

IFSCC 2025 full paper (N° IFSCC2025-1688)

“Consumer Community: a digital, approach to guide Researchers in Sustainable Beauty innovations”

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Keywords : diagnostic, sustainability, texture/sensoriality

1. Introduction

The past few decades have witnessed an unprecedented global surge in eco-anxiety, driven by interconnected factors such as climate change, scientific advancements, social activism, and policy initiatives (Ipsos Global Trends survey 2023).

This heightened awareness of environmental issues has significantly altered consumer, corporate, and governmental perspectives, prompting a reevaluation of choices toward a more sustainable future.

Increasingly, individuals are seeking to minimize their environmental impact through the adoption of sustainable lifestyles. This trend is increasing in all countries since 2019 (Ipsos Global Trends survey 2022).

Consequently, companies face pressure, both from consumers and regulatory bodies, to incorporate sustainable development goals into their core strategies. The beauty industry is no exception, undergoing a transformation to meet the evolving demands of increasingly discerning consumers (Ipsos Global Trends survey 2022).

However, a notable discrepancy persists between consumer intentions and actual purchasing behavior (Simon Kucher, 2021; IBM, 2021).

Several factors contribute to this gap:

- Price: Sustainable products are often more expensive than their conventional alternatives. For many consumers, cost remains a major barrier to purchasing environmentally friendly products.

- Performance and sensoriality: In the collective beliefs, sustainable products are less effective and less pleasant than conventional products.
- Availability: Sustainable products are not always readily available. Consumers may struggle to find sustainable options in their local shops or online.
- Consumer Habits: Entrenched buying habits can be difficult to change. Consumers may be reluctant to try new brands or products, even if they are more sustainable.
- Lack of transparency: Lack of clarity in labelling and sustainability claims can make it difficult for consumers to make informed choices. Greenwashing, where companies exaggerate their sustainable practices, can also cause confusion.

In such a challenging and fast-moving context, researchers are working hard to develop the best sustainable beauty products and overcome the persisting gap between consumer sustainability aspirations and actions.

In this context, a deeper understanding of consumer behavior, beyond stated intentions, is crucial. Indeed, a dynamic reading of consumer habits and attitudes to better understand their say/do gap drivers is key to help the researchers impacting consumers sustainable shift. Using online consumer community is a good way to listen to consumers and collect relevant feedback (Dennis A. Pitta 2005; Robin Waite 2024).

To address this challenge, we developed a novel digital consumer platform to guide researchers in sustainable product development.

This platform facilitates multi-layered consumer engagement and comprehension of perspectives on sustainable beauty. This granular approach to consumer profiling enables:

- Identification of unmet consumer needs within sustainable beauty routines, allowing researchers to formulate desirable and relevant product experiences.
- Enhanced adoption of sustainable practices and fostering of consumer trust through targeted communication and educational initiatives.
- Empowerment of consumers to transition from intention to action, accelerating the shift toward sustainable beauty.

2. Materials and Methods

In October 2023, we launched the first multi-country digital community focused on skincare and haircare, designed to drive sustainable innovation. This consumer-centric platform prioritizes agility and collaboration within a framework of consumer intimacy. This approach enabled real-time monitoring of evolving consumer behaviors and identification of crucial experience trade-offs.

The community comprised 600 heavy beauty users women, from 18 yo to 65 yo, with a wide diversity of skin and hair types, across four key markets: France, China, and the USA (representing mature beauty markets), and Brazil (as a rapidly growing market).

Community activities included:

- assessment of the consumer say/do gap;
- exploration of beauty routines and related habits and attitudes;
- co-creation of ideal sustainable beauty experiences with consumers and researchers;

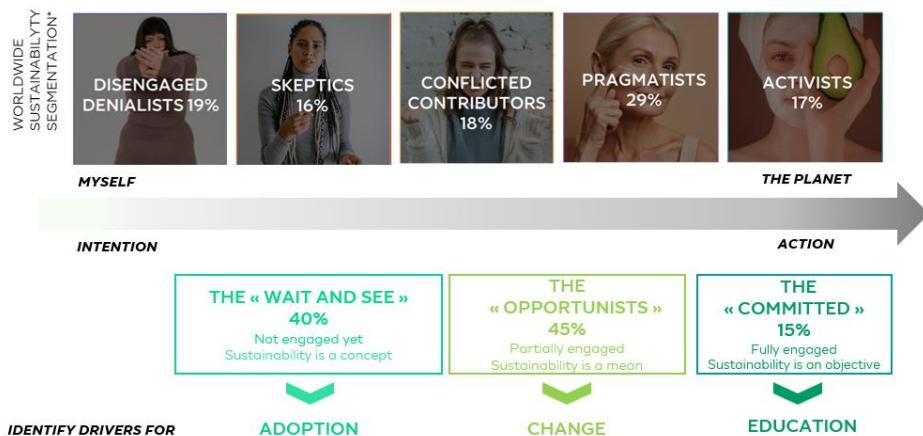
- optimization of existing sustainable product experiences;
- promotion of sustainable product and packaging innovations through impactful communication and educational content.

Research was aligned with four key pillars of the Beauty industry sustainability commitments:

- **Water Consumption:** In-depth analysis of consumer water usage habits within their beauty routines and associated implications.
- **Eco-Packaging:** Investigating consumer understanding and perceptions of eco-packaging, with a focus on plastics, aligned with a "reduce, replace, and recycle" strategy.
- **"Green Beauty" Communication:** Deciphering effective communication strategies for conveying the value of green innovations and influencing behavior change.
- **"Green Beauty" Sensory:** Defining and evaluating emerging sensory cues associated with sustainable beauty products to establish connections between sustainability, efficacy, and pleasurable sensory experiences.

These research areas were explored through engagement with diverse consumer profiles across the four countries. Participant recruitment was based on internal and external consumer data (Ipsos sustainability segmentation 2022; Dynvibe social listening 2023), resulting in the definition of three distinct beauty user profiles (Figure 1). These segments were utilized within the community framework.

3 CONSUMER PROFILES based on their sustainability engagement



* Ipsos Sustainability segmentation, 2022. Global base : 10 530 consumers - 16 markets.

Figure 1. Definition of the 3 consumer profiles for the community

Three distinct consumer segments were identified to represent the spectrum of consumer engagement with sustainability:

- **The "Wait and See"** (40% of the global community sample): This segment comprises frequent beauty product users who are not yet actively engaged with sustainability. They represent a key target for understanding the factors that might motivate adoption of sustainable beauty practices. Their insights are crucial for evaluating potential levers for future product innovation.

- **The "Opportunists"** (45% of the global sample): These consumers demonstrate partial engagement with sustainability, primarily driven by personal benefits. Understanding their motivations and potential trade-offs is essential for developing appealing and effective sustainable beauty products.
- **The "Committed"** (15% of the global sample): This segment actively embraces sustainability and seeks concrete, verifiable information. Their insights are invaluable for identifying key drivers of change and informing communication strategies.

To ensure representative sampling, participants were recruited from the four target countries, maintaining consistent segment proportions across regions. Over a one-year period, each participant engaged in multiple studies, with a maximum of four studies per individual. Data collection commenced in October 2023, encompassing ten multi-country surveys and over 900 interviews. The ten studies are summarized in Table I.

Water consumption	Exploring consumer's shower and bath habits with focus on hair wash to identify possible trade off towards water use	France US China Brazil	120 women
	Evaluating consumer acceptability and ability to save water for hair wash with a new shampoo experience with thick texture	France	60 women
	Evaluating new no rinse off shampoo experience consumer acceptability and ability to space out regular shampoo (x2 runs)	France	90 women (Run#1 30; Run#2 60)
Eco-packaging	Exploring pack sustainable material perception and acceptability	France US China Brazil	120 women
	Assessing eco-pack claims understanding and ability to drive product choice with a focus on plastic claims	France US China Brazil	120 women
Green communication	Exploring consumer safety & animal respect communication & labels	Brazil	30 women
	Identifying most relevant sustainable territory of communication to raise consumers' awareness and behavior change	France US China Brazil	120 women
Green sensory	Decoding anti-aging cream performance and sensory cues to support future sustainable product development	France US China	180 women
	Evaluating sustainable skin care cream usage experience and consumer acceptability of sensory cues under application, penetration and skin finish	France China	60 women

Table I. List of surveys performed within the community, objective, countries and number of interviews

3. Results

3.1. Cross Country & Topic Meta Learnings

Three key meta-learnings emerged consistently across all 2024 studies:

- **Geographic and cultural nuances significantly influence consumer preferences.** A one-size-fits-all approach to communication and sustainable innovation is ineffective. Tailoring strategies to specific consumer groups is essential.
- **Holistic product performance and pleasurable sensory experiences are non-negotiable.** Even highly engaged consumers are unwilling to compromise on efficacy and sensory appeal when choosing sustainable beauty products. These products must deliver comparable benefits to conventional alternatives.
- **Consumer engagement in sustainable beauty requires proximity and positive communication.** Shifting consumers from intention to action necessitates clear articulation of personal benefits and a compelling legacy narrative.

3.2 Specific Learnings about Water Consumption

Three surveys dedicated to shower habits and product usage revealed the following insights regarding water consumption:

- Water is universally associated with pleasure and comfort in the shower context. Reducing water usage often leads to consumer frustration.
- Consumer challenges primarily revolve around routine complexity and time constraints, rather than guilt about self-indulgence or a strong awareness of water scarcity. Consequently, water conservation is not yet a primary driver of product choice.
- Adoption of new sustainable non-rinse-off products, potentially involving routine/gesture trade-offs, is primarily driven by direct exposure to water scarcity. Geographic location plays a key role in influencing action.

3.3. Specific Learnings about Eco Packaging

An evaluation of eco-packaging perceptions across four countries (France, USA, China, and Brazil) revealed consistent expectations, irrespective of consumer sustainability profiles:

- Sustainable packaging is a central consumer demand for sustainable beauty products. It ranked as the top asset in Brazil and second in the remaining countries.
- Consumers prioritize accessibility/ease of purchase, affordability, convenience of use, and product safety/quality reassurance (particularly in China) related to packaging. They are unwilling to compromise on these aspects.

Regarding plastic reduction, replacement, and recycling, some country-specific variations emerged (independent of sustainability profiles):

- Consumers seek tangible impact from their contributions, influenced by cultural background and societal commitments. Reducing plastic ranked highest in France, China, and the US, while replacing plastic was prioritized in Brazil. Recycling was the second most important action across all countries.

- Effective sustainable packaging claims require clear, easily understood comparisons, significant numerical values (e.g., >60%), and positive, motivating language that empowers consumers.

3.4 Specific Learnings about "Green" Sensory

A performance and sensory decoding study of anti-aging creams in China, France, and the USA highlighted the following drivers of consumer choice:

- Efficacy is the primary driver of satisfaction, regardless of age, country, or target profile. Consumers prioritize performance even in the context of sustainability.
- Sensory satisfaction is crucial for sustained product adoption.
- There is no universally recognized definition of a "green" sensory experience. Consumers lack specific associations between sensory cues and sustainable anti-aging creams.

3.4. Specific Learnings about "Green" Sensory

Based on the performance and sensory decoding study on anti-aging creams conducted in China, France and USA, we were able to highlight common drivers of consumer choice:

- Efficacy is the first driver for satisfaction across age, countries and target profiles. No trade off on performance even for the sake of sustainability.
- Sensory satisfaction is necessary to lock product adoption.
- No universal definition of a "green sensory experience" exists. Consumers do not have specific representations of sustainable anti-aging cream cues yet.

3.5. Specific Learnings about "Green" Communication

Our survey across four countries explored four communication territories related to sustainable beauty: transformation processes, environmental impact, formulation sources, and recyclability. Key findings include:

- Consumers express a desire to learn more about sustainability, but overall knowledge remains limited. Clear, positive, and benefit-centric messaging is crucial for capturing consumer interest. Communications resonating most effectively connect with tangible health, safety, and beauty benefits.
- Effective sustainable communication prioritizes concrete individual benefits over environmental benefits.
- Messages about transformation processes and environmental impact require further consumer education to enhance understanding and address "greenwashing" concerns. This highlights an opportunity for continued education in the green consumer space.
- A universally effective green communication strategy is unattainable due to varying cultural contexts, consumer knowledge levels, interests, and needs. Tailored approaches are essential.

3.6 Specific Learnings about Consumer Profiles

Based on ten multi-country studies and 900 interviews, we identified three distinct consumer personae regarding sustainable beauty: "wait and see," "opportunists," and "committed." These personae, summarized in the table II, exhibit distinct behaviors toward sustainable beauty, informing targeted communication strategies and educational pathways.

	Behaviors	Opportunities
The "Wait and see"	<p>Do not want to compromise / lose in adopting sustainable products</p> <p>Sometimes doubtful about "Green Beauty" product performance</p> <p>Have vague or negative perception about "Green Beauty" sensory</p> <p>They look to be convinced that "Green Beauty" is worth to be considered and is attractive & effortless</p> <p>Low sustainable knowledge, tend to be driven by brand identity & ingredient list mainly</p>	<p>Reassure about sustainable-product's performance & pleasurable sensoriality</p> <p>Educate about sustainability in a playful & emotional way to feed curiosity</p>
The "Opportunists"	<p>Want to make the smarter choice</p> <p>Open to make small yet impactful changes for the planet if not overhauling lifestyle</p> <p>They need to understand what "Green Beauty" is bringing extra vs conventional</p> <p>Looking 1st for the best favorable option for themselves, wherever in sustainable or conventional</p> <p>Generally aware but not deeply informed about "Green Beauty", need guidance to take decisions</p>	<p>Clearly express sustainable products consumer benefits first</p> <p>Keep on educating in a simple & positive way to make sustainability more relatable & desirable</p>
The "Committed"	<p>Want to align their sustainable values with beauty products consumption</p> <p>Convince about the emergency to act in favor of environment yet looking for performant & pleasurable beauty products</p> <p>They fight in finding clear information and be sure they are doing right in their sustainable choices</p> <p>Sometimes lost, frustrated or doubtful when exposed to the current green beauty offer</p>	<p>Assess "Green Beauty" sustainable benefits in a clear & explanatory way to secure green choice</p> <p>Communicate further about brand / industry engagements to set up collaborative support for sustainable switch</p>

Table II. Summary of the 3 consumer profiles personae

4. Discussion

A consistent finding across all 2024 studies in France, the USA, China, and Brazil was the significant influence of geography and consumer environment on sustainable actions.

This held true across all four key challenges, regardless of location or consumer sustainability profile.

Specifically regarding the "water challenge", consumer behaviors and willingness to adapt beauty routines were notably impacted by water stress and scarcity. Consequently, the 2025 studies will expand to include India and African countries (Kenya, South Africa, and Nigeria) to investigate how varying levels of water stress, from scarcity to quality issues, influence consumer behavior change in beauty habits.

Another point of improvement is to enrich the target diversity including men and more diverse skin and hair types. These expansions will provide valuable opportunities to co-create future sustainable innovations and claims directly relevant to diverse consumer realities.

A digital consumer community is an agile qualitative method deployed in market research but it's generally used for a local problematic. Being the first to do a global cross country community, mixing consumer physiological characteristics with their sustainable behaviors is a real advantage to better understand consumer's say/do gap and primary drivers of choice.

To further leverage consumer communities, an activation at a brand level of the key insights collected is recommended in order to equip marketing teams with guidelines for sustainable beauty development with relevant educational pathways.

This will strengthen consumer trust by fostering shared sustainable values and collaborative engagement, further aligning consumers, research, and marketing efforts.

5. Conclusion

In today's volatile, uncertain, complex, and ambiguous (VUCA) world, where consumers face numerous challenges, we must adapt our methods of evaluating beauty products and communicating about sustainability. Beyond transformation metrics and product indicators, maintaining a user-centric approach is essential to let the Beauty industry act for positive education and behavioral change.

By prioritizing active listening and empathic approach with a consumer community, the researchers will get actionable insights to develop desirable and relevant beauty experiences aligned with consumer sustainability awareness and deliver genuine added value.

Our dynamic, qualitative approach of a consumer community dedicated to sustainable beauty innovation, facilitates rapid and agile collection of consumer insights across four countries and three consumer sustainability profiles (with varying levels of engagement). Real-time, real-life context communication yielded rich learnings, empowering researchers and marketers to build a foundation for future sustainable innovation driven by the consumer's voice.

This approach represents a significant milestone in co-creating innovations with consumers, fostering positive education, and reinforcing consumer trust.

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