Beauty & Personal Care Product Testing

Consumer Perception Studies

Claims · Insights · Validation · Risk Mitigation



Beauty & Personal Care Product Testing

The Benchmarking Company's (TBC) consumer perception studies can garner powerful consumer claims to support sell-in and sell-through. Our unique approach ensures your claims are powerful as well as compliant with advertising and marketing regulations for cosmetics and personal care products.

Why are consumer perception studies important?

Because in today's "show me proof of efficacy before I'll buy it" world, claims studies conducted by an independent third-party research firm offer proof - driving the beauty and personal care consumer to buy and become loyal product evangelists.

.

Claims are Important When Marketing to Women

93% LOOK FOR EFFICACY CLAIMS BEFORE PURCHASING A OF WOMEN BEAUTY PRODUCT



86% MAKE BEAUTY BUYING DECISIONS WHILE STANDING OF WOMEN AT THE BEAUTY COUNTER



To win in today's beauty market, you need 5-STAR CONSUMER CLAIMS.

Data based on a March 2014 poll of 2,000+ US females ages 18+ who regularly purchase beauty products



Claims are Important When Marketing to Men

89% find consumer claims important when buying a high cost personal care item
83% trust 'men like them' saying that a product works more than a brand saying the same thing
91% would be willing to pay more for a product if they knew it worked and delivered on its promises

Data based on a May 2017 poll of 370 US males ages 18+ who regularly purchase personal grooming products

1 in 2

Claims are Important For Sell-In & Sell-Through

theBenchmarkingCompany

female beauty consumers admit they would <u>buy more</u> beauty products if they could read consumer claims from women like them which affirmed that the products work.



consumers want independent validation and proof that the products work quickly, are made with high quality ingredients and are effective.



Works Quickly





High Quality

Effective

And, top retailers use this proof to sell more!















Claims are Important For Sell-In & Sell-Through

Not only do retailers like QVC, Sephora and CVS expect brands they carry to have conducted consumer in-home use testing to validate their marketing claims...



...more and more retailers are demanding it as a prerequisite to doing business

theBenchmarkingCompany

Properly-worded Claims are Important For Regulatory Compliance & Legal Risk Mitigation

Although marketing claims are important, how brands <u>communicate</u> claims is as important as the claim itself.

"Popular marketing words like recover, heal, and restore can draw regulatory attention and that was evident in 2016, when consumer class suits and FTC and FDA regulatory actions against beauty companies rose steadily." –Ronie Schmelz, Esq., counsel at Tucker Ellis, LLP.



increase in the number of Federal Trade Commission (FTC) warning letters issued to cosmetics companies in 2016 over 2015 for improperly worded claims

> Federal Trade Commission



What makes TBC's approach different?

TBC has conducted testing for the largest brands in the business, as well as scores of Indie startups. Our unsurpassed knowledge of beauty and personal care consumers and the claims that resonate with them, coupled with our proprietary methodologies and our renowned panel of 200K+ beauty and personal care buyers, are reasons why brands come back to us time and again.

Key Advantages of Working With TBC

Independent Voice. By working with TBC for your beauty product testing, you bring the real value of having a third-party source, adding proven credibility in an increasingly highly regulated environment.

Consumer Intelligence. We know beauty and personal care consumers and understand intimately what they are looking for in their product offerings, and we know how to work with you to optimize the product portfolio you choose for testing.

Market Tracking. Knowing the current in-market claims found in most products allows us to maintain up-to-date knowledge of what claims and techniques are trending. We evaluate the competition and white-space opportunities and craft claims strategies and testing protocols that ensure that your offerings are elevated above the rest.

Benchmarked Testing. Having conducted hundreds of studies we know what the product performance and percentages should be as compared to peer group products.

Market Claims. We have studied and proven that the type of questions asked, the process in which they are asked and a woman's entire experience with your products is important to manage effectively. We have optimized our methodology from the participant screening process to the self-assessment survey questionnaire to the daily communications to provide best-inclass claims, insights and validation.



Beauty or Personal Care Product Testing involves sending either a prototype or a product that is conditionally approved for in-market commercialization and has undergone appropriate safety and stability testing to a defined panel of target consumers.

This highly targeted panel uses the product – according to specific usage instructions – for a given time period, and then assesses their experiences with the product at various intervals throughout the trial. This type of testing

reveals emotional connections to products and brands which is a valuable tool for any marketing team.

- Panel sizes range from 35 to 300.
 Average panel size is 100 to 150.
- Up to 3 SKUs tested (must have differentiated benefits)



Quantitative and Qualitative Product Testing

Performance Testing

Market-Ready Beauty Product Testing

Develop hero claims, go-to-market product and collections claims and consumer testimonials in addition to a core group of brand voices.

How well does it get the job done? Can the product compete in the market?

Prove Product Efficacy Claims Strategy & Articulation Market-Ready Claims Market-Ready Testimonials Before & After Photography Third-Party Validation Risk Mitigation against False Claims

Group Size: 35-300 panelists Timeframe: 1, 7, 14, 28, 56+ day trials

Experience Testing

Prototype Beauty Product Testing

Test initial efficacy and deep-dive into the consumer's reactions and interactions including usage (texture, scent, appeal, ease-of-use, and effectiveness) in an online, in-person or at-home study format at any stage of formulation.

Does it work? Does it appeal to consumers? Is this a product she will want to buy?

Verify Product Offering

Comprehensive Sensory Testing

Consumer Experience & Usage Feedback

Price Point and Purchase Intent

Red Flags & In-Market Inhibitors

Optimization Opportunities

Third-Party Validation

Group Size: 30-50 panelists Timeframe: 1, 7, 14+ day trials

Types of Products Tested

Cosmetics and Nails

Foundation, Bronzer, Lipstick, Lip Gloss



Skincare

Acne, Sunscreen, Anti-Aging Skincare, Lotion



Beauty and Personal Care Devices

Anti-Aging Ultra-Sound Devices, Purifying Shower Heads



Body Care Body Oil, Body Lotion, Neck Cream



Hair Care Shampoo, Conditioner, Gel, Styling Cream



Fragrance Perfume, Eau de Toilette, Body Lotion



Men's Care Deodorant, Shave Creams, Beard Balm, Lip Care



Types of *Beauty & Personal Care* **Product Testing** (Consumer In-Home Use Testing)

As varied as your marketing & PD needs

- ✓ Branded
- ✓ Blind
- ✓ Prototype/Pilot
- ✓ New SKU
- ✓ New Formulation
- ✓ New Formulation vs. Old
- ✓ Formula A vs. B
 for max. efficacy
- ✓ Old SKU
- ✓ New Set
- ✓ Competitive
- ✓ Fragrance Preference
- ✓ Usage instruction efficacy
- ✓ Advertising compliance



Beauty & Personal Care Product Testing Methodology

Independent Voice • Consumer Intelligence • Market Tracking Market Claims • Benchmarked Data







TBC Targets Your Consumer

Whether you are looking to test a beauty product for women or men, for long hair or short, for a specific skin type or complexion color, TBC will create the perfect panel. With <u>more than 200k+ vetted beauty and</u> <u>personal care buyers</u>, you establish the criteria, and we build your ideal panel.

- Geographic Location
- Shopping Habits
- o Skin Concerns
- o Age
- o Ethnicity
- o Household Income
- o Values

TBC Tests Your Product

TEST YOUR PRODUCTS WITH YOUR TARGET CONSUMER AND GET VALUABLE FEEDBACK

It is an opportunity to make things good (and then better) and right (and then fantastic) for the men and women who use the products.

- Gain participant legal consent
- Establish a testing protocol
- Develop claims and selfassessment surveys
- Ship products to participants
- Gather survey responses
- Aggregate survey data
- Certify and validate claims

TBC Validates the Claims & Gathers Testimonials



DRUNK ELEPHANT



My skin is noticeably tighter, reducing the laugh lines extending from the edges of my lips to my nose. I thought only surgery could fix those. Also made the lines between my eyes much **less noticeable**. I've tried many serums, including some very expensive brands. None of them are even close to being as **effective** as TLC Framboos. I also love the packaging. It makes it very easy to get the same amount every time I use it without risking contaminating the product. —Donna B., Henrietta, TX



"At first, I thought the straightener wouldn't work for me since there are no heat adjustments. I thought it may not get hot enough. I have thick hair and it can be hard to style. This was not the case! It worked **PERFECT** for me and I love the overall results. I currently own a another straightener, but I LOVE this styler **so much better**. It is gentle on my hair, glides effortlessly, and my hair looks **shiny and smooth**. Overall, I would absolutely prefer this styler over any other straightener I have used in the past." —*Amber W., St. Augustine, FL*



ALGENIST Several Medication

After 10 days of use, 95% of subjects reported visible improvements of skin texture around the eyes

GLAMGLOW FLASHMUD Brightening Treatment

After 3 uses, 93% said it created a brighter complexion

Algenist ELEVATE Firming & Lifting Contouring Eye Cream

Claims Support in Product Packaging

ADVANCED GENE SCIENCE, VISIBLE SKIN RESULTS

Clinically-advanced anti-aging face treatment backed by 8 years of university and scientific research

- Visibly softens fine lines and deeper wrinkles
- Reinforces and restores elasticity and firmness
- Hydrates and protects against moisture loss



- Unprecedented results*:
- 100% agree skin is soothed and nourished
- 100% agree skin is smooth
 95% agree skin is healthy and restored

RESVOLOGY

ADVANCED GENE SCIENCE, VISIBLE SKIN RESULTS

Luxuriously hydrating and rejuvenating eye cream with clinically-proven anti-aging actions

- Minimizes crow's feet, fine lines and wrinkles
- Reinforces skin firmness and elasticity
- Deflates puffiness and brightens dark circles



100% agree fine lines and

- wrinkles are minimized
- 100% agree eye area is firm
 100% agree eye area is hydrated

Pore Corrector Anti-Aging Primer

This anti-aging primer is formulated with Alguronic Acid and an additional 7 powerful ingredients to visibly refine pores, blur fine lines and imperfections, and improve skin texture and tone over time. This lightweight, aqueous formula evenly distributes onto the skin, creating a satin-soft finish for smooth, long-lasting makeup application.

After immediate use:

Leaves the skin soft and smooth in 93%* of subjects.

Improves makeup application and wear in 90%* of subjects.

Within 10 days of use:

Blurs fine lines and imperfections in 93%* of subjects.

Visibly improves the appearance of pores in 90%* of subjects.

Directions for Use: Apply evenly to clean and/or moisturized skin, avoiding the eye area. For a flawless finish, allow product to dry prior to applying makeup. Use only as directed.

¹ Results obtained using product once daily before applying makeup following self-accessments of 100 women, Average result measured following an in vitro test with Algorovic Acid 10.15⁺¹, 0.045⁺¹⁴2

StriVectin

StriVectin-EV"

7% PRA 1981 - Wearsin G. Actions 77

Otherste

100% of versions and versions are previous in hydrothere are the eyes





ALGENIST

Regenerative Anti-Aging Moisturizer

Formulated with Alguronic Acid, the Regenerative Anti-Aging Moisturizer nourishes and restores skin moisture while rebuilding firmness and elasticity. The appearance of winkles, fine lines, and pores is minimized. The skin is regenerated.

Within 10 days of use:

Skin moisture is restored in 96%* of subjects. Skin is regenerated in 96%* of subjects. Within 4 weeks of use: Fine lines & wrindles are minimized in 90%* of subjects. Skin firmness is rebuilt in 88%* of subjects.

Directions for use: Apply to the entire face, neck, and chest area twice a day. Use only as directed.

* Results obtained using product twice daily, following a self-assessment of 100 women.



 4 to 12 WEEKS / 4 à 12 SEMAINES
 Reduces the intensity of dark circles and fades spots / Réduit l'intensité des comes et attérue les

tâches de peau

C 15 ml/0.5 floz

texture

elasticity

Agree eye cream increases skin

Claims Support in Social Media



Expand

t1 Retweet *** More

Claims Support in POS Displays











Claims Support in Print Advertising



*Senge between it table if long works restand publicly is a brigger, third rule if some age to a 10 kiloring module upprove "Sends altered following a alteraction of 100 meters."

"See myers-care for clinical study results

Claims Support in Print Advertising

WANT YOUNGER, HEALTHIER LOOKING SKIN?

SKINSORIALS" SKINCARE

An exquisite beauty ritual filled with what your skin craves: gorgeous textures, naturally derived scents and effective ingredients.



¹/PURIFY

bareMinerals Cleansers

deliver exceptionally i pure and revitalized skin.* ii

SKINLONGEVITY"

²/EMPOWER

is clinically proven to improve skin's overall appearance.**

³/MOISTURIZE

bareMinerals Moisturizers

100% of women experienced an immediate improvement in skin hydration.***

"Based on 1-week independent US consumer studies of 100 to 110 women "Based on an 8-week independent US clinical study of 65 women ""Based on 4-week independent US clinical studies of 37 to 42 women

BE ORIGINAL. BE NATURAL. BE GOOD.

Come in for a personalized consultation and discover how **NEW SKINSORIALS** unleashes your skin's most vibrantly healthy looking glow.



 VIBRANC

 ARGAN OIL SKINCARE FOUNDATION FLU

 ARGAN OIL SKINCARE FOUNDATION FLU

 ARGAN OIL SKINCARE FOUNDATION FLU

 RESH SQUEEZED FOUNDATION

 VIBRANT, JUICY, GLOWING SKIN

 Medium-to-full coverage / Radiant, dimensional finish

 Cincally proven to hydrate, soothe, and smooth

 We the most sensitive skin

BETTER FIRMNESS BETTER HYDRATION



THE NEW RESURGENCE AGE-DIFFUSING FIRMING MASK TIGHTENS AND LETS TO RESTORE NATURAL CONTOURS

PLEMPS TO EASE LINES AND WRINKLES
 FirmD/ Dr. Mared's lettest youth building innovetion, tightens
and lifts while dain planging Brazilian Fruit Extracts promote



collagen production.



PREE Research Rips Conservable (2) and Relationship UR for Next and Detectives (COS) with Age-Diffusing Proming Real parchase. Yes Manufacturing of cruck 2001/2011/2011 for stern your research Research of the regions (2001/2).

Availation at Septrote USA, Pleasage Drop Spec Pive Spec and Satern & Humationer in the college DOLATING



authorized retailer

Claims Support in Marketing Materials

EXCLUSIVELY ON STRIVECTIN.COM

NO MORE DARK CIRCLES

New! Get Even Dark Circle Corrector

\$59 add to bag +

Fades all dark circles. Brightens the use area. New Get Even Dark Circle Corrector has a lightweight, non-greasy texture that's instemily absorbs: by delicate skin in the eye area to brighten complexion and reduce the look of under-eye dark circles Within 4 weeks, sum and dark spots visibly fade.

POWERED BY NA-114* TECHNOLOG

Waken a refreshed, renewed look.

Get Even Dark Circle Corrector renews, rehydrates and soothes as it deeply nourishes ekin. Under-eye area looks less puffy, more radiant and translucent so you start the day fresh and youthful looking.





90% of women see visibly lighter dark circle in only two weeks.

 Targets dark circles caused by excess pigmentation, aging or thinning skin

 Fades dark spats and brightens under-eye area

 Helps rebuild skin's moleture barrier and fight off the key visible signs of aging with our patiented, scientifically-proven NIA-114TM molecule

What makes our new dark circle corrector so different?

 Breakthrough formula features proprietary NIA-114* molecule that boots the efficacy of Vitamin C Actives** to brighten the skin

 Specially developed to target all types of under-eye circles that result from aging, hereditary factors or broken capillaries

 Improves overall health of akin around the eyes to prevent and correct all visible signs of siging



Genius Ultimate Anti-Aging Cream Consumer Study Results

Results obtained following a consumer use study of 100 women using the product twice daily.

95%

Dull skin is

days

brighter in 10

Fragile skin texture appears reinforced within 10 days

91%

Skin appears firmer and more resilient, and bounce and suppleness appears restored within 28 days

Forehead wrinkles, creases and lines are visibly minimized within 28 days

7 out of 10 Women Said Lashes Appeared Fuller.*

ALGENIST

Wouldn't you like to be able to say that? Here's what else women told us after using Mary Kay® Lash & Brow Building Serum® once a day for one month during an independent study:

80%	said it helped reduce lash loss.*
77%	said it reduced lash brittleness and breakage.
76%	said the look of thin, sparse lashes was improved
65%	said the look of thin, sparse brows was improved.





Claims Support in Marketing Materials



Kapow! Peptides – super-charged amino acids that build keratin (for your nails) and collagen (for your cuticles) – are our Mighty Nail & Cuticle Serum's secret weapon to transform dry and damaged cuticles almost overnight. Plus, get visibly stronger, smoother nails with fewer ridges and less splitting and brittleness in only 2-3 weeks.

Testimonials



"As for the Mighty Nail Serum, I followed the Pro-Tips over the last three days and my cuticles have already been more manageable. My hand look so much better!" -Alexa, Sneak Peek Maven

"First off, I didn't realize that this was a nail serum product because of the packaging - I assumed it was lip color or something - but once I realized it was for your nails/cuticles, I saw that the applicator was PERFECTI I've used the Julep cuticle oil with the roller-ball, and I much prefer this twist/brush applicator." -Natasha, Sneak Peek Maven Transform your dry and damaged cuticles and get visibly strong, smoother nails in only 2-3 weeks!







BEFORE

AFTER

Claims Support in Marketing Materials



bareMinerals Skinsorials Bare Haven Moisturizer

PRODUCT BENEFITS

- This product is dermatologist tested, non-irritating, and noncomedogenic.
- Can help improve skin texture within four weeks.

In a study:

• 100% of women experienced an immediate improvement in skin hydration.

In a consumer survey:

- 100% of women agreed their skin looked and felt soft after using this product.
- 94% of women agreed this product improved skin suppleness.
- 93% of women agreed it created a natural, healthy-looking radiance.
- 89% of women agreed it rejuvenated skin.

Mary Kay® Lash Primer, \$15

- · Instantly intensifies lash volume and creates longer-looking lashes
- Strengthens and helps condition lashes.
- Lifts lashes and helps them stay curled longer.
- Clear formula works like an invisible mascara for a natural look or pair with your mascara.
- Dual-action brush is specifically designed to maximize benefits and deliver a natural look.

Primes and Pampers!

93% said mascara glides on smoothly and easily.1

3 out of 4 women agree, Mary Kay* Lash Primer adds dramatic definition to eyes and creates fuller lashes when used as a base coat under mascara even helping you use less mascara!!



Before allowing primer to dry, immediately apply your favorite Mary Kay® mascara.



Information provided by bareMinerals[®].

Claims Support in Top Media



Claims Support in Top Media



Claims Support in Top Media







Elle

NEWBEAUTY To All You Coconut Oil Fans-This Will Be Your New Obsession



NewBeauty



InStyle

Dr. Oz The Good Life







ELLE USA YOUTHHUDE TINGLEKFOLIATE TREATMENT



VOGUE, MARCH 2015 YOUTHMUD* TINGLEXFOLIATE TREATMENT



ALLURE, MARCH 2015 YOUTHCLEANSE * DAILY EXFOLIATING



COSMOPOLITAN, MAY 2015 SUPERMUD# CLEARING TREATMENT

TBC Sets the Standard

TBC sets the industry standard for consumer in-home use testing of beauty and personal care products. Having worked with countless Indie brands and corporate mainstays, TBC develops and substantiates "5-star" consumer claims that result in market share growth. Understanding the intricacies of regulatory and retailer requirements, we help brands develop "stand-apart" claims while giving the consumer the proof she expects before purchase.

The Stats:

- Captured more than 2.5 million consumer opinions
- Vetted beauty and personal care panels of 200k+ (male and female)
- Tested more than 500 unique products



But don't take our word for it, take the word of our clients.

patchology.



"It's phenomenal—we still use the claims garnered from our tests with TBC. They're on our website, we talk about them on-air, and they continuously market the benefits of our products while putting us center-stage with established competitors." Chris Hobson, Founder and CEO, **Patchology**.

bare Minerals



"TBC is one of our go-to testing houses for consumer perception studies pre-launch. Their knowledge and expertise with consumer testing and regulatory claims compliance are an influential factor in our continued collaboration, especially for our global launches. It's refreshing to work with a firm that will go above and beyond to accommodate all of our testing needs." Remona Gopaul, Manager, Technical Information, **SHISEIDO Group USA**

Panasonic



"When we introduced our device to the US market, we engaged The Benchmarking Company to do both qualitative and quantitative beauty consumer research. The resulting user claims supported advertising, served as proof points on device efficacy, and gave us valuable feedback on how to improve future devices to meet consumer needs." Lori Chiazzo, Consumer Marketing Manager, Beauty and Grooming, for **Panasonic** Consumer Electronics Company.

But don't take our word for it, take the word of our clients.

ELEMIS

"There is no doubt that TBC helped us navigate the murky waters of communication with regards to consumer claims. It was reassuring to put Elemis in the hands of industry experts and come out with a robust list of usable claims that will help us further sell-in and sell through." Sean Harrington, President and co-founder, **Elemis**.



"I knew right off the bat I was in the right hands. TBC knew the questions to ask and we received very useful feedback from consumers. They customized the project for us, gave us what we asked for and more." Jill Scalisi, **Scalisi Skincare.**



"The Benchmarking Company has done beauty product testing studies for us and gives us validation to make product comparisons such as our mascara beats a competitive brand. The team has immense understanding of the beauty business and our business. We don't have to spend our time with an education process to tell them what we need. It is a turnkey program." Brian Talbot, Vice President of International Marketing for **Markwins Beauty Brands**.

TBC Conducts Research For Top Brands



TBC Conducts Research For Top Brands



For more information, contact:

The Benchmarking Company 11710 Plaza America Drive Suite 2000 Reston, VA 20190 Office: 703-871-5300 x102

Jennifer Stansbury Co-founder, Managing Partner jenn@benchmarkingcompany.com

Denise Herich Co-founder, Managing Partner denise@benchmarkingcompany.com

theBenchmarkingCompany

