

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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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

EXECUTIVE SUMMARY

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

THE MARKET

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
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- 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
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- Brands support consumers' 'hard water' concerns

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 - Graph 8: clean product usage (NET*), by age, 2023
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