



# Unlocking growth with brand purpose

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# Agenda

**1**

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Brand Purpose: Why?  
Where to focus?

**2**

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Do consumers care about  
sustainability post-covid?

**3**

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Who's connecting the  
dots to win?

**4**

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The Indie uprising

# Consumers care about brands who support causes that matter to them, being good for people and the planet

74%

Of U.S. Millennials said they are more likely to buy brands supporting social issues they care about

Good for **people**

Good for **planet**



STOP  
ASIAN  
HATE



#CHOOSE  
#WOMEN



# Planet: Post COVID, over 1/3 say sustainability is important and will pay more

## Top beauty & personal care sustainability trends

## This attribute is important to me when shopping for beauty & personal care items

## I would be willing to pay a little or a lot more for this attribute when shopping for beauty & personal care items

<b>Reusable Packaging</b>	38.7	40.4
<b>Recycled Packaging</b>	43	42.5
<b>Less Packaging</b>	42.7	39.4
<b>Environmentally Friendly</b>	45.4	46
<b>Cruelty Free</b>	39.6	41.2
<b>Not Tested on Animals</b>	43.8	44.4
<b>Organic Farming</b>	30.3	39.7
<b>Plant Based</b>	30.4	35.5

# Dove: Embedding purpose authentically throughout the brand

Good for the **people**      Good for the **planet**



## The 'Dove Real Beauty Pledge'

Dove wants to help make a positive experience of beauty accessible to all women. We believe that every woman should be able to define and enjoy beauty on her own terms: enjoying it as a source of pleasure and self-expression.



## Dove Self-Esteem Project

Mission is to ensure that young people grow up enjoying a positive relationship with the way they look



**Plastic mission:** Reducing the manufacture of more than 20,500 tonnes of virgin plastic per year. Making the iconic Beauty Bar packaging plastic-free globally. Launching new 100% recycled plastic bottles



## Dove Reforestation Project

Partnered with Conservation International to protect and restore 20,000 hectares of forest in North Sumatra, Indonesia



**Natural:** Natural ingredients (No phthalates, phasing our parabens) striving to find the most sustainably sourced options



**Cruelty Free:** Globally accredited by the animal rights organisation PETA (People for the Ethical Treatment of Animals)

# Garnier: Purpose driven manifesto and product innovation



## Green Sciences & Formulas

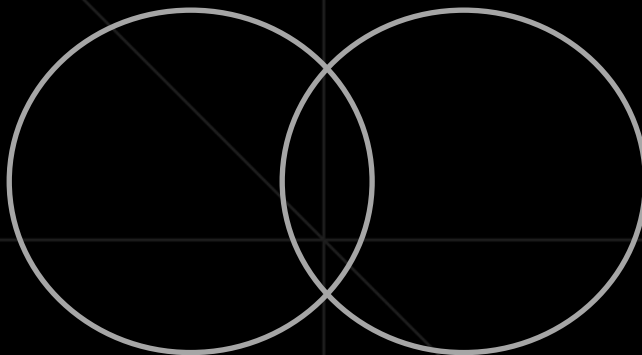
In 2019, the new shampoos and hair care formulas reached an average of 91% biodegradability\*. By 2025, they will create new high performing and respectful formulas for hair and skin, powered by Garnier's Green Sciences initiatives.



**Natural:** Launched Hair Food, range of Hair Care with 98% natural ingredients

Good for the **people**

Good for the **planet**



## More renewable energies

Since 2005, the industrial sites and distribution centres have cut water usage by 45% and reduced CO2 emissions by 72%. By 2025, 100% of the industrial sites will be carbon neutral.



## More recycled & recyclable packaging

By 2025, Garnier will aim to use Zero Virgin Plastic in packaging, saving 37,000 tonnes of plastic every year. By 2025 all packaging will also be either reusable, recyclable or compostable.



**Reduce Plastic:** Launched their first solid shampoo bar with zero plastic waste. Each last up to 2 months of use



**Cruelty Free:** All Garnier products globally are officially approved by Cruelty Free International under the Leaping Bunny Programme



# The **indie** uprise

# Tiny but mighty, Indie brands lead the recovery in beauty

## Beauty Market Segmentation by % of \$ revenue



Indie brands recovered **132%** of their sales post-COVID, vs only **99%** for the industry as a whole

**Micro**

3.5%

**Private Label**

6.9%

**Indie**

1.7%

**Niche**

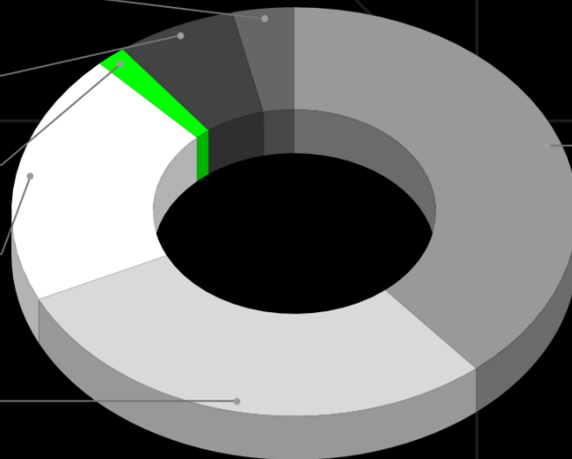
20.0%

**Beauty Groups**

29.0%

**Conglomerates**

38.9%





# Cosmetics and Nail categories have the highest presence of Indies

## Indie Top Growers

Raw Sugar	+\$55MM
LA Colors	+\$16MM
Olive & June	+\$8.7MM
The Honest Co.	+\$8.6MM
Pacifica	+\$8.2MM



# Indies set the trends and move with speed

## Trendmakers



Indie brands focus more on **organic** and **clean ingredients**, as well as **personalization** - the fastest growing trends.

## Authentic Influence



Focus turns away from celebrity spokespeople and toward **social media influencers** that build and cultivate their own DTC brands.

## Rapid Innovation



Indie brands shorten the **innovation** cycle from 18-24 months to ~20 weeks

## Values First



Lead in addressing emerging trends such as **inclusivity**, **personalization**, **innovation** and **eco-consciousness**



# Key Takeaways

## 1

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Brands need to embed purpose that's good for both the people and the planet. Authentically communicate and demonstrate this purpose across the entire brand.

## 2

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Mass brands are setting the table stakes; reducing plastic, naturals, cruelty free, sustainable, missions and manifestos. Indie brands will need to incorporate and find their own way to differentiate

## 3

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Indie brands should leverage the power of social media influencers who connect with audiences in a more authentic way