FACIAL SKINCARE FORMAT AND INGREDIENT TRENDS – UK – 2023

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Facial Skincare Format And Ingredient Trends - UK - 2023

This report looks at the following areas:

- The consumer's primary skin concerns and how this correlates with facial skincare usage
- Attitudes towards facial skincare formats and interest in format innovation
- How launch activity compares to consumer interest in select facial skincare ingredients and formats
- How and where brands should communicate ingredient information to consumers
- What brands can do to stand out as products calling out hero ingredients saturate the market

> Consumers are engaging with skincare ingredients, but need guidance from brands. Formats can be used to boost efficacy as hero ingredients saturate the market.

Overview

The cost-of-living crisis continues to squeeze budgets. This will drive savvy shopping behaviours and **encourage more consumers to partake in 'dupe culture'**. This will benefit private label brands if they can **meet the demand for premium ingredients and formats**, while premium brands will have to go further to **demonstrate value**.

Report Content

EXECUTIVE SUMMARY

Opportunities for the facial skincare format and ingredient market

- Help consumers navigate ingredients and formats
- Innovate to improve efficacy and stability of ingredients
- Cater for natural demand

Market dynamics and outlook

- The five year outlook for facial skincare ingredients and formats

What consumers want and why

- Facial skincare users are receptive to innovation
- Meet the consumer demand for efficacy
- Online and offline media impacts skincare routines
- Sustainability knowledge and behaviours are polarised
- Convenience and familiarity continue to win over consumers

Innovation and marketing

- Popular active ingredients see growth
  - Graph 1: % of facial skincare launches formulated with select active ingredients, 2018-19 vs 2022-23
- Continued innovation with familiar ingredients
- Men become more engaged in facial skincare
- Novel formats tackle stability issues
- Serum format sees an increase
  - Graph 2: % of facial care* launches accounted for by serums, 2018-23

MARKET DYNAMICS

Macro-economic factors

- The UK has avoided recession, but economic output has stagnated since the cost of living crisis began
  - Graph 3: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
  - Graph 4: CPI inflation rate, 2021-23
- Combat savvy shopping behaviours

Social, environmental and legal factors

- Create a community through social media...

- ...and keep up with fast moving trends
- Natural ingredients remain popular
- Target skin conditions with OTC facial skincare
- Be inspired by eczema-focused innovation
- Drive repertoires through skincare layering trends
- Link facial skincare tools to improved results
  - Graph 5: usage of non-electrical facial tools/accessories, 2022
- Provide more advice to boost skincare device usage
  - Graph 6: usage of electrical facial skincare devices, 2022
- Pay attention to the rise of skincare for melanin-rich skin
- Innovate for an ageing population
- An opportunity for face wipe replacement

WHAT CONSUMERS WANT AND WHY

Usage of facial skincare products

- Consumers become more engaged in facial skincare
  - Graph 7: facial skincare usage in the last 12 months, 2021 vs 2023
- Stress the importance of cleansing for dry skin
- Help consumers with oily skin repair their skin barrier
- Heritage brands can drive usage of treatments amongst older consumers
  - Graph 8: facial skincare treatment usage in the last 12 months, by age and gender, 2023
- Tap into growing usage of skincare amongst men

Skin concerns

- Appeal to the consumer's top skin concerns
- Dryness dominates concerns within facial skincare
  - Graph 9: biggest skin concerns, 2023
- Help consumers with dry skin navigate ingredients
  - Graph 10: experience of dryness, by age and gender, 2023
- Promote the anti-wrinkle benefits of retinol
- Look to emerging ingredients and trends for sensitive skin
- Reach both men and women with genderless acne care
- Pigmentation is more of a concern for ethnic minorities

Sought after ingredients in facial skincare

- Familiarity continues to boost interest in vitamin C
  - Graph 11: sought after ingredients in facial skincare, 2023
- Extend vitamin C innovation

- Reach older consumers with concern-focused products
  - Graph 12: % of consumers who don't typically look for ingredients in the facial skincare products they use, by age, 2023
- Consumer education can create hype around ingredients
- Look to nature for collagen boosting actives
- Target retinol alternatives towards pregnant women
  - Graph 13: % of consumers who look for select ingredients in the facial skincare products they use, by age and gender, 2023
- Tout the skin tolerability of bio-retinols
- Maximise on peptide trends
- Link ceramides to skin health themes to drive interest

Sources of facial skincare ingredient information

- Consumers use various sources for ingredient information
- Simplify on-pack ingredient information
  - Graph 14: sources of information found most useful when looking for facial skincare ingredient information, 2023
- Seek inspiration from Cocokind's on-pack messaging
- Partner with third parties to verify website information
- Facilitate family/friend conversations with comparison tools
- Make ingredient information more accessible through magazines
- Use social media platforms to educate women aged 55+
- Maximise on TV shows popular amongst men
  - Graph 15: % of consumers who use TV shows for facial skincare ingredient information, by gender, 2023
- Interest in medical advice provides opportunity for doctor partnerships

Product preferences in facial skincare

- Focus on ingredient naturality and efficacy
- Natural ingredients drive preferences in facial skincare
  - Graph 16: factors that influence facial skincare decisions, 2023
- Cater for natural ingredient demand
- Reach more consumers by highlighting the enhanced penetration of naturals
- Expand target audience by spotlighting multiple ingredient attributes
- Seek inspiration from APAC for deeply penetrating messaging
- Help consumers shop by ingredient concentration
- Use hero actives to tap into minimal ingredient interest
- Tap into social media trends
- Consider marketing techniques to demonstrate traceable ingredients
- Lead with sustainability messaging to combat concerns around lab-engineered ingredients
- Look to AI for patent inspiration

Methodology

- Consumer research methodology
- TURF analysis methodology
- TURF analysis data

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