

CLEAN & CONSCIOUS BEAUTY – US – 2023

An established segment of the BPC market, "clean and conscious" product concepts evolve to support consumer desire for trust, safety and affordability.



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Clean & Conscious Beauty - US - 2023

This report looks at the following areas:

- How consumers define "clean beauty"
- What types of "clean" beauty and personal care products are used and priority sub-categories when purchasing "clean"
- Attributes that build consumer trust in a beauty and personal care brand
- Where consumers look for information on "clean" products
- Where consumers are buying "clean" beauty and personal care products
- Attitudes and behaviors toward beauty and personal care with emphasis on changes in product usage, sustainability and safety perceptions



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Overview

This report examines consumer usage, definitions and attitudes toward "clean" personal care and beauty products. As regulation remains volatile, the definition of "clean" remains subjective and unclear. Consumer data reflects consumers attitudes and own definition of what defines "clean."

A majority of adults are turning toward the "clean" category more so than years prior with many defining "clean" through way of a product's ingredients: "non-toxic" claims, natural/botanical inclusions and free-from perceived "dirty" ingredients. However, a trusted brand also means proven effectiveness, creating a mission for brands to provide solution-based products that also reflect intentional development with respect to the end-user and the

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global environment. With the help of third-party credentials, retailer merchandising and "clean" badges, consumers ultimately choose products that reflect their own values and definitions of clean, until true regulation of the category are defined and upheld. Many also expect products to carry eco-friendly ingredients and packaging to standby "clean" definitions, reflecting a future shift in overall lifestyles. While usage of exclusively "clean" personal care and beauty products remain mixed, wide availability across channels and price points gives adults plentiful options to decide.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- Definition
- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

THE MARKET

Market context

- Market context

Market drivers

- US retailers driving definitions of "clean"
- Meaning diminished due to wide availability
- "Clean" across some, but not all products – mixed bag
 - Graph 1: purchasing only "clean" beauty and personal care products, 2023
- On shaky ground: regulation and safety
- Sustainability may also mean reduced usage
 - Graph 2: "I am trying to use fewer products to be more sustainable," 2023
- Watch out for Generation Alpha
- Millennial parents are shaping the new consumer
 - Graph 3: attitudes toward personal care products (any agree), Millennials, 2023
- "Clean" and eco-friendly attributes already piquing the interest of younger generations
 - Graph 4: benefits sought by beauty consumers aged 12-17, 2022

COMPETITIVE STRATEGIES & MARKET OPPORTUNITIES

- Certifications: a quick filter, but consumers want more
- The importance of ingredient integrity
- "Chemical-free" desires signal a wider preference
- Newer logos enter the space: MADE SAFE

- Showcasing the extensiveness of certification
- 'Ecosystem Approach Screening' critiques impact from all angles
- Certifications can be pricey for small brands
- "Clean" matters, but proven efficacy is required
- Retailers promote in-house badges to denote clean attributes
- Award winners bring eyes to publishers and brands
- 'Prestige' dominates "clean" product pricing
 - Graph 5: "clean" product launches by beauty price positioning, 2018-22
- 'Quiet beauty' denotes prestige-positioned products
- Ingredient-led marketing connects cleanliness and efficacy
- Understated packaging denotes simplicity and sophistication
- Clean + clinical = "cleanical"
- "Cleanical" availability for the masses
- Sustainable and eco-friendly lifestyles desired
- Companies take charge
- Big brands, big commitments
- Brands join together to support packaging circularity and waste concerns
- 'Carbon neutral' claims continue to gain steam
 - Graph 6: BPC product launches with 'carbon neutral' as the claim, by region, 2018-23
- Carbon offsetting programs & credits being utilized in BPC
- Brands utilize third-party companies to support carbon claims
- Clean and eco-friendly attitudes extend to loved ones
- Eco-friendly operations must be considered in the professional space
- Third-party partners help salons with sustainability initiatives
- Human hair can help save the planet?
- A global focus on water
- Water is still the new luxury: building on Mintel's 2016 Trend
- A focus on ocean preservation and plastic waste
- 'Reef-safe' claims become more common in sunscreen
- Product formulations and usage education can support water conservation efforts
- Brands support consumers' 'hard water' concerns

CONSUMER INSIGHTS

Consumer fast facts

Clean beauty product usage and priorities

- Clean product usage is near universal

- Graph 7: clean product usage (NET), 2022-23
- Clean personal care accepted across ages
 - Graph 8: clean product usage (NET*), by age, 2023
- Lower discretionary spending may mean less specialty product usage
 - Graph 9: select clean product usage, by household income, 2023
- Frequent usage habits and "clean" priorities go hand-in-hand
 - Graph 10: clean product purchase priorities (ranked – up to three), 2023
- Premiumization in personal care with a focus on safety, naturalness and skincare-inspired attributes

Defining "clean"

- Non-toxic buzzes among "clean" definitions
- Non-toxic buzzes among "clean" definitions
 - Graph 11: defining clean, 2023
- Ingredient recognition certainly a factor
 - Graph 12: defining clean, by gender and age, 2023
- 'Science-backed' claims may not be enough
- Younger adults consider the environment around them
 - Graph 13: defining clean, by age, 2023
- 'Ethically made with love': Activist Skincare
- Clean values come at a price
 - Graph 14: defining clean, by gender and age, 2023

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- Adults look to tangible validation for their "clean" research
 - Graph 15: "clean" product discovery, 2023
- Make product information accessible across channels
 - Graph 16: "clean" product discovery, by age, 2023
- The power of retailer labelling and trusted brand names matter
 - Graph 17: "clean" product discovery, by age, 2023
- Young adults seeking expertise amongst the noise...
 - Graph 18: "clean" product discovery, by age, 2023
- ...and may turn to influencers, though not as their first choice
 - Graph 19: "clean" product discovery, by age, 2023

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- Mass channels reign as the top destination for "clean"
 - Graph 20: retailers shopped for "clean" BPC products, 2022-23
- Specialty retailers win with breadth of "clean" products
 - Graph 21: any specialty beauty retailer shopped for "clean" BPC products (NET), 2022-23

- Gen Z females are likely seeking brands across channels
 - Graph 22: retailers shopped for "clean" BPC products, by gender and generation, 2023
- Price is clearly a factor among tighter budgets
 - Graph 23: retailers shopped for "clean" BPC products, by financial situation, 2023
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 - Graph 24: retailers shopped for "clean" BPC products, by select race and Hispanic origin, 2023
- Integrate into male shopping routines
 - Graph 25: shopping at supermarkets for "clean" BPC products, by gender, 2023
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- Young adults desire transparency
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 - Graph 31: attitudes toward environmentally-friendly and synthetic ingredients, those who agree, by generation, 2023
- Proving safety for users should be a part of the value equation
- Proving safety for users should be a part of the value equation
- Connect gentleness and efficacy

APPENDIX

- NETs for clean beauty and personal care usage
- Bases for clean beauty and clean personal care purchase priorities (ranked up to three)
- Sustainability attitudes, by age, 2023
 - Graph 32: sustainability attitudes, by age, 2023

- Consumer research methodology
- Generations
- Abbreviations and terms

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