## 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



## • Only 66% have a clear understanding of

Clean is Murky

- "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)

**Beauty** 

## **Expectations** • 85% list benefits of

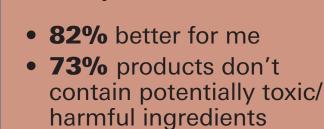
Her Clean Brand

- 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

## **Association** • 60% safe

Clean Beauty Word

- **57%** natural
- **51%** non-toxic
- **45%** pure • **40%** paraben
- and phthalatefree



Why She Buys Clean

- 57% better for the
- environment • **48%** better for my family

### 78% free of phthalates or parabens

Her Definition of Clean

- **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

## **Detail/Define Clean** • 86% on secondary packaging

Where She Expects Brands to

- 79% brand's website
- **72%** bottle/jar
- 68% online product pages of where
  - product is sold

### What's Important **#1** Efficacy – the product works

By Category

In Addition to Clean,

**#2** Products are cruelty-free

Intimate care products

**#3** Price



## **Categories She Buys** Clean 92% facial skincare

- 65% hair care • 62% bath & body
- products • 38% sun protection

16%

A few

6%

None

1%

#### All Most Some

41%

36%

• 66% easier to research specifics of products online to

• 53% easier to research specific ingredients found in a

based on retailer's navigation and grouping of products

• 53% easier to identify which products are "clean"

The Retail Landscape Why She Shops Clean More Online than In-store:						
Facial skincare		17%	45%	30%	9%	0%
Bath & Body products		18%	43%	30%	9%	0%
Hair care		21%	41%	29%	8%	0%
Fragrance		25%	31%	30%	12%	1%
Personal care (i.e. deodorant, waxing kits)		29%	37%	26%	8%	1%
Sun protection		31%	37%	25%	6%	1%
Oral care (i.e. toothpaste)		31%	36%	23%	8%	1%
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know if they are clean

#### retailer's standards or definition of clean

or always research the

• 43% most of the time

- She shops clean products more online (83%) than in-store (66%)
- Favorite "Clean Only"

### She Looks to Avoid **Beauty Retailers** 1. Love Peace Organic

**3.** The Detox Market

2. Made Simple Living

product

online

products

## 51% Aluminum

## "No-no" Ingredients

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

## • 49% it's just how I shop for all beauty/personal care

Most Influential to her Clean BPC Buying

Positive product reviews

or consumer claims

Free samples Special deal/price

**Decision** 

Brands She Thinks of

## 64% Clean @ (Sephora, other retailers)

- Clean Certifications of Importance to Her
- 69% MADE SAFE
- 51% EWG Verified 50% Credo Beauty Clean

• 58% USDA Organic

- 47% COSMOS (Organic/Natural)
- 47% BeautyCounter Blueprint 41% NSF International

# **USDA** ORGANIC

## as "Clean" and Buys **Most Frequently**

Olay

Dove

Honest Co.

- 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.

Based on original primary research of 2,982 US female beauty and personal care

consumers. December 2022.