sexual orientation
- 5 Body size
- 6 Visible disability

These identity dimensions include:

1. **Gender expression:** Feminine, masculine, and gender nonconforming
2. **Skin tone:** The **Monk Skin Tone Scale**, a more inclusive 10-tone scale explicitly designed to represent a broader range of skin tones
3. **Age:** Perceived age, plus or minus five years
4. **Observed sexual orientation:** Individuals shown in the context of a romantic or intimate or partnered interaction

5. **Body size:** As defined by perceived body mass index and analysis of body type (e.g., small, small-muscular, medium, medium-muscular, large, large-muscular and pregnant)
6. **Visible disability:** Presence of a visible disability (such as hearing or vision impairment, diabetes, Down syndrome, dwarfism, mobility disabilities, pushed wheelchair, partial or completely missing limbs)

For a more detailed description of our methodology, see the Appendix on page 14.

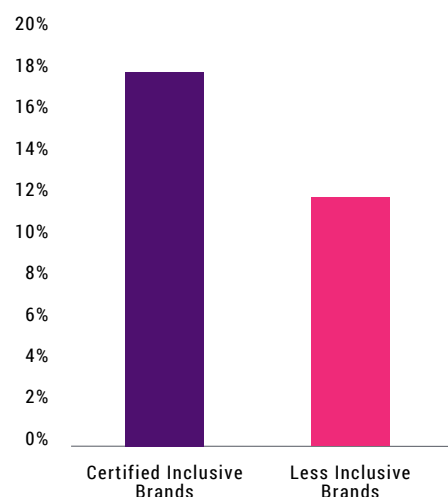
## Key Findings

This analysis found that Certified Inclusive brands on the 2023 [SeeMe Index for Beauty](#), which were M·A·C, Dove, L'Oréal Paris, Maybelline New York, NYX Cosmetics, Fenty, and e.l.f Cosmetics, grew faster than their less inclusive competitors and the industry overall. Cumulatively, Certified Inclusive brands are growing **1.5X** faster than their less inclusive counterparts. Certified Inclusive brands outpaced growth of less inclusive brands at 18% versus 12% during the period SeeMe Index and Circana studied, which was January through June of 2023 for all brands. While other factors also impact growth, such as distribution, inflation, sales promotion, and others, more inclusive brands outpaced growth of less inclusive brands, illustrating that being an inclusive brand is a business imperative.

Certified Inclusive brands are growing  
**1.5X** faster than their  
 less inclusive  
 counterparts.

## Certified Inclusive brands outpace the growth of less inclusive brands

Dollar performance first half  
 (Jan.-June) 2023 vs. year ago



Source: Circana, U.S. Prestige Beauty, Total Measured Market, Jan.-June 2023 vs. YA Circana, U.S. Beauty, Omnichannel, Jan.-June 2023 vs. YA



## What Differentiates the Most Inclusive Brands?

Even the best brands have opportunities to improve, but what separates Certified Inclusive brands – which include M·A·C, Dove, L'Oréal Paris, Maybelline New York, NYX Cosmetics, Fenty, and e.l.f cosmetics – from the rest? They have three things in common:

### 1. They see inclusivity as an organizational approach.

It's evident among those with the highest Inclusivity Quotient (IQ) scores on the SeeMe Index that inclusivity is part of everything the brand puts out into the world. Many brands take commendable action in either ads, product, or external commitments, but Certified Inclusive brands consistently demonstrate inclusivity efforts across all consumer touchpoints, regardless of organizational siloes. Jessie Feinstein, senior vice president of marketing at Maybelline New York, explains the brand's approach like this: "By celebrating diversity and embracing individuality, [Maybelline New York](#) is able to foster a community that makes its consumers feel seen, valued, and beautiful, which is pivotal to the growth of the brand. Our commitment to inclusivity not only expands our customer base, but drives innovation as we constantly want to ensure that our products resonate with the diverse needs of our global audience."

2. **Intersectional thinking.** Certified Inclusive brands also take authentic action by finding the intersection of their brand platform with consumer identity dimensions. This approach makes inclusive action meaningful and significant for different audiences. Their efforts aren't a "flash in the pan" or limited to a dedicated month – they're part of long-term commitments that are adapted as needed. Consider NYX's [Proud Allies for All initiative](#), which not only stays on its website all year round, but also provides discounts for anyone that takes their Allyship quiz.

3. **Transparency.** Brands that provide identity-specific product testing detail or ongoing progress on year-long brand commitments set themselves apart from the rest of the industry. Consider that the [e.l.f. Cares](#) tab stays on their brand website all year long and links to their [yearly impact report](#) to provide full transparency of all the commitments e.l.f. makes to different identity groups.



## How to Become More Inclusive (and Drive Sales in the Process)

Becoming an inclusive brand — or simply becoming more inclusive — starts with understanding where your brand is today. The SeeMe Index measures all the ways a consumer experiences a brand across ads, product positioning, and external commitments. Many brands are strong in one of these areas for certain identity dimensions, but few are consistent in demonstrating inclusivity to consumers.

At SeeMe Index, we can't even count how many times we were excited to find an incredible example of brand inclusivity only to be disappointed because it appeared in isolation. The table to the right offers a few real examples of what brands have tried, and what they could have done differently to holistically demonstrate inclusivity.

To help brands improve, SeeMe Index compiled tactics that Certified Inclusive brands execute well, specifically looking at consumer-facing brand components such as ads, product positioning, and external brand commitments. Brands can use these insights to gain support they need to work on each of these components.

| What a brand promised                                                                                       | What they actually delivered                                                                              | What the brand could have done to demonstrate inclusivity                                                                                     |
|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>External commitments:</b> A video celebrating a brand's longtime commitment to meaningful inclusivity... | ... only had 400 views because there was no paid or earned media behind it.                               | Dedicate equitable media spend to this brand asset to ensure that its inclusivity message is seen.                                            |
| <b>Product positioning:</b> A shade range boasting 60+ shades of foundation...                              | ...was destroyed by influencers who claim that the darkest shades viewed online are not as deep as shown. | Accompany shade swatches on the website with images of talent across the skin tone spectrum illustrating shade matches for deeper skin tones. |
| <b>Ads:</b> A multicultural and multigenerational group of models in skincare ads...                        | ...was misleading because the product wasn't tested on all ages and skin tones.                           | Specify the ages and skin tones of participants in the consumer testing groups.                                                               |
| <b>Consistency:</b> An inspiring ad featuring people with disabilities...                                   | ...sent users to a website without accessibility settings on it.                                          | Consistently show up for an identity group across all consumer-facing assets.                                                                 |



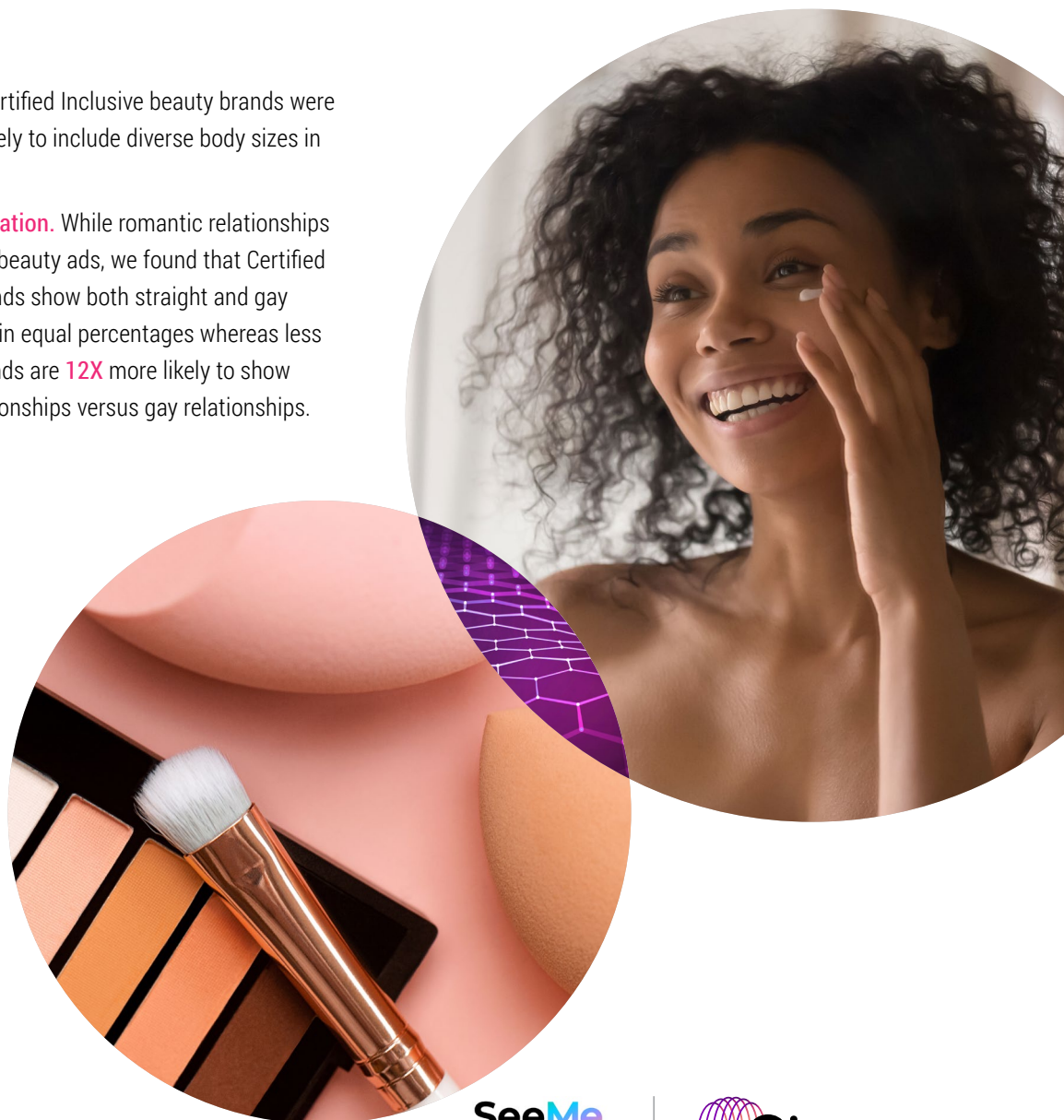
## Ads

SeeMe Index defines ads as the publicly available, most-viewed content that a consumer is likely to see across any platform, including TV, YouTube, Instagram, TikTok, Meta ads, and others. Oftentimes, the most frequently viewed content is brand-produced and supported by paid media, but this report also includes creator content to account for organic reach and virality.

### Takeaway

**By 2044, the U.S.** will have a majority-minority population, which means there will be little difference between a “general market” and a “multicultural market.” Therefore, it was unsurprising that the more successful Certified Inclusive brands in the SeeMe Index were already more likely to feature lesser-seen identity dimensions in their ads compared to other beauty brands. For instance:

- **Body size.** Certified Inclusive beauty brands were **5.3X** more likely to include diverse body sizes in their ads.
- **Sexual orientation.** While romantic relationships are scarce in beauty ads, we found that Certified Inclusive brands show both straight and gay relationships in equal percentages whereas less inclusive brands are **12X** more likely to show straight relationships versus gay relationships.
- **Skin tone.** Certified Inclusive beauty brands were **1.2X** more likely to feature medium to deep skin tones, defined as skin tones 6-10 on the Monk Skin Tone Scale.
- **Age.** Certified Inclusive beauty brands were **2.5X** more likely to have ads that include adults with perceived age over 55.
- **Gender expression.** Certified Inclusive beauty brands were **3.7X** more likely to include individuals with gender nonconforming expression.



## Product Positioning

SeeMe Index defines product positioning as the products themselves, product testing, and website imagery and language used by a brand. SeeMe Index evaluates the brand's product line for breadth and depth of shade range, products available to different identity dimensions such as melanated skin, transparency of product testing details, and website features, including accessibility, language, personalization, and language used.

### Takeaway

**Skin tone distribution.** Certified Inclusive beauty brands not only had broad foundation shade ranges covering eight-plus skin tones of the Monk Skin Tone Scale, but they were **1.4X** more likely to be evenly distributed throughout the scale. Certified Inclusive brands were also **1.2X** more likely to show how the products look on people of different skin tones.

**Gender expression.** Certified Inclusive beauty brands were **1.2X** less likely to have gender binary terms on their website, meaning there were no mentions of a product or category designated “for him” or “for her.”

## External Commitments

SeeMe Index defines external commitments as a company's brand platform or charitable initiatives that extend beyond the product itself. This often encompasses initiatives, partnerships, donations, and public support announcements for specific identity groups. SeeMe Index evaluated the notable intersectionality of brand purpose and identity dimensions, transparency of brand impact, opportunities for consumer engagement, the long-term nature of commitments, and the ease of finding commitments on the brand's website.

### Takeaway

If a brand only has external commitments visible on its website during a “dedicated month,” this is a strong signal that the brand is not actually committed to that platform or charitable initiative. This analysis found distinct differences with how Certified Inclusive brands approach external commitments. For example:

- **All year round:** Certified Inclusive beauty brands are **1.4X** more likely to have their brand platform or charitable initiative easily accessible on their website throughout the year.
- **Measurable:** Certified Inclusive brands are **1.4X** more likely to measure impact and report back on progress throughout the year.
- **Intersectionality:** Certified Inclusive brands are **1.5X** more likely to highlight the intersectionality of the external commitment and specific identity dimensions, acknowledging that different identity dimensions may require different resources.
- **Call to action:** Certified inclusive brands are **1.7X** more likely to have a call to action for consumers to get involved.



## Four Steps Brands Can Follow

Getting to the level that Certified Inclusive brands have achieved may seem overwhelming, but it doesn't have to be. Every brand, no matter its size or budget, can start somewhere. When SeeMe Index works with brands on their inclusion journey, it recommends starting with these four key first steps.

### 1. Measure where you are today vs. competitors.

Just as brands need to consistently measure sales data, they also need to consistently measure holistic inclusivity to understand how they compare to their most important competitors. Once they've measured and benchmarked, they can decide on priorities.

### 2. Use this data to make decisions and create identity-specific goals.

Brands can't be everything to everyone, which is why it's important to use benchmarking data to make decisions about who to focus on. For instance, if a brand knows it's far behind competitors with deep skin tone representation, it should think about: Is the goal to match competitors? Surpass them? It's important for brands to make decisions about what they need to change in relation to their competitors.

### 3. What gets measured gets managed.

If brands only measure their progress once, they'll never be aligned with changing brand behaviors and consumer expectations. They should set specific times throughout the year to measure continuously to ensure they're meeting identity-specific goals.

### 4. Every brand has a different starting point.

Not every brand needs or has a project spanning 20 years of commitment like [Dove's Real Beauty campaign](#). But every brand has the power to decide which consumers to focus on and show up for. A little bit of focus on inclusivity can have an [outsized impact](#) on brand favorability.



## Case Studies

As beauty brands consider how they could bring their inclusivity efforts to life, they would do well to study some of the top-rated brands on the SeeMe Index for Beauty.

### M·A·C

M·A·C was the No. 1 brand on SeeMe's 2023 index. It earned this position by doing a lot of things right across ads, product lines, and external commitments. What sets M·A·C's inclusivity efforts apart is its external efforts with the Viva Glam program. That program, which is 30 years old, illustrates the company's long-term commitment to raising funds and awareness for AIDS education and support services. In recent years, it has expanded the program's mission to include sexual, gender, racial, and environmental equality.

What stands out in M·A·C's efforts is the visibility the brand provides to its external commitment efforts, including raising \$520 million globally and its involvement with 9,713 grants to 1,818 organizations across 92 countries for AIDS education and support services. It also provides opportunities for consumers to get involved, both through direct donations and

by purchasing Viva Glam products, where 100% of the proceeds go to grantees. Many other brands SeeMe Index measured have external commitments, but lacked specificity around the program, length of commitment, and impact. In some cases, the external commitment section on brand websites was replaced with other brand initiatives throughout the year.

### How M·A·C performs on SeeMe Index's three consumer-facing measures:

- **Ads.** M·A·C is the top-scoring brand for representation and screen time of gender nonconforming individuals.
- **Product line.** M·A·C changed its brand tagline from "all sexes" to "all genders" to be more inclusive and removed gender-biased language from products and its website.
- **External commitments.** Viva Glam is a best-in-class external commitment in the industry for its long-term duration, measurable impact, and opportunities for consumers to get involved.



"M·A·C has always championed inclusivity, embodying our credo 'All Ages. All Races. All Genders.' This philosophy unites us and reflects the true diversity of the world," M·A·C Senior Vice President and Global General Manager Aïda Moudachirou-Rébois told SeeMe Index. "For us, inclusivity is not an initiative, but a core value deeply rooted in our brand's ethos. We have always celebrated the beauty in diversity, and inclusivity is a fundamental principle that we uphold unwaveringly."

## Fenty

According to Circana, Fenty grew total beauty dollar sales a whopping 82% in the first half of 2023, and was ranked as the top makeup brand based on inclusivity.<sup>1</sup> When Fenty Beauty launched in 2017, it brought inclusive beauty to the forefront and changed the shape of the industry. The company focused on up-leveling **skin tone inclusivity** by launching the Pro Filt'R foundation with 40 shades, which has now become an industry standard. Since then, Fenty continues to raise the bar in shaping the definition of inclusive beauty with expanded shade ranges and the diverse talent featured in ads.

Unsurprisingly, in SeeMe's 2023 index, Fenty led the industry in featuring talent with deeper skin tones. It continues to go beyond this by featuring talent with larger bodies and disabilities, both of which were identity dimensions that were virtually nonexistent in the beauty ads SeeMe Index analyzed across the top 40 brands. In fact, large bodies comprised only 2.9% of people featured in the beauty ads SeeMe Index looked at. Individuals with disabilities were a mere 0.2%. Fenty continues to highlight and celebrate the many intersectional definitions of beauty.

October 31, 2023 · Strategy & Growth

### How Rihanna's Fenty Brand is Leading in Diversity & Inclusion



Source: <https://www.indigo9digital.com/blog/fentydiversityinclusion>

#### How Fenty performs across SeeMe Index's consumer-facing measures:

- **Ads.** Above-average representation of deepest skin tones, body size diversity, models with scars, Down syndrome, and distinct LGBTQIA+ identities.
- **Product.** Fenty Beauty's foundation line includes over 50 shades. Each shade features a different model, covering nine of 10 Monk Skin Tone groups.
- **External commitments.** The Clara Lionel Foundation, Rihanna's charitable foundation, donates to organizations representing people of color that are fighting for climate change.



## Rare Beauty

After SeeMe Index completed work on the 2023 Index, Rare Beauty, a beauty brand founded by actress Selena Gomez, achieved dollar sales growth of 124% in 2023, according to Circana Checkout Tracking. Rare Beauty will be officially scored by SeeMe Index in 2024, but given its success, it's worth highlighting some of the brand's efforts.

Based on its sales growth, Rare Beauty is clearly doing something right, and it stems from the brand's authenticity rather than Gomez's celebrity status. Rare Beauty consistently shows its products being used by real people, and promotes positive mental health, body positivity, and self-acceptance messages. When SeeMe Index looks at Google trend data throughout 2023, it's apparent that Rare Beauty's search interest is unique and not only driven by Selena Gomez's name recognition.

### Some of Rare Beauty's standout inclusiveness efforts include:

- **Accessible packaging:** Rare Beauty has incorporated inclusive packaging across many of its products, which is a great illustration that building for accessibility is truly building for all. The brand's liquid blush features a low-resistance cap, an easy-to-remove applicator, a matte finish bottle for improved grip, and a bottle size that's comfortable to hold.

# Rare Beauty's Accessible Makeup Proves Simple Changes Can Make Beauty More Inclusive

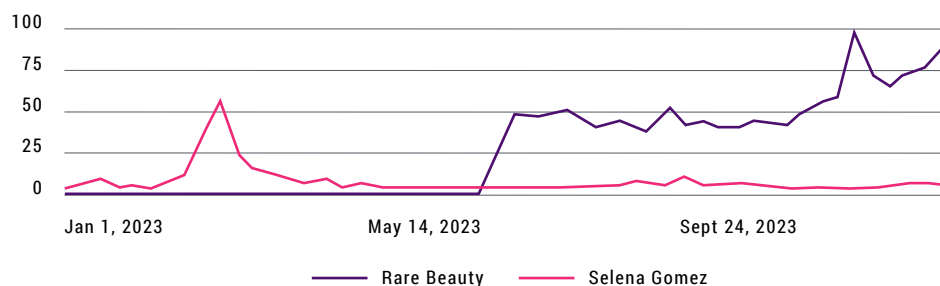
BY ZOE YU GILLIGAN | MAY 9, 2023 5:00 AM EST

Source: <https://www.women.com/1280332/rare-beautys-accessible-makeup-proves-simple-changes-can-make-beauty-more-inclusive/>

- **External commitments:** Rare Impact, the brand's signature social impact initiative, puts external efforts front and center as a key pillar for the brand. In Rare Impact's efforts to remove stigma around mental health, they connect the cause with how it uniquely affects different identity dimensions and has a defined goal of raising

\$100 million over the next 10 years with many ways for consumers to get involved. According to the [Rare Beauty Social Impact Report 2023](#), 1% of all Rare Beauty sales are donated to the Rare Impact Fund to expand access to mental health services and education for young people around the world.

## Google Search Interest for Selena Gomez vs. Rare Beauty Over Time.



## Answering Demand for Inclusive Beauty

Now, more than ever, consumers demand and deserve to be seen by the brands they want to support — and brands increasingly recognize this. The beauty industry has a tremendous impact on shaping identity and driving inclusivity. This makes it critically important for brands in the industry to lead the way in helping people feel seen.

The research conducted by the SeeMe Index and Circana uncovered both the human imperative for brands to be more inclusive as well as the business imperative. And consumers know the difference between brands that act inclusive and brands that are inclusive. [Wunderman Thompson Intelligence report](#) found that “82% of consumers agree actions on inclusion and equality mean nothing unless they are integrated throughout the entire business.” At SeeMe Index and Circana, we truly believe that what you can see, you can be, and that every person deserves to be seen and celebrated by the brands they shop from.



## Appendix

SeeMe Index measures inclusive efforts of top brands in each industry, scoring brands on three consumer-facing components, each weighted equally, that together provide a holistic view of a brand's inclusivity efforts, which leads to an Inclusive Quotient (IQ) score with a maximum score of 300. Brand IQ scores are grouped into four quartiles. The full descriptions for each brand grouping include:

**1. Certified Inclusive:** *I am empathetic and a proven inclusive brand.*

Brands in this category are at the forefront of inclusivity. They excel across ads, product, and external commitments, demonstrating holistic inclusivity efforts. Their efforts are often ingrained in the DNA of the brand itself. These brands are Certified Inclusive and have earned the prestigious SeeMe Index seal of approval, which they can proudly showcase in their marketing materials.

**2. Acts inclusive:** *I stand with you and support you.*

These brands are actively working toward inclusivity and have made significant progress. While they might not excel in all three components, they consistently show a strong dedication to inclusivity.

**3. Feels inclusive:** *I try to feel what you feel.*

These brands are taking some meaningful inclusive actions, but they're inconsistent across components and identities. They are more nascent in their inclusivity journey but deliver some impactful efforts.

**4. Thinks inclusive:** *I try to think like you do.*

Brands in this category show promise of inclusive action. However, efforts have yet to fully materialize, and they have significant room for improvement.

These brand groupings are inspired by research by British clinical psychologist Simon Baron-Cohen and his colleagues at Cambridge University. Their research has focused on different types of empathy, which is a critical attribute of any inclusive brand. An individual or brand's ability to empathize with others consists of three components: cognitive empathy, emotional reactivity, and social skills.

SeeMe Index measures the inclusive efforts of top brands in each industry, scoring brands on three key consumer-facing components, each weighted equally, that together provide a holistic view of a brand's inclusivity efforts, which leads to an IQ score. When

SeeMe launched its index, it used WWD as one source to help identify the most powerful beauty brands in mass and prestige across the major beauty categories of cosmetics, skincare, and haircare. It also leveraged TribeDynamics CreatorIQ, which is a platform for measuring earned media value of beauty brands, and SPATE, which is an insights platform that measures how brands are searched on Google and hashtagged on TikTok.

### The Role of AI

AI enables SeeMe Index to measure inclusivity in ways that weren't possible before. However, it's critical that the organization is responsible when utilizing AI to measure inclusivity.

This is one of the reasons that SeeMe Index partnered with Alltold AI to measure the ads portion of the SeeMe Index. SeeMe shares the belief that how AI models are trained should not be overlooked. The organization is hyper-conscious that bias in an AI model will lead to a biased output. These models have been built with representative training datasets that demonstrate inclusive outputs. For instance, [the Monk Skin Tone Scale](#) is used instead of the Fitzpatrick scale to ensure

wider representation of brown and black skin tones. Similarly, since gender itself is defined by an individual, the model measures gender expression and includes a gender-nonconforming option for those who aren't neatly categorized. Most importantly, Alltold and SeeMe Index work closely with experts and advocacy groups to ensure that our identity measurements are inclusive and representative.

For the product line and external commitment portions of the index, SeeMe Index also used a combination of AI-powered website scraping tools, plus a manual review for subsequent AI outputs.

### Leveraging Circana data

Finally, to measure the performance of SeeMe Index's selected 40 brands, SeeMe Index used POS data that Circana collected between January and June of 2023 from leading U.S. beauty, general merchandise, and mass retailers. POS data, also known as retailer census data, comes to Circana directly from leading U.S. retailers and provides aggregated sales metrics on specific beauty products. POS data is syndicated, and leverages consistent definitions for categories, channels, and geographic markets, and is the foundation for sales trends and competitive, distribution, price, and promotions analysis, and more.



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#### About Circana

Circana is a leading advisor on the complexity of consumer behavior. Through superior technology, advanced analytics, cross-industry data, and deep expertise, we provide clarity that helps almost 7,000 of the world's leading brands and retailers take action and unlock business growth. We understand more about the complete consumer, the complete store, and the complete wallet so our clients can go beyond the data to apply insights, ignite innovation, meet consumer demand, and outpace the competition. Learn more at [circana.com](https://circana.com).

#### About SeeMe Index

SeeMe Index is a responsible AI leader that utilizes the technology to holistically measure and guide brands' inclusivity efforts. For the first time ever, SeeMe Index is harnessing this cutting-edge technology and insights to provide data-driven inclusivity guidance, unlocking brand growth and love. SeeMe Index takes the guesswork out of inclusive marketing. Learn more at [www.seemeindex.ai](https://www.seemeindex.ai).

Have questions or want to see a deep dive of the data?

Contact SeeMe Index at [hello@seemeindex.com](mailto:hello@seemeindex.com)



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