SHIELDING AGAINST THE IMPACT OF POLLUTION, STRESS AND UV

In-Cosmetics Bangkok November 2014
AGENDA

Introduction
Brands communication
Consumers
Products
What’s next
PERSONAL ENEMY #1

The world health organization has announced that **pollution is the world’s biggest environmental health risk.**

**Pm2.5**
– fine particulate matter – is causing asthma and heart attacks.
THE KILLER AROUND US

Source: Pure Earth / Blacksmith Institute

8.4 m

Deaths caused by pollution every year.
A MAP OF AIR POLLUTION

Exposure to particulate matter with an aerodynamic diameter of 10 µm or less (PM10) in 1600 urban areas*, 2008–2013

The boundaries and names shown and the designations used on this map do not imply the expression of any opinion whatsoever on the part of the World Health Organization concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Dotted and dashed lines on maps represent approximate border lines for which there may be no yet be full agreement.

Annual mean PM10 (µg/m³)
- <20
- 20–29
- 30–49
- 50–59
- 100–149
- ≥150

* The mean annual concentration of fine suspended particles of less than 10 microns in diameter is a common measure of air pollution. The mean is an urban population-weighted average from cities with available air pollution measures.

Data Source: World Health Organization
Map Production: Health Statistics and Information Systems (H3)
World Health Organization

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Source; World Health Organization
THE CAUSES OF SKIN DISTRESS

ENVIRONMENTAL

sun, wind, dirt, humidity, air-pollution, pollen, smog, dryness, cold, changing weather

LIFESTYLE

fatigue, exercise, air-conditioning, central heating, drink, smoking, STRESS, lack of sleep, diet, busy

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UV PROTECTION IS A MUST-HAVE CLAIM IN SKINCARE

Global launches with UV protection in Skincare (% of total)

- 2010: 13.6%
- 2011: 13.6%
- 2012: 13.1%
- 2013: 15.4%
- 2014: 16.4%

Source: Mintel GNPD
ANTI-POLLUTION & ENVIRONMENT PROTECTION
THE NEW PROTECTION CLAIM?

The anti-pollution claim in skincare launches grew its share rapidly in 2013 and shows signs of maintaining this growth in 2014

Global launches with anti-pollution claim in skincare, colour cosmetics and haircare (% of total)

Source: Mintel GNPD
*Search for products where Full text search matches "pollution" with word variants
BRANDS’ RESPONSE

PRODUCTS & INGREDIENTS

- Shielding & Repairing Claims
- Repositioning Existing Products
- Green Concept
- Combine Advanced Technology & Natural Ingredients

MARKETING

- Creating New Claims
- Lifestyle Marketing
- Healing/Detox Marketing
- Eco-Friendly Marketing
- Consumer Education
BRANDS

Communicate on the importance of protecting the skin against environmental damage
POLLUTION: THE NEW THREAT TO THE SKIN

90% of visible ageing is caused by environmental factors like sun exposure and pollution (Clarisonic)

SKIN IS A PRIMARY SITE OF PARTICULATE MATTER POLLUTION ABSORPTION

The signs of skin aging are easy to identify:
- wrinkles, rough patches, loss of elasticity, discoloration, dark spots and dryness.

But the source of aging can be hard to determine.

Particulate pollutants can be up to 20 TIMES smaller than human pores.

For those living in polluted areas, skin experiences:
- DEHYDRATION: making skin appear dull and sagging
- LACK OF OXYGEN: Less SKIN CELL TURN OVER
- Depletion of important ANTIOXIDANTS such as Vitamin E

Sources and Illustration: Clarisonic
REPOSITIONING FOR CITY LIFE

Simple recommends its Cleansing Facial Wipes, Foaming Cleanser and Protecting Light Moisturiser SPF15 as the antidotes to city life, stress and grime, and offers lifestyle advice.

30% of US facial skincare users worry about the effects of the environment on their skin.
BEAUTIFUL WITH ANTI-SMOG MASKS

Max Factor’s “Smog Busters” contest invites Chinese women to upload images of their best make-up while wearing an anti-pollution mask.
ANTI-PM2.5 CLAIM IS GROWING IN CHINA

Helena Rubinstein and Dior launched digital campaigns for PM2.5 situation; Pond’s launched PM2.5 cleansing products.

Of Chinese consumers are worried about pollution

Source: Mintel Report Marketing to Consumers A Regional Perspective China 2013
* Survey conducted on adults aged 20-49 years old
AVON LAUNCHES E-DEFENCE BASED ON THE STUDY OF “URBAN DUST”

22%

Of UK women use facial skincare to protect their skin from environment/pollution

Ranked third reason for using facial skincare after improving skin texture (35%) and brightening complexion (22%)

Source: Mintel Report Facial Skincare UK May 2014
CLARINS EDUCATES CONSUMERS

Clarins’ anti-pollution campaign, anti-pollution complex and products

Clarins anti-pollution plants

Succory Dock-Cress
Leguminosee

White tea
Camellia sinensis

Moringa
Moringa oleifera

Clarins Eye Quartet Mineral Palette features an anti-pollution active ingredient to defend the eye contour against free radicals

90% Of French Facial skincare users agree that lifestyle has a big impact on the skin.

Source: Mintel Consumer Data Chart Facial Skincare 2014
SUNSCREEN FOR CLOUDY WEATHER

Neutrogena is encouraging consumers to wear sun protection on cloudy days in Singapore, the brand has repackaged some of its sunscreens as cloudscreens.
**MEASUREMENT AND CUSTOMIZED PROTECTION**

*June* is a bracelet from netatmo that measures sun exposure and advises the wearer how to protect their skin.
TAKE A BREAK: HEALING & DETOXING MARKETING

Innisfree touches consumers with an emotional approach based on a ‘healing travel’ concept based on the clean and isolated natural place of JeJu, the origin of their products’ ingredients.

73%

Of Chinese agree that they can improve their skin condition by leading a healthy lifestyle.

Source: Mintel Report Facial Skincare China August 2014
CONSUMERS

Increasing awareness of skin protection
UK & US: MOISTURISERS & CLEANSERS ARE THE KEY OPPORTUNITY FOR ANTI-POLLUTION PRODUCTS

UK: Reasons for using facial skincare products, March 2014

% using to protect skin from pollution/environment

US: Reasons for using facial skincare products, March 2014

Source: Mintel Reports Facial Skincare US and UK 2014
EUROPE: DESIRED RESULTS OF USING FACIAL SKINCARE PRODUCTS

Source: Mintel Consumer Data Charts Facial Skincare 2014
ANTI-AGEING CONCERNS ON THE RISE IN CHINA

China, consumers’ skin concerns, 2013 vs 2014

Linking skincare solutions to concerns over pollution has been a major trend in recent years.

89%

Of Chinese consumers have used Facial Skincare Sunblock in the last six months to June 2014

Source: Mintel Report Facial Skincare August 2014
* Survey conducted on adults aged 20-49 years old
PRODUCT LANDSCAPE

Responding to growing demand
Europe dominates anti-pollution skincare launches, thanks to strong activity in the UK and France. China is the leading Asian market, but Japan and India are enjoying growing shares.
SKINCARE: ANTI-POLLUTION PRODUCTS AS % OF SUB-CATEGORY, 2010-14

Anti-pollution claims have become an important feature of face/neck and eye launches and are emerging in bodycare.
PRODUCT POSITIONING

**PROTECT**
- Cleansing
- UV Protection
- Shielding technology and defence systems
- Improve skin resistance and moisture barrier

**REPAIR**
- Healing & natural concept
- Caring and soothing positioning
- Enhancing beauty functions; Moisturizing, Antioxidant, Anti-aging

**LIFESTYLE**
- Urban life, anti-stress & detox concepts
- Multi-functional products to gain time
PROTECTION: WASHING AWAY POLLUTANTS

Wash Away pollution

Clarins Extra-Comfort Anti-Pollution Cleansing Cream is suitable for skin weakened by a polluted urban environment. It has anti-pollution benefits, antioxidant and moisturising benefits.

Cleansing Device

Clarisonic Skin cleanses skin 6X better than manual cleansing. Reduce the appearance of pores, fine lines & wrinkles. Cleanses so thoroughly, skin care products absorb better.
PROTECTION AGAINST THE ENVIRONMENT (SUN & POLLUTION)

UV & Pollution Shield

Etude House Dust Cut Facial Mist is designed to protect the skin from harmful environmental aggressions by forming a protective outer barrier.

DiorSnow White Reveal UV Shield BB Creme SPF 50/PA+++ protects skin all day from environmental aggressors responsible for the accelerated degradation of skin transparency.
PROTECTION: MULTI-DEFENCE

Blocks indoor and outdoor rays

Vonin Blue The Style Daily Defense Sun Aqua Gel SPF 30/PA++ is a light daily sunscreen designed for men that gives a moisturised feel.

Daily Defense Shield

Decléor DD Daily Defense Fluid Shield SPF 30 is described as a daily sun care product designed to offer double protection for skin’s beauty.
PROTECTION: SHIELDING & BLOCKING-OUT

Shield against pollution and UV rays

Shiseido SS Smart Shield SPF30/PA+++ is an active defence cream that shields against damages caused by UV rays and pollution without stressing the skin.

Block out

Helena Rubinstein Premium UV Anti UV-Ageing-Pollution 12h Moisture-Nude BB Base is said to be hydrated and protected against UV and pollution; the appearance of sun induced sagginess, wrinkles and dark spots is decelerated.
REPAIRING: STRENGTHENING THE SKIN’S RESISTANCE AND MOISTURE BARRIER

Devitalised skin against environmental aggressions

Clarins Hydraquench Cream is designed to protect dry and devitalised skin against environmental aggressions, fend off wrinkles and improve radiance with Hyaluronic Acid complex and an anti-pollution complex. Contains rhodiola, an antioxidant rich in gallic acid.

H20 Plus Marine Defense Green Tea Antioxidant Toner
Non-drying toner containing antioxidant Tea Complex and marine-derived Anti-Pollution complex to soothe the skin and give it anti-ageing protection against environmental aggressors, combating skin irritants and visibly repairing damaged skin.
REPAIRING: DETOX LANGUAGE

Skin Detoxifying Booster

Dior One Essential Intense Skin Detoxifying Booster Serum is designed to offer a triple action: detoxifying continuously, renewing for instantly rested looking and more invigorated skin; and a boosting effect to increase the effectiveness of the regular skincare routine.

Filter pollution

Bourjois Bio Détox Organic Perfecting Powder is formulated with chlorophyll to give the complexion oxygen and also to filter pollution, and linen powder to mattify skin.
REPAIRING: ANTI-POLLUTION TREATMENTS
(MOISTURISING, ANTIOXIDANT, ANTI-AGEING)

City Stress

Tromborg Anti-pollution Serum prevents skin ageing and protect sit against "city stress". The product comes with an aromatherapeutic fragrance to provide active physical and therapeutic benefits.

Anti-Pollution Detox

Elemis Pro-collagen Marine Cream Ultra-rich Anti-pollution detox, with anti-oxidants and encapsulated vitamins to attack skin blocking toxins and rejuvenate the cellular skin matrix.
Lancôme City Miracle CC Cream Complexion Beautifier Daily Defense SPF40/PA+++ was tested in some of the world’s most polluted cities, including Paris, Shanghai and New York. Contains anti-pollutant Detoxyl, adenosine and vitamin CG to reduce wrinkle depth and the appearance of age spots, and anti-dullness.

Task Essential O2 System Red Regenerative Treatment is based on oxygen molecules, vitamins and plant extracts to combat ageing, pollution, stress and tobacco on men’s skin. Contains ectoin, snow algae, concentrated hyaluronic acid and oxygen, and argan stem cells.
INGREDIENTS AND NATURAL CONCEPTS

Kale Enzymatic

Mushroom Relief

Nourish Enzymatic Exfoliating Cleanser: A multi-tasking treatment cleanser, mask and facial designed to defend skin from urban pollution, and oxygenate and exfoliate to reveal smoother, healthier skin.

Dr. Andrew Weil for Origins Mega-Mushroom Skin Relief range is designed to strengthen and soothe sensitive skin, instantly reduce redness, improve evenness and strengthen skin's barrier after four weeks, and offer a healthier and stronger skin after eight weeks.
WHAT’S NEXT
X3
World’s urban area

X2
World’s urban population

Source: United Nations environment programme
2050

70%

Of world’s population
6.4 billion
living in cities.

Urban residents are
growing by
60 million a year.

Source: United Nations environment programme
Protection against external aggressions

Claim
More specific anti-pollution terminology, specifying the source and chemical composition of the pollution and backed by certification organisations
Expansion across regions, categories, occasions, ages and gender

Products
“Protective” ranges to address protection from inside-out: topical, wearables, ingestible
Product that offers under or top protective coating
Botanical shields that work internally as well as externally

Customized Protection
Devices, digital program, mobile app to measure daily air conditions and reduce their exposure to pollution
Customisable products that respond to daily environmental conditions