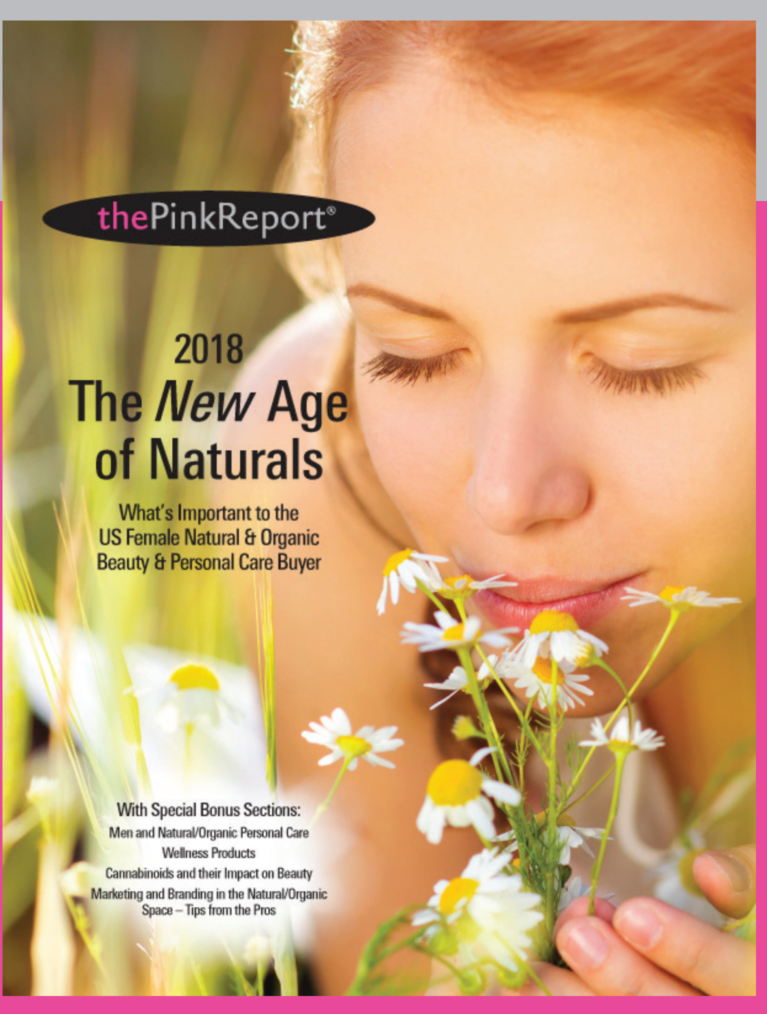
Beauty by the Numbers™ • 2018 Insider Sneak Peek!

TBC's 2018 PinkReport® The *New* Age of Naturals – AVAILABLE NOW!



Ten years ago TBC's PinkReport® examined a growing trend – Natural and Organic beauty. A decade later, we are excited to deliver our 2018 PinkReport®, **The *New* Age of Naturals**, which confirms that what was once a growing trend has fully morphed into a collective behavior for many beauty and personal care buyers and its popularity is skyrocketing.

Join us as we take a look at the natural/organic brands that have moved the needle the furthest in 10 years, which brands each generation buys, how far natural/organic beauty and personal care (BPC) products have evolved over the past decade in the eyes of the female (and male) consumer, and what that evolution means to brands in terms of guiding marketing plans. Bonus Sections of the Report include a dissection of wellness product buying, cannabinoids/CBDs and their impact on beauty, and marketing and branding tips from the pros.

thePinkReport®

Download the full report – 168 pages of must-read data for $1,499 – at www.benchmarkingcompany.com/pinkreports

The Natural and Organic Beauty & Personal Care Consumer

She is all ages, all ethnicities and represents all socio-economic groups

- **62%** exercise regularly
- **77%** take vitamins
- **83%** have attended college or hold a college degree
- **57%** have a household income >$50K
- **52%** buy natural/organic BPC products on Amazon.com (#1 retailer chosen)
- **70%** buy natural/organic BPC products at least half the time they shop
- **71%** are willing to spend more on natural/organic products beauty products than on traditional beauty products

What She Is Looking for Before Making a Purchase

- Positive consumer claims and online product reviews are essential for **86%** – she won't even entertain the thought of buying a new beauty or personal care brand without them!
- **70%** check out a product's ingredient list before buying
- **52%** expect product efficacy to be backed by scientific proof

Expectations of Natural/Organic BPC Products

Buyers of natural/organic BPC expect products with these monikers to deliver performance with perceived safety.

- **80% of women/72% of men** free from toxic pesticides
- **76% of women/69% of men** free of known carcinogens, natural or synthetic
- **72% of women/ 68% of men** as effective as traditional beauty products made with chemicals and synthetics

PARABEN FREE

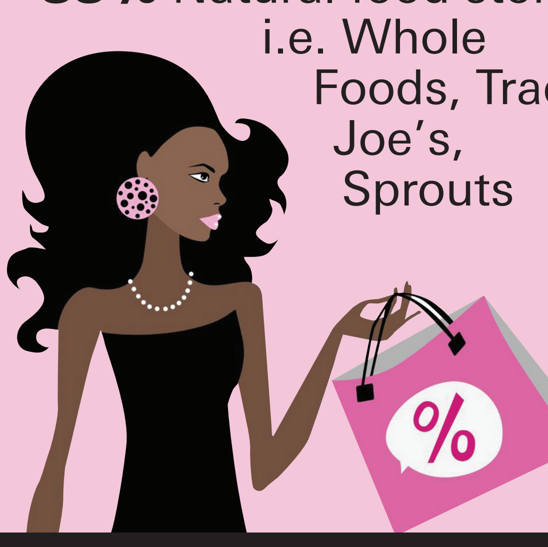
cruelty free

Top Considerations in Her Purchase Decision

- **79%** Price
- **75%** Does not test on animals
- **70%** BPA free
- **63%** Shelf life
- **57%** Paraben free
- **50%** Plant-derived

Where she shops Organic/Natural BPC Products

- **52%** Amazon
- **43%** Superstore, i.e. Target, Walmart
- **47%** Beauty specialty store, i.e. Ulta, Sephora
- **33%** Natural food store, i.e. Whole Foods, Trader Joe's, Sprouts



She is Principled, Socially Aware and Concerned for the Environment

- **81%** state it is important that the brand does not test on animals
- **72%** say its important for the brand to pay a living wage to all employees
- **71%** expect brands to be socially and environmentally responsible
- **76%** say it is important for the brand to be "green" and eco-friendly

The Buzz about Cannabis

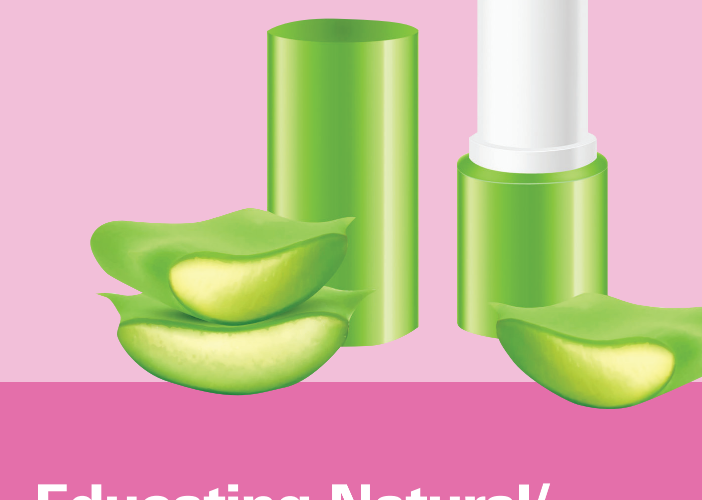
- **73%** of natural/organic BPC buyers and **59%** of non-natural/organic buyers are aware that some new BPC products contain hemp or cannabinoids
- **37%** of natural/organic BPC buyers have purchased a BPC product containing these ingredients
- **51%** of all women who haven't purchased this type of BPC product would be willing to give them a try

The Brands She Buys & The Brands He Buys

Ranking	Her Purchases	Ranking	His Purchases
1	Aveeno	1	Aveeno
2	Burt's Bees	2	Burt's Bees
3	Bare Escentuals/ Bare Minerals	3	Tom's of Maine
4	Aveda	4	Seventh Generation
5	EOS	5	Aveda

The Ingredients She Seeks in her BPC products

- **80%** Aloe Vera
- **71%** Vitamin C
- **71%** Vitamin E
- **68%** Argan Oil
- **67%** Coconut Oil/Essence



Natural/Organic Product Categories Poised for Growth

Girls & Guys stated they have not purchased these natural or organic products in the past but would like to give them a try.

- **51%** Mascara
- **50%** Nail Polish
- **48%** Essence / Facial Treatment /Foundation or Concealer (tied)
- **46%** Blush /Shaving products / Eye Makeup (tied)
- **45%** Exfoliator
- **40%** Face wipes / Facial treatment (tied)
- **37%** SPF/sunscreen
- **36%** Shaving/Grooming products
- **35%** Detoxifying tonics/ ingestibles
- **34%** Hair styling products

Educating Natural/Organic Consumers is a Brand Opportunity

- When testing her organic/natural IQ about certification, specific ingredients and definitions of organic and natural, for each question, 53% or fewer women answered correctly
- **Only 56%** said they understand the difference between a natural product vs. an organic product
- **73%** of all respondents said they understand the difference between a natural/organic product vs. a synthetically made product

Of Those Who Haven't Tried Cannabis/Hemp Beauty

- **52%** don't understand the benefits
- **30%** don't think they're safe for skin
- **18%** are afraid of "getting high"

The Top Organic/Natural Products Consumers Purchase

Ranking	Her Purchases	Ranking	His Purchases
1	Lip balm	1	Body Moisturizer/ Facial Moisturizer (tied)
2	Oils	2	Deodorant / Facial Cleanser / Lip Balm / Conditioner (tied)
3	Body moisturizer	3	Body Scrub
4	Shampoo / Facial moisturizer (tied)	4	Shampoo
5	Facial masks	5	Body Wash

Data based on an original survey of 5,872 US women and men ages 18+, conducted in June 2018.