

THE CLEAN CONUNDRUM

Is a “clean” product one that’s free-of certain ingredients, or one that won’t clog a landfill? Is it made from everything found in nature, or can it coexist with synthetic add-ins? Does the consumer believe it’s clean just because “clean” is part of a brand name, SKU name, or the word simply appears somewhere on the label? Much like “natural” the consumer isn’t quite sure what clean means, making it imperative for brands to communicate their definition of clean, in light of increased legal challenges and buyer scrutiny. Read on to learn what 2,900 US female beauty and personal care consumers had to say about “clean” in a December 2022 primary research study.



52% surveyed say they purchase “clean” beauty/personal care products (BPC) regularly

The Clean Beauty Buyer

- **60%** have been using clean beauty products for less than 2 years
- **87%** feel clean beauty products work just as well as traditional BPC products
 - **67%** would be willing to sacrifice performance of a BPC product because “I know using a clean product is better for my health in the long run”
- Only **58%** regularly research ingredients to ensure they are clean



Clean is Murky

- Only **66%** have a clear understanding of “clean” in terms of BPC products
 - **57%** believe all “clean” BPC products must be safety tested before put on the market per governmental regulations (**22%** did not know)
 - **66%** believe the term “clean” as it relates to BPC is often defined by the brand or retailers carrying the product (**20%** did not know)
 - **30%** believe the US government defines clean as it relates to BPC products (**34%** did not know)

Her Clean Brand Expectations

- **85%** list benefits of product on package
- **73%** test ingredients for purity
- **69%** disclose if synthetic ingredients are in the product
- **67%** display clinical and/or consumer claims results

Clean Beauty Word Association

- **60%** safe
- **57%** natural
- **51%** non-toxic
- **45%** pure
- **40%** paraben and phthalate-free



Why She Buys Clean Beauty

- **82%** better for me
- **73%** products don’t contain potentially toxic/harmful ingredients
- **57%** better for the environment
- **48%** better for my family

Her Definition of Clean

- **78%** free of phthalates or parabens
- **74%** free of sulfates
- **72%** free of ingredients proven to be carcinogenic
- **68%** free of ingredients “suspected” to be carcinogenic or hormone disruptors
- **64%** free of ingredients proven to be hormone disruptors

Where She Expects Brands to Detail/Define Clean

- **86%** on secondary packaging
- **79%** brand’s website
- **72%** bottle/jar
- **68%** online product pages of where product is sold

In Addition to Clean, What’s Important

- #1** Efficacy – the product works
- #2** Products are cruelty-free
- #3** Price



Categories She Buys Clean

- **92%** facial skincare
- **65%** hair care
- **62%** bath & body products
- **38%** sun protection

HOW MUCH OF HER BPC BUY IS “CLEAN”

By Category	All	Most	Some	A few	None
Intimate care products	41%	36%	16%	6%	1%
Oral care (i.e. toothpaste)	31%	36%	23%	8%	1%
Sun protection	31%	37%	25%	6%	1%
Personal care (i.e. deodorant, waxing kits)	29%	37%	26%	8%	1%
Fragrance	25%	31%	30%	12%	1%
Hair care	21%	41%	29%	8%	0%
Bath & Body products	18%	43%	30%	9%	0%
Facial skincare	17%	45%	30%	9%	0%

The Retail Landscape

- **43%** most of the time or always research the retailer’s standards or definition of clean
- She shops clean products more online (**83%**) than in-store (**66%**)

Why She Shops Clean More Online than In-store:

- **66%** easier to research specifics of products online to know if they are clean
- **53%** easier to research specific ingredients found in a product
- **53%** easier to identify which products are “clean” based on retailer’s navigation and grouping of products online
- **49%** it’s just how I shop for all beauty/personal care products

Favorite “Clean Only” Beauty Retailers

- 1.** Love Peace Organic
- 2.** Made Simple Living
- 3.** The Detox Market

“No-no” Ingredients She Looks to Avoid

- 51% Aluminum
- 49% Parabens
- 47% Heavy metals
- 45% Formaldehyde
- 43% Sulfates

Most Influential to her Clean BPC Buying Decision

- Positive product reviews or consumer claims
- Free samples
- Special deal/price

Clean Certifications of Importance to Her

- 69% MADE SAFE
- 64% Clean @ (Sephora, other retailers)
- 58% USDA Organic
- 51% EWG Verified
- 50% Credo Beauty Clean
- 47% COSMOS (Organic/Natural)
- 47% BeautyCounter Blueprint
- 41% NSF International



Brands She Thinks of as “Clean” and Buys Most Frequently

- Honest Co.
- Olay
- Dove
- Burt’s Bees
- Ilia

Interested in customized beauty consumer research for your brand? Call 703.871.5300 or visit benchmarkingcompany.com or info@benchmarkingcompany.com for information on Beauty/Personal Care Product Testing and specialized consumer research.