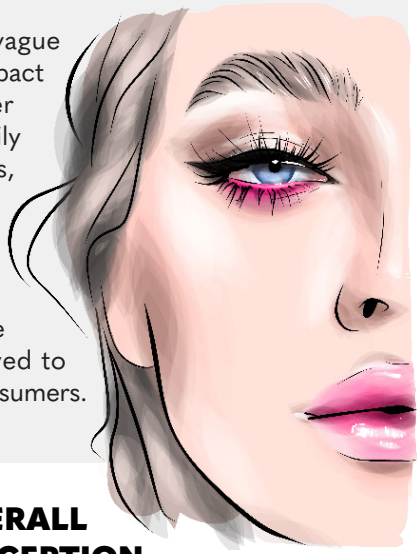


## The Clean Beauty Boost: How Consumers are Thinking Post-Pandemic

Clean beauty boomed pre-pandemic, despite vague definitions and very little regulation. COVID's impact on the segment has been fascinating: consumer interest in ingredients spiked—but not necessarily in a way that always benefited clean. Consumers, curious—and with time to spend researching—questioned “clean,” calling out the illegitimacy of many “free from” claims. Consumers turned to science-backed brands, leading us to the present moment, which many are calling “The Year of the Derm.” But clean beauty has evolved to phase 2.0 and is more popular than ever with consumers.



### LEVEL SET: ALL BEAUTY SPENDING IS UP

**16%** YoY increase in beauty sales in 2021, to **\$88.7B**

- In-store sales increased 12% to \$62.8B while online sales increased 27% to \$25.9B
- Online now makes up 29% of all beauty sales



### OVERALL PERCEPTION MATTERS

**62%** of consumers view clean beauty products as safer than mainstream products; 59% feel that way about higher quality

**65%** report they are using more clean beauty products than they were last year



### STILL, THOUGH—WHAT DOES IT MEAN?

Consumers report what clean beauty means to them:

- **62%** Natural/organic
- **53%** Made from non-toxic ingredients
- **52%** Free from certain ingredients
- **51%** Eco-friendly
- **42%** Cruelty-free
- **33%** Effective
- **32%** Ethical
- **20%** Expensive
- **15%** Science-backed



### DIFFERENT THINGS TO DIFFERENT GENERATIONS

**55%** of 18-24-year-old Gen Zers associate clean beauty with eco-friendliness; whether that's valid or not, brands that *do* have valid sustainability claims should focus on them

**40%** of women 18-34 report that they have heard of clean beauty and somewhat understand its meaning, compared with only 28% of all women—younger generations are interested in and powering the movement

### EFFICACY GAINS TRUST

**44%** of consumers trust beauty or personal care brands with **clinical studies** that **prove efficacy**



- The second most trusted quality? Brands that only use recognizable ingredients, at 37%; this suggests that brands using synthetic ingredients need to focus on education

### PRIME DELIVERS THE MOST CLEAN BEAUTY

**45%** The percentage of consumers who purchased their clean beauty or personal care items on **Amazon**

**43%** bought clean beauty and personal care products from **mass merchandisers**

**37%** purchased from any **specialty beauty retailer** (including Sephora and Ulta)

### THE WELLNESS SPOILEROVER

Consumers relied on beauty routines during lockdowns; **69%** feel those routines are **essential to their overall wellness**



### LEAVE THE FEAR IN 2020

Consumers have had enough fear mongering: clean beauty brands should now focus on the wonderful ingredients in their products, rather than the ingredients left out

