Transitioning to Transparency

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ABSTRACT

Consumers are seeking comprehensive information in every aspect of their lives to gain control in a rapidly evolving world. The world is more connected than ever. Six in ten individuals in major economies state that they are constantly looking at screens making every answer a mere fingertip or voice command away (Ipsos, 2018). By 2020, connected devices will be close to seven times more than the number of people on the planet (PWC, 2017). The Internet and the instant availability of digital information has transformed consumers into researchers, who can and will crosscheck everything, from a product's price, source, and claims before making a purchase. This evolution has taken the power to connect with consumers out of the brand's and marketer's hands.

At the same time, there is a surge in data availability. According to Ipsos, 80% of consumers globally believe that there is so much contradictory information that it is hard to know who to trust. Also, 73% state that they are more likely to trust a new product if it is from a brand they already know (2018). These contradicting statistics highlight the opportunity for brands to build consumer trust and to provide the right information, which consumers are now demanding.

The beauty industry is not exempt from this growing demand for transparency. Beauty consumers are demanding more information about their products, with 65% seeking information on ingredients and 72% expecting explanations of product benefits (FIT Transparency Perception Assessment Survey, 2018). Brands are at risk of losing consumers due to the absence of transparency; this transparency builds trust, which is the foundation of any healthy relationship. Today, Clean Beauty brands have come to be known for credible and trustworthy claims, being cruelty-free, and utilizing fewer chemical ingredients within their formulations.

The Clean Beauty movement symbolizes a desire for a shorthand to well-being and safety. However, the emergence and growth of the Clean Beauty movement is just a symptom of a growing lack of trust in the beauty industry and is likely only the tip of the iceberg.

Our research sets out to gain a better understanding of the consumer purchase funnel, identify bottlenecks, pinpoint the most salient steps in the process, and discover where trust gaps lie in the industry. The methodology employed to obtain the supporting data includes both internal and external secondary research, field studies in the European and Asian markets, interviews with beauty editors, industry executives and experts, and a proprietary quantitative consumer survey. As a result of this research, three individual gaps were identified: Knowledge, Authenticity and Relatability. Recommendations were constructed to close each of these gaps allowing beauty brands to meet the consumer's need for transparency. If brands do not answer this urgent call, they will run the risk of irrelevancy.

Keywords: Transparency, Authenticity, Knowledge, Relatability, Clean Beauty, Ingredients, Safety

"Silence is a tax on the truth, and trust is only going to be regained when the truth moves back to center stage."

-Richard Edelman, President and CEO (2018)

INTRODUCTION

In order to cope with a complex new environment that does not provide enough transparency, retailers and consumers are latching on to the hook of 'clean beauty,' while they wait for brands to clear the air. Retailers are recognizing the danger of losing customers and are beginning to demand transparency from the brands they carry. National chains in both mass and prestige channels are continuing to build on their dedicated 'natural' segments both online and in-store. Mass retailer, Target, is demanding that all beauty products, including fragrances, provide a full ingredient list by 2020. Further demonstrating their commitment, both CVS and Target have promised to remove chemical ingredients, such as parabens and phthalates from approximately 600 of their in-house products.

Authenticity is no longer a point of difference; it is the new normal. While ingredients and formulation are vital concerns, the demand for transparency extends to all aspects of the brand promise. Recently, CVS pledged to be authentic and transparent in its advertising by introducing CVS Beauty Mark, a watermark used to identify beauty-related imagery that has not been materially altered.

Today, the linear path to purchase has transformed into an ever-evolving maze. More than 70% of consumers know what they want before going into the store, and 50% of consumers consult friends or family before making a purchase (BCG, 2015). However, 60% of store purchases are now influenced by mobile research (Sephora Summit, 2018), with 35% of

consumers consulting blogs and forums (BCG, 2015). The average Millennial goes through 300 feet of social feed each day, the equivalent to the height of the Statue of Liberty (CBS News, 2018)!

Further, communities are emerging as the new authority on information. Online communities such as Reddit's SkincareAddicts and Sephora's Beauty Insider Community help consumers consult peers on their purchase decisions. Approximately 70,000 questions are asked per month on the Sephora Community platform and the ability to "chat with other shoppers" online has replaced traditional customer service platforms.
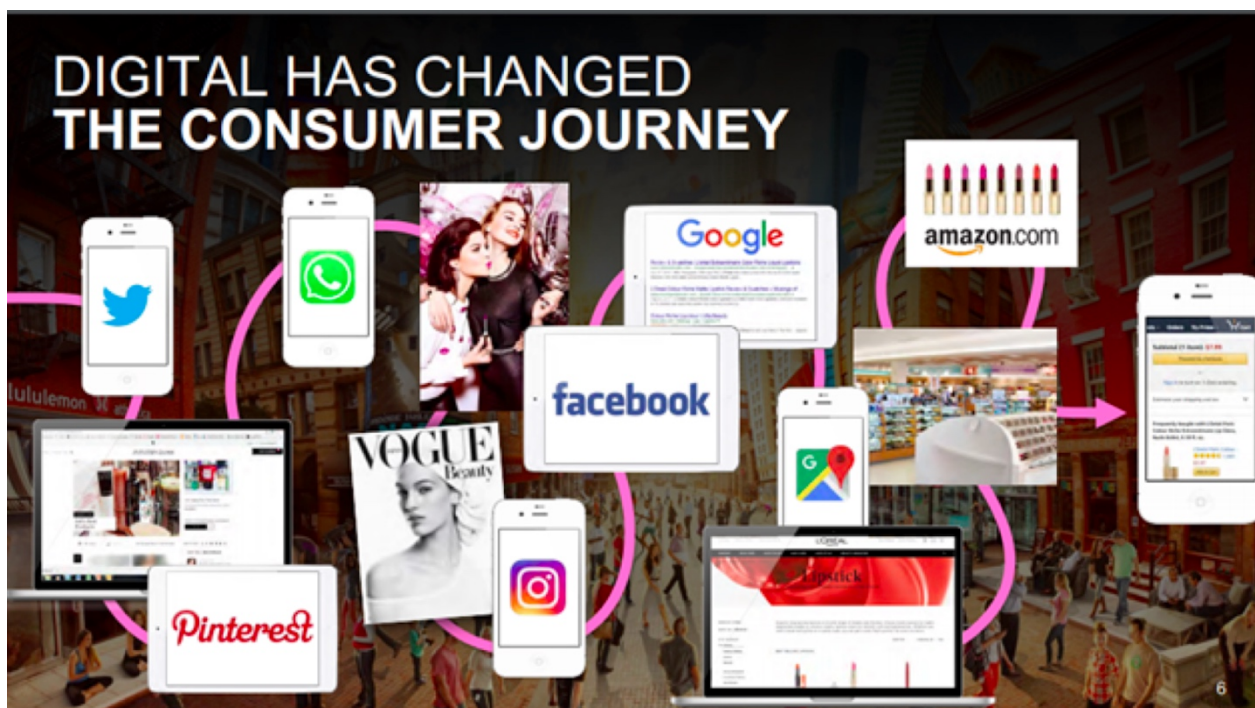

Figure 1. The Digital Consumer Journey

Consumer behavior research suggests that trust is essential to forming an intention to purchase. When trust is high, people are much more likely to take risks and engage in trade. In

traditional business contexts, trust emerges and evolves in a physical space, and between two or more people interacting in person. In an e-commerce setting, however, a prospective customer usually does not have any such contact, and so they must rely entirely on the digital experience (Neufeld, 2018).

So, how exactly does consumer trust emerge online? Certifications and seals have been one of the ways brands try to establish trust with the consumer. However, in the absence of clear definitions of what is clean, green, natural, synthetic or sustainable, beauty brands across all categories are struggling to communicate their authentic identities and to educate consumers on who they are. Before a significant scandal or new regulation forces change, how will brands adjust business practices to meet this consumer demand for transparency? "Traditional brands can no longer sit on their hands and allow well-scripted corporate statements to shape who they are," says Tripp Donnelly, CEO of digital reputation management firm REQ. "They have to be dynamic and understand they're talking to multiple generations of people" (Tynan, 2018). Now more than ever, brands need to own the conversation and educate their consumers. The future of the beauty industry will depend on how the industry comes together to address these issues.

MACRO TRENDS

1. Climate Change or is the Climate Changing?

Four million people in Cape Town – one of Africa's most affluent metropolises – may soon have to stand in line surrounded by armed guards to collect rations of the region's most precious commodity: drinking water. Population growth and a record drought, perhaps exacerbated by climate change, is sparking one of the world's most dramatic urban water crises,

as South African leaders warn that residents are increasingly likely to face "Day Zero" (Welch, 2018).

Climate change has had a catalyzing impact on the world's economy and the population's well-being. It has threatened finite resources and vulnerable coastlines, and strengthened significant storm systems. According to the Climate Reality Project, the climate crisis is real and it is impacting people around the world today. Examples include rising temperatures and changing climate patterns ("Wait, Why Is Climate Change a Bad Thing?" 2018). One of the repercussions of climate change is a universal sense of uncertainty, apprehension, and scarcity about the future. It is one of the top five issues that worry consumers the most in the US, Europe and China (SocioVision, 2017). This concern is only expected to increase with time, especially as 75% of the world's large cities are located on coasts, and rising sea levels threaten megacities from New York and Tokyo to Cairo and Mumbai (Ipsos, 2018).

2. Eroding Sense of Safety

Political and financial uncertainty coupled with terrorism and displacement (e.g. Syria) is eroding people's sense of safety. Individuals are seeking safety before anything and from everything. There is a wave of suspicion where people are questioning the world they live in, or the world they are going to leave behind for their children. In early 2017, Jean Paul Agon, CEO of L'Oreal stated that the year would be chaotic. "Last year, I said the world was becoming 'VUCA' – volatile, uncertain, complex, ambiguous. It's getting more and more VUCA." (Bloomberg, 2017). The world has become predictably unpredictable.

TWO EMERGING NEED STATES

People are conditioned to doubt and fear, which mostly arises from a feeling of loss of control over a situation. Now, more than ever before, consumers are seeking safety, empowerment and connection as a result of two societal states of lack: lack of trust and a lack of purpose.

1. Lack of Purpose

The consumer's mindset is shifting towards the realization that their lives lack 'giving back.' The constant feeling that urban living is focused merely on jobs and securing the future is leaving consumers feeling extremely unfulfilled. They are seeking more meaning and a broader purpose that is manifesting in movements such as the green wave which can be defined as an increased focus on water conservation and protection of natural resources.

Social media has been responsible in driving change in consumer; screens have taken precedence over human connections. The statistics, as outlined by social psychologist, Jean Twenge for *The Atlantic,* are alarming. Instead of going out with friends and looking for every chance to escape from their parents, the post-Millennial generation is staying in and Snapchatting – and it is making them less happy. Today's twelfth graders spend less time out of the house without their parents than eighth graders did in 2009. Further, only 56% of high school seniors dated in 2015, compared to 85% of Gen Xers and Baby Boomers. The number of teens who spend daily time with friends dropped by 40% between 2000 and 2015. (Morris, 2017)

Even though the world is more connected than ever before, consumers are lacking real meaningful connections and there is a perpetual sense of increasing fragmentation. With growing differences and complexity, the human condition is one of anxiety and striving for more (Ipsos, 2018). UK's Mental Health Foundation revealed that 48% of people believe they are lonelier than

before. Millennials top the chart of being the loneliest generation in history. According to AXA's survey, unlimited internet use plus social media build a false sense of reassurance and create the illusion of connectedness (WGSN, 2018). Eve Critchley, head of digital for Mind, argues that "the sudden access we have to virtually every movement of everyone through social media is creating a pervasive sense of FOMO, that in turn perpetuates loneliness." A 2017 study published by the American Journal of Preventive Medicine found that people that spent more than two hours a day on social media were twice as likely to feel socially isolated. A growing number of cafés and bars are banning smartphone use to encourage socializing and human interaction (WGSN, 2018). There is a clear feeling of isolation and loneliness amongst the younger generation compared to their parents or grandparents.

2. Lack of Trust

Today, there is a rise of chemophobia, an irrational fear of compounds that are perceived as 'synthetic' and the potential damage caused by them (Kennedy, 2016). *How are consumers responding to this?* There is a rise of organics and the growth of 'free from' communication in all categories. The rising concern about the impact of synthetic ingredients and chemicals on health and appearance is emerging from people's struggle to cope with the pressures of evolving life. The negative aspects of environmental and social damage are occurring with increased frequency. Consumers are focusing on things they can control compared to those that they cannot. However, beauty is seemingly the one element that they can take charge of and have the power to make informed decisions – decisions that need to be informed by 100% transparency.

IDENTIFYING THE GAPS

Consumers are searching for ways to feel an overall sense of trust and security in a world where uncertainties and untruths are the norms. This feeling is impacting consumers in all aspects of life, from climate to food. In the beauty industry, the development of the Clean Beauty movement is an early symptom of this rising mistrust that consumers are experiencing from brands, retailers, and the overall industry. One solution to this growing problem is transparency, the availability of product or brand information that enables a consumer to make better and more informed purchase decisions.

For decades, various industries have experienced a dangerous loss of consumer trust that has damaged both reputation and profit. Many of these industries rebounded while some failed to respond appropriately to the consumer during the aftermath. When delving into these contrasting industries, common signaling cues arose as predictive indicators of impending turmoil. These indicators are categorized into two groups: "red flags" are the equivalent to early warning signs while "danger zones" signify occurrences that have resulted in major damage to a company or industry. Examples of these key indicators are shown in the table below:

Red Flags	Measure/KPI	Industry Example(s)
Lawsuits	# of lawsuits reported	• Over 400 lawsuits filed against Reckitt-Benckiser after deadly humidifier sterilizing fluid was sold to South Korean consumers.
Consumer Complaints		
Individual	# of complaints reported to organizations (i.e. FDA)	• Increased number of complaints regarding slow operating systems in iPhones
Collective Consumer/Group Pressure	# of protests, anti-brand social compaigns	• "#deleteUber" due to increasing consumer awareness/unhappiness with Uber's surge pricing policy
Number of Reformulations	Nielson Data/ IRI	• Reformulations of paint to address lead concerns
		• Reformulation of Honest Cleaning Products to address false "all natural" claim
Danger Zones	**Measure/KPI**	**Industry Example(s)**
Recalls: Mandatory	# of Recalls	• Recalls of Takata vehicles due to faulty airbag deployment
		• Recalls of Mattel's children's toys due to safety issues (i.e. lead contamination)
Collective Consumer/Group Pressure/Advocacy Groups/ NGO Action	#s of groups challenging/change	• "Truth": national campaign geared towards educating people about the harmful effects of tobacco
		• "We Are Still In": campaign comprised of global industry leaders still participating in the Paris Climate Agreement

Figure 2. Predictive Indicators

These indicators are applicable to the beauty industry, as well. For example, data on side effects from cosmetic products reported to the US Food and Drug Administration show an increase in product complaints; side effect reports climbed 78% to 706 in 2015, followed by a 300% surge to 1,591 adverse events in 2016 (Kwa, 2017). While the beauty industry has operated with significantly low incident rates, it is important to address these "red flags" in order to prevent any damaging incidents within the industry in the future.

After researching several case studies depicting the reaction of companies to severe loss of consumer trust across multiple industries, three consumer trust gaps emerged – **Knowledge, Authenticity** and **Relatability**. Our research also identifies solutions for closing these consumer gaps and preventing the beauty industry from following the path of destructive incidents that too many industries have experienced.

Knowledge Gap

Knowledge is power and power creates control. The desire for knowledge stems from two issues – an overall lack of trust in institutions and societies, and cases of mistrust that have forced consumers to take education back into their own hands. Today's beauty consumers are investigative and want to learn more about the functionality and safety of ingredients being used in their favorite products. In a world where information can be overwhelming and conflicting, it is the responsibility of brands to serve as a trusted counterpart to consumers by delivering 100% transparency. However, this notion of transparency no longer consists only of stating "what's in the product" through ingredient labels, but rather extends to finding additional ways to thoroughly educate consumers on cosmetic ingredients.

Authenticity Gap

Consumers are holding existing and new beauty brands to a higher standard of authenticity. They are looking beyond price, quality, and convenience while demanding full transparency about their beauty products. Honesty about the product's origins and sourcing of ingredients is essential to these shoppers. According to the FIT Transparency Perception Assessment Survey, over 60% of consumers wanted brands to identify sources for ingredients used in their products and more than 50% wanted to know if brands did well for the environment (FIT Transparency Perception Assessment Survey, 2018). Today, conscious shoppers want to know everything about their favorite products. They want to understand how the products were made and validate for themselves how the brand's sourcing and manufacturing practices impact the environment.

Relatability Gap

The existing and widening divide between beauty brands and consumers is fueled by the inability of brands to consistently be relatable to the consumer. The exploding influencer community has attempted to shrink this relatability gap; however, research has shown that consumers are increasingly honoring peer-to-peer ratings and reviews over influencers. According to the FIT Transparency Perception Assessment Survey, 68% of consumers seek family and friend recommendations and 67% turn to online reviews from peers with needs similar to their own when deciding to make a purchase (FIT Transparency Perception Assessment Survey, 2018). There is a feeling of comfort and trust when people can see themselves reflected in others; relatability fosters reliability and credibility, and it is clear that people trust individuals with whom they share a connection.
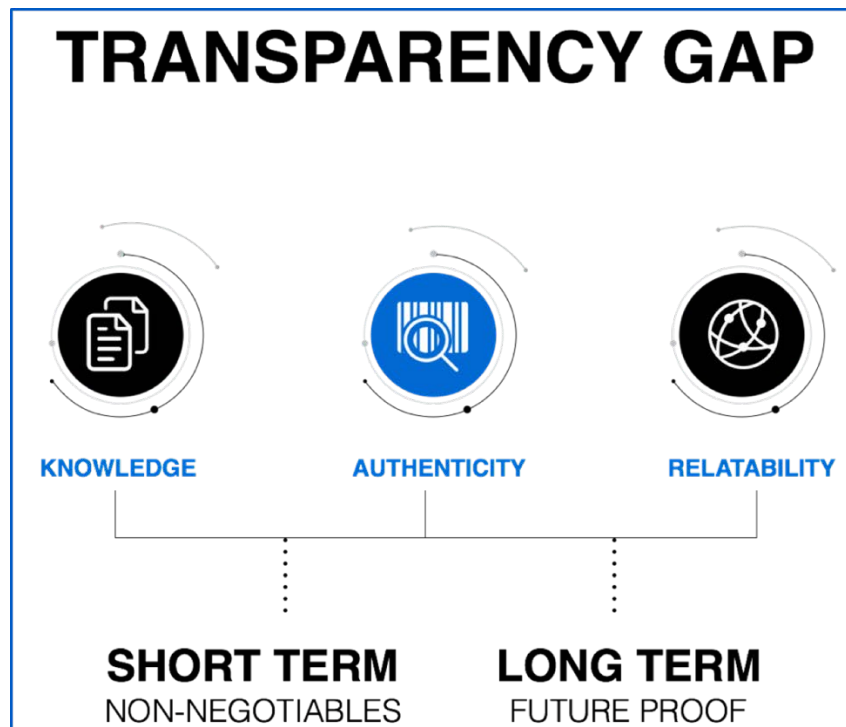

TRANSPARENCY GAP

KNOWLEDGE   AUTHENTICITY   RELATABILITY

SHORT TERM   LONG TERM
NON-NEGOTIABLES   FUTURE PROOF

Figure 3. The Transparency Gap

BRIDGING THE GAPS

Clean Beauty has sparked a revolution that is only in its infancy. However, ingredients are not the main problem. Instead, lack of information has triggered a lack of trust that is spiraling out of control. After analyzing the consumer's need for transparency and unearthing the root of the problem, our objective is to look ahead and recommend solutions that will bridge the three identified transparency gaps − knowledge, authenticity and relatability. The term Clean Beauty remains undefined and open to various interpretations, while the real issue of trust is overarching and all-encompassing. **There is a need for clarity and the ability to see through and go beyond the surface as beauty is not just skin deep − it's about Clear Beauty, providing 100% clarity to the consumer about all aspects of the brand promise.** Following the identification of the three major gaps in transparency, our research leads to a new model that addresses each existing issue, paving the way for Clear Beauty. Depicted visually below is the Clear Beauty Model:
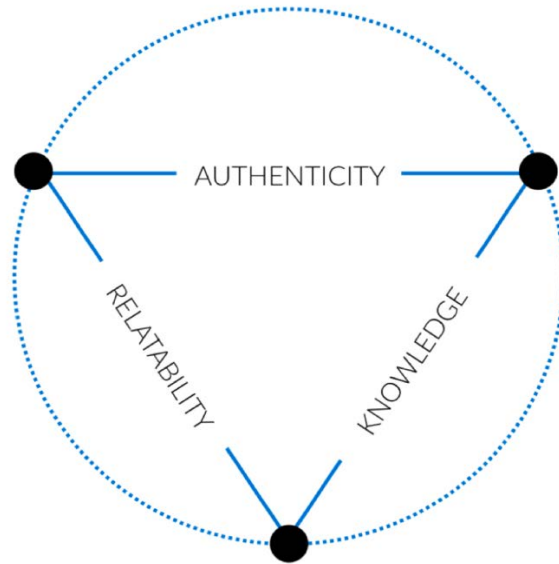
Figure 4. The Clear Beauty Model

THE KNOWLEDGE GAP

The overwhelming amount of access combined with an increasing lack of clear information has become a bottleneck in the consumer's path to purchase. According to the FIT Transparency Perception Assessment Survey, 60% of respondents use more than four sources of information when researching beauty products (FIT Transparency Perception Assessment Survey, 2018). Today's savvy consumer is demanding answers to critical questions – *what is in my product and what does it do?* Recent cases of misinformation have created severe feelings of distrust throughout the beauty industry. As a result, consumers want more control and are taking education into their own hands.

Today, brands are at risk, as consumers have information readily available at their fingertips. Brands need to take back ownership of the conversation, as certain information sources are unreliable and their credibility is driven by popularity, not validity. In addition,

consumers expect to make a fully informed purchase decision, though at times the information they desire is inaccessible or difficult to understand. They want to be well-informed and expect brands and companies to satisfy their mandate for transparency.

The following industry case studies depict how information can influence consumer and brand behavior. Several parallels exist in the beauty industry; specifically, many of the ingredients used in cosmetics can be claimed as "harmful" with no "real" scientific backing (i.e. independent studies). It is the responsibility of beauty brands to act as trustworthy sources of information to fulfill the consumer demand for validity and accuracy.

I.   **MMR Vaccine and False Connection to Autism**

In 1998, a research report conducted by Dr. Andrew Wakefield was published in the British medical journal, *The Lancet*. This report falsely connected the Measles, Mumps, and Rubella (MMR) vaccination to autism spectrum disorder (ASD). Wakefield claimed that 8 out of 12 children who participated in the study lost cognitive and developmental skills as a result of the MMR vaccination at a young age. The publication caused many parents not to vaccinate their children in fear of them developing ASD. As a result, the number of cases of measles in the UK rose from 3,670 in 2007 to 5,088 in 2008 (Office for National Statistics: Public Health England, 2017).

After a thorough investigation by both the British General Medical Council and investigative reporter, Brian Deer, the dishonesty of Wakefield's study came to light (Barrett, 2010). Numerous studies disproved the doctor's theory and uncovered blatant falsification of data. The children in the research study had not been randomly selected and partial funding of the research came from lawyers of families involved in anti-vaccination movements. In addition,

the study itself utilized methodology that was considered invasive and unethical (Eggertson, 2010).

It took 12 years for The Lancet to finally retract the report. Paul Offit, current chief of infectious diseases at the Children's Hospital of Philadelphia, sums up the severity of this issue simply: "This retraction by The Lancet came far too late. It's very easy to scare people; it's very hard to unscare them" (Wang, 2010). Widespread campaigns enforcing the safety of vaccinations were needed to serve as "damage control" to help parents regain trust in vaccinating their children. Finally, in 2010, the UK saw a decrease in the reported number of MMR cases to 2,235 as a result of the study's invalidation and de-publication (Office for National Statistics: Public Health England, 2017).

II.   **Microbeads and the Environment**

Microbeads are tiny bits of plastic found in many facial scrubs and polishes sold within the personal care industry. These beads can pick up multiple toxins when washed down the drain. Research has proven that fish and other marine animals often eat these microbeads, introducing potentially toxic substances into our food chain. In fact, chair of the British Environmental Audit Committee, Mary Creagh has stated that nearly 50 particles of plastic can be found in a plate of six oysters (Environmental Audit Committee, 2016).

Several companies in the beauty industry such as The Estée Lauder Companies, Proctor & Gamble and L'Oreal were proactive as a result of these learnings and chose to voluntarily reformulate microbeads out of their products. Though the choice to reformulate was originally voluntarily, the Microbead-Free Waters Act of 2015 now mandates that all personal care products be microbead free (Pallone, 2015). In addition, 193 countries have signed a resolution

program created by the United Nations to further drive education regarding the negative impact plastic pollution has on human health and the environment (UN News, 2015).

III.   EOS & Miseducation of Ingredients

In January 2016, Rachel Cronin, a consumer of EOS lip balm, claimed that the company's egg-shaped chapstick caused her lips to chap, dry, and flake just a few hours after using. Cronin stated that her condition began to worsen with rashes and blisters developing on and around her mouth for nearly ten days (Begley, 2016). EOS agreed to resolve the class action lawsuit after receiving negative press from social media and the filing of an additional nine lawsuits (Dua, 2016). However, the brand did not reformulate its products, as the outbreak was a result of lack of information regarding the product's ingredients and not its safety. Ingredients such as Vitamin E (ascorbyl palmitate) can cause allergic reactions, despite being natural. EOS therefore agreed moving forward to include details about ingredients and instruction for correct use on their packaging to fully educate their consumer (Janssen, 2016).

IV.   Johnson & Johnson: Talc Debacle

Johnson & Johnson (J&J), a prestigious company known for its famous baby care products and Imerys, an industry supplier of talc, was ordered to pay investment banker, Stephen Lanzo III and his wife, Kendra Lanzo, over $40 million in punitive damages, as Stephen claimed the continual use of J&J's baby powder and Shower to Shower products caused him to develop cancer. Both J&J and Imerys were found guilty of misleading consumers by not disclosing the talc used within its baby powder formulation contained trace amounts of asbestos. Asbestos is a

commonly known carcinogen that causes mesothelioma, a cancer found within the lungs, heart, and stomach (Feeley and Fisk, 2018).

A 1972 research report conducted by J&J scientists has recently come to light in which scientists outlined the potential for talc to contain asbestos during the mining process. However, this information was not publicized to consumers and the content of the report still remains heavily debated. J&J plans to immediately appeal the Lanzo decision, as the company stands by its rigorous testing procedures to ensure the safety of its products to consumers (Feeley and Fisk, 2018). Further, this decision also comes in the wake of nearly 6,600 current lawsuits against J&J from women claiming the company's products are tied to their diagnosis of ovarian cancer (Bellon, 2018). The connection between talc and ovarian cancer still remains inconclusive.

Possible Short Term Solutions:

1. ALL-ENCOMPASSING BRAND DOTCOMS

The consumer of tomorrow is a digital native. This incoming consumer requires brands to act with a high degree of urgency, as there are less and less physical touchpoints in the brick and mortar environment for consumer education. In order to connect with these consumers, information must be available through brand dotcoms and social handles.

Brand dotcoms need to adapt with changing times by making information easily accessible and accurate. The challenge is not only to provide a list of ingredients, but to provide explanations on functionality, benefits, and side effects of each particular ingredient utilized within a formula. This information must be free from all marketing jargons and claims, and in fact be simple, clear, and useful.

Happy Family Organics is a clear example of a brand whose consumer education is simple, relevant and easy to access. Parents can visit the brand's website to view entire ingredient listings and recipes for their child's baby food. In addition, non-natural ingredients are translated into a non-technical definition; within a particular puree ingredient listing, "Vitamin C" is listed directly next to "ascorbic acid" (Nurture, Inc, 2018).

Further, brands need to leverage social platforms to educate consumers on product ingredients, formulation inclusions and exclusions (i.e. the use of a safe synthetic versus the use of a natural ingredient), and product efficacy/claims testing. This is the avenue where brands can interact with consumers the most in terms of time spent and frequency. Brands can use their social media platforms to better educate their consumers by bringing them *"behind the scenes"* via Insta-stories and by initiating a two-way conversation via live videos. In addition, there is always the opportunity to leverage tools such as Google Hangout and Facebook Live for consumer-focused education panels.

2. SCIENCE, TECHNOLOGY, EDUCATION, AND MATH (S.T.E.M.) EDUCATION PROGRAMS

Early education has been a proven success to serve as a call to action or cause behavioral change. One example of this can be seen when examining the waste education program implemented in schools across Sweden. As a result of this recycling program, 99% of Sweden's waste is recycled or converted to energy (Fredén, 2017). In addition, the amount of energy generated from this waste alone provides heating to one million homes and electricity to 250,000 people across the country (Kim & Mauborgne, 2017). Beauty companies also share the ability to take advantage of the benefits of education through partnerships with youth education

organizations such as Cooking Cosmetics, Inc, a company that teaches the benefits of feeding the skin the same healthy ingredients used to nurture and nourish the body (Cooking Cosmetics, 2013). Leaders within both organizations can collaborate to develop appropriate curriculum that educates children and young adults about the nature and functionalities of cosmetic ingredients while simultaneously exposing them to science and mathematics.

3.   MODERN DAY BEAUTY ADVISORS

The time has come to give consumers more visibility to the creation of their beauty products. Today, brands have the ability to introduce consumers to real-time employees such as Research & Development chemists and product developers. For example, Drunk Elephant's own Director of R&D, Nathan Rivas, is often seen conversing with consumers regarding formulation ingredients via Instagram comments. A brand could choose to have a chemist create and run a blog solely dedicated to interacting with consumers to answer burning questions about ingredients or product recommendations. This experience also adds a human touch back into the consumer journey, through the replacement of automated customer service representatives with real employees. All brands, regardless of financial status, can take advantage of this tactic to better connect with consumers by providing trusted, credible sources of information directly from their own platforms.

4.   SERVSAFE-LIKE CERTIFICATION

Employees in the food industry today are able to gain training and certification on safe food handling through an online program named "ServSafe." In collaboration with the National Restaurant Association Education Foundation, ServSafe has created over 960,000 training

facilities and employed 12.8 million Americans. Educational courses cover a range of topics and are segmented into four categories: Food Manager, Food Handler, Alcohol Service and Allergens. Many prestigious hotels, restaurants and bars require their staff to be ServSafe certified, as it is a laudable training standard within the industry (National Restaurant Association Educational Foundation, 2018).

The beauty industry needs to adopt the ServSafe Certification methodology and create its own test for store and customer service personnel that interface directly with beauty shoppers. This new certification will help educate and empower beauty personnel with ingredient knowledge far deeper than what beauty companies typically provide on their own. Employees that complete the test would be able to use the beauty certification as a display of confidence to show shoppers their extra level of commitment to serving their beauty needs.

Future Prediction:

According to the FIT Transparency Perception Assessment Survey, the avid beauty consumer identified that honesty reigns supreme when discussing transparency and trust. Consumers reiterated the importance of brands being clear on their stance and position on the safe synthetics/naturals spectrum in addition to simply being natural or cruelty-free (FIT Transparency Perception Assessment Survey, 2018). Shoppers are turning to brands with certifications because these brands are providing ingredient transparency, which is the next most valued attribute after honesty. Consumers see these brands as having nothing to hide. Clearly communicated positioning and full ingredient transparency are two ways for brands to successfully close this transparency gap.

1. THE CLEAR BEAUTY APP

Korea is now leading the transparent beauty movement in Asia, with emerging brands that offer full ingredient clarity (e.g. ISOI and Belif). These brands have adopted simple labelling to help shoppers navigate products easily. For Korean beauty shoppers and retailers alike, watchdog apps are becoming an important and trusted source of information. Armed with five million users and 87,000 analyzed products in its database, beauty app, Hwahae, utilizes its strong credentials to establish its own awards and an e-commerce function. "We live in an era where the brand value no longer guarantees product quality. Consumers nowadays know that a lot of companies with low brand recognition work hard on developing quality - this opened a new chance for honest mid-sized and small companies," explains Hwahae founder, Lee Woong (Boo-Hyeok, 2016).

AmorePacific has used Hwahae's technology to inform new product development techniques. Recently, the company started creating more fragrance-free products based on consumer ratings and reviews.

Consumers are getting more and more involved in their beauty purchases and are looking into on-pack information. Six out of ten consumers read beauty labels, and this number increases to seven and eight out of ten for Millennials and Gen-Z consumers, respectively (Sephora Summit, 2018). According to the 2017 Label Insight Ingredient Confusion Study, 31% of consumers are hesitating to buy beauty products if they find the ingredient list to be confusing (SmartLabel, 2017). Now is the time to provide an innovative solution that will solve the US consumer demand for knowledge. The solution to future proof the beauty industry is THE CLEAR BEAUTY APP.

This app is one-part ingredient translator, one-part review aggregator and one-part comparison shopper, in real time. Consumers are already thumbing through vast amounts of content daily, spending 1.5 hours researching a product, and still find themselves unsatisfied with their purchases (Lomas, 2018). This information must be synchronized in one easy to use application that clears the path to purchase. This app will leverage Augmented Reality (AR) technology, which is gaining traction across industries due to its positive impact on the consumer purchase journey. The app will be powered by Google, where technology and know-how for THE CLEAR BEAUTY APP already exist in the form of Google's Arts and Culture App and Google Translate. Google's Arts and Culture App is able to optimize smartphone enablers to identify all key information linked to any artwork with details such as dates and museum location. Google Translate helps eliminate language barriers to gain and understand any information available in a foreign language. Combining the best of both resources, THE CLEAR BEAUTY APP is an evolution of these two powerful technologies, which are both operated by Google.

The root of these technologies is in leveraging Google search results by making use of the smartphone's camera or Google Image searches. Google Lens takes cues from the camera and uses Artificial Intelligence technology paired with deep machine learning and identifies an object. The technology understands what it has identified and provides results based on the image it captures. For example, Google Lens can identify a monument and provide directional details and estimated time of arrival when traveling. Additionally, Google Lens can also capture images of other objects, such as flowers and provide details of their origin (Financial Express, 2018).

The CLEAR BEAUTY APP will reinvent the beauty industry by enabling consumers to make an informed decision about their beauty purchase, independent of subjectivity and brand influence. The CLEAR BEAUTY APP will be devised in partnership with Google, leveraging the technology behind Google Lens, and will close the Knowledge Gap that currently exists between beauty brands and shoppers by providing the right information in a single source at the touch of a button. Consumers will be able to find exact information on ingredients and compare other products with similar claims. More importantly, the CLEAR BEAUTY APP will also educate consumers about each ingredient's functionality and safety.

The new CLEAR BEAUTY APP will be created through a partnership between the FIT Master's Program and Google. Such a partnership, between an educational platform and a technology company, will be perceived to be credible and neutral by beauty consumers. Furthermore, this platform is a strategic fit with Google's mission to organize the world's information and make it universally accessible and useful. Operating the CLEAR BEAUTY APP as a not-for-profit business may require corporate and technology sponsors while alternatively, another option is to operate as a profit-share model and offer the opportunity to mine and monetize the available consumer data similar to other Google offerings.

THE AUTHENTICITY GAP

Complete transparency is the new norm for evolving beauty shoppers. They believe actions speak louder than words and demand truth at every step of the product journey, from source to skin. Consumers want to authenticate what is in their products, where they come from and how they are made. In this age of skepticism, consumers gravitate towards authentic brands

that they can relate to and trust. The absence of traceability of beauty products has led to an Authenticity Gap.

A five-year study by Edelman found that when price and quality were equal, the number one thing consumers cared about was purpose (Edelman, 2012). Consumers want to support brands that are environmentally responsible. They are looking for brands that they can believe in, that they can recommend to others, and that they can support with their dollars.

Today, beauty shoppers are seeking out beauty products that deliver results and also align with their own values. According to the FIT Transparency Perception Assessment Survey, consumers identified knowing the origin and source of ingredients was important when purchasing a beauty product. A majority of the respondents also wanted beauty brands to protect the environment and make a positive difference to the climate (FIT Transparency Perception Assessment Survey, 2018). *How will the beauty industry respond to this call for authenticity?* Lessons from the food industry may provide the solution.

Transparency and Traceability in Food

Global food trend predictor, The Hartman Group explains that food buyers want to know what is inside a product, how it was made, and who made it before buying. Consumers increasingly view sustainability and corporate responsibility – from organic ingredients to animal welfare to company treatment of employees and energy conservation – as aspects of quality, not just a feel-good factor (Hartman, 2018).

Food Certifications

In the present world of processed foods and industrial farming practices, ingredients and preparation procedures are often uncertain. At the same time, consumers are making smart

choices for their own health and the environment. To help clear up the confusion, many products are now certified by respected organizations to put consumers at ease and provide fast, easy identification of the products they are looking for. For organic foods, there is a single logo for such food products in the US and EU (Pitman, 2017). Organic, Certified Naturally Grown, Non-GMO Project Verified and Fair Trade are the most common food certifications used to help guide grocery shoppers.

Figure 5. Top US Certified Food Labels

Beauty shoppers perceive food-based ingredients to be healthier, free of harmful toxins and more wholesome. According to the FIT Transparency Perception Assessment Survey, over 90% of consumers believed that natural or naturally-derived beauty ingredients were better for them (FIT Transparency Perception Assessment Survey, 2018). However, there are no government or industry standards for claims about the source, safety and effectiveness of personal care products and their ingredients.

Further, there is an absence of a single logo for natural & organic personal care products (Pitman, 2017). The industry is seeing a proliferation in natural & organic logos for natural and organic personal care products. When the International Sustainable Cosmetics Summit began

nine years ago, there were five major certifications for natural & organic personal care products in Europe and about eight worldwide. Today, there are over 20 standards in Europe and over 30 worldwide (Pitman, 2017).

According to the Environmental Working Group, a lobbying organization known for its mission to educate consumers regarding ingredients and environmental health in both the food and cosmetics industries, "lax federal regulations mean that claims like natural, nontoxic, plant-based and free of have no legal basis in the personal care industry" (Burns, 2018). There are so many different claims on packages; consumers are often left confused, or even misled, about what is really in their products.

Food Packaging

Food trends, especially green ones, are a useful indicator of consumer desire for authenticity. Conscious shoppers are eager to make informed purchasing decisions, buying from responsible brands that sell quality products with real value. Packaging sustainability and food waste are increasing concerns for grocery shoppers around the country.

Food containers and packaging are considered environmental pollutants. According to the Environmental Protection Agency (EPA), containers and packaging alone contribute over 23% of the material reaching landfills in the US, and some of these discarded materials are food-related containers and packaging (EPA, 2014). While packaging protects the food between processing and usage by the consumer, it must be removed in an environmentally responsible manner after consumption.

Packaging technology, therefore, must balance food protection with other issues, including energy and material costs, strict regulations on pollutants and waste disposal, and heightened social and environmental consciousness.

A global online study by Nielsen found that respondents aged 15-20, also known as Gen Z, were willing to pay more for products and services that came from companies committed to positive social and environmental impact (Nielsen, 2015). This eco-conscious mindset has implications on how consumers purchase beauty products as well. According to the FIT Transparency Perception Assessment Survey, 84% of 18-24 year olds found recyclable packaging to be a significant attribute of beauty products that they purchased (FIT Transparency Perception Assessment Survey, 2018).

Food Safety

The following industry case studies depict the importance of traceability and authenticity within the food industry. Unfortunately, a lack of these elements caused significant health issues for consumers and in some instances led to death. The beauty industry can learn from these examples by employing traceability initiatives, such as the utilization of blockchain by China e-commerce giant, Alibaba, to ensure consumer safety and product authenticity.

I.   **Chinese Milk Scandal**

In 2008, Chinese milk and infant formula were found to be contaminated with melamine, a common chemical compound used to create plastic tableware (Lu, Tao, & Woo, 2009). The chemical was secretly infused into baby formula to give the appearance of higher protein content in order to pass a standard nutrition test used in the Chinese food industry (Huang, 2014). During

this time, 300,000 victims fell ill, of which 54,000 were hospitalized. Unfortunately, six infant cases turned fatal due to kidney stones and damage (Branigan, 2008).

Additional examples of lack of food safety, such as exploding watermelons and "glowing" pork, were also discovered during this time (Demick, 2011). Chinese trust in domestic brands, was lost, and still today, foreign brands continue to dominate the market while driving economic growth. The loss of trust and increasing exposure of lack of food safety further highlighted the need for revision of food safety standards within China and has created strong emphasis on reform from both consumers and government alike.

II.   **Brazilian Meat Scandal**

In June 2017, the US suspended the import of Brazilian fresh beef, after learning Brazilian federal food inspectors were allowing the sale of expired and contaminated beef in return for monetary bribes. Other countries such as China, South Korea, and Chile, soon followed suit as the two-year federal investigation revealed a corruption scheme between political parties, the Ministry of Agriculture, and Brazilian beef producers. As a result of the investigation, Brazil's meat export sales dropped to $74,000 from a daily average of $63 million (Phillips, 2017) and Brazilian meat companies combined may have seen a loss totaling $1.5 billion, constituting nearly 10% of the global meat market (Freitas Jr. et al, 2017).

III.   **Romaine Lettuce and E. coli Outbreak**

Romaine lettuce grown in the Yuma region of Arizona was linked to a deadly *E. coli* virus during the month of April 2018. At least 172 cases have been reported to the Centers for Disease Control (Centers for Disease Control and Prevention, 2018) of which 75 have been hospitalized.

Twenty of those hospitalized have exhibited hemolytic-uremic syndrome, one type of kidney failure. As of late, one case has been fatal (Brueck, 2018).

Both the FDA and CDC previously issued a nationwide recall of romaine lettuce, in addition to advising consumers to avoid purchasing/consuming romaine at the time (Centers for Disease Control and Prevention, 2018). A new statement from the CDC, though, references that the shelf life of romaine lettuce is typically three weeks, therefore eliminating any chance of contaminated lettuce being for purchase. In addition, the majority of production of romaine lettuce has now shifted to central California and therefore should alleviate consumers' concerns (Brueck, 2018).

IV.   **Alibaba & Blockchain**

Alibaba, China's largest online commerce company, recently introduced the "Food Trust Framework" to allow Chinese consumers to trace food purchases through the "farm-to-table" journey (Hsu, 2018). The system utilizes blockchain technology, a technology where data is shared simultaneously by millions of computers instead of one centralized location, ensuring that all information is verifiable and accessible to everyone. Don and Alex Tapscott, authors of Blockchain Revolution state: "The blockchain is an incorruptible digital ledger of economic transactions that can be programmed to record not just financial transactions but virtually everything of value" (Rosic, 2016). Specifically, this new system is an attempt to give consumers full transparency and elevate consumer confidence in Chinese food safety through utilizing QR codes for product tagging and technologies that will provide an authentic and verified public report of the supply of goods and products (Hsu, 2018).

Retailers Championing Sustainability

Brands have been slow to respond to the consumer demand for transparency around where their favorite products come from and how they are made. In the meantime, retailers are taking steps to ensure they are only selling the highest quality, safest products to their consumers. Target, CVS and Sephora have all launched ingredient safety-related initiatives in the last year. Target's strategic commitment to the environment and, in turn, its green conscious consumers, stands out amongst its retail peers.

I. **Target**

Target was one of the first retailers to evaluate sustainability practices of products that it sold in its stores. In 2013, it created a corporate Sustainable Product Index (SPI) to help assess products by factors such as environmental sustainability, sourcing practices, and "good for you" ingredients. In 2017, the company introduced a new chemical strategy that will drive full transparency and address all aspects of the company's value chain (Target, 2017). The retailer wants to help guests make informed choices. The new policy simplifies finding better-for-you product options for consumers.

According to Jennifer Silberman, Target's Chief Sustainability Officer, its chemical strategy will be one of the most comprehensive in the US retail industry. She believes it is ambitious and hopes its robust approach will accelerate similar efforts across the industry (Target, 2017). Ultimately, Target wants to bring all stakeholders together to innovate and champion a consistent, industry-wide approach to greener chemistry.

So, how does this new policy revolutionize beauty shopping? Target executives explain that today, when looking for a healthier alternative, the customer needs to shop in the natural

aisle. In the future, however, all the products will be mixed with each other and customers, whether [wanting] natural or not, will see all of them in the in-line set. The key to distinguishing between products will be having a strong chemical policy and a standardized rating system for all beauty products (Brown, 2017).

II.   **Tata Harper Transparency**

Tata Harper's eponymous brand has been at the forefront of transparency since first launching several years ago. Each and every ingredient used in the brand's formulas is foraged from the brand's farm in Vermont (Tata Harper, 2018). Through its Open Lab & Traceability Program, Tata Harper shows that it has nothing to hide. By entering the number etched into the bottom of a bottle on its website, shoppers are able to trace the product's product journey and experience how it was made. Within one year of launching the program, over 60,000 customers have checked out their bottle numbers on Tata Harper's website (Murray, 2018). Open Lab brings quality web traffic to the brand's website – these customers spend twice the amount of time on the site than average.

Possible Short Term Solutions:

1. **MANDATING EXPIRATION DATES**

Tata Harper explained that understanding the true age of a product was one of the reasons she launched Open Lab Traceability. She said, "when you're buying a product, it might already be two years old when you open the box. Each of our bottles has the freshest and highest-performing ingredients possible. We strive to minimize production time — from farm to face" (Murray, 2018). This and the food industry, where almost every category has an expiration date

clearly printed on it - dry or perishable, inspired the short term non-negotiable recommendation to add expirations dates on all beauty products. Currently, in the US, an expiration date is only required for over the counter (OTC) products. To increase the amount of transparency and information available to consumer, three key dates should be added to all products - batch date, production date and expiration date - with a month and year. More than 80% of women know that makeup has expiration dates but they still don't discard them. Less than 1 in 5 toss mascara in the recommended 3-month timeframe (Stowaway, 2015). Adding consumer friendly expiration dates to all products, both OTC and non, will ensure authenticity and protection.

2. ESTABLISHING INDUSTRY DEFINITIONS AND STANDARDS

Consumers are more skeptical than ever about ingredient sourcing, product formulation, and environmental sustainability practices. Simultaneously, existing information sources are often confusing or contradictory. ASTM International is an international standards organization that develops and publishes voluntary consensus technical standards for a wide range of materials, products, systems, and services. Since the beauty industry is self-regulated, ASTM could serve as an unbiased 3rd party to set standards for the beauty industry.

While many beauty industry insiders believe that additional regulation would be beneficial, the industry cannot risk waiting for a dangerous (and likely costly) scandal to prompt government involvement. Trade associations like the Personal Care Products Council, (PCPC), often work with ASTM to review industry standards and provide feedback. The organization is so well respected that the US government made its recommendations mandatory and federal standards when regulating the toy industry (ASTM, 2018). ASTM should partner with PCPC and

EWG to establish industry standards for ingredient sourcing, product manufacturing, and product packaging.

Figure 6. ASTM Model

3. UNIFIED TRANSPARENCY RATING

Today, there are no clear standards or definitions for beauty products. Beauty marketers can liberally use terms such as natural, organic, free from and non-toxic. Further, there are no federal standards governing sustainability practices for the beauty industry. This leaves consumers doubtful and at a disadvantage, as they do not have a reliable source of information to trust when purchasing beauty products.

Recently, Guerlain worked with Ecocert to earn this first-of-its-kind certification, earning recognition for its commitment to biodiversity and the climate. The company firmly believes that total transparency is a competitive advantage. According to CEO Laurent Boillot, "sustainability is the responsibility of everyone – civilians and companies" (Shatzman, 2018). Guerlain makes sure to measure and track all of its efforts so it can see their impact. Boillot reiterates that transparency is good for the product, the planet, and the business. "It's no longer a charity – it's a business essential," he maintains (Shatzman, 2018).

Similar to Guerlain, most beauty companies in the US pursue their own beauty definitions and standards. These are not uniform across the beauty industry and open up the industry to consumer scrutiny. The beauty industry needs one trusted symbol of safety, quality, and trust. In other consumer product businesses, symbols like the Good Housekeeping Seal or Energy Star have served as standardized representations of quality. A similar seal is needed for beauty – a powerful visual cue that combines all existing seals and certifications into one unified rating to make the consumer path to purchase clearer.

Further, a single seal that stands for all qualities important to the consumer will be a cost-effective way to increase trust in the beauty industry. When companies and brands have to navigate multiple certifications and organizations, it becomes costly and inefficient. With speed to market becoming increasingly important, it is crucial that the industry remove these barriers to transparency.

Path to Creating Unified Transparency Rating

The beauty industry must come together and create a unified transparency rating for beauty products. Several disparate versions of such ratings and certifications already exist in the

form of EWG and EU standards on ingredients and sustainability, Target's Sustainability Product Index, Sephora's Clean at Sephora Seal, etc. Beauty companies must join and develop a singular source of information for the consumer. This rating standard should not only certify the safety of beauty products but also extend to sustainability of practices in their production cycle such as ingredient sourcing, testing, manufacturing, and packaging.

Future Prediction:

BLOCKCHAIN TECHNOLOGY

Blockchain solutions are already up and running in industries like pharmaceuticals and gold production, and are now being applied to the food space. In food, blockchain implementation will benefit consumers, wholesalers and suppliers alike.

I. **Food Recalls**

Each year, 1 in 10 people around the world become ill due to foodborne diseases, and approximately 420,000 of them die (Radochio, 2018). Part of the reason why people are dying is that it takes far too long to isolate product recall or contamination issues in the supply chain. With a blockchain track-and-trace solution, sources of contamination can be traced in seconds.

II. **Food Product Labeling**

Labeling a product as organic, cruelty-free, or sustainable is a popular marketing tactic. Blockchain will take help validate the authenticity of these claims by bringing the US food industry together around regulations and consumer demand (Radocchia, 2018). Blockchain-

based standards for suppliers will ensure the integrity of the marketing claims and existing certifications and audit reports will be registered on blockchain to prove these claims (Radocchia, 2018). According to Monday, Inc., CEO, Larry Myler, "we could be looking at a future with higher standards for health and a stronger understanding of our food, with the added bonus of a discounted price tag" (2018). Blockchain technology will certainly bring a new level of affordable transparency and accountability.

1. BLOCKCHAIN TECHNOLOGY FOR THE BEAUTY INDUSTRY

Blockchain companies like IBM and Provenance are already redefining transparency for the food and fashion industries. Beauty is next on the horizon. The founders of UK-based, Provenance, believe that opaque supply chains are devastating the environment and compromising the wellbeing of people, animals and communities (Provenance, 2017). Blockchain will enable a future where every beauty product will have a digital history, allowing shoppers to trace and verify its origins, attributes and ownership.

The future of transparency in beauty truly lies in blockchain technology. According to Barbara Close, the founder of Naturapathica, "beauty products will be traceable from source to skin within the next five years" (Close, B., 2018). This technology will give consumers a clear view into the top-notch safety and sustainability practices of beauty companies.

Further, this technology can be adapted into a barcode or a new label on beauty products giving both consumers and companies access to the complete product journey for every product. L'Oreal recently partnered with SmartLabel to allow consumers to learn more about its Garnier brand. As part of implementation, L'Oreal is including SmartLabel Language Detection QR codes on its Garnier products. Through a scan, consumers are taken to a URL where they can

view information on product ingredients, usage directions and advisory warnings, and learn about the company.

In 2017, Unilever announced that it would disclose ingredients in all personal care products by the end of 2018. Consumers could find more information about the Dove, Axe, Degree, Nexxus, Suave, TRESemme and Vaseline brands on the SmartLabel website or app, which Unilever and other US companies use to share information beyond what's on a product label (Gowda, 2017). Blockchain is certainly on the minds of beauty brands.

2.   BLOCKCHAIN AND CRYPTO-ANCHORS: AN END TO DIVERSION

Blockchain technology is poised as the future of digital transactions, infusing trust, efficiency, and transparency into supply chains. However, blockchain alone cannot ensure the authenticity of physical goods. In efforts to solve for this gap in authenticity, IBM researchers are developing crypto-anchors, tamper-proof digital fingerprints, to be embedded into products, or parts of products, and linked to the blockchain. For example, crypto-anchors can be embedded into an edible shade of magnetic ink, which can be used to dye a malaria pill. The code could become active and visible from a drop of water letting a consumer know it is authentic and safe to consume (IBM, 2018). These digital anchors will track the product lifecycle and authenticate the product's blockchain record.

Blockchain and crypto-anchors combined could help solve one of the biggest authentication issues in the beauty industry: diversion. In fact, according to a Deloitte study, this practice of unauthorized selling "siphons as much as $63 billion of US industry sales" (Gibson, 2015). Counterfeit and outdated products compromise the beauty industry's promise to the

consumer. Beauty companies could add crypto-anchors to their product formulas or packaging and thereby easily trace the whereabouts of their products putting an end to unwanted diversion.

THE RELATABILITY GAP

As skepticism is rising and lack of trust is growing, beauty consumers are questioning everything – ingredients, claims, efficacy, brand advertisements and paid partnerships on social media. Consumers want to know who can they trust when purchasing the best product for their needs. While they are continuously seeking the best products, there is a copious amount of information available to aid in the decision process and often insufficient means to fact-check this information as truth. There is a mounting demand for overall transparency and for brands to understand how to relate to the consumer genuinely. The absence of this has created a Relatability Gap. Brands must provide an opportunity for the consumer to feel that a product or experience is customized and personalized for them and for others that have similar needs.

During our research, we examined multiple brands across industries who have attempted to address this Relatability gap. Some brands were unsuccessful, while others managed to design methods aimed at shrinking the gap, and ultimately found a better way for the consumer to feel connected with the brand and the brand communities.

Relatability Currency

Fellow-feeling or community of feeling is a feeling of care and concern for someone, accompanied by a wish to see the individual better off (Burton, M.D. 2015). It is comforting to have someone to relate to that shares similar feelings, as it creates a more profound personal engagement. Today, consumers are gravitating to social communities cultivated by influencers

who have a connection with the consumer audience. By sharing personal accounts and experiences, these influencers are forming an invaluable relationship that allows consumers to relate on a more meaningful level.

Relatability is an influencer's currency, and they are strategically using this to build trusting relationships with consumers. A survey conducted by WWD's sister publication Variety, showed YouTube stars are more popular than traditional celebrities with younger audiences between the ages of 13 and 24. The survey clearly indicated the importance of relatability; Millennials and Gen Z consumers used phrases such as "just like me," "doesn't try to be perfect," and "genuine" in their responses (Strugatz and Strugatz, 2018).

While influencers are trying to lessen the gap, they are also gradually becoming less trusted as Federal Trade Commissions paid partnership disclosures increase and endorsement guidelines are enacted nationally. Likewise, retailers are also ahead of brands and have initiated campaigns relating to the consumer's desire to have more authentic relatable advertising. As mentioned earlier, CVS is introducing the CVS Beauty Mark, a watermark used to identify beauty-related imagery that has not been materially altered. To further emphasize this notion of relatability, individuals responded in the FIT Transparency Perception Assessment Survey, the need for advertisers "to show real women, not celebrities" when speaking to them (FIT Transparency Perception Assessment Survey, 2018).

Within the FIT Transparency Perception Assessment Survey, the importance of ratings and reviews was uncovered. This is the consumer's number one source of beauty information after family and friends. Consumers want beauty brands to speak to them like a friend (54%), followed by an expert (35%) (FIT Transparency Perception Assessment Survey, 2018). Consumers trust people who look like them and who have the same skin care concerns as them –

"You know you can trust the beauty industry when you can see the results of a product. I usually don't buy a product until I either see before and after pictures or watch a YouTube video with the influencer using the product. If the product works great for them and we have similar skin/hair types, I'll be more likely to buy it" (FIT Transparency Perception Assessment Survey, 2018). It is clear that influencers will not exist in the same manner they do today in the future. Therefore, the future of credible beauty information and education will lie in the hands of the consumers – peer reviews of people that share the same physical characteristics and interests, and speaks to them as a friend rather than a customer.

Now is the time for brands to step in and take a stronger hold of the brand education to bridge the gap further. It is essential that brands understand that relatability must become their currency of the future. Relatability fosters both reliability and credibility. The following case studies in the personal care, beverage, and fashion industries depict examples of relatability 'fails' and serve as illustrations of worst-case practices when relating to the consumer.

I. **Dove**

Dove, one of Unilever's leading beauty brands, received a tremendous amount of backlash over a recent advertisement aired in October 2017. Consumers turned sour, as the ad was perceived as an African-American woman "turning" herself white, despite Dove's intended message of "products for all people." Consumers actively voiced their disdain on social media with many calling for boycotts of Dove's products. In addition, many made comparisons to racist ads from the late 1800s and early 1900s where soap was used to "wash the melanin" out of African-American skin (Pearson, 2017).

This, however, is not the first time the beauty brand has been scrutinized because of its advertisements. In 2011, an African-American woman transitioned into a white woman after using Dove body wash. Specifically, the "before" picture of skin corresponded to the black woman, while the "after" picture corresponded to the white (Slawson, 2017). Though Dove intended to communicate inclusivity through both advertisements, the company was insensitive in its execution, further ostracizing its community of African-American consumers.

II.   **Beverage Industry and Black Lives Matter**

In April 2017, fashion supermodel and reality TV star, Kendall Jenner starred in a Pepsi advertisement to promote a cultural message of unity following nationwide protests in Ferguson regarding the death of Michael Brown. In the ad, Jenner leaves a photoshoot to join a peaceful protest, ending with her handing a can of Pepsi to a police officer amongst break-dancing crowds and people taking selfies (Patel, 2017).

Both Jenner and Pepsi received backlash from consumers claiming racial insensitivity and appropriation to the Black Lives Matter movement. Alexander Smith of NBC wrote,
"It drew scathing criticism on social media from Bernice King, the youngest daughter of Dr. Martin Luther King Jr. She posted an image of her father mid-peaceful protest – literally being pushed back by a police line and tweeted: "If only Daddy would have known about the power of #Pepsi" (Smith, 2017). Despite Pepsi's attempts at damage control, the insensitivity communicated from the ad long withstands in the minds and hearts of an entire community of consumers.

III.   **Fashion and Beauty Brands That Listen**

In contrast to Pepsi, there are beauty and fashion brands that are succeeding in proving to be relatable to the consumer. Fashion designer, Christian Siriano, honored in 2018 as one of Time Magazine's 100 Most Influential People, understands the importance of building an authentic connection and making his consumer feel like she is a part of the brand community.

Christian Siriano, most notably known for his unique and jovial character on hit reality show, Project Runway, is a designer who champions body inclusivity within the fashion industry. Siriano made waves when he rescued Ghostbuster star, Leslie Jones, from a fashion crisis. Jones tweeted that no designers would dress her for her upcoming movie premier, leaving the star with a serious dilemma. More importantly, though, was Jones' and Siriano's criticism of the fashion industry, bringing to light the notorious exclusion of plus size women, despite the average American woman ranging from a size 16-18 (Brolley, 2018). At her premiere, Jones' stunned on the red carpet, dressed to the nines in a red, off the shoulder evening gown Siriano custom-designed. Siriano continues to make strides towards fashion inclusivity through his new collection for plus-size brand, Lane Bryant, and a recent fashion show that included models of all sexes, races, and sizes, of which Leslie Jones was front row and center.

Brands that are winning today are those that incorporate consumer feedback into their product development process and speak to the consumer like their friend. Conversational commerce strengthens the relationship with the customer and makes them feel a part of the brand. Creating communities centered around a shared affinity for a brand alleviates the "lack of purpose" customers face and improves their trust in the brand through a mutual connection.

Two brands that exemplify gaining trust via conversational commerce best are Drunk Elephant and Glossier. Drunk Elephant created their own "clean-clinical" category and decided

early on that they would "exclude any "question mark" ingredients." They focus on what works and only include ingredients that serve a sincere purpose in the formula – no fragrance, no extra colorants, no nonsense (Pina, 2017). Founder, Tiffany Masterson, says her "customer and fans are like a huge focus group – they are loud and interactive and we are always listening and responding as quickly as we possibly can" (Pina, 2017).

In 2018, Drunk Elephant launched a new cleanser, Beste Cleanser, which received mixed reviews from customers. Consumer complaints included that it stung their eyes and had leaky packaging. Masterson admitted it "wasn't the best product" and instead of hiding behind a relaunch, admitted to her customers, "Look, we screwed up. We didn't love it, you didn't love it. We fixed it and hope you like the new one." (Strugatz, 2018). Masterson renamed the improved edition Beste No. 9 Jelly Cleanser because it took her nine times to perfect the formula. "It's the highest form of transparency. I'm telling the consumer it took me nine times to get it right. We're all humans, we're going to make mistakes…You tell them [customers] the truth and guess what? Everyone understands" (Strugatz, 2018).

Glossier launched in 2014 and founder Emily Weiss, wanted to create a brand where the customer is a part of the company (Chitrakorn, 2017). Glossier was one of the original brands to use crowdsourcing for product development. Founder Emily Weiss posed the question "What's Your Dream Cleanser" in January 2015 and the question received over 400 comments. The Glossier team used all of these to create "Milky Jelly Cleanser" which is one of their top sellers today. "At Glossier, we have always believed that every single one of our customers is an influencer," she says. "The brands of the future are going to be co-created." The lesson learned for all brands is to tap into your consumer base to identify and build a loyal army of advocates to take your brand to the next level on the relatability spectrum.

Possible Short Term Solutions:

In a world where technology is rapidly changing the landscape of business, industries must decide the best and most innovative ways to use it. In countries like China and Korea, businesses innovate through shared consumer data. According to the FIT Transparency Perception Assessment Survey, only 26% of US consumers said that they were unwilling to share their personal data with beauty brands. A large amount of the consumer population agrees to their data being shared with the intention of bettering the product and overall consumer journey, especially if it was personalized to them (FIT Transparency Perception Assessment Survey, 2018).

1.   **CELEBRATE CONSUMER CO-CREATION**

"Community is the new authority" according to Glossier founder, Emily Weiss. Supporting this theory, the FIT Transparency Perception Assessment Survey yielded 54% of consumers who said they would want to be involved with the product development process of their favorite brands (FIT Transparency Perception Assessment Survey, 2018). Co-creation has been around since 2000 though many companies are only now beginning to recognize the value of this concept. Co-creation can be defined as "the joint creation of value by the company and the customer; allowing the customer to co-construct the service experience to suit their context" (Crandell, 2016).

DHL recognized that their innovations needed to be customer focused and implemented innovation centers in Singapore and Germany. The teams conducted intensive workshops with customers and DHL service partners that "explore and understand technology, economic, socio-

political and cultural trends to develop new ways to manage supply chains and logistics" (Crandell, 2016). The result has been incredible as the customer satisfaction scores are over 80%, and on-time delivery performance is 97% or higher worldwide. Customer churn rates are down and revenue from new services/products is up" (Crandell, 2016). DHL has held over 6,000 co-creation engagements and have launched new innovations such as Smart Glasses and robotic applications that are being dual tested with consumers.

Likewise, in the beauty industry, Drunk Elephant has been successful in using this strategy. After Drunk Elephant launched LaLa Retro Whipped Cream in an open jar, consumers complained that it compromised the stability of the ingredients. In response, the founder apologized and re-debuted the product in an airless jar in just nine months. In the six months after the pack was relaunched, Drunk Elephant saw a +249% increase in Instagram engagement (SocialBakers). The launch also contributed 11% of the total category growth in anti-aging moisturizers (NPD BeautyTrends, 2017).

Beauty brands must implement the co-creation strategy as a means to build consumer value and trust. By involving consumers in the product development process, companies can create consumer advocacy. The commitment, transparency and the responsibility of co-creation can be frightening for companies, as it involves sharing data and transparently engaging the consumer (Crandell, 2016). However, this strategy will establish a sincere foundation of trust among consumers and both legacy and indie brands. Emily Weiss at Glossier, strives every day to not only make sure her customers feel involved but also rewarded if they are engaged. "Reward her if she's involved. Get her involved and say thank you. Use that information, that feedback loop" (Avins, 2016).

2. COMMUNITIES OF YOU

The new consumer collective is the way of the future for consumers to band together to find products that work by consulting others with "like me" concerns. From similar types of skin textures, to similar types of skin concerns, these engaging communities, or Communities of You, will facilitate the creation of hyper-personalized products and recommendations. Today, while influencers and peer reviews are the platforms that consumers trust for insights during their purchase journey; these platforms will not be relevant in the future. Consumers will seek advice and recommendations from people who they connect with and who share similar issues.

By using aggregated shared consumer data of similar purchase patterns and beauty and skin concerns, brands can create communities for consumers to consult and connect with each other. In fact, Sephora has successfully introduced a growing consumer-centric online beauty community. Sephora understands that its "clients crave outlets and experiences that give them deeper personal connections and they want to be next to people they feel are like them and share their same passion for beauty. We know they are increasingly looking to their peers and people like them and (the Beauty Community) plays into that," explains Mary Beth Laughton, Sephora's Senior Vice President of Digital (Strugatz, 2017).
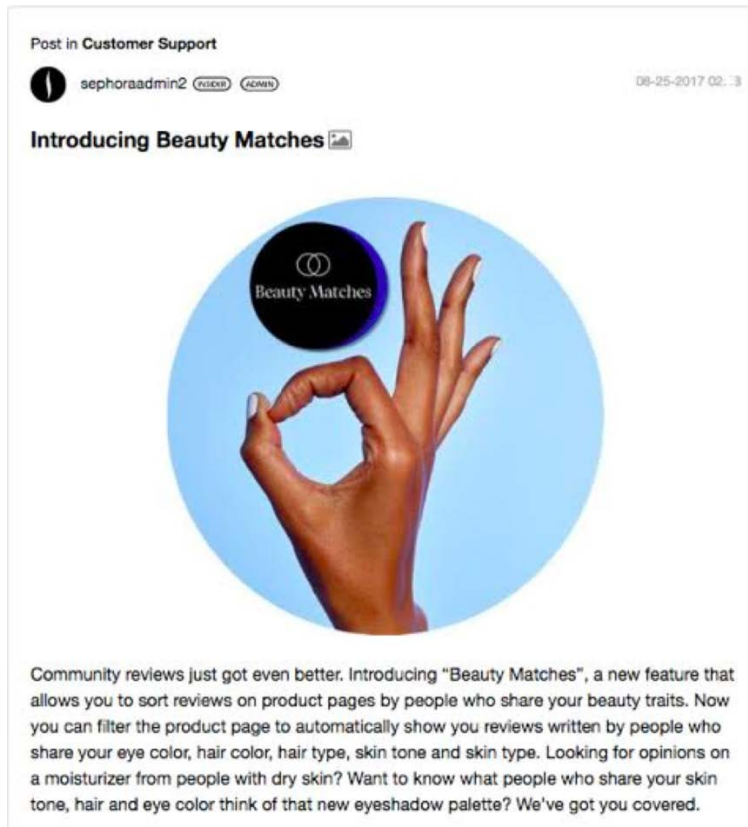
Figure 7. Sephora Beauty Matches

3. REAL LIFE ADVERTISING #NOTHINGTOHIDE

The product development journey is not perfect nor is the creation of advertising campaigns and communication strategies. Beauty brands need to be mindful of how their advertising practices are perpetuating unattainable beauty standards. A survey found two out of three women strongly agree that the media has set an unrealistic standard of beauty. 80% of women feel worse about themselves after seeing a beauty advertisement. 90% of girls ages 15 to 17 want to change at least one aspect of their physical appearance (CVS, 2018). CVS is regulating how brands must disclose airbrushing/photoshopping practices through the use of its Beauty Mark. Brands should follow this lead and self-regulate by making their advertising choices clearly visible to consumers.

Relatability goes beyond photoshopping an image, to the models featured in the ads. In the UK, only 12% of Millennials aged 16 to 35 say they believe their ethnicity is accurately portrayed in advertising (Mintel, 2018). Fenty Beauty's launch was named "Invention of the Year" by Time Magazine and dubbed the most inclusive brand in the world (Mandell, 2017). Fenty's launch challenged the industry to think about all its consumers, beyond mainstream clientele. Beauty brands need to prioritize their promise over profits.

Future Prediction:

1. **SKIN TWIN**

Personalization is the current buzzword in luxury, as consumers want a product that expresses their unique individuality. The next step in this is a personal genomics and biotechnology service that works similarly to the existing DNA testing company, 23andme. The new service will allow beauty consumers to go beyond the surface of their skin and find out how to best treat and preserve their largest organ. By connecting with others that have similar specific skin types and issues, trusted communities will form in an effort to uncover best practices and products to treat an individual's skin concerns. This data (when shared with beauty companies) will also allow brands to develop customized products for the consumer. Companies such as Proven and Intuit have begun doing this with intelligent surveys to build a unique, personalized skin care routine for each customer. DNA-based routines will be the next frontier in this trend, as "one size fits all fits no one" according to Proven's motto. Olay's Principal Scientist says it best: "We'll be able to tell that while someone isn't going to wrinkle much, they'll have loads of age spots. And we'll know what ingredients your skin genetically responds to that will specifically

address that problem." By aggregating and classifying DNA-data, this type of predictive personalization can be made possible. Building a Communities of You is the future.

CONCLUSION

The eroding sense of safety, lack of trust and lack of purpose in today's society has created a consumer demand for 100% transparency. The consumer is seeking access to trusted information, safe ingredients and direct brand dialogue. Our research focused on understanding the trust gaps that exist in the beauty industry and what beauty brands must do to close these gaps to provide a stronger state of trust, safety, and transparency for the consumer. After examining the industry through secondary research, delving into case studies of other consumer industries such as food and fashion, conducting expert interviews, and implementing the FIT Transparency Perception Assessment Survey, the overarching recommendation from our research is that there must be industry collaboration to simplify the consumer path to purchase and build trust. To address the three trust gaps – Knowledge, Authenticity and Relatability – brands must follow and implement the short and long term recommendations outlined in this White Paper.

The beauty industry cannot wait for new government regulation or a dangerous (and likely costly) scandal to answer the consumer demand for transparency. The time to act is now. Beauty brands must agree to completely clear the lines of communications with consumers and provide constant co-creation, transparent traceability and relatable interactions.

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CLEAR BEAUTY 2023 PLEDGE

TAKE THE CLEAR BEAUTY 2023 PLEDGE TODAY:

WE PLEDGE TO empower consumers through education:
- By making all brand information easily accessible on all owned media platforms
- By demystifying all ingredients so that everyone knows their exact purpose

WE PLEDGE TO authenticate all steps in the source to skin journey:
- By adding three vital dates (batch, production and expiry) with a month and year to mitigate poor results, enforce authenticity and protect our consumers
- Explore blockchain technology to highlight the story of our product
- Implement tamper proof crypto-anchors to fight diversion head on

WE PLEDGE TO be consumer-obsessed and create Communities of You:
- By fostering conversational commerce to guide product development
- By taking data aggregation and genome technology to another level to provide predictive personalization

Full adherence to this pledge will close the Transparency Gap for your beauty brand and ensure prosperity in the future

</div>

Figure 8. The Clear Beauty Pledge

As Jean Paul Agon, CEO of L'Oreal stated in their 2017 Sharing Beauty With All Progress Report, "we are well aware that, to go even further, we cannot move forward on our own" (L'Oreal, 2018).

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