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## **Vegan Claims in Skincare**

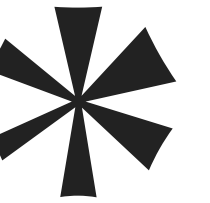
A data-driven analysis of consumer attitudes  
toward vegan skincare claims

SURVEY: 900 CONSUMERS ACROSS US, UK, AND SOUTH KOREA

FOCUS: PRESTIGE SKINCARE SEGMENT (\$25+)



# Executive summary



## The Vegan Paradox in Skincare

Vegan claims are widely misunderstood, rarely acted upon, and rank **13<sup>th</sup> out of 20 purchase drivers**, between "new technology" and "recycled packaging."

### Three Critical Findings:

#### 1. The Intention-Action Gap

56% say vegan is important. Only 14% always buy it

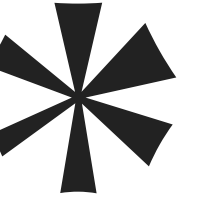
#### 2. The Definition Problem

89% associate vegan with cruelty-free, clean, or natural – not animal-free (11%)

#### 3. The Better Strategy

Direct claims outperform vegan as a proxy: Natural (48%), Cruelty-free (28%), Vegan (10%).  
Consumers respond to specific attributes, not vegan certification

# Key finding 1



**56%**

of prestige consumers say vegan is important, but...

**14%**

Always buy vegan.

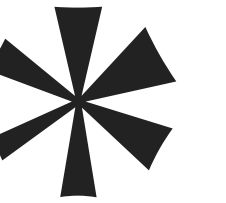
## The Reality

56% of consumers say vegan is important, but only 14% always buy it. **3/4 of the people who claim vegan is important are not necessarily buying it.**

## Leading to Key Finding 2:

Of the roughly half of consumers who value the vegan claim, only 11% prioritize its actual meaning (animal-free). **The other 89% primarily seek cruelty-free, clean, and natural attributes - benefits that rank higher as purchase drivers than vegan itself.**

# Key finding 2



## Consumers do not understand what vegan means.

When consumers hear “vegan skincare” – they think it means, in order:

1. **Cruelty-free** (25% in Q17, 19% in Q18)
2. **Natural/naturally derived** (23% in Q18)
3. **Clean** (23% in Q17, 14% in Q18)
4. **Superior skin benefits** (15% in Q17)
5. **High efficacy** (14% in Q17)
6. **Non-toxic** (13% in Q18)
7. **Sustainability** (12% in Q17, 9% in Q18)
8. **Organic** (10% in Q18)
9. **No animal products** (11% in Q17, 12% in Q18) ←\*

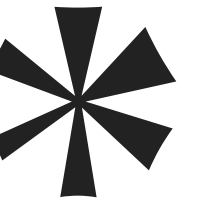
### The Reality

When consumers ask for vegan, 89% want something else. **It is a proxy for eight other attributes they value** – cruelty-free, clean, natural, high-performing products. Only 11% are seeking truly animal-free formulations.

### Leading to Key Finding 3:

This misunderstanding means consumers who claim to want vegan will actually accept – **even prefer** – non-vegan ingredients.

# Key finding 3



## Consumers accept, even prefer, non-vegan ingredients.

Because consumers associate vegan with cruelty-free, clean, and natural attributes rather than animal-free formulations, they act in contradiction:

57% of those who say vegan is important would still use products with milk and honey.

In the US market, this rises to 68%.

Among consumers who claim vegan is important, vegan ranks 13<sup>th</sup> (10%) as a purchase driver – far behind (in order):

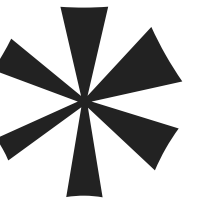
1. Efficacy (52%)
2. Clinically proven (48%)
3. Natural/naturally derived (48%)
4. Sustainable (37%)
5. Clean (34%)

The data reveals additional confusion. Among consumers who say vegan is important: **43% believe silk is a vegan ingredient**. 79% are more likely to purchase if a product is **biodegradable or made from renewable resources** – nearly **8x** more than those who always buy vegan (14%).

### The Reality

The data shows consumers prioritize **efficacy, natural ingredients, and sustainability over vegan certification**, and the majority who value vegan claims would still use efficacious animal byproducts like honey, beeswax and milk.

# High level synopsis: What the data tells us



## The Intention-Action Gap

56% of prestige consumers say vegan is important, yet only 14% always purchase vegan products – a 4:1 gap between stated preference and behavior.

## The Definition Problem

When consumers say they want vegan, 89% are seeking attributes other than animal-free: cruelty-free (25%), natural (23%), clean (23%), performance (15%), and sustainability (12%). Only 11% identify vegan with its actual meaning.

## The Behavioral Contradiction

Among those who say vegan is important: 57% would use products with honey and milk. 43% believe silk is vegan. Vegan ranks 13th (10%) as a purchase driver, far behind efficacy (52%), natural (48%), and sustainable (37%)

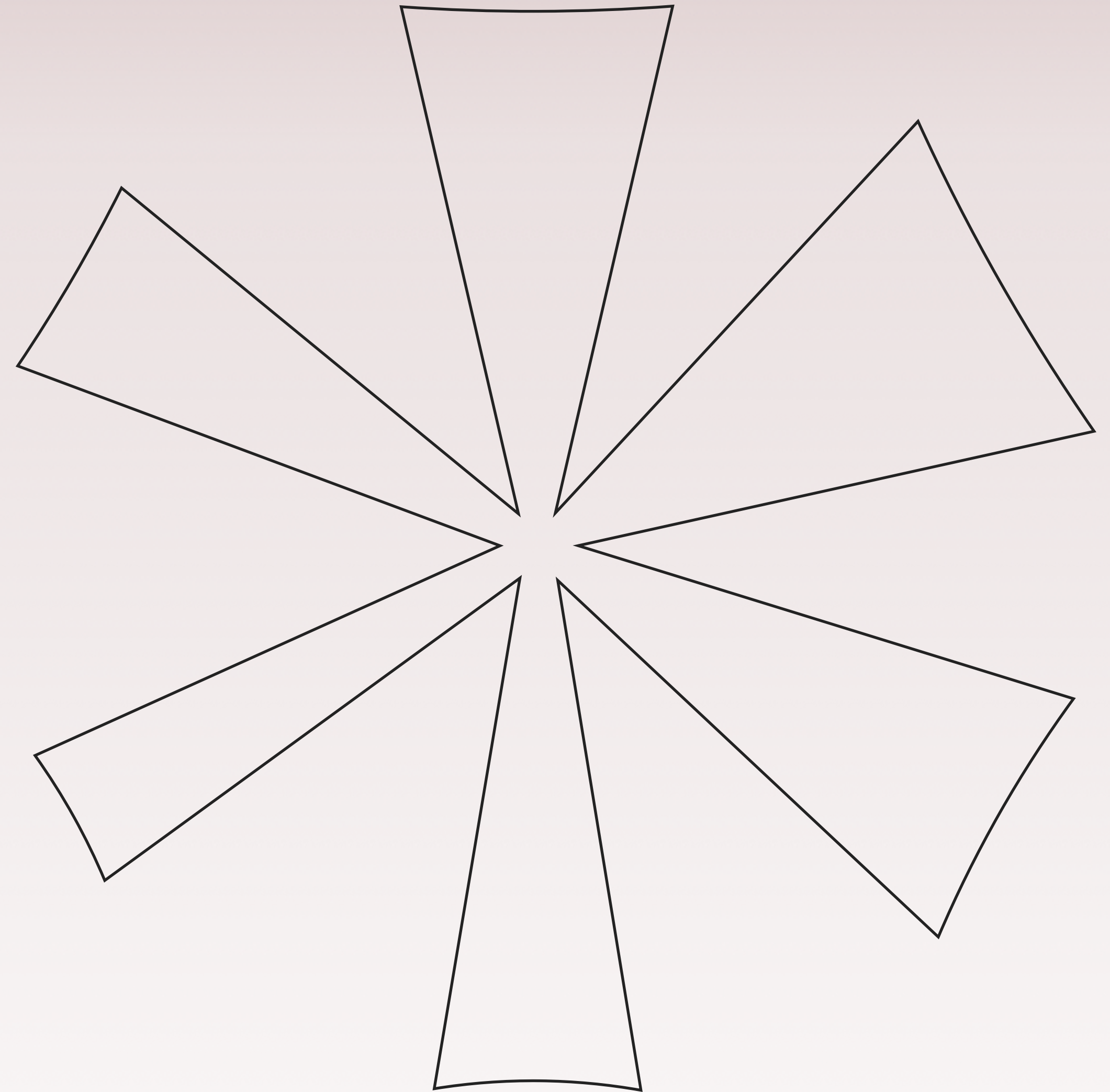
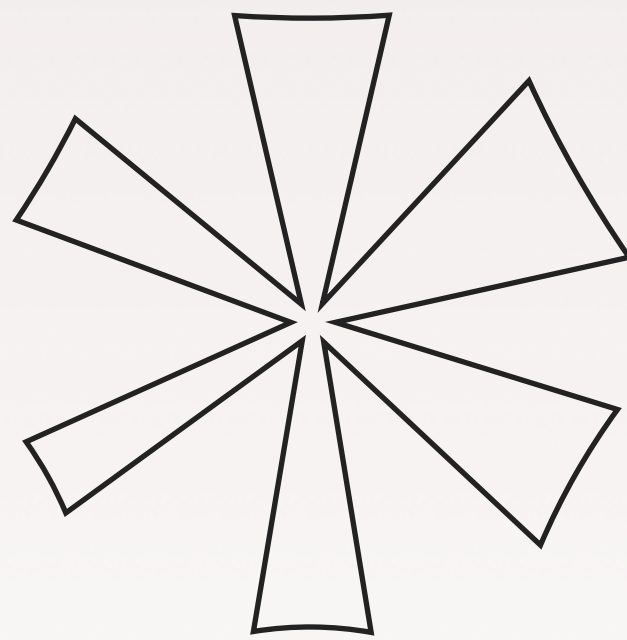
## Why Vegan Underperforms as a Claim

Consumers don't respond to vegan certification itself – they respond to the specific attributes they mistakenly associate with it. When directly asked what matters most, those attributes (efficacy, natural, sustainable, cruelty-free) rank significantly higher than vegan. **Brands leading with direct claims outperform those relying on vegan as a proxy: natural ranks 3rd (48%), cruelty-free ranks 7th (28%), while vegan ranks 13th (10%).**

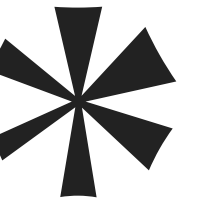
## The Bottom Line

Using "vegan" as shorthand for quality attributes is less effective than **claiming those attributes directly**. Consumers prioritize performance and sustainability over vegan certification, and behavioral data shows they will choose superior performing products with animal byproducts over vegan alternatives when efficacy is clearly communicated.

# Full Data Story



# Objective and methodologies



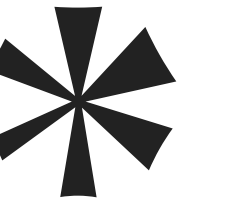
**Objective:** Understand consumer attitudes and usage for vegan skin care products

**Methodology:**

- Online survey, total n=900
- Regions: US, UK, S. Korea (native language), n=300 per region
  - Within each region n=100 masstige (\$15-24.99), n=200 prestige (\$25+)
- Respondents screened on:
  - Age 18-65
  - Female only
  - P6M purchasers of facial skincare products (e.g., serums, masks, lotions, moisturizers, etc)
- Vendor Prodege MR, fielded Oct 10, 2024 – Oct 23, 2024

**Analysis Note:** Data in this deck is stat tested at 95% and 90% confidence, signified by **A/B** (95%) indicating a statistically significant difference between that data point and the one in the other column

# Vegan skincare is more important to the prestige skincare segment

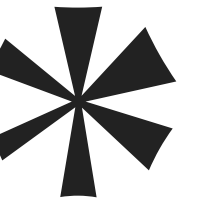


**Over half of the prestige segment see vegan claims as an important factor when selecting skincare product.**

## Importance of 'vegan' when selecting facial skincare product

	Total Masstige (A)	Total Prestige (B)
Sample size	n=248	n=611
Very/somewhat important	<b>39%</b>	<b>56% A</b>
Neither important nor unimportant	36% B	28%
Very/somewhat unimportant	24% B	15%

# Importance varies by region

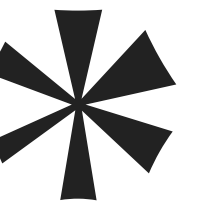


## Importance of 'vegan' when selecting facial skincare product

	Total Masstige (A)	Total Prestige (B)	US Masstige (C)	US Prestige (D)	UK Masstige (E)	UK Prestige (F)	S.Korea Masstige (G)	S.Korea Prestige (H)
Very/somewhat important	39%	56% ACE	39%	51% AE	30%	64% ACDEH	53% E	55% ACE
Neither important nor unimportant	36% B	28%	33%	28%	40% BDF	22%	41% BF	33% F
Very/somewhat unimportant	24% B	15%	28% BFGH	21% FGH	30% BFGH	13%	7%	12%

- Across all regions, UK prestige market places the most importance on facial skincare products being vegan
- S. Korean masstige consumers place nearly an equal importance on vegan as the the S.Korea prestige consumer does
- US and UK prestige consumers are more likely to see vegan as an important factor than their masstige counterparts

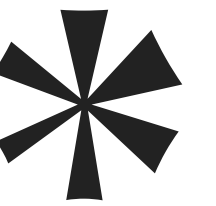
# Yet only a small percentage of prestige skin care consumers state vegan is a mandate for purchase



## Frequency of purchasing vegan skincare products by region

	Total Prestige (A)	US Prestige (B)	UK Prestige (C)	S.Korea Prestige (D)
Always	14%	12%	20% ACD	11%
Sometimes	50%	50%	53%	48%
Rarely	19%	18%	15%	23% C
Never	10%	11%	6%	14% C
I don't know	6%	9% D	7% D	3%

# Which is likely the result of how prestige consumers interpret the value of 'vegan' in skincare



They see it as a signal of cruelty free and clean, rather than a reflection of an animal free lifestyle.

## Why vegan skincare is important

	<b>Prestige who say vegan claim is important</b>
Sample size	n=225
Signals cruelty free	25%
Indicates product is 'clean'	23%
Has superior skin benefits	15%
Signals high efficacy	14%
Indicates sustainability	12%
Contains no animal products	11%

## Cruelty-Free Quotes

"Vegan products are typically not tested on animals and promote ethical practices"

"I prefer my products to be cruelty free"

"Because it means never tested on animals"

"It shows that no animals were harmed"

## Clean Quotes

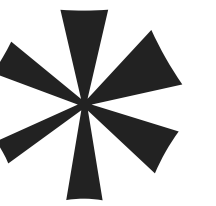
"Vegan skincare are non toxic and contain organic ingredients that are environmentally friendly and healthy"

"I only want clean products and are made from natural resources"

"The ingredients are healthy and non toxic to human skin"

"Because I'm not putting any harsh chemicals on my skin"

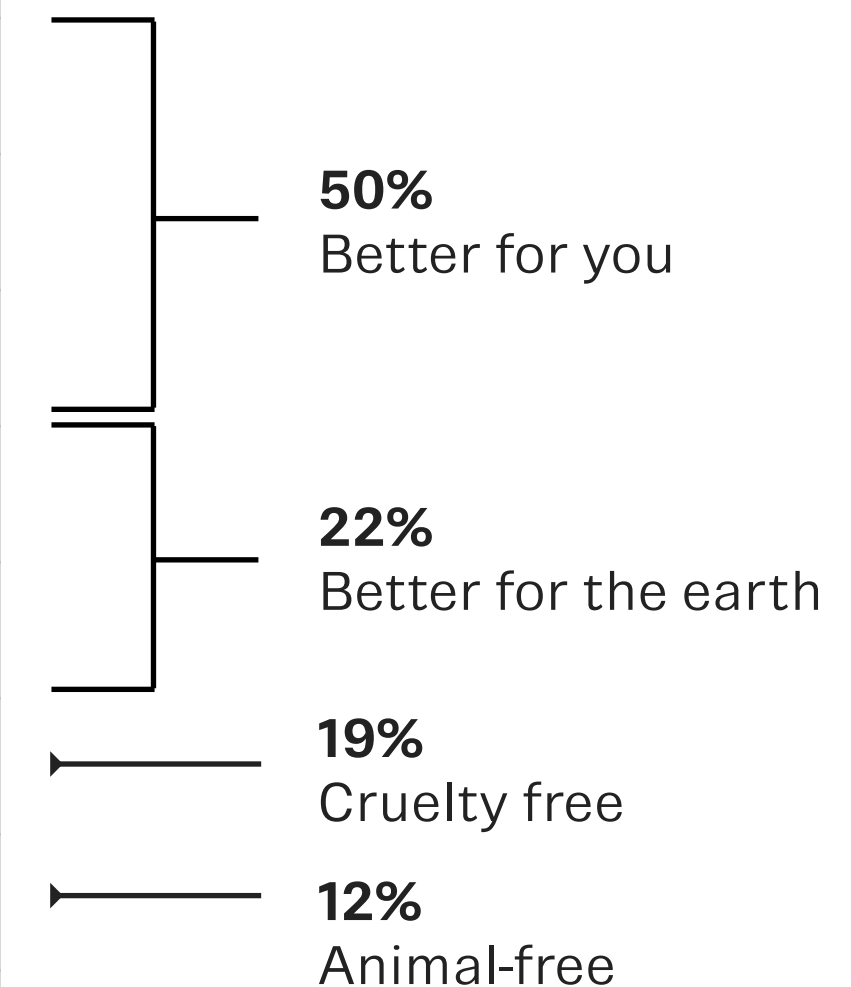
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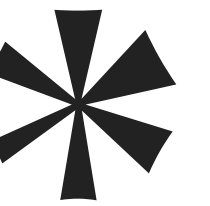
They see it as a signal of better for you, better for the earth, and cruelty-free, rather than a reflection of an animal free lifestyle.

## Reasons why vegan skincare is important

	Total Prestige who say vegan claim is important (A)	US Prestige who say vegan claim is important (B)	UK Prestige who say vegan claim is important (C)	S.Korea Prestige who say vegan claim is important (D)
Sample size	n=345	n=96	n=125	n=124
I want my facial skin care products to be natural/ naturally derived	23%	15%	23%	28% <b>B</b>
I want my facial skin care products to be clean	14%	22%	13%	10%
I want my facial skin care products to be non-toxic	13%	14%	9%	16%
I want my facial skin care products to be organic	10%	13%	10%	9%
I want my facial skin care products to be sustainable	9%	4%	10%	11%
I want my facial skin products to be cruelty-free	19%	20%	22%	14%
I do not want my facial skin care products to contain animal derived products	12%	13%	12%	11%
None of the above	0%	1%	0%	0%



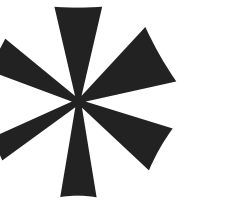
# This sentiment is further reflected in their views of animal byproducts as skincare ingredients



## Perceptions of skincare ingredients

	Total Prestige who say vegan claim is important (A)	US Prestige who say vegan claim is important (B)	UK Prestige who say vegan claim is important (C)	S.Korea Prestige who say vegan claim is important (D)
Sample size	n=345	n=96	n=125	n=124
I would use skin care products with ingredients like goat's milk and honey, even though they are not vegan	57%	68% CD	53%	52%
Silk is a vegan skincare ingredient	43%	45%	47%	38%

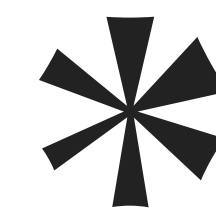
# They prioritize sustainability over vegan



## Perceptions of skincare ingredients

	Total Prestige who say vegan claim is important (A)	US Prestige who say vegan claim is important (B)	UK Prestige who say vegan claim is important (C)	S.Korea Prestige who say vegan claim is important (D)
Sample size	n=345	n=96	n=125	n=124
It is more important to me that a skin care product is biodegradable or made from renewable resources than if its vegan	54%	57%	51%	56%
I am more likely to purchase a skin care product if it is biodegradable and/or made from renewable resources	79%	75%	74%	85% C

Despite seeing vegan claims as important to the purchase process, prestige consumers are far more likely to place value on performance and better for you/ better for the earth claims when it comes to shopping for skincare



### Top 10 Facial skincare product purchase drivers

Rank	T2B Agree	Total Prestige who say vegan claim is important (A)	US Prestige who say vegan claim is important (B)	UK Prestige who say vegan claim is important (C)	S.Korea Prestige who say vegan claim is important (D)
	Sample size	n=345	n=96	n=125	n=124
1	Efficacy/ how well it works	52%	53%	48%	55%
2	Clinically proven	48%	51%	54% <b>D</b>	40%
3	Natural/ naturally derived	48%	40%	53%	50%
4	Sustainable	37%	29%	47% <b>ABD</b>	31%
5	Clean	34%	47% <b>ACD</b>	26%	31%
6	Made from organic ingredients	29%	31%	34%	23%
7	Cruelty free	28% <b>D</b>	44% <b>ACD</b>	26%	17%
8	Paraben, sulfate, or phthalate free	24% <b>C</b>	30%	14%	29% <b>C</b>
9	Backed by science	23%	21%	26%	22%
10	Contains new technology/ingredients	18%	23% <b>D</b>	22%	11%
13	Vegan	10%	7%	10%	13%



**Thank you.**

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