



# PROOF POSITIVE: WHAT BRANDS ENTERING THE US MARKET NEED TO KNOW ABOUT CONSUMER CLAIMS

JANUARY 22, 2025

**COSMOPROF**  
NORTH AMERICA  
LAS VEGAS | MIAMI

theBenchmarkingCompany

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# ABOUT US

The Benchmarking Company (TBC) is an award-winning beauty and personal care consumer research firm, providing marketing intelligence through custom consumer research studies, online and in-person focus groups, and consumer in-home use testing (IHUTs) for claims substantiation and risk mitigation.

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# TBC KNOWS CLAIMS

**1,000+**  
PRODUCTS  
TESTED

**5M+**  
OPINIONS  
COLLECTED

**280K+**  
PANELISTS

**30M+**  
DATA POINTS

**skincare ● hair care ● body care ● personal care ● wellness  
products ● supplements ● devices ● intimate care**

# SKINCARE BRANDS



KOPARI



patchology

**PAPATUI**<sup>™</sup>  
TAKE BETTER CARE<sup>™</sup>

**FB**

Perricone MD

HERBIVORE  
BOTANICALS

AMOREPACIFIC

FENTY BEAUTY  
BY RIHANNA



**Hero.**



JOSIE MARAN

Neutrogena<sup>®</sup>



DOLLAR SHAVE CLUB



Neutrogena®

CURIE

Supergoop!

PEACH & LILY

SOL  
DE  
JANEIRO

BODY CARE

MAËLYS  
clinically proven body solutions

HEMPZ  
THE SECRET IS IN THE SEED™

Aveeno®

TOMMIE COPPER



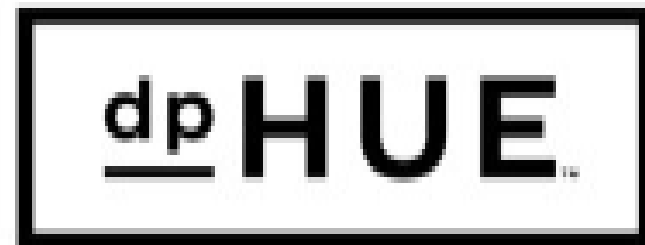


# A FEW OF THE HAIR CARE BRANDS TBC WORKS WITH



AQUIS

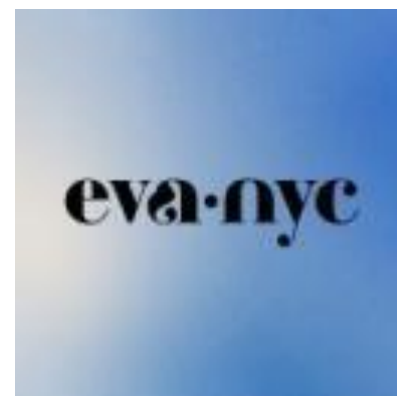
OUAI



KENRA<sup>®</sup>  
PROFESSIONAL



ORIBE



OLAPLEX.

**K18**  
BIOMIMETIC  
HAIRSCIENCE



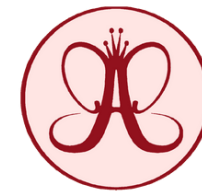
**COLOR COSMETICS**

**benefit**  
SAN FRANCISCO

**LAURA MERCIER**  
PARIS | NEW YORK

**SHISEIDO**

**NARS**



**ANASTASIA**  
*Beverly Hills*

**Freck** *BEAUTY*

**bareMinerals**  
THE POWER OF GOOD

**pixi!**<sup>®</sup>





92%  
saw more faded dark spots  
and discoloration in 14 days\*



agree skin

## A FEW OF OUR INTERNATIONAL BRANDS

\*3rd party consumer study results on Tran  
\*\*Brand study results on the Transparen-C Pro Brightening Moisturizer





# WHAT WE WILL COVER

The US Market for International Brands

Brand Success Study

What Makes the US Consumer Unique

Why Claims Are Important to US Beauty Buyers

Risk & Risk Mitigation

Purchase Motivators & Drivers

How to Craft Impactful Claims

Measuring Up: Benchmarking Against Your Competitors

Strategies to Leverage Claims to Win Her Loyalty



# UNDERSTANDING THE US MARKET

The U.S. beauty and personal care market was valued at approximately \$98 billion in 2023, with projections indicating continued growth. Before entering the US market, brands should focus on the following:

- **Regulatory compliance** – from ingredients to packaging to marketing to reporting.
- **Consumer preference** – uniquely heterogenous market – from skin tones and types to cultural sensitivities – know who you are marketing to and why
- **Competitive landscape** – what is your USP? What is your retail distribution strategy? Know where your competitors are finding success and chart your own path
- **Marketing and branding** – tailor campaigns for the American buyer – think US holidays, events and shopping days (i.e. Black Friday).
- **Innovation** – the US consumer is always looking for what's new and effective. Build an innovation pipeline

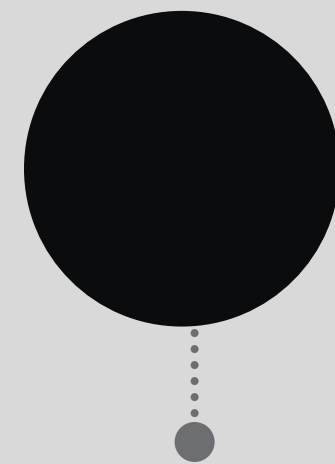






# INTERNATIONAL MAINSTAY BRANDS

The international brands that have succeeded in the US market have demonstrated their ability to adapt to U.S. consumer behaviors and preferences, cementing their positions as leaders in the beauty and personal care industry.

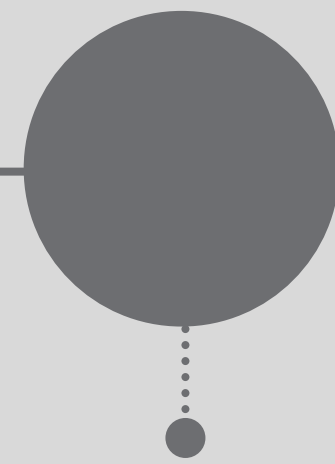


L'Oréal  
(France)

Diverse portfolio  
across price points

Innovation-focused

Effective digital  
marketing/social  
content

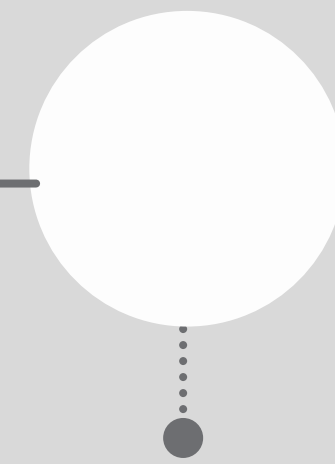


Unilever  
(Dutch/British)

Commitment to  
inclusivity and real  
beauty

Sustainability

Effective market  
penetration and  
retail distribution  
model

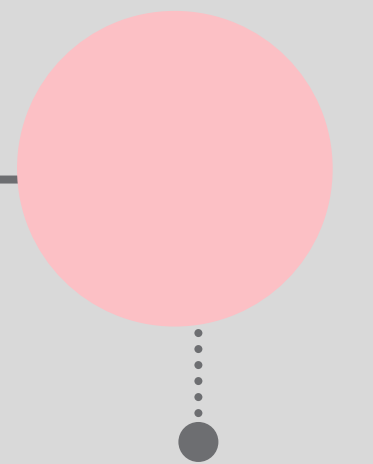


Shiseido  
(Japan)

Emphasis on  
science based,  
high quality  
cosmetics

Luxury appeal

Cultural resonance  
(J-beauty)



Amorepacific  
(South Korea)

Sets trends for K-  
beauty

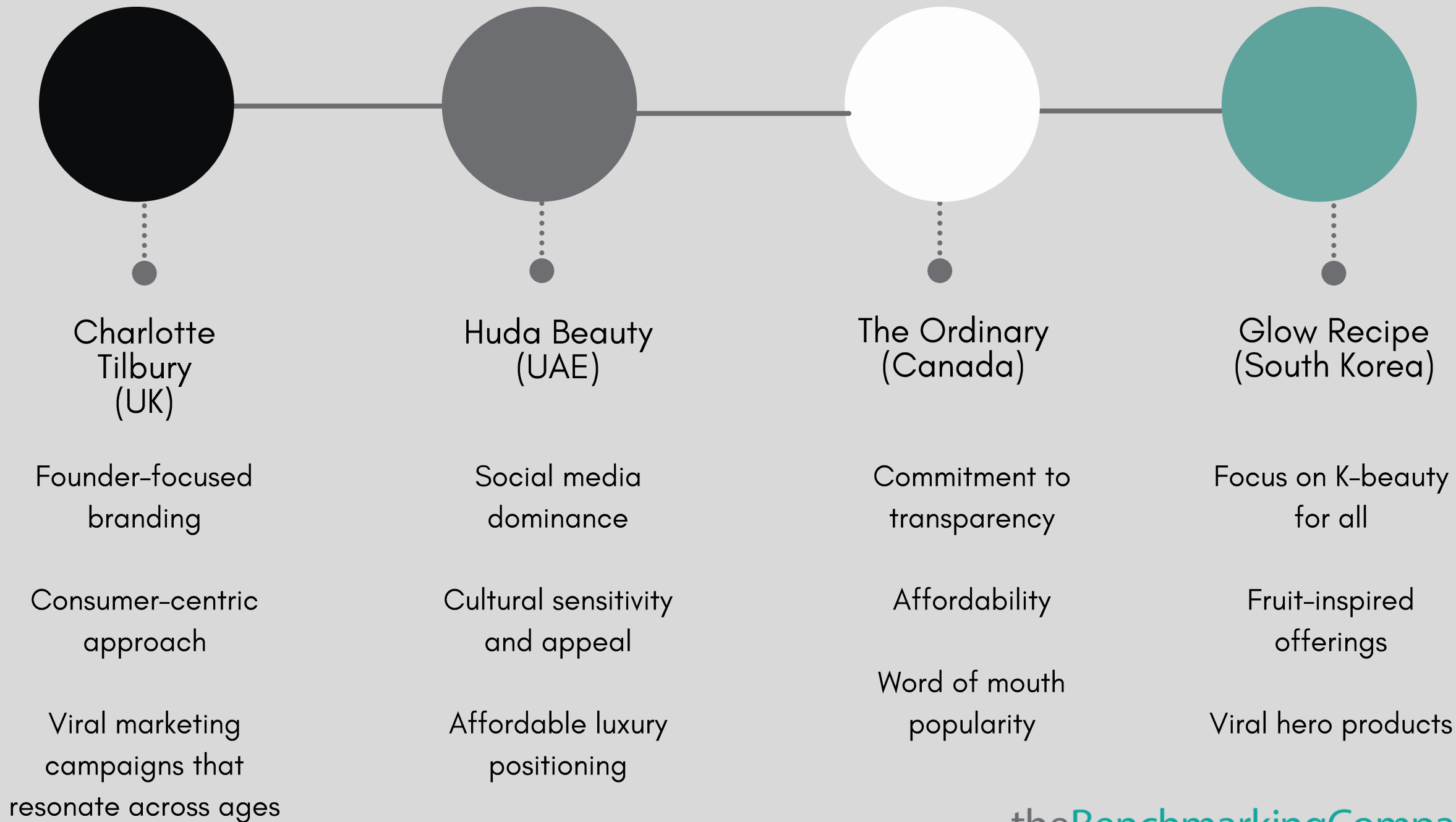
Focuses on  
innovative skincare

Strong e-  
commerce collabs



# INDIE BRAND SUCCESS

Strong brand identities, innovation in products, a focus on the consumer, unique positioning, social media savvy and smart marketing, coupled with demonstrative proof of efficacy are common traits of Indie brands that have demonstrated success in a competitive market.





# WHAT MAKES THE US CONSUMER UNIQUE



Cultural Diversity and Inclusivity

Influence of Social Media

Demand for Innovation & Exploration

Emphasis on Clean and Ethical Beauty

She Loves a Good Story

Demand for Customization and  
Personalization

Multi-Channel Research and Shopping  
Experience

*Focus on Results and Efficacy*

**Proof!**

# WHY CLAIMS ARE IMPORTANT

**89%** pay attention to claims in the beauty/personal care brand advertising and on packaging

**94%** are more likely to believe a product will solve a problem if it has validated claims

**69%** spend an hour or more researching a product that is \$100 or more



**4 out of 5** say product claims have a greater influence today on their purchase decision than five years ago

**98%** say brands should conduct consumer perception testing to demonstrate truth in advertising

**66%** likely to join a class action suit for false advertising if the product did not deliver on its benefit statements



# EYES ON THE INDUSTRY

## Federal Government

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FDA

FTC

Consumer Product  
Safety Commission

## Self-Regulatory Bodies

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National Advertising  
Division of The Better  
Business Bureau

## Competitors & Plaintiffs' Lawyers

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Costly lawsuits  
Product liability  
Demand letters

Beauty brands face a range of regulatory and legal scrutiny from government agencies, self-regulatory bodies, competitors, and plaintiff's lawyers. These risks range from non-compliance with FDA regulations, to FTC Advertising Violations, challenges to advertising claims, Lanham Act Claims, Product Liability Claims, Greenwashing allegations and class action lawsuits for benefits not realized.

# MITIGATING RISK



## Why Conduct Claims Substantiation?

- ▶ Guidance for Innovation
- ▶ Avoid Million Dollar Mistakes
- ▶ Mitigate Legal & Regulatory Risks
- ▶ Give the Consumer the Proof She Demands





## PURCHASE DRIVERS

**77%** speed of efficacy

**73%** positive reviews/consumer claims

**69%** an attractive price

**56%** negative reviews

**54%** ingredients

**42%** differentiation from competitive products



## WHAT MOTIVATES HER TO BUY

Efficacy - and proof of efficacy **(4.8)**

Price **(4.4)**

Free samples **(4.4)**

Positive product reviews **(4.4) (tied)**

Consumer claims **(4.4) (tied)**

High number of positive reviews **(4.3)**

Made for someone like me **(4.3)**

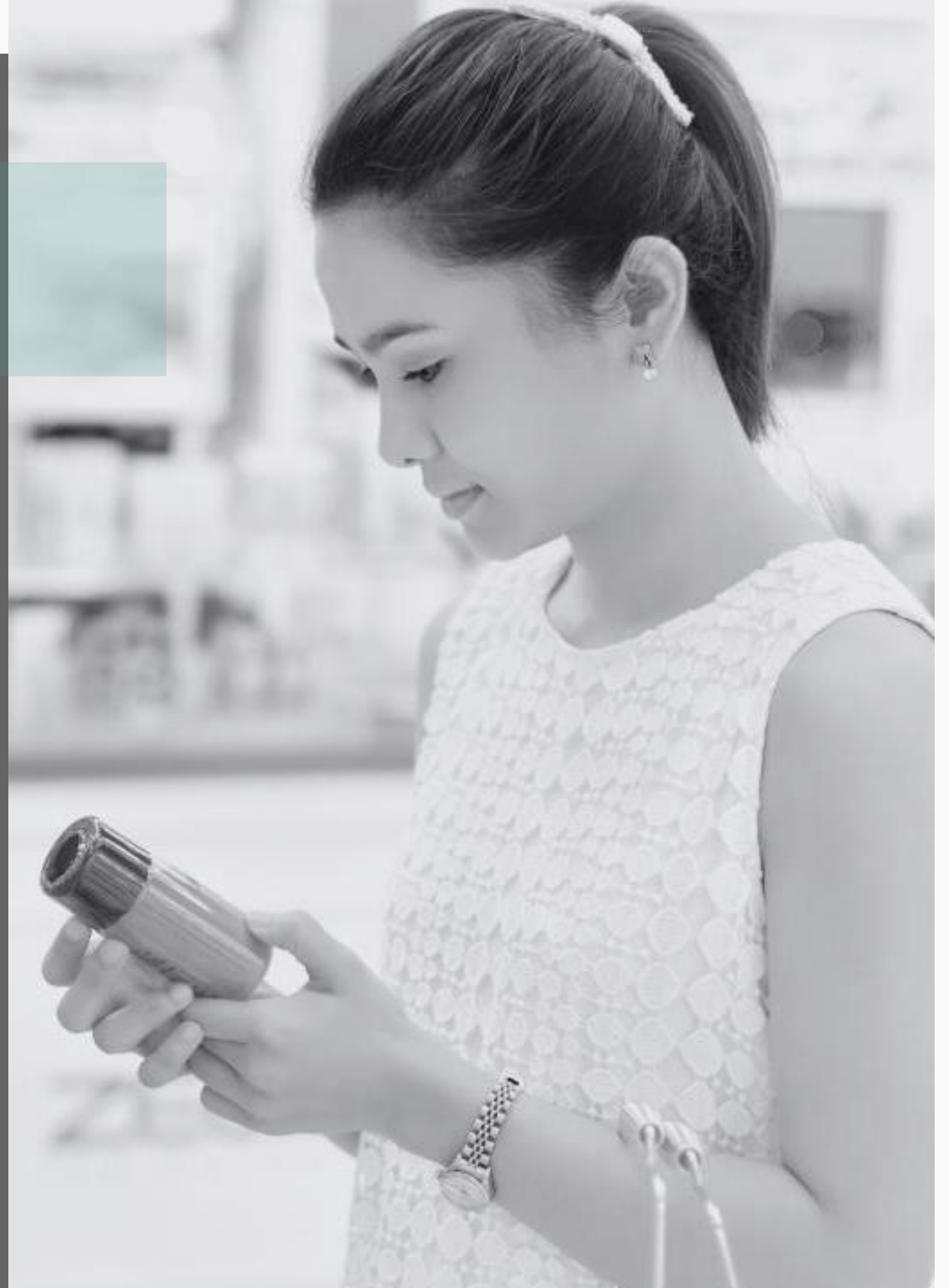
**\*Rated on a scale of 1 to 5, with 1 being not influential and 5 being highly influential.**



# CLAIMS FOR SELL-IN & SELL THROUGH

Not only do retailers like QVC, Sephora, Ulta and CVS expect the brands they carry to conduct claims testing to validate their marketing claims, but more and more retailers are demanding it as a prerequisite to carrying the product. Take a look around and see claims in action at your local beauty retailer!

**86% are more likely to shop specific retailers that require consumer claims testing for the products they carry**



# PROVE YOURSELF WORTHY

Proof comes in many forms



**Video Testimonials**



**Consumer Claims**



**Ratings & Reviews**



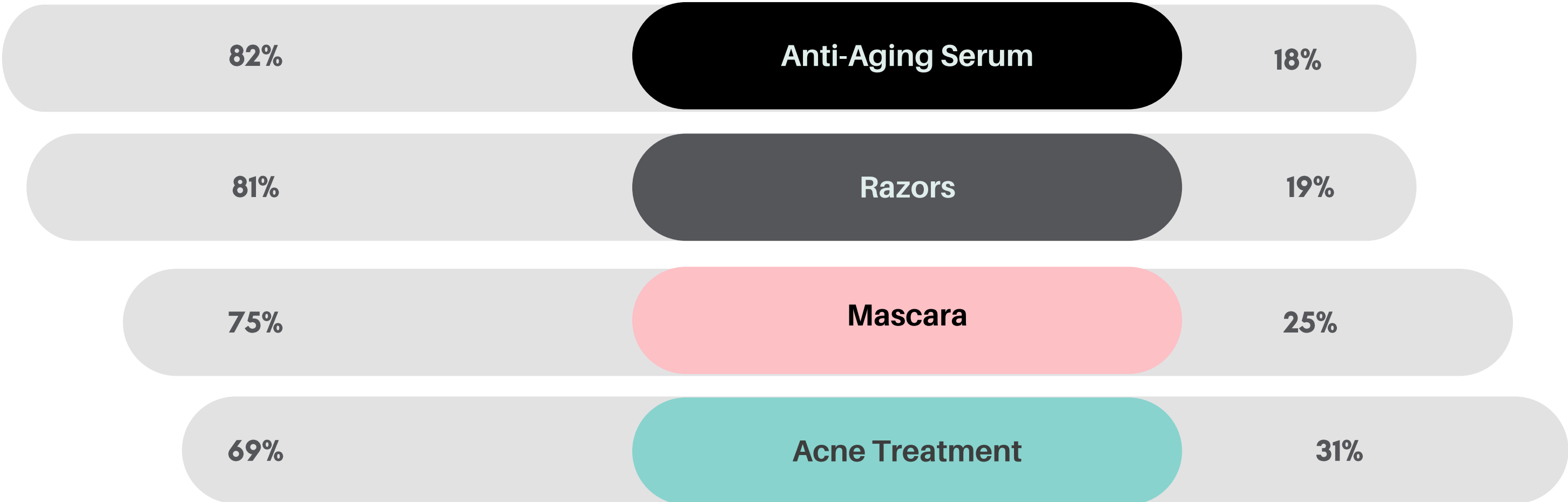
# CONSUMER CLAIMS ARE MOST COMPELLING

When shown consumer and clinical claims from actual print advertisements touting the same product benefits, respondents stated the consumer claim was more compelling than the clinical claim for the same product. Why? Because consumers trust real people who have used the product and can attest that it works. Consumer claims are more EMOTIONAL as well.

Consumer Claims

VS

Clinical Claims



**92%** would be more likely to purchase a product if the research results were visible to her (i.e. package or POS display)

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**98%** expect brands to conduct consumer perception testing to give buyers expectations of benefits

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**92%** say consumer claims differentiate one brand's products from another

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# MAKE HER NOTICE





### **KNOW YOUR AUDIENCE**

Don't test your anti-aging product on an 18-year-old. Craft claims that match your product benefits and intended consumer.

### **PROVE THE BENEFITS**

She wants to know this product works for someone like her. Claims should be structured to give her this proof!

### **HIGHLIGHT WHAT MAKES THE PRODUCT DIFFERENT**

It may be an ingredient or a unique delivery system. Craft claims that speak to this unique selling point.

### **SPEAK TO HER IN WORDS SHE UNDERSTANDS**

Science can be sexy, but making it too complicated may turn her away. She wants to know how the science is going to help her look and feel beautiful!

# CRAFT COMPELLING CLAIMS

# MAKING THE MOVES

## Legal Consent

Gather legal consent from all panelists on your behalf prior to the study.

## Testing Protocol

Carefully design your study's testing protocol to be followed by all panelists.

## Claims Development

Develop compliant cosmetics and OTC claims.



## Send Products to Panelists

Blind and properly label your products. Pack and ship to your panelists across the country.

## Survey Responses

Gather and aggregate your survey responses. Run statistical analysis testing

## Certify and Validate Claims

Have your research certified by a third-party expert.

Testing your products with your target consumer will yield valuable feedback while mitigating your brand's legal, regulatory and reputational risk. 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.

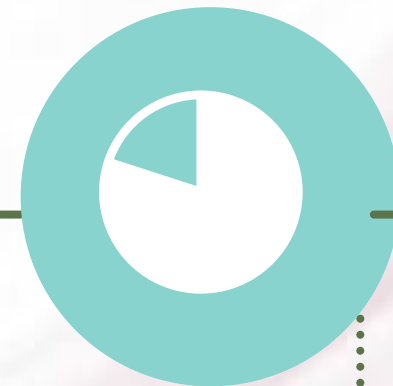


# THE SWEET SPOT



**75 people**

minimum # of participants needed in a study to make a claim believable



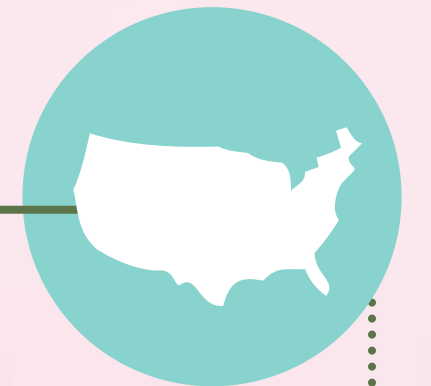
**80% or higher**

Percentage of agreement for believable claim



**Independent Firm**

No friends & family, formulators & cradle to grave consultants



**National Scope**

Must be target relevant - large panels and full representation

# WORDS MATTER

In a Blind Use Test on 107 women, ages 28-35 yrs, consumers reported the following results with Coco Rose Body Polish:

- 95% agree that their skin feels instantly softer
- 93% agree that their feels instantly smoother
- 89% agree that their skin feels instantly moisturized
- 88% agree that their skin feels instantly nourished



99% said skin felt more hydrated, moisturized and smooth\*



- It's not really clinical if a clinical lab conducts a CPS
- Even if a clinical study shows a change to the structure or function, you still can't say it!
- Words mean different things to different audiences – diminishes vs. reduces
- Use words like "looks" and "feels" not "protects" and "prevents"



# NUMBERS MATTER MORE


- The sample size is critical!
- Don't forget your MOE
- Look to benchmark your claims before deciding which to use
- Hard-hitting may score lower but can be more important to her overall purchase decision
- Stay above 80%





# MEASURING UP

PRODUCT TYPE	DESIRED CLAIM	Low	Mean	High	Brand Score
Anti-Aging Cream	Diminishes appearance of fine lines and wrinkles	66%	80%	94%	94%
Eye Cream	Reduces appearance of dark under eye circles	51%	73%	91%	85%
Brightening Serum	Skin looks brighter	76%	89%	97%	95%
Acne Serum	Reduces the appearance of whiteheads	72%	81%	88%	80%
Anti-Frizz Spray	Diminishes the appearance of split ends	86%	94%	100%	97%
Supplement	Made me feel calmer	54%	76%	96%	90%
Cellulite Cream	Tightens the appearance of skin	81%	84%	87%	81%
	<i>Think outside the box</i>				

 High score - make the claim!

 Above the mean, below the high - consider making the claim but determine if there is a more compelling claim.

 Above the mean, slightly below the high - make the claim

 Below the mean - don't make the claim



# CLAIMS IN USE

**Perricone MD**

**PREBIOTIC ACNE THERAPY 90-DAY REGIMEN**

**94%** said the regimen was more gentle than other acne products they had used before\*

*\*In a consumer study with 67 people after 12 weeks.*

**bioelements**

**AFTER 42 DAYS**

- 90%** improved dullness and skin texture is improved
- 94%** skin feels more resilient
- 96%** skin feels nourished

\*Full clinical data on bioelements.com

**sara happ**  
THE LIP EXPERT

**100%** noticed dry, chapped, & peeling lips were soothed, rejuvenated, & resored after 3 weeks of use\*

**PEACH & LILY**

NEW!

**Not your ordinary body scrub**

**MEET KP BUMP BOSS →**

**Do I have KP body bumps?**

You might – 2 in 5 adults do.

Keratosis Pilaris (KP) looks like "chicken skin" or goosebumps.

**93%** of people with KP saw smoother and softer skin

\*3rd party study results

Your Proven Solution for Keratosis Pilaris and Body Bumps

- Eliminates KP and KP bumps, leaving skin soft and smooth
- Soothes, hydrates, and repairs dry, itchy, and irritated skin
- Hydrates, soothes, and repairs dry, itchy, and irritated skin
- Helps improve skin texture, leaving skin soft and smooth

**AFTER JUST 1 USE**

**99%** felt that the scrub prepped their skin for absorption of other skincare.

**AFTER 4 WEEKS OF USE**

**95%** said their skin looked and felt refined, soft, smooth and supple

- 96%** AGREED THEIR IRRITATION HAD IMPROVED\*
- 94%** AGREED THEIR FLAKINESS OF THE SCALP HAD IMPROVED\*
- 91%** AGREED THE SHAMPOO AND SCALP SERUM FELT GENTLE ON THEIR SCALP\*



Believe the hype. Mighty Patch is a smarter way to handle pimples overnight.



#### Consumer Testing Results

**94%** of users agreed that the Mighty Patch Original gently extracts pus/gunk from the pimple

**90%** of participants agreed that using the patch is a faster way to visibly shrink whiteheads overnight compared to traditional zit cream.

**98%** said the patch protects the skin from picking/popping it.

# CLAIMS ABOUT

**90%** of women saw visible improvement after 8 weeks\*



\*Based on a clinical study of 100 women with dry skin. Individual results may vary.

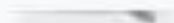
BIO:IONIC

SHOP

HOW TO

MOSTURING HEAT

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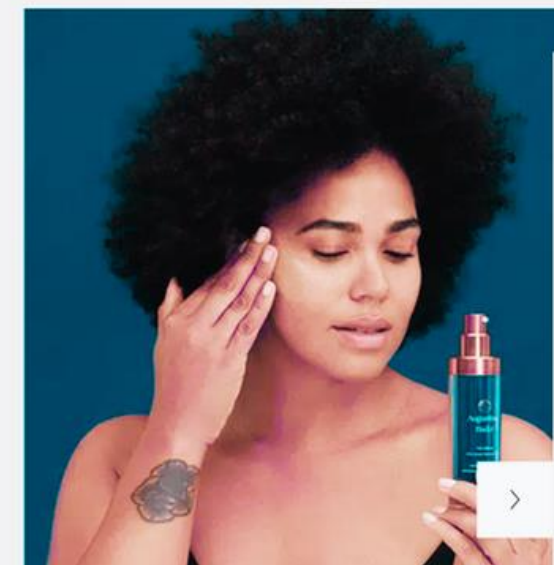
Before

After



DIVE INTO THE EVIDENCE

#### Clinical and User Trials



#### The Cream

**92%** agree dull skin appears brighter.

**89%** agree skin appears healthier.

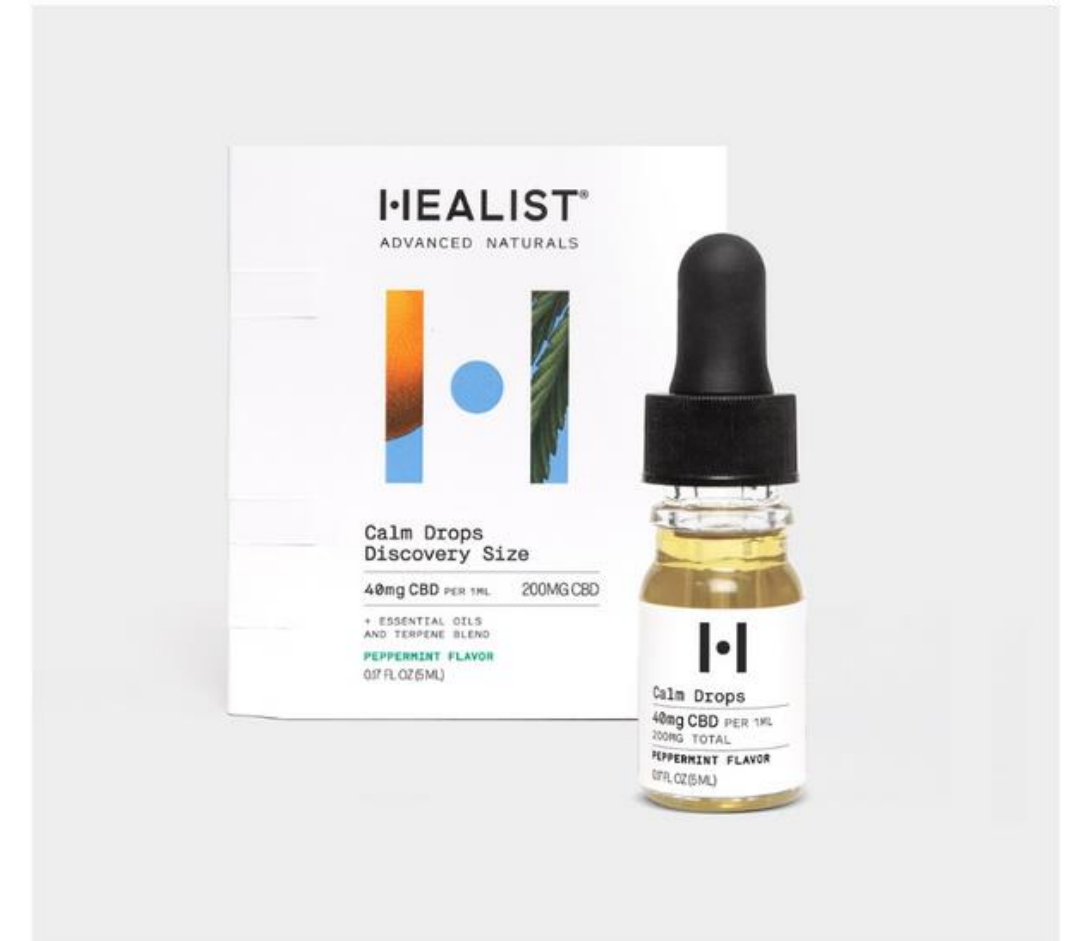
**87%** agree their complexion looks plump and replenished.

[ALL RESULTS FOR THIS PRODUCT](#)





# BEAUTY FROM THE INSIDE OUT CLAIMS



## Consumer Study Data:

85% of users reported that hair feels stronger\*

84% of users reported that hair looks noticeably healthier\*

84% of users have noticed less hair loss since taking this supplement\*

\*Based on a 12 week consumer study of 115 participants



CLEAN & NATURAL



TRIPLE LAB TESTED



NO HIGH



CRUELTY FREE



VEGAN




NON GMO

\*\* Independent consumer testing panel of 109 people who used Double Strength Calm Drops for 14 days consecutively and completely a self-assessment of their experience.



# CLAIMS ON PRODUCT PACKAGING



**HOLLYWOOD, CALIFORNIA**  
**GLAMGLOW**  
YOUTHMUD® GLOW STIMULATING TREATMENT  
MASQUE SOIN STIMULATEUR D'ÉCLAT

**REAL RESULTS**

<b>97%</b> said skin felt and looked smoother and renewed*	<b>94%</b> said skin looked brighter and more even-toned*	<b>93%</b> said skin looked transformed*
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benefit  
**GIMME BROW+**  
YOLUMIZING MICROFIBERS  
THIN, SKIMPY BROWS??  
FULLER-LOOKING NOW!  
**94%** SAID BROWS LOOKED VISIBLY THICKER\*  
\*self-evaluation by 66 women after 1 week  
BROW-VOLUMIZING FIBER GEL  
GEL VOLUMATEUR SOURCILS  
3.0g Net wt. 0.1 oz.

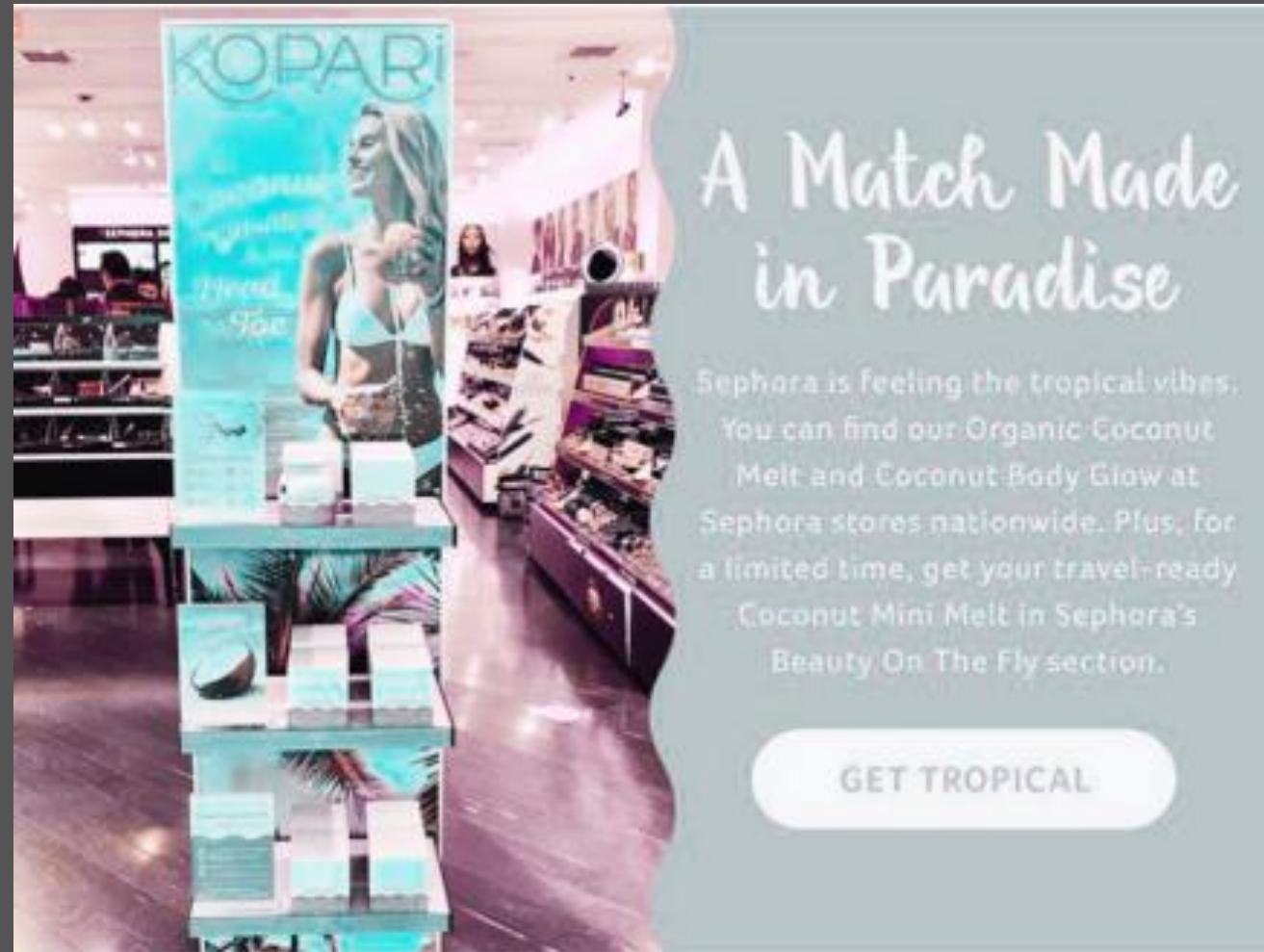


VH  
essentials  
Vaginal Odor Treatment  
pH Balanced Vaginal Tablet  
Eliminates Odor | Restores Confidence\*  
Supports Healthy pH Balance

<b>98%</b>	Agree it <b>eliminated</b> embarrassing odor
<b>95%</b>	Agree it <b>reduced</b> odor after just one use
<b>100%</b>	Said they felt <b>more confident</b> being intimate

Easy to Use | Fast Acting | No Mess  
6 Tablets | Six Day Supply





**KOPARI**

## A Match Made in Paradise

Sephora is feeling the tropical vibes. You can find our Organic Coconut Melt and Coconut Body Glow at Sephora stores nationwide. Plus, for a limited time, get your travel-ready Coconut Mini Melt in Sephora's Beauty On The Fly section.

**GET TROPICAL**



**T3** PROFESSIONAL CURLING IRON  
**T3 TWIRL 1 1/4"**

Powered by T3 SinglePass® Technology

Custom blend ceramic barrel | Smart microchip | Ceramic heater technology


92% of women agree that styling with maximum heat will not give away your styling.

**Fast. Healthy. Beautiful.**

- Polished curls in one pass
- Long-lasting results
- Optimal heat

# CLAIMS AT POINT OF SALE

BEST SELLERS THE BRAND BLOG **GOLDFADEN MD** PRESS SEARCH SIG



## Exfoliation: The Best Thing You Can Do For Your Skin

- 95% agreed that skin feels smoother (after 14 days)
- 92% agreed that skin looks healthy (after 14 days)
- 91% agreed that skin appears refreshed and renewed (after 14 days)

(The data above has been collected using Doctor's Scrub for 14/28 days of participants. Participants used Doctor's Scrub 2-3 times per week.)

## GIVE YOUR CONSUMER THE PROOF THEY SEEK

WHETHER YOUR CONSUMER IS BUYING IN-STORE OR ONLINE, FOR 3 OUT OF 4 CONSUMERS, CLAIMS AT THE POINT OF SALE HIGHLY INFLUENCE HER PURCHASE DECISION WHILE ALSO HELPING YOUR PRODUCTS STAND APART FROM COMPETITIVE PRODUCTS



# CLAIMS IN SOCIAL MEDIA



98% EXPERIENCED STRONGER LASHES\*

\*Survey results from an independent 8-week consumer study of 63 participants.

revitalashcosmetics • Following  
Revitalash Cosmetics

revitalashcosmetics • #RevitalashAdvanced: This award-winning and category-leading serum features proprietary, scientifically advanced technology to strengthen #lashes and protect against breakage while improving flexibility and shine, resulting in dramatic looking #eyelashes. #BioPeptideComplex

#RevitalashCosmetics #Revitalash #LashConditioner #EyelashConditioner #LashSerum #EyelashSerum #LashProducts #EyelashProduct #ForLashes #LashLife #EyelashGoals #LashExtensions #EyelashExtensions #ForLashExtensions #ForEyelashExtensions #ophthalmologistreviewed #Physiciandeveloped #OGFree #Veganfriendly #CrueltyFree #FragranceFree #Hypoallergenic

52 likes  
December 14, 2022

Add a comment...



Instagram

View all 98 comments  
2 hours ago

koparibeauty

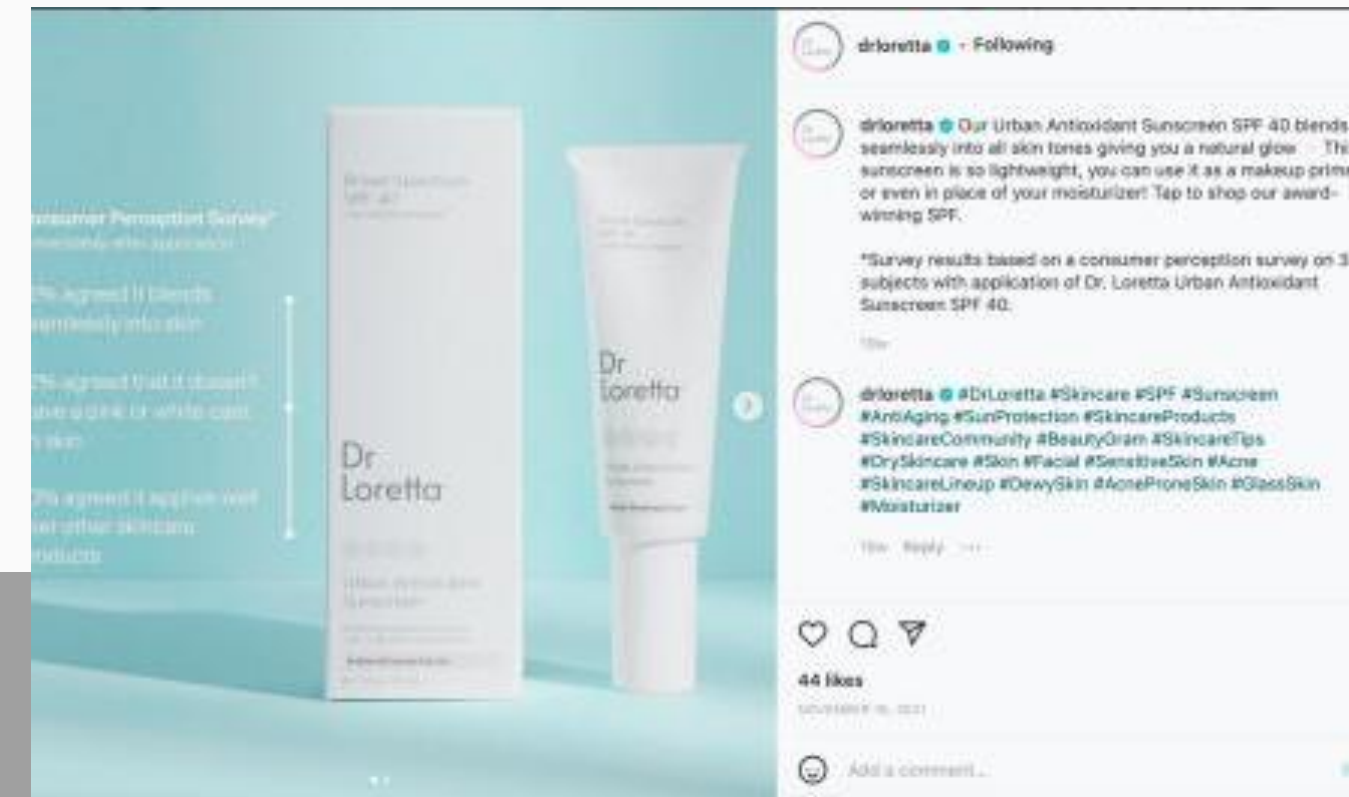
WHY KP BODY BUMPS BE GONE SCRUB

92% say exfoliates gently, yet effectively  
92% say skin is smoother to the touch

\*Based on a study with 39 consumers after 30 days

View shop

410 likes  
koparibeauty What is KP?! Let's deep dive 🌸... more  
View all 24 comments



Dr. Loretta

Consumer Perception Survey\*  
92% agreed it blends seamlessly into skin  
75% agreed that it doesn't give a pink or white cast to skin  
75% agreed it applies well to other skin tones

Dr. Loretta

Dr. Loretta

drloretta • Following

drloretta • Our Urban Antioxidant Sunscreen SPF 40 blends seamlessly into all skin tones giving you a natural glow. The sunscreen is so lightweight, you can use it as a makeup primer or even in place of your moisturizer! Tap to shop our award-winning SPF.

\*Survey results based on a consumer perception survey on 3 subjects with application of Dr. Loretta Urban Antioxidant Sunscreen SPF 40.

drloretta • #DrLoretta #Skincare #SPF #Sunscreen #AntiAging #SunProtection #SkincareProducts #SkincareCommunity #BeautyGram #SkincareTips #DrySkincare #Skin #Facial #SensitiveSkin #Acne #SkincareRoutine #DewySkin #AcneProneSkin #GlassSkin #Moisturizer

44 likes  
November 16, 2022

Add a comment...



94% agreed that their lips were instantly hydrated

GOLDFADEN MD.  
LIP THERAPY

\*In a consumer study of 50 participants, after 14 days

goldfadenmd • Following

goldfadenmd The results are in! Customers are loving our NEW Lip Therapy 🌸

susan\_desperately\_seeking  
4 likes Reply

denise3232 Thanks for being in @jamiemakeup swag bag! Love the feel of it already 🌸🌸🌸

4 likes Like Reply

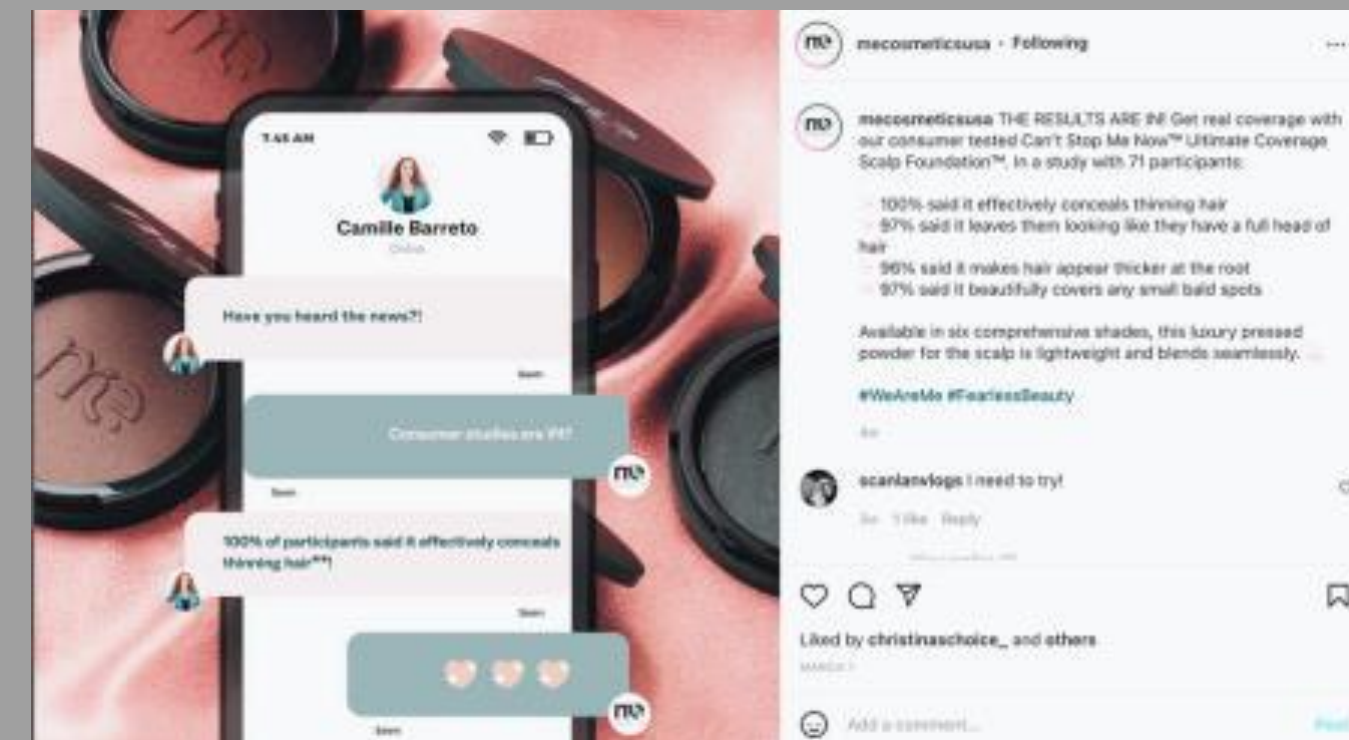
deo\_kris Love this 🌸

4 likes Reply

jules123m Another product I know I will love. Thank you @jamiemakeup #swagbag and as always thank you @goldfadenmd 🌸🌸🌸

554 views  
April 11, 2022

Add a comment...



THE RESULTS ARE IN! Get real coverage with our consumer tested Can't Stop Me Now™ Ultimate Coverage Scalp Foundation™. In a study with 71 participants:

- 100% said it effectively conceals thinning hair
- 87% said it leaves them looking like they have a full head of hair
- 96% said it makes hair appear thicker at the root
- 97% said it beautifully covers any small bald spots

Available in six comprehensive shades, this luxury pressed powder for the scalp is lightweight and blends seamlessly.

#WeAreMe #FearlessBeauty

scanlanvlogs I need to try!

3 likes Reply

Liked by christinaschoice\_ and others


Add a comment...



# ON-AIR USE

In a consumer perception survey of 100 participants using Patchology FlashPatch™ for 5 minutes, after a single use, participants stated:

- 100% said their tired eyes appeared awakened, revived and revitalized
- 98% said the skin under their eyes looked and felt smoother
- 97% said their eye area looked less puffy
- 94% said one 5-minute beauty treatment provided more immediate results than their current under eye skin care regimen




Prices and the availability of FlexPay shown on the previously recorded video may not represent the current price options. Consult the product page for current price options.

Patchology FlashPatch 30pair Eye Gels w/FlashMasque



SHOP WATCH What can we help you discover? Welcome Guest My Account Cart

**SUNDAY RILEY**  
Forward-thinking formulas that truly care for your complexion.




Brand Founder, Sunday Riley  
She believes every decision makes a difference: take the journey to beautiful skin.

SHOP WATCH

Product Detail


A353901  
**Josie Maran Argan and Hemp Seed Glow Oil**  
★★★★☆ 4.0 (96) [Read Reviews](#)



RESUME SKIN DOPE  
argan glow oil  
50% argan oil  
50% hemp seed oil  
hemp omega 3, 6, 9  
30 mL (1.1 fl. oz.)

0:05 / 6:03

SAY HELLO TO HEAT, AND GOODBYE TO SPLIT ENDS!



ghd platinum

ADVANCED SPLIT END THERAPY

In a consumer survey after 1 day:

- 100% Agreed Advanced Split End Therapy improved the appearance of split ends.
- 100% Agreed their hair looked less damaged.

purchase a ghd Classic Styler and receive a FREE Advanced Split End Therapy, so you can increase the power of heat to straighten, smooth, and protect your hair. Combined by the heat of your styler, this lightweight cream repairs and seals the cuticle, leaving your hair looking stronger and feeling sleek, smooth, and shiny for up to 10 washes.

ghd  
gives hair style, every day.

ghd Classic Iron with Advanced Split End Therapy  
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# STRATEGIES TO MAKE YOUR BRAND CLICK-WORTHY

- Don't make claims that cannot be substantiated.
- Plan for regulatory scrutiny. Conduct claims studies that follow set standards. Leverage consumer and clinical testing to demonstrate product benefits.
- Watch what you say and how you say it! NAD/FTC.
- Don't rely on consumer perception claims that are derived from "add-on" studies to a traditional clinical study unless the study is national in scope, consumer-relevant and is conducted using international standards for consumer perception claims testing.




# MORE...

- Conduct claims studies with a consumer-relevant panel that is adequate in size to substantiate the claims you want to make in market.
- Benchmark your claims – know which ones stand out and feature your USP.
- Use a research firm that follows international standards for claims testing.
- Use a third-party independent firm to substantiate your claims.



# Contact Us

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