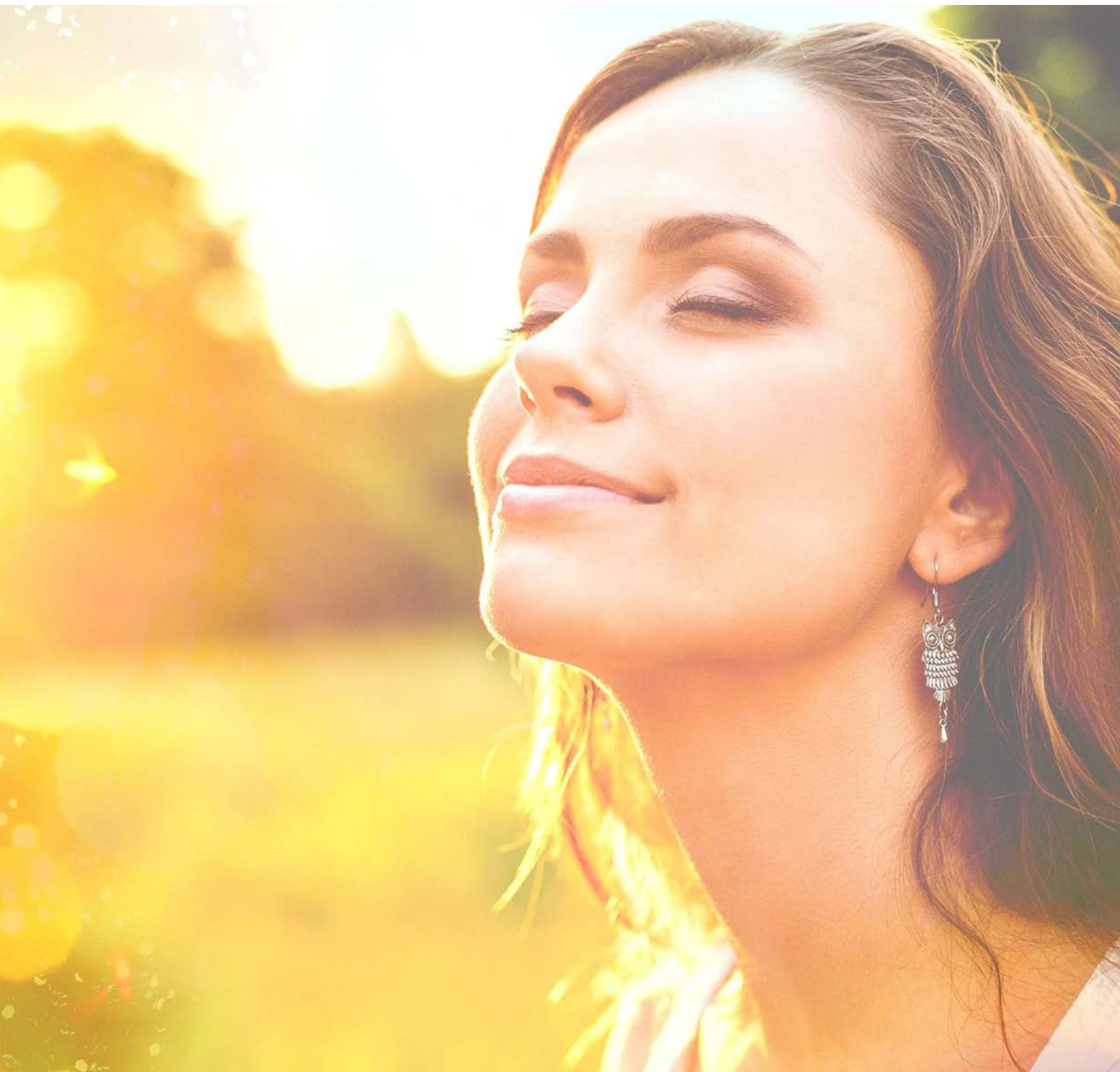


The Inner Light:

What "Glow" means to
skincare consumers



Introduction: #Rethinking beautiful

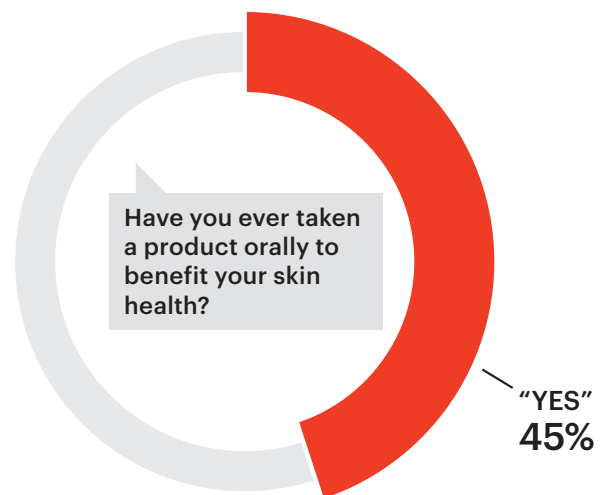
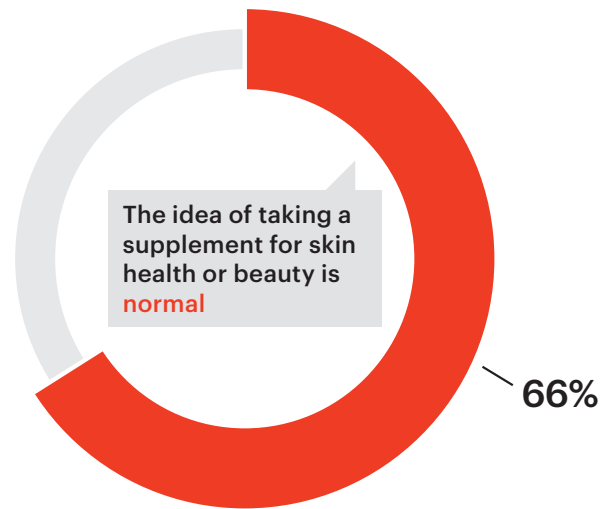
We're frequently told to "love the skin we're in," but how often do we really practice that? Over the years, Lycored has come to realize that maintaining skin health and wellness is a lifelong journey that begins on the inside, the home of our "inner glow." We created our ingestible skincare research and our proprietary carotenoid blends with that notion in mind.

It's also a philosophy we work hard to share with consumers. Our **#rethinkbeautiful** initiative aims to challenge traditional ideas of beauty and help people build an emotional connection with the concept of beauty-from-within. And in helping educate them on the critical role nutrition plays in skin health and appearance, we hope to support the growing ingestible skincare category.

The other side of the coin is that we are committed to helping our industry partners understand and tap into consumers' attitudes to beauty. This report takes a deep dive into current trends in beauty and skincare. It presents new findings on consumers' skincare goals, with a particular focus on the concept of a "healthy glow".

The mainstreaming of ingestible skincare

In 2017, Lycored published 'Beyond Skin Deep', an exploration of consumers' deepest held attitudes towards skin health and beauty. One of the report's key findings was that ingestible skincare had firmly established itself as a mainstream category. The research that underpinned the report found that **two thirds** of consumers saw the idea of taking a supplement for skin health or beauty as normal, while **43%** of millennials had used an oral product to benefit their skin health at some point.¹



New developments in beauty and skincare markets

Since we published 'Beyond Skin Deep', ingestible skincare has continued to flourish, both in established markets such as Asia, and newer ones such as the Americas.

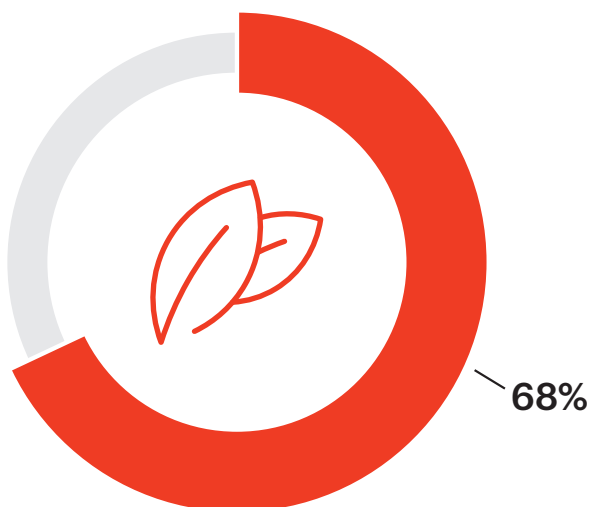
Nutrition Business Journal identified beauty-from-within as a top dietary supplement product trend for 2019 and predicted that the category could be worth more than **\$1 billion by 2020**.² A focus on skin wellness via supplements was also a consistent theme in consumer-facing articles on key skincare trends for 2019³, with one remarking that ingestible beauty supplements had "turned morning smoothies into legitimate skincare products."⁴

Meanwhile, in the two years since 'Beyond Skin Deep', other trends in beauty and skincare markets have gained importance:

1. The importance of naturality

Research has shown that **one in every two (50%)** American skin care consumers want products that are all-natural or free from synthetic chemicals⁵, with **68%** buying at least some natural or organic products.⁶ Reflecting that, US sales of "natural" personal care and beauty products were worth more than **\$1.5 billion** in 2017.⁷

68% of American skincare consumers buy natural or organic products



Demand for natural beauty products is not confined to North America. In the UK, **the certified organic and natural beauty market grew by 14%** in 2018, well above the level of growth in the country's wider wellbeing market.⁸ Meanwhile, Asia's share of the global natural cosmetics market is predicted to rise.⁹

Furthermore, the tendency to prefer natural skin care products skews towards younger consumers, which is expected to lead to increased consumer demand.⁵ In 2017, **43%** of American facial product users aged between 18 and 34 had used skincare products containing natural ingredients.¹⁰ Other research shows that the percentage of consumers who purchase organic or natural beauty or personal care products decreases with age. Among Generation Z, the figure is **73%**, dropping to **70%** for millennials, **67%** for Generation X, and **61%** for baby boomers.⁶

It is clear that the beauty industry has responded to the growing call for naturality. Names of new brands that launched in 2018 included "Love, Beauty & Planet", "Nature Box", "Seed Phytonutrients", and "La Provençale Bio". Retailers such as Space NK have devoted shelf space to products that are free from undesirable chemical ingredients.¹¹ Increasing numbers of brands, including big ones like L'Oreal Garnier, have applied for accreditation, such as Soil Association COSMOS certification, that allows them to display their natural credentials. The number of products in Europe with COSMOS organic or natural certification doubled in 2018 to **10,000**.¹²

The percentage of consumers who purchase organic or natural beauty or personal care products decreases with age



Generation Z

73%



Millennials

70%



Generation X

67%



Baby boomers

61%

2. Blurring boundaries

The underlying reason for the growth of ingestible skincare is that boundaries between health and beauty are blurring, with consumers adopting an increasingly holistic approach. One commentator calls the trend “essentially ‘360 degree’ beauty – focussing as much on what we put in our bodies as on them”, noting that “Consumers today are much more aware of the links between inner balance and wellbeing and the positive effect that has on external beauty.”¹³

Another boundary that is becoming less distinct is the one between food and supplements. In a trend that Mintel calls ‘Gastronomia’, more and more skincare products contain food ingredients. The research company identifies a “surge of face and neck care launches in the U.K. and the U.S. that mention food” and notes that consumers who “have already switched on to ‘inside out’ beauty will be more ready to accept the ‘outside-in’ beauty potential of using nutritious food ingredients in facial skincare.”¹⁴

3. Holistic regimens

The mainstreaming of beauty-from-within has resulted in a new phenomenon – the combination of topicals and ingestibles as part of a holistic strategy. At Lycored, we are increasingly approached by companies seeking to add ingestible products to their topical ranges. Many have taken the holistic approach a step further, creating combinations of ingestibles, serums, masks, and even medical devices to offer a comprehensive, “twincosmetic” package for all beauty and skincare needs.¹⁵

At the same time, many supplement companies specializing in skin health are starting to add topical products, and there has been an injection of innovation into the market. As one commentator has noted:

“2018 saw a boom of beauty supplements from skin care brands and vitamin makers alike. Now, innovative startups are refining the options – formulating and marketing teas, tinctures, mix-in powders and pills to ensure beauty-from-within outlives the trend and becomes a regular part of consumer skincare routines.”¹⁶

Whatever the background of your business, the holistic approach has clear benefits. For traditional topical manufacturers, the addition of ingestible offerings allows them to tap into the growing popularity of beauty-from-within, and to overcome perceptions that topical products offer only short-term or superficial benefits. For producers of ingestibles, being able to offer a topical solution helps increase appeal to consumers who expect instant results.



A healthy glow: The new 'end goal' for consumers

A "healthy glow" is an increasingly sought-after goal for users of skincare products, both topical and ingestible. Its importance is clear from much consumer-facing beauty writing. According to Vogue in 2019, "A radiant, glowing complexion has surpassed the perfect cat-eye flick or flawlessly-applied red lip as the end goal of many of our beauty routines."¹⁷ One recent article titled 'Here's Exactly What Meghan Markle Does for Glowing Skin' included the word "glow" 24 times.¹⁸

And one writer has gone so far as to tell Cosmopolitan:

"One of the things I want most in life...is glowing skin."¹⁹

What does Glow actually mean? New consumer insights from Lycored

Despite this, there is no one single definition of what "glow" actually means. At Lycored, we set out to explore how consumers understand it, what they see as the most effective way to achieve it and, more broadly, which skincare goals are most important to them.

Lycored sought the views of over 500 consumers in six different countries. A total of 507 people in the UK, US, France, China, Japan and Korea were surveyed online between 21st and 26th February 2019. All had purchased a skincare product (either a topical or a supplement for beauty or skin health) over the previous 12 months.



What do skincare consumers want?

First we presented respondents with a list of eight possible skincare goals (a healthy glow, natural appearance, radiance, smooth texture, youthful appearance, even complexion, reduced redness and overall / holistic wellness). They were asked to choose the five they most wanted to achieve in their own skincare regimes and to rank them in order of importance.

The goal that scored highest was “natural appearance”, which was important to **77%** of consumers, with **22%** ranking it in first place. Interestingly, men were slightly more likely than women to rate naturality as an important skincare goal (**82%** compared to **74%**).

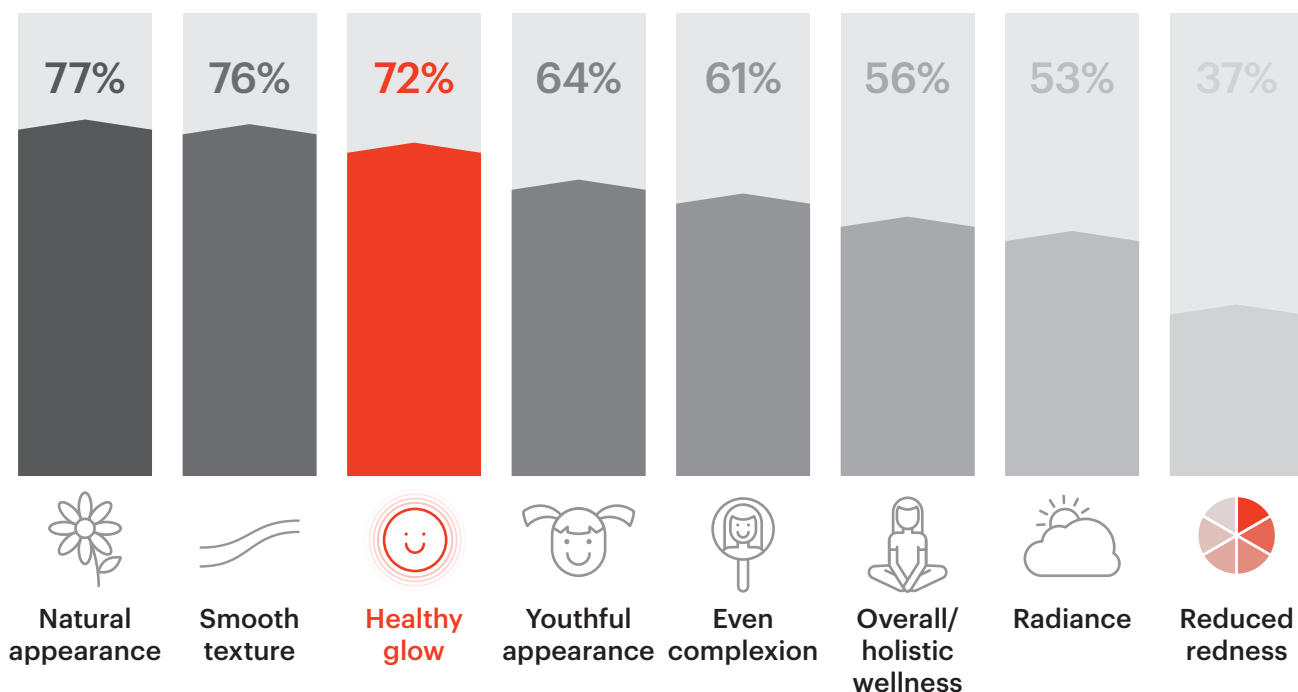
The next most important goal was smooth texture, which **76%** of survey respondents ranked in their top five, followed by healthy glow (**72%**), youthful appearance (**64%**), even complexion (**61%**), overall / holistic wellness (**56%**), radiance (**53%**) and reduced redness (**37%**).

The findings confirm that “glow” is a key goal for skincare consumers, and also suggest that they are more likely to use the term than “radiance”. The results are also in line with previous research on the growing importance of naturality and the diminishing appeal of simply appearing younger. As one commentator has put it:

“The trend to aspire to [look] ten years younger is gradually being eclipsed by the desire for a healthy, natural, youthful glow.”²⁰

This is also a key finding for manufacturers sourcing ingredients for skincare products, because a consumer who is focused on achieving naturality is also likely to want products containing natural ingredients.

Which of the following reasons to use skincare products are most important to you?



A holistic understanding of glow

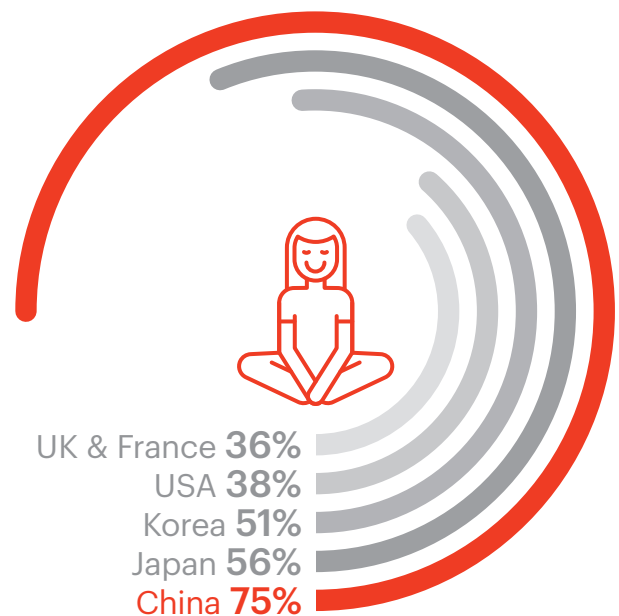
Another key finding was that consumers understand 'glow' in very holistic terms – as a quality with emotional and mental elements as well as physical ones. When asked which words they most associate with the idea of a healthy glow, almost half (47%) of our survey respondents picked "overall / holistic wellness", not far behind physical characteristics such as smooth texture (56%) and even complexion (51%). More than a third (34%) said mental or emotional wellness was one of the terms they associated with a healthy glow, and almost all (97%) agreed with the statement: "Good mental and emotional wellness is a necessary component to achieve a healthy glow."

Interestingly, consumers in Asian countries were particularly likely to see glow this way. Three quarters (75%) of survey respondents in China, 56% of those in Japan and 51% of those in Korea associated the idea of a healthy glow with overall or holistic wellness, compared with 36% of those in the UK and France and 38% of those in the US. Similarly, consumers in China and Japan were significantly more likely than those in other countries to say that overall or holistic wellness was a goal they wanted to achieve from their skincare regime.

The respondents were also asked where they thought a healthy glow comes from. One in five (22%) said it was most likely to come "from within", higher than the number who said it is most likely to come from external factors, for example applying a skincare product topically (15%). However, the majority (64%) said a healthy glow is most likely to come from a combination or balance of both "within" and "external" factors.

Women were significantly more likely than men to take this view, with **73% believing that a healthy glow comes from a combination or balance of both "within" and external factors.** By contrast, men were much more likely than women to believe that glow comes from external factors (23% v 8%).

Good mental and emotional wellness is a necessary component to achieve a healthy glow



Where do you think a healthy glow comes from?

73% A combination of internal and external factors



Sleep and nutrition – the secrets to glowing skin

Our research revealed very high awareness of the importance of nutrition in achieving a healthy glow. Almost all (98%) respondents agreed with the statement “Good nutrition is necessary to achieve a healthy glow.” And when they were asked which five factors (from a list of ten) were most likely to give them a healthy glow, the second highest score was for healthy diet / nutrition, which was picked by 65% of survey respondents, second only to getting the right amount of sleep (66%).

Both sleep and nutrition ranked higher than skin factors such as hydration (56%), skincare products applied physically to the skin (39%) and exercise (36%).



We then asked respondents to rank four foods in order of how likely they thought they were to give their skin a healthy glow. Those rich in Vitamin E, such as almonds and sunflower seeds, were ranked highest, with 79% of respondents placing them in their top two.

They were shortly followed by foods rich in carotenoids, such as carrots and tomatoes, which two thirds (65%) of respondents ranked in either first or second place, ahead of foods rich in collagen (46%). Interestingly, consumers in France, the only Mediterranean country in the research, were particularly likely to believe in the skincare benefits of carotenoids, with over half (51%) ranking foods such as carrots and tomatoes as the ones most likely to give their skin a healthy glow.

In fourth place were foods infused with rosemary, which 11% of respondents ranked in either first or second place. Given that rosemary polyphenols can play a role in photoprotection, there may be scope for more education on their benefits for skincare.



Lycoderm™: Meeting consumer needs

Lycoderm™, Lycored's proprietary blend of tomato phytonutrients and rosemary leaf for skincare supplements, is carefully calibrated to maximize the synergy between these natural ingredients. It also meets many of the needs identified in our consumer research.

Rich in the carotenoids lycopene, phytoene and phytofluene, as well as Vitamin E, it contains the two food ingredients that our survey shows consumers most associate with a healthy glow.

Formulated to boost the skin's ability to maintain its natural radiance, Lycoderm™, has been shown to aid our skin's natural resilience to external stressors and support its ability to cope with the aging effects of sun exposure. And in recent research, a statistically significant decrease in erythema (redness) formation was observed in subjects taking Lycoderm™ compared to a placebo group.²¹

Furthermore, lycopene levels in the skin correlate with improved texture and reduced roughness.²² During a twelve-week study measuring the density, thickness, and smoothness of skin, statistically significant improvements were found in subjects who received the antioxidant supplement as opposed to a placebo.²³



The Cycle of Glow: Lycored's wellness philosophy

The Lycored team believes that when we are good to our bodies and our minds, they return the favor. We call this the "Cycle of Glow."

We are committed to helping cultivate skin health and wellness through our world-class range of carotenoids, wellness extracts, and proprietary skincare nutrient blends, which we created to synergistically enhance the benefits of topical, external glow treatments. During their development, we found that carotenoids work even better when synergistically combined with rosemary extract to neutralize free radicals and reduce oxidative stress in skin tissue.

Carotenoid levels in our bodies can increase just 24 hours after supplementation, but while the full benefits of carotenoid supplementation take time to cultivate, there are some effects – like reduced redness in the skin – that can be seen after just a few weeks.²⁴ Antioxidants and nutrients like carotenoids help balance our skin from environmental stressors such as UV rays, building up like a "reservoir of goodness" that is there when you need it.

Carotenoids aid in our skin's natural response to environmental stressors such as UV rays, and when used in conjunction with topicals, can support and complement an active outdoor lifestyle, and even help improve long term skin health.²⁵ Carotenoid supplementation can be used as part of a holistic skincare regimen to reduce oxidative stress and control erythema, support healthy blood flow,²⁶ and otherwise promote long term sustainable skin health.²⁷



New research on the benefits of Lycoderm™

Lycored recently tested the effectiveness of Lycoderm™ through a full-scale, double-blind clinical study.²¹ We examined its bioavailability, safety and efficacy, and explored its potential to balance the skin's response to UV challenge.

One hundred and forty-five healthy men and women supplemented for 12 weeks with softgels containing either Lycoderm™ or a placebo. They were exposed to controlled local UV radiation before and after supplementation.

A statistically significant decrease in erythema formation was observed in the group taking Lycoderm™ compared to the placebo group. At the molecular level there was a reduction in pro-inflammatory cytokines.

The results provide specific evidence for the mechanism of action of Lycoderm™, demonstrating a significant effect on pro-inflammatory cytokines induced by controlled UV exposure. They also provide definitive proof of the effect on physiological parameters such as reduction of the intensity of erythema caused by UV exposure, supporting a causative relationship between supplementation with Lycoderm™ and benefits for a healthy glow.

Lycoderm™ is formulated to:

- Help skin cope with environmental challenges and reveal its healthy glow to live radiantly
- Help skin detox by boosting the natural defense mechanism of skin cells (epidermis and dermis)
- Contribute to balancing the skin's response to oxidative stress and DNA damage
- Help calm inflammation by reducing the secretion of inflammatory mediators
- Modulate expression of skin photo-aging markers
- Support reduced erythema intensity
- Boost the skin's ability to maintain its natural radiance
- Increase carotenoid levels in the skin to reduce cellular damage caused by free radicals
- Help maintain the skin's ability to better cope with the aging effects of environmental and endogenous challenges
- Increase skin smoothness, density and thickness
- Support maintenance of natural collagen
- Help nourish skin with rich nutrients and antioxidants designed to complement a holistic skincare routine



Conclusion

Lycored's latest consumer research paints a picture of sophisticated skincare consumers: natural appearance is far more important to them than goals such as looking younger. They want a healthy glow but know it does not come from a tube and can only be achieved through a complex combination of external and "from within" factors.

Finally, they understand the importance of nutrition, and the role of vitamin and carotenoid-rich foods, in achieving that much sought-after "glow".

Key findings:

1. "Glow" is a key goal for skincare consumers
2. They believe sleep and nutrition are the most important factors in their pursuit of it
3. Foods rich in Vitamin E and carotenoids are widely linked with a healthy glow
4. Natural appearance is more important to skincare consumers than youthful appearance
5. Most consumers believe a healthy glow comes from a balance of "within" and "external" factors



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