



 PROVENANCE®

# Skin Deep Beauty

Shopper expectations and the  
truth behind sustainability claims



# Executive summary

The beauty and wellness industry faces a major challenge. It is no longer enough to promise high-performing or competitively priced products. Modern consumers now want to know that the feel-good factor and benefits they experience don't come at the expense of the natural world, or to the detriment of people working within the sector or supply chain.

After years of focusing almost exclusively on how their ingredients improve a customer's wellbeing, there is now both a moral and commercial imperative for brands to win over buyers who have become significantly more environmentally conscious and socially aware in recent years.

However, the information many brands supply is so full of buzzwords and unsubstantiated claims that consumers can often feel confused, meaning they yearn for greater transparency and clarity around environmental and social claims.

Provenance commissioned London Research to explore how important sustainability is to the consumer in the beauty and wellness market, perceptions around industry transparency, and where any confusion or lack of trust emanates from. We wanted to understand how shoppers are navigating this new world of claims and buzzwords, and what kind of information they seek out relating to environmental and social impact.

After speaking to a broad range of beauty brands, and carrying out an international survey of 1,500 consumers, we discovered a major disconnect between how the industry is operating and the expectations of consumers.

# Summary of key findings

1

## **Sustainability-minded shoppers face a lack of transparency**

Sustainability and other ethics-related considerations are important to nine in ten shoppers, but fewer than a quarter strongly agree that brands are transparent about the environmental and social impact of their products.

2

## **Mistrust in the industry is prevalent**

Shopper concern over brand transparency means that four in five consumers (79%) have difficulty trusting the sustainability and social claims made by companies in the beauty and wellness industry.

3

## **Vague claims are leaving shoppers confused**

Part of the reason why shoppers think brands are not transparent, leading to low levels of trust, is a lack of understanding about what the various claims made on packaging and websites really mean. For a range of sustainability claims covering waste, nature and animal welfare, treatment of workers, commitment to community, and climate change impact, two in three consumers believe brands could be clearer when making claims.

4

## **Shoppers want independent verification**

Shoppers are very clear on which resource is their number-one choice for checking out a brand's sustainability claims. More than four in five (85%) trust an independent verifier, putting this source of information ahead of others such as on-pack or in-store information. Shoppers are almost three times as likely to describe independent verification as 'very trustworthy' compared to social media (including influencers and bloggers) or advertising.

# Acknowledgements

We would like to thank the following people who were interviewed as part of the research for this report.

- Sarah Brown, Founder, **Pai Skincare**
- Kim Fenn, Head of Special Projects, **ELEMIS**
- Oriele Frank, Co-Founder and Chief Product and Sustainability Officer, **ELEMIS**
- Ben Grace, Founder, **SBTRCT Skincare**
- Alicia Hickey, Head of Sustainability and Social Causes, **Cult Beauty**
- Jill Jago, Co-Founder and Chief Sustainability Officer, **Vermouth**
- Audrey Bois Nicolaï, Head of Brand, **Noble Panacea**
- Laura Rudoe, Founder, **Evolve Organic Beauty**
- Shaun Russell, Founder, **Skandinavisk**, and Chair of the Supervisory Board of the **B Corp Beauty Coalition**
- Peter Wübben, Director Corporate Communications and ESG, **DOUGLAS**
- Jessi Baker, Founder & CEO, **Provenance**

# Methodology

This report was published in partnership with London Research, led by Director & Co-Founder Linus Gregoriadis, a marketing technology analyst and journalist with 20 years' experience.

As well as industry interviews, London Research carried out a survey of 1,500 consumers in the US, UK and Germany (500 in each market). Shoppers must have bought a beauty and wellness product (for example moisturisers/skincare or haircare) within the last six months to have been eligible for the survey which was carried out in August 2022.

This report also includes proprietary Provenance data relating to the use of different Proof Points by brands, and the level of consumer engagement with Proof Points. This data was collected in July and August 2022.

A hand with light-colored nail polish and a ring holds a black magnifying glass. The lens of the magnifying glass is positioned over the word 'clarity' in the text below. The background is a solid, warm orange color.

1. Why misled shoppers  
need **clarity** and verification

This Provenance research into the disconnect between consumers' sustainability aspirations and brand promises cannot be seen in isolation. It comes from empirical evidence that consumers are now more interested in sustainability and want to make informed choices, but are held back by what many informed industry commentators describe as 'greenwashing BS'.

As an organisation committed to explaining environmental and social claims to consumers, and measuring whether brands are doing what they claim, Provenance wanted to delve into consumer attitudes to sustainability and assess whether they feel confused by beauty and wellness industry claims, and where they look for clarity and to establish trust.

Previous research studies have shown that sustainability is important to the public, and yet buzzwords and marketing terms place an opaque veneer over an industry that truly needs to be doubling down on transparency.

Mintel research<sup>1</sup> has revealed consumers are now backing up their passion for sustainability by changing their behaviours. The most prevalent behaviour is recycling packaging, for 59% of consumers, followed by just over half of shoppers cutting down on food waste and buying fewer clothes. A quarter of consumers are buying products which have less impact on the environment, and one in five are shopping for products where workers are paid a fair wage.

The 2022 research also found that nearly two-thirds of consumers (64%) like the idea of shops where they are assured all products are sustainable.

Environmental and social issues are important to shoppers, and yet there are barriers to turning environmen-

tal conviction into better purchasing decisions. It would be easy to think that cost is the only obstacle to more sustainable choices, with research from Deloitte confirming it is the leading factor for 51% of shoppers. However, nearly as many people (48%) feel a lack of information is holding them back from a more sustainable lifestyle.<sup>2</sup>

Hence, when shoppers are asked what they want to see from brands, to encourage them to make better decisions for the environment, more than half want better information on recycling, as well as a commitment for companies to use less plastic in products. According to Deloitte, they want to see this evidenced by public commitments on company websites, with as many as one in five revealing they want to see evidence of B Corp certification.

These recent Mintel and Deloitte reports follow on from a previous Provenance survey of Cult Beauty shoppers carried out in 2019 and 2020. The research found that 48% of beauty consumers wanted to know details of a brand's values and commitments to the environment, and 42% wanted similar information relating to social impact.

Provenance Founder Jessi Baker believes this body of existing research highlights the importance of the company's mission to provide independent, third-party verification of claims made across multiple industries, including beauty and wellness.

1. [mintel.com/consumer-sustainability-barometer](https://www.mintel.com/consumer-sustainability-barometer)
2. [deloitte.com/uk/en/pages/press-releases/articles/the-price-is-not-right-for-consumers-trying-to-make-more-sustainable-choices.html](https://www.deloitte.com/uk/en/pages/press-releases/articles/the-price-is-not-right-for-consumers-trying-to-make-more-sustainable-choices.html)

**9/10**  
shoppers believe sustainability and ethics-related considerations are important when they are buying beauty and wellness products

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There's just so much greenwashing out there that shoppers don't know what all the claims being made actually mean and whether a company meets the standards they claim to.

We're there to help shoppers make informed decisions, by making sure brands don't get to mark their own homework. What's clear from this research is that sustainability is a key purchase consideration for a huge majority of beauty shoppers, but the industry as a whole is leaving shoppers confused and sceptical about positive impact. If beauty and wellness businesses want to stay relevant to increasingly values-led shoppers, they need to be much clearer on sustainability claims, and use verification to prove them.

**Jessi Baker**  
Founder, Provenance



This new Provenance report emphasises just how important this is, with nine in ten beauty and wellness consumers revealing sustainability and ethics-related considerations are important when they are buying products (Figure 1).

**Figure 1: How important are sustainability and ethics-related considerations when you are buying beauty and wellness products?**

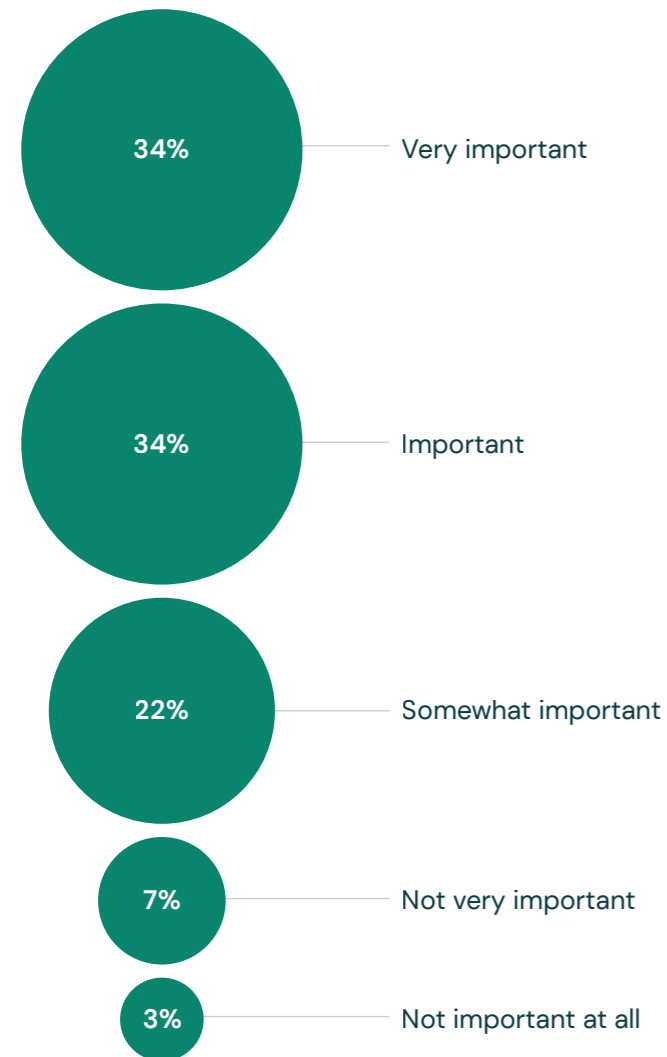
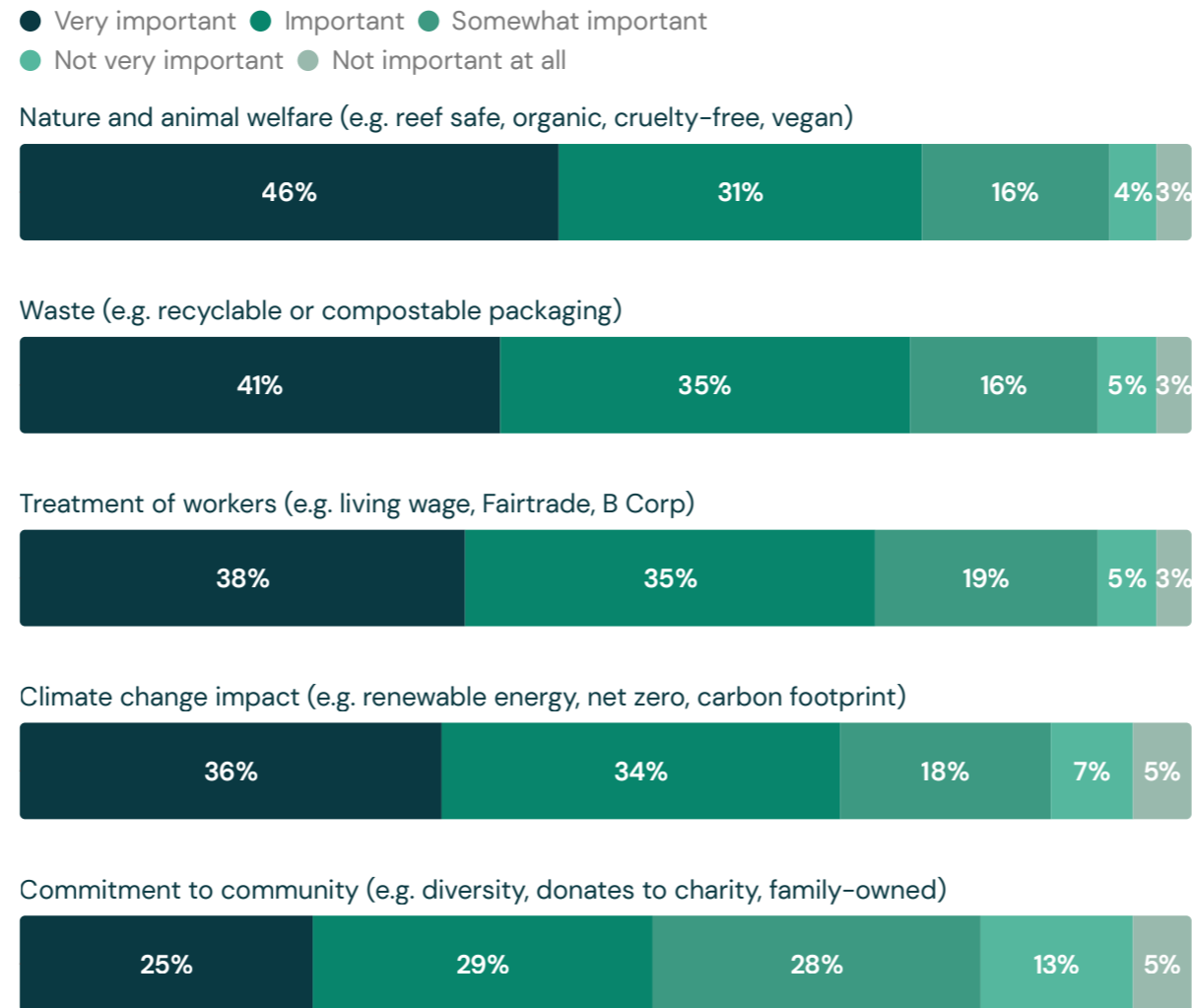


Figure 2 drills down further into the relative importance of different environmental and social considerations to beauty shoppers. Nature and animal welfare, waste and treatment of workers are deemed at least 'somewhat important' by more than 90% of consumers, and the corresponding percentages for climate change impact and commitment to community are 88% and 82%, respectively.

**Figure 2: How important are the following sustainability and ethics-related considerations when you are buying beauty and wellness products?**



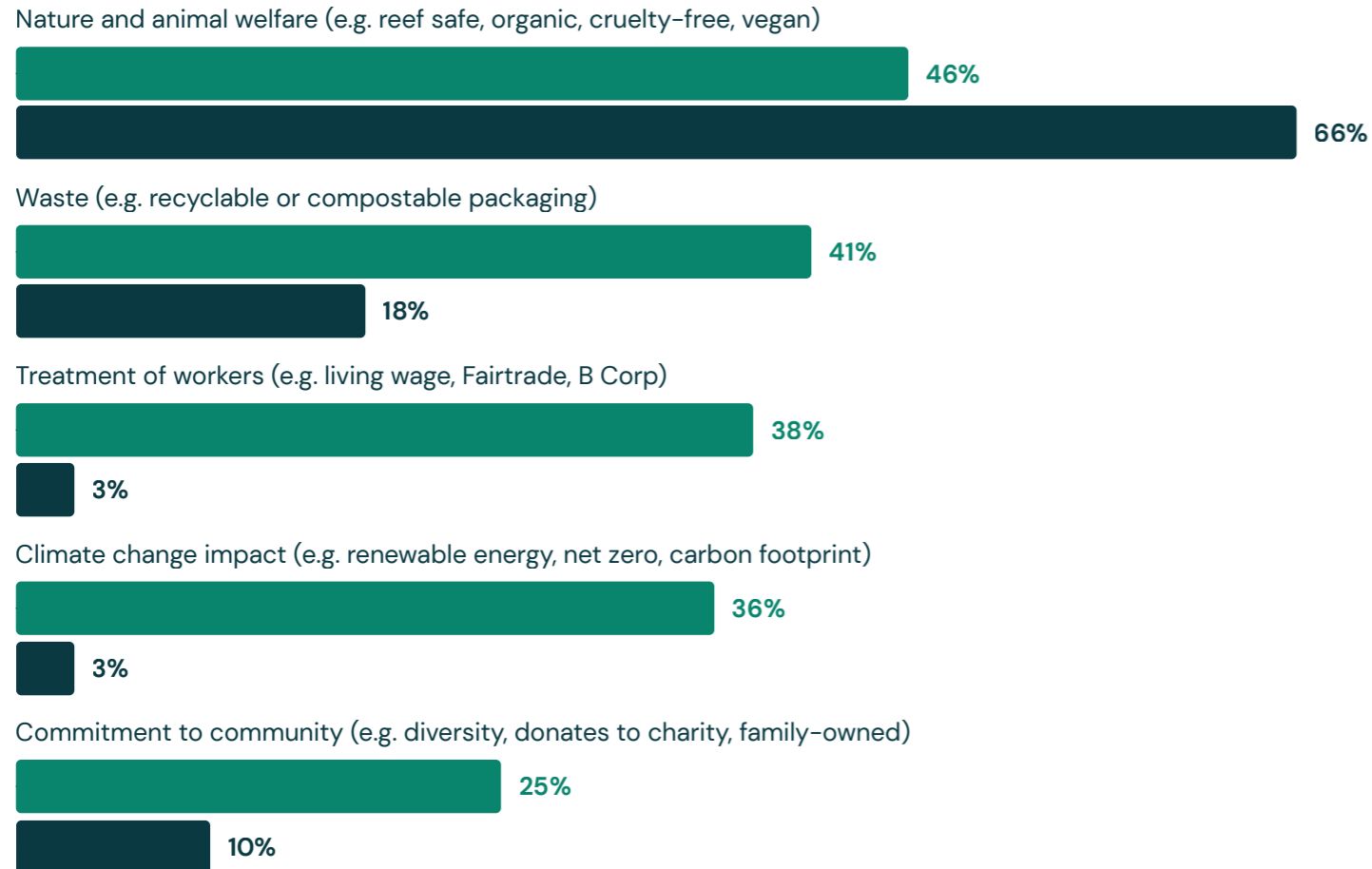


Based on proprietary Provenance data, Figure 3 shows the extent to which beauty brands are aligned with consumer thinking on the relative importance of different issues. Brands are most likely to use Proof Points relating to nature and animal welfare, and to waste, which are the two most important issues for consumers. However, the use of Proof Points by

brands is much less evenly spread than the level of consumer focus across the range of environmental and social challenges. There is a huge shortfall in Proof Points evident for all issues apart from nature and animal welfare – this deficit is most stark when it comes to claims about climate change impact and the treatment of workers.

**Figure 3: The issues shoppers care about vs. brands' claims today**

- % of beauty shoppers that consider this a very important issue
- % of all claims published through Provenance that relate to this issue



**93%**  
of beauty shoppers believe that nature and animal welfare is an important consideration

**4,123**  
Nature & Animal Welfare-related Proof Points were published by Provenance brands by Summer 2022



**Did you know?**  
Proof Points are clickable sustainability claims about a brand or a product. Using technology, they connect what brands say to real evidence or independent verification

See how Proof Points could help your brand





## 2. Buzzwords and vague claims confuse shoppers



At the heart of the disconnect between brands and consumers, uncovered in this report, are a range of unsupported and ill-explained claims beauty brands make about their products. Far from helping shoppers decide, they often confuse.

As the market has moved towards consumers wanting beauty and wellbeing products that have a minimal impact on the planet and the people involved in their production, the marketing teams have gone to work.

Buzzwords now abound in advertising copy, websites, point-of-sale information and on packaging. Some would appear to be deliberately ambiguous, such as 'clean' or 'natural' beauty, while others are designed to attribute an ethical stance to a product, such as 'cruelty-free', 'vegan', 'organic' or 'ocean-safe'. Often packaging will bear 'recyclable' or 'compostable' labels without explaining how much of the product this claim applies to.

Sarah Brown, Founder of Pai Skincare, reveals the problem is 'ten times worse' than when she set up the company in 2007.

**71%**

**of shoppers aren't sure what is meant by 'environmentally friendly' and 62% say the same for 'green' claims**

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There's just so much murkiness out there, as one brand makes unsubstantiated claims, so does another, it becomes self-perpetuating.

The term 'organic' is used all the time by brands that are not registered as organic, they often put stars next to ingredients to make it appear they are properly accredited. We are fully certified organic and that means we are far more heavily regulated about how we reference the term than a company that isn't. That's why the Provenance service is so useful for helping explain certification clearly and consistently, and making sure the shopper doesn't have to do all the vetting themselves.

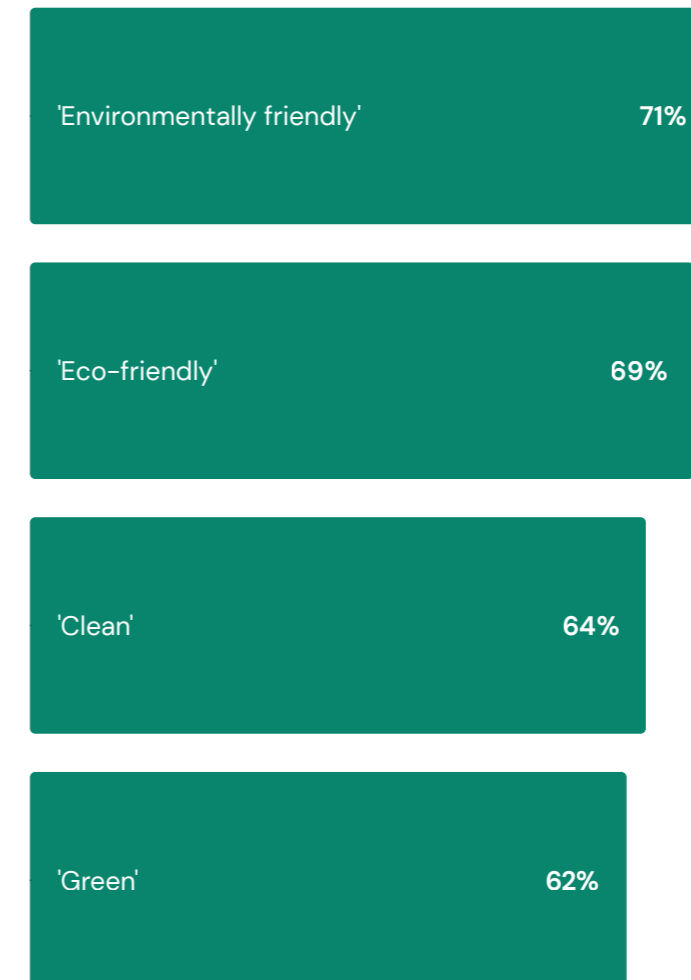
**Sarah Brown**  
Founder, Pai Skincare



pai

Figure 4 shows the proportion of consumers who believe various sustainability claims commonly made by beauty brands are unclear. Almost three-quarters of consumers (71%) aren't sure what is meant by 'environmentally friendly' and 62% say the same for 'green' claims.

**Figure 4: Proportion of consumers who believe sustainability claims are unclear**



The feeling that the beauty industry bombards consumers with jargon and industry buzzwords that many simply do not understand is reinforced by Figure 5.

Fewer than a third of consumers (30%) find it very easy to understand the criteria behind waste and recycling claims made by beauty and wellness brands, and that proportion drops to just over a quarter (26%) for nature and animal welfare, such as 'reef safe' and 'cruelty-free'.

Perhaps most worryingly for brands who are reacting to the climate emergency by trying to limit their impact on the environment, only one in five consumers (22%)

find it very easy to understand climate change claims. Promises around renewable energy, carbon footprints and net zero targets are often worded in such a way that they are not easily understood by shoppers.

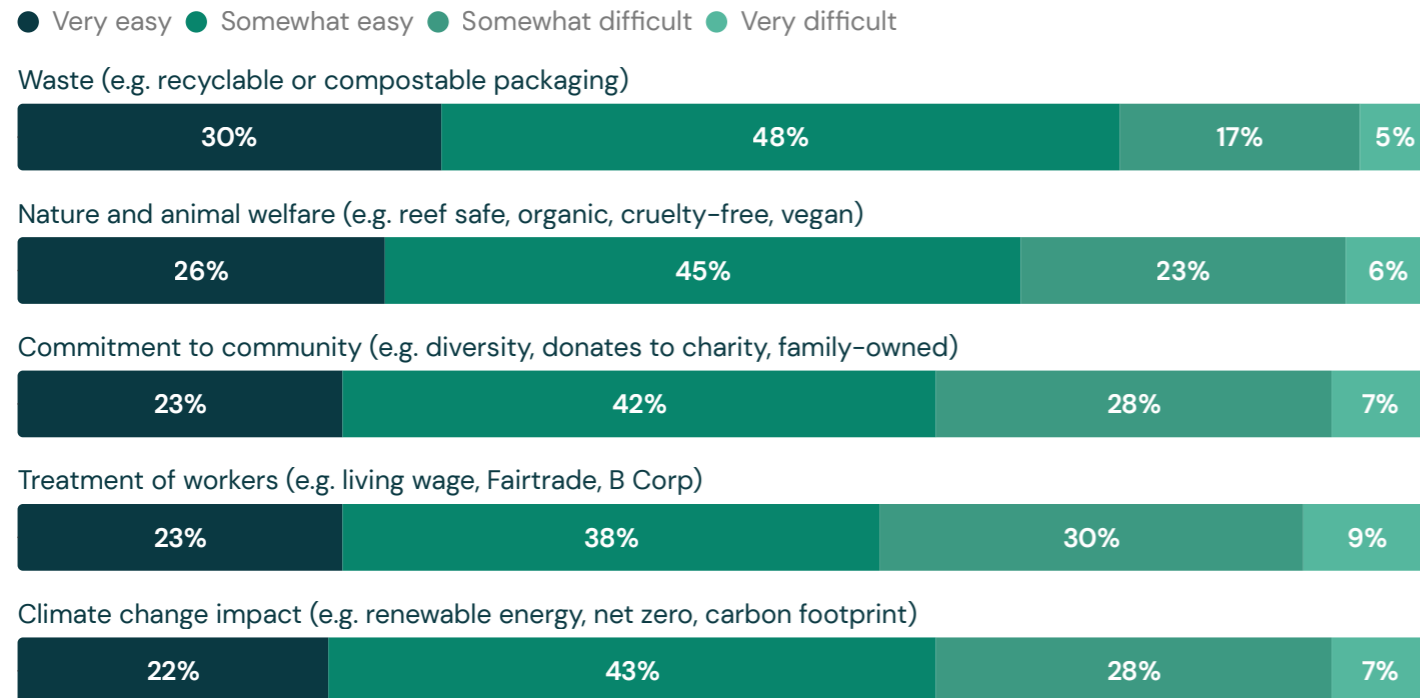
### The hidden complexity behind beauty claims

It is worth remembering that not all brands are trying to confuse shoppers. To the contrary, many are seeking to set up a more open and honest dialogue with the public. ELEMIS is one of many beauty brands attempting to make it easier for its environmental credentials to be communicated to consumers.

The brand, now part of the French luxury retailer L'Occitane, is striving for B Corp status to underline how seriously it takes its commitments to the natural world, its people and the communities which underpin its operations.

ELEMIS Co-Founder and Chief Product and Sustainability Officer, Oriele Frank, points out how hard it is for a global company to get sustainability certifications for products when rules vary from one country to another. It is also more difficult for a large brand with a complex global supply chain to meet sustainability criteria as quickly as a start-up which has no legacy issues to contend with.

**Figure 5: How easy or difficult is it to understand the criteria behind sustainability claims made by beauty and wellness brands in the following areas?**



### Did you know?

The Provenance Framework is an open-source library of 80+ sustainability certifications and standards, developed by leading independent experts to help brands communicate impact and avoid greenwashing. Each claim in the framework includes details of the criteria you'd need to meet, as well as accepted evidence and verifiers.

[Explore the Provenance Framework](#)



If you're a start-up and a new business, it's much easier to tick all the boxes, whereas we've got a heritage and a legacy.

We're not allowed to put certifications on boxes because they aren't necessarily recognised by everyone. If you're just a British brand and selling locally it's a lot easier. But when you become global, you're not allowed to put any of these symbols on your brand's carton.

**Oriele Frank**  
Co-Founder and Chief Product and Sustainability Officer, ELEMIS



**ELEMIS**



“

A lot of people look for the term ‘vegan’ on beauty products because they assume it’s better for the planet, but we can’t say we’re vegan because we use beeswax.

We chose not to be vegan because we believe beeswax is a better ingredient than many mineral resource derived alternatives. We need an open, honest and transparent labelling system to help consumers understand what they are buying so they can make informed choices.

**Jill Jago**  
Co-Founder and  
Chief Sustainability  
Officer, Vermouth



Jill Jago, Co-Founder and Chief Sustainability Officer of US-based lipstick brand Vermouth agrees brand promises are not always straightforward to make, and a badge is not always as reassuring as it appears.

The complexities of labelling and badging make it even more necessary for common standards and for brands to be open with consumers, with claims verified by a third party. This is particularly important when it comes to unravelling recycling pledges which may lead the shopper to believe a product is a lot more environmentally friendly than it really is. The reality for many people is that the products may in theory be recyclable, but the infrastructure to make this happen is not in place.

“The consumer ultimately is very confused,” adds Oriele Frank. “They don’t know what they can recycle, really. If every brand was signed up to Provenance, that would give the consumer more awareness.”

**Baffled shoppers lack trust**

With an in-store customer often having to work out for themselves what all the buzzwords and logos on packaging mean, it is hardly surprising that many feel confused. Where there is confusion, consumers can be expected to wonder whether beauty brands may be obscuring where their products come from, how they’re made, and how people and animals are treated. If the claims are obscure, perhaps those making them are not to be trusted?

When Provenance checked out this prognosis, shoppers were very clear, 79% have doubts about the trustworthiness of beauty and wellness brands’ sustainability and social impact claims (Figure 12, Appendix).

Ben Grace, founder of SBTRCT Skincare, believes the key to brand credibility is building trust through transparency – something which is currently lacking in the industry. He’s passionate about clearly communicating that SBTRCT products are palm oil free, contain no added water content and have 100% compostable packaging with zero plastic.

Too often, he believes, companies lack clarity and openness when communicating their sustainability credentials to consumers. For example, not revealing just how unrealistic it is that their recyclable bottles will actually be recycled and used again.



© Vermouth



© SBTRCT

Only **25%** of shoppers on average find it very easy to understand the criteria behind sustainability and social impact claims

**79%**  
of beauty shoppers have doubts about whether to trust the industry's sustainability claims

Less than  
**1 in 4**  
of shoppers strongly agree that the beauty industry is transparent on sustainability

The lack of trust in the mainstream beauty sector has its roots in the disconnect with informed consumers who do not feel beauty and wellness brands are transparent when they talk about them.

The research shows that only a quarter (24%) strongly agree that the beauty industry is transparent about the environmental and social impact of its products (Figure 6).

**Figure 6: To what extent do you agree that the beauty industry is transparent about the environmental and social impact of its products?**

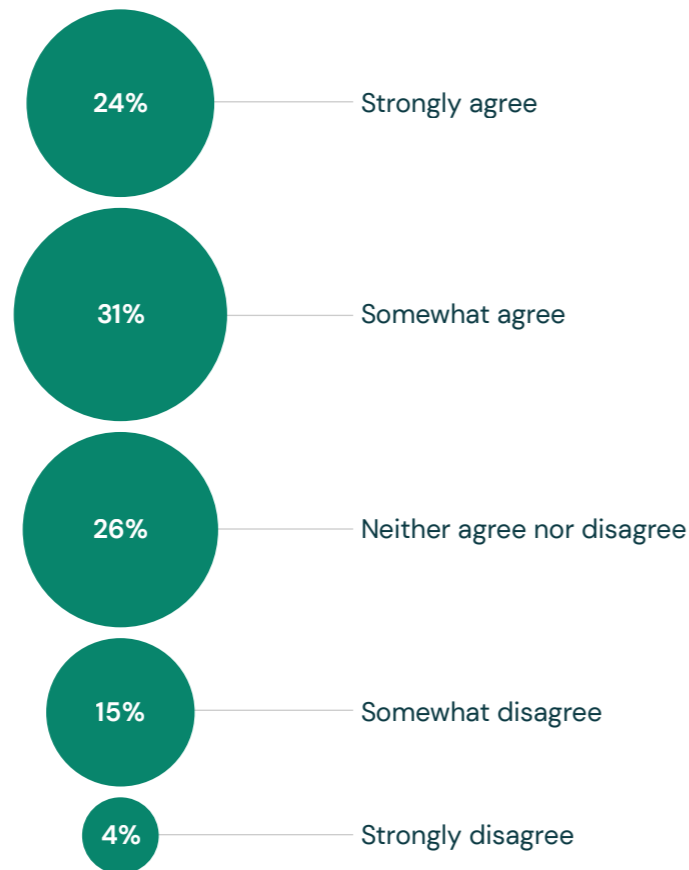
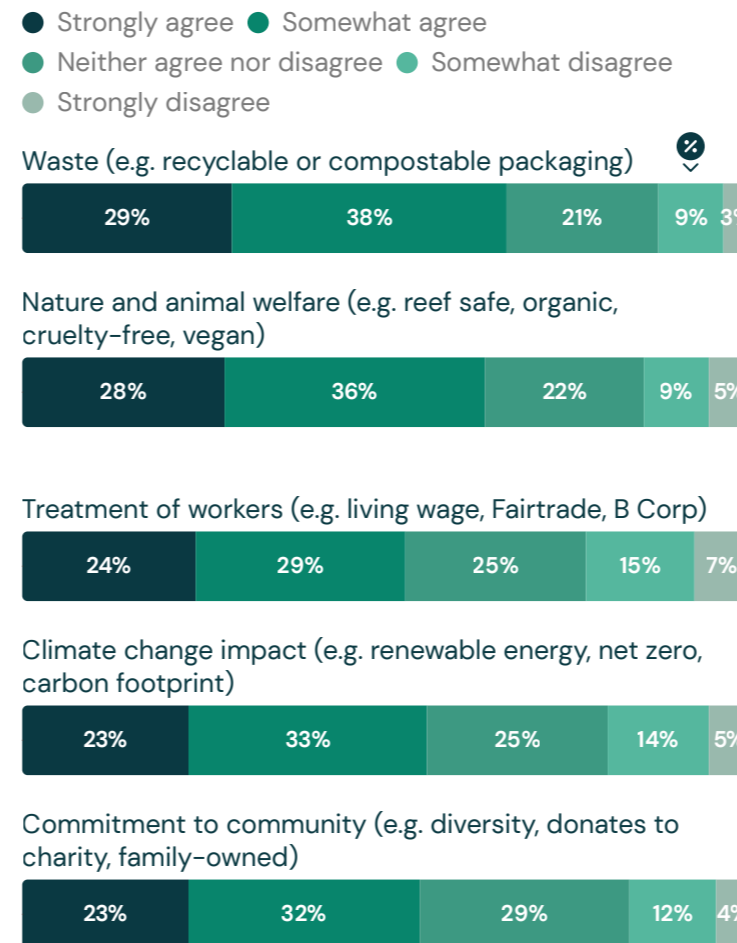


Figure 7 shows that the lack of transparency from brands and retailers applies across the full range of environmental and social issues. The problem is worse around treatment of workers, climate change and commitment to community, where fewer than a quarter of consumers strongly agree that the industry is transparent.

**Figure 7: To what extent do you agree that brands and retailers are transparent about the impact of their beauty and wellness products in respect of the following issues?**



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Sustainability has slowly climbed to the top of the agenda but as an industry, we've developed a reputation for greenwashing and therefore a lack of trust lingers.

It's important to me that the SBTRCT mission is understood and has credibility. Partnering with Provenance has been fundamental in helping us achieve this by ensuring our customers understand the claims we make about our products and why they are better for the environment.

**Ben Grace**  
Founder,  
SBTRCT Skincare

**SBTRCT**  
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**3.**  
**Where do shoppers  
look for reassurance?**



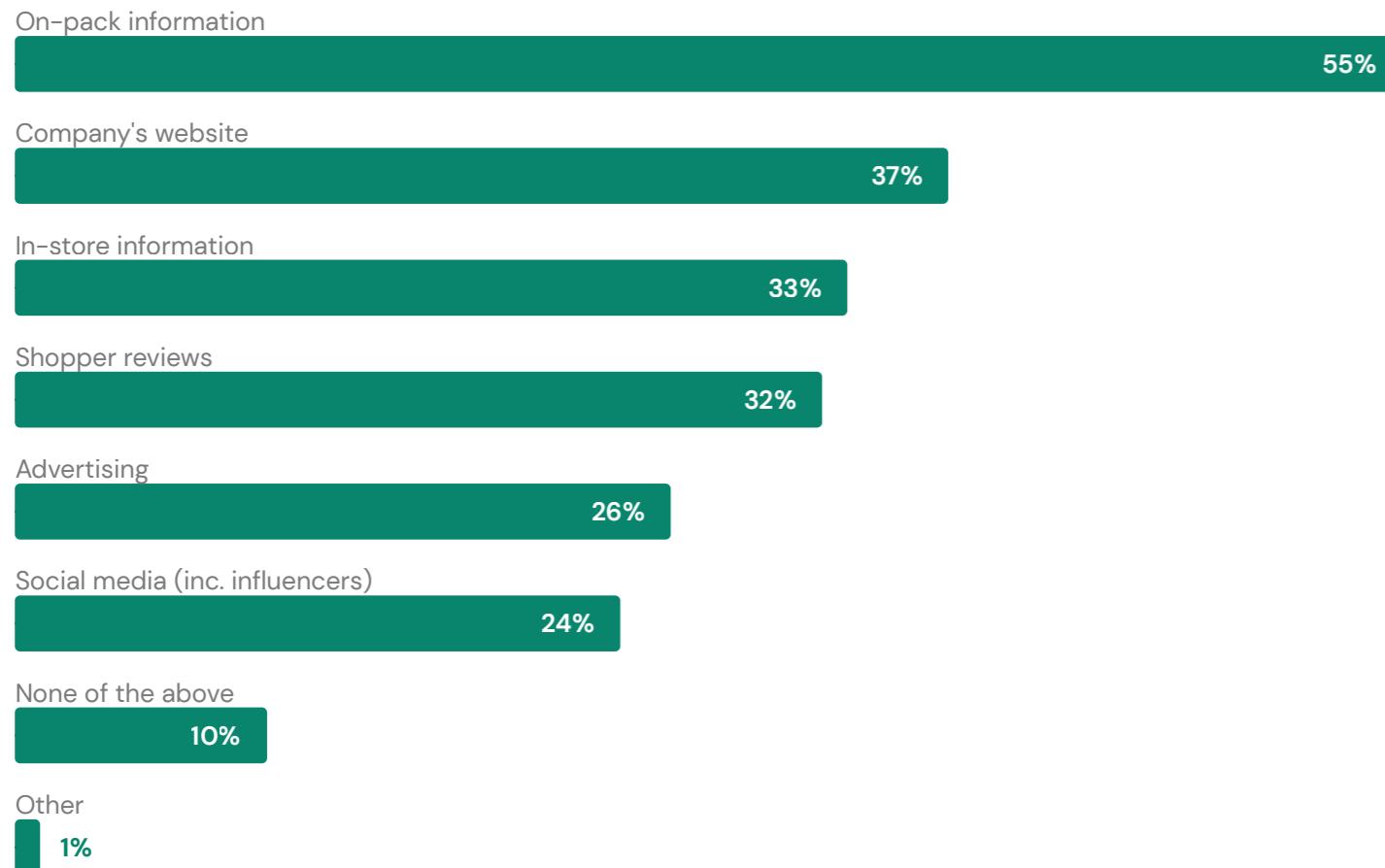
This feeling among consumers that beauty and wellness companies lack transparency not only leads to low levels of trust, it also leaves consumers having to do their own research and trying to unpick the claims being laid out before them.

Finding sustainable products is so important that nine in ten shoppers look for sustainability information when purchasing a beauty and wellness product. Most shoppers (55%) will check on-pack information,

while 37% will consult a company's website and 33% will look for in-store information.

This raises an obvious issue. The top three information sources used by customers to delve a little deeper into social, environmental and ethical claims are controlled by the brand or retailer selling to them. Given the lack of trust that many consumers have in the claims made about beauty products, there is clearly an issue if brands are widely perceived to be 'marking their own homework'.

**Figure 8: Where do you look for sustainability information when purchasing a beauty and wellness product?**



**37%**  
of shoppers look at a company's website when they want information about sustainability

**41%**  
of shoppers say independent verification is very trustworthy, making it the most highly trusted source of sustainability information when consumers are in purchasing mode



### Shoppers trust independent verification

It is therefore no surprise that independent verification (41%) is far and away the most highly trusted source of sustainability information when consumers are in purchasing mode (Figure 9). This act of looking beyond channels where the brand or retailer is in full control of messaging is so important to consumers that it outranks social media as a channel for checking brand claims.

Additionally, consumers are revealing that all sources of information are not rated equally when it comes to their credibility. Shoppers rate independent third-party verification as far and away the most highly trusted source of sustainability information when they are in purchasing mode.

For Alicia Hickey, Head of Sustainability and Social Causes at online beauty retailer Cult Beauty, this act of looking up information about a brand's claims and seeking out verification underlines the disconnect between consumers and the industry. For her, the market is clearly crying out for claims to be judged by third-party verification, with those brands that do not act losing out in the long run.

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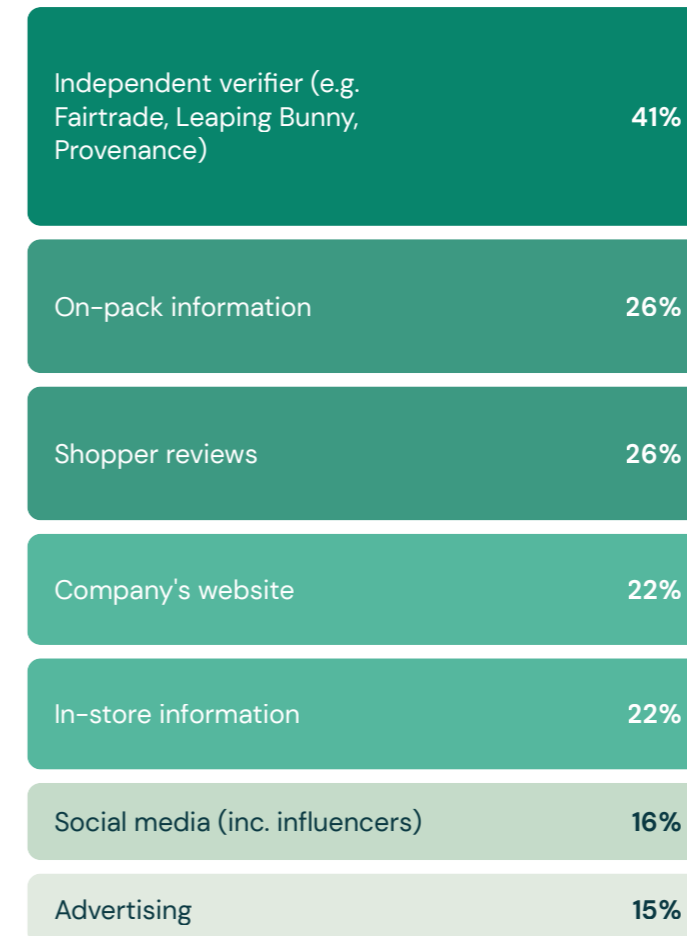
There are so many claims and a lot of ambiguity — especially in beauty — around claims like ‘clean’ and ‘green,’ she says. “With so much (sometimes unintended) green-washing and purpose-washing, it’s no wonder consumers are confused and trust is low. Customers need an easily recognisable, standardised stamp of approval to show a product has been impact checked. As sustainability becomes table stakes, brands need to act to future-proof their brands and ensure they don’t lose trust.

**Alicia Hickey**  
Head of Sustainability and Social Causes, Cult Beauty

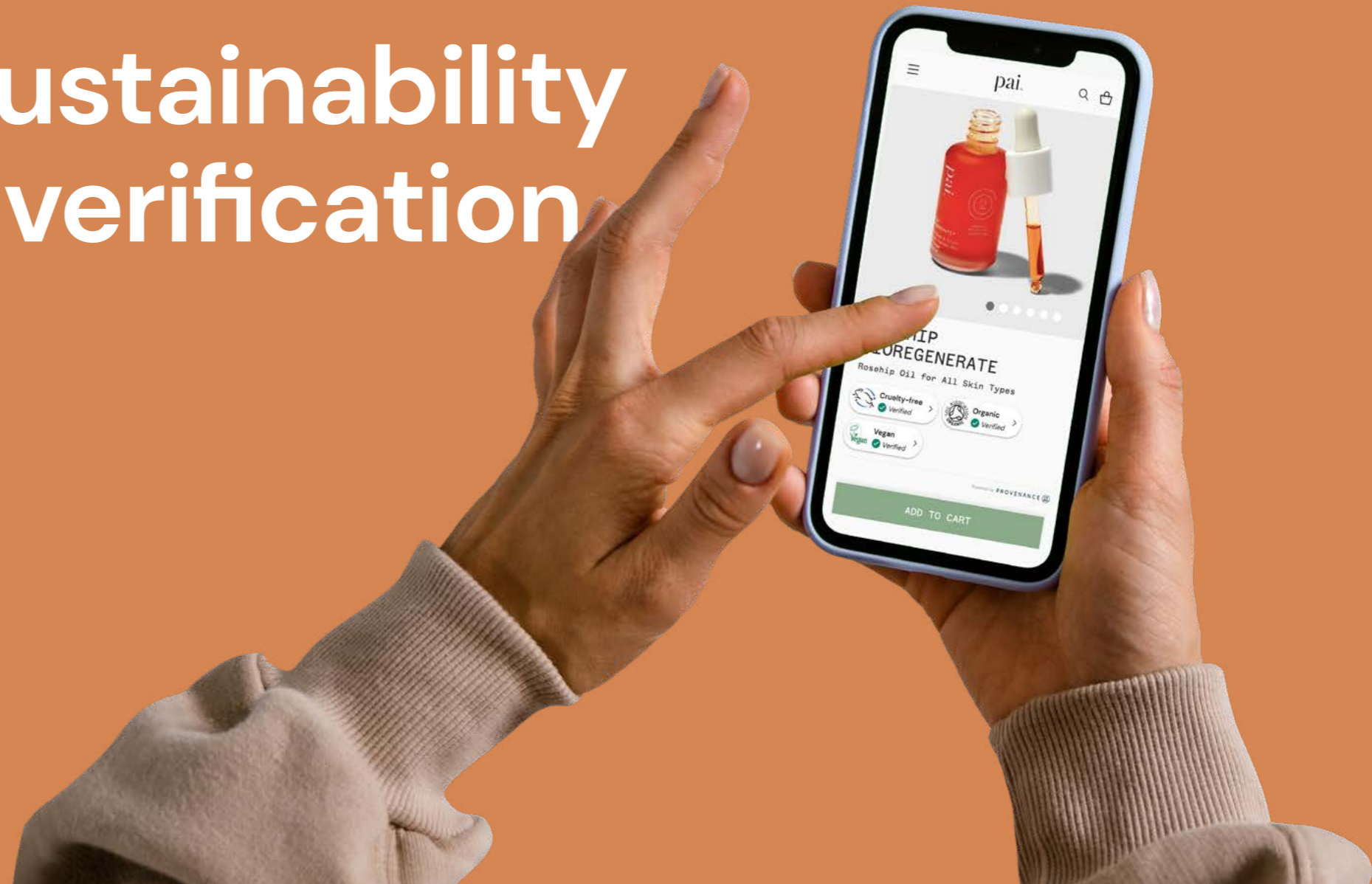


*cult*  
**BEAUTY**

Figure 9: Proportion of respondents saying that the following sources of sustainability information are ‘very’ trustworthy when purchasing a beauty and wellness product



# 4. Shoppers want sustainability information, and verification



# 3x

Sustainability information is three times more important than social proof or reviews when shoppers are making a beauty and wellness purchase

Trust in beauty brands and their sustainability buzzwords is clearly low, but consumers are also clear on what they want to see from the industry.

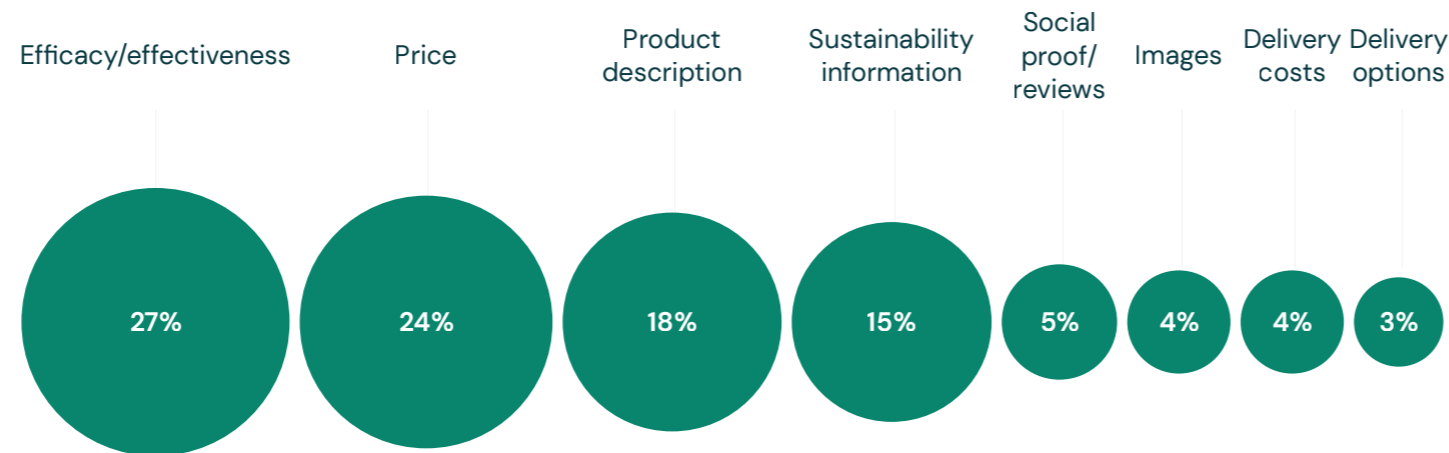
When it comes to making beauty purchases, it is no surprise to see that consumers are primarily looking for details on product efficacy and then the price, followed by a product description (Figure 10). Like any product, shoppers want to know what they are buying, and how much it will cost.

However, close behind these usual considerations comes the consumer desire for sustainability information. It is three times more important to shoppers than social media or reviews. Perhaps just as impor-

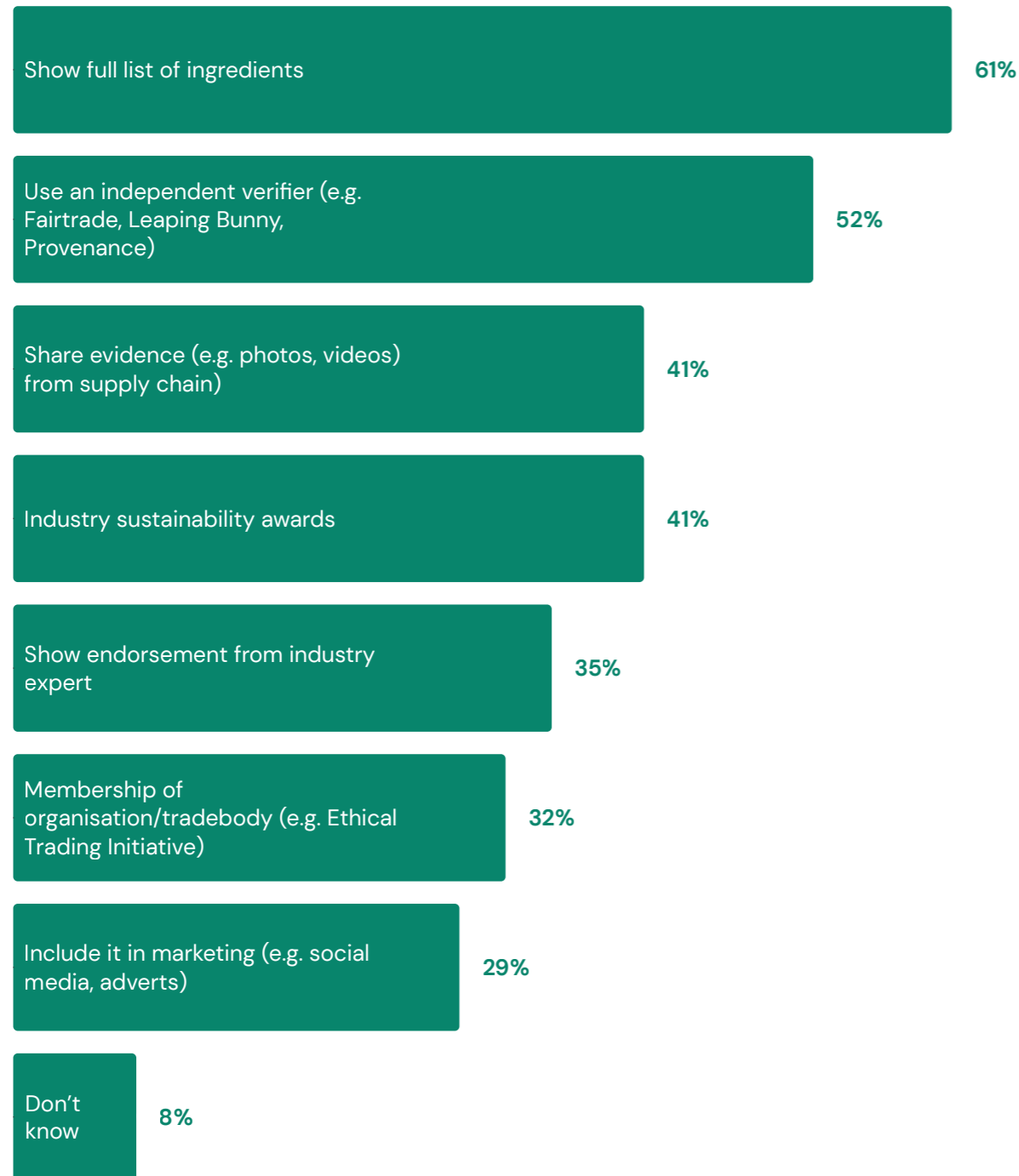
tant for brands to consider when commissioning luxurious-looking photo shoots, sustainability information is nearly four times as popular as imagery as a first choice for making a purchasing decision. The same goes for delivery options which are also much further down the pecking order.

Consumers are clearly leaning into sustainability information but, as this report has recovered, only a minority feel they understand what brands are claiming and trust them. So, when it comes to gaining confidence and convincing the public that sustainability claims are true, what should brands be doing to win the confidence of consumers that their sustainability claims are accurate and true?

Figure 10: Most important type of information when making a beauty and wellness purchase



**Figure 11: What can beauty and wellness brands do to win your confidence that a sustainability claim (e.g. 'organic') is accurate and true?**



As shown in Figure 11, consumers are most interested in ingredients because what goes into a product is a major part of whether it can claim to be, for example, organic or cruelty-free. However, the next most important step a brand can take is to use independent verification to show their claims are backed up by a trusted third party. More than half of consumers (52%) think that beauty and wellness brands should be doing this.

Next come a range of proactive steps a beauty or wellness business can make, including being clearer on their supply chains, through posting videos and photos, as well as drawing attention to sustainability awards. Returning to third-party verification, consumers are also clear that industry endorsements from independent experts and trade bodies, such as B Corp status, are highly desirable.

Audrey Bois Nicolai, Head of Brand at Noble Panacea, makes the point that shoppers essentially want to have an honest and open conversation with the industry, in which claims are both explained and certified.

**A full list of ingredients (61%) and use of an independent verifier (52%) are seen by shoppers as the best tactics to win their confidence**



Consumers simply want brands not to mislead them and instead be transparent on the claims they are making," she says. "For example, the buzzword 'natural beauty' can be misleading because a product may not be best for the natural world if the ingredients have an impact on nature, which can be avoided by a man-made ingredient. The industry needs to be far more transparent on these issues and that's where we believe the Provenance Proof Points are so helpful for consumers because they ultimately need a trusted third party to verify a brand is telling the truth.

**Audrey Bois Nicolai**  
Head of Brand,  
Noble Panacea **NOBLE PANACEA**





**5.  
What the future  
may look like**



Many of the smartest thinkers at the most forward-thinking beauty brands are committed to change. Whether it is the Sustainable Beauty Coalition, formed by the British Beauty Council, or the global B Corp Beauty Coalition, organisations are coming together to share best practice and agree goals to help the industry become more transparent as it focuses on products and practices that are kind to people and the planet.

This is being accompanied by a degree of regulatory support. The UK Green Claims Code was launched by the Competition and Markets Authority (CMA) in 2021. It reminds brands that they are free to make environmental claims but if they are not true, they could be in breach of consumer protection laws.

The advice that accompanied the new code was comprehensive, warning brands against making bold claims they cannot back up with evidence and reminding them they must be honest and not hide any information about their environmental impact. The aim is to ensure consumer law is ad-

hered to and the public is empowered to make informed choices.

The Federal Trade Commission offers similar guidance in the United States, with a particular focus on clarity on ingredients and the use of certifications and kite-marks. The EU is taking action by turning guidelines making green claims into legally enforceable obligations under revised EU consumer law as part of its New Consumer Agenda.

Regulation is still catching up with stringent rules on food but there is progress in the right direction to, at the very least, encourage responsible brands to communicate effectively and clearly with the public.

Peter Wübben, Director Corporate Communications and ESG at premium beauty and health retailer DOUGLAS, believes this will lead to beauty and wellness products taking a leaf out of consumer electronics, for instance, and displaying a rating for their impact on the environment.



© DOUGLAS

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I think it will probably take a few more years but I suspect we'll get to a point where products are rated by the criteria currently being developed by initiatives such as the Eco-BeautyScore Consortium,” he says. “Aside from the fact that there might be regulations that require it, products will display their environmental footprint because it is vital for consumers who want to make sustainable and responsible purchasing decisions, as well as for companies that want to be fully transparent and fulfil their responsibilities with respect to the environment and society.

**Peter Wübben**  
Director of Corporate  
Communications  
and ESG, DOUGLAS



DOUGLAS

“

The beauty industry has always made a lot of noise about how it can make you feel better and now there's a cacophony of noise about 'clean' and 'environmental' promises.

You can understand why shoppers are confused and don't know who to trust. I think the industry needs to stop using these kind of empty promises, and instead be transparent about their environmental and social impacts. The trust marks that can demonstrate this are already there. What is needed is independent third-party verification to show shoppers a brand meets the criteria of the claims and logos it bears.

**Shaun Russell**

Founder, Skandinavisk and  
Chair of the Supervisory  
Board of the B Corp  
Beauty Coalition



B Corp™ Beauty Coalition

SKANDINAVISK



For Shaun Russell, Founder of fragrance business Skandinavisk, and Chair of the Supervisory Board of the B Corp Beauty Coalition, the need for change is fundamental and goes beyond labelling.

An interesting aspect of the future could well be that in addition to proper certification and verification,

the industry might move on from claims of how little harm they are doing, to how they are regenerative. This will move the debate on in the next decade to how brands are a force for good, putting more back into natural resources than they take out, according to Laura Rudoe, CEO and Founder of Evolve Organic Beauty.



© Evolve Organic Beauty

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At Evolve Organic Beauty, our mission is to go beyond sustainability to build a business that is net positive by becoming regenerative. Regenerative means better for the soil, better for the planet as well as better for people and animals. There is a new regenerative organic certification that has recently launched which is very exciting but so far it is not possible to find any materials certified to this standard. This is likely to improve over the coming five to ten years, and ultimately we would like to integrate this into our certification programme. In the meantime we will be prioritising any ingredients that support soil health and biodiversity to ensure that our products are as regenerative as possible.

**Laura Rudoe**

CEO and Founder,  
Evolve Organic Beauty

EVOLVE  
ORGANIC BEAUTY





## Conclusion – Action points

Beauty and wellness consumers are crystal clear about what they want from the beauty industry. They want to make more sustainable purchasing decisions and they understand the issues. It's only when the brands start making up buzzwords that they get confused, and that confusion leads to worryingly low levels of trust.

Consumers want to know what's in a product, that it works well and that it has been sustainably sourced, manufactured and distributed. For that to happen, they need the industry to embrace independent, third-party verification. It is far and away the most highly trusted source of information the shopper turns to for clarity on brand claims about products.

## Action points

To strike up a more transparent and open dialogue with consumers and to win back their trust, brands should consider four action points:

- 1 Prioritise your positive impact**  
Understand that sustainability is an essential element in modern purchasing decisions. It's important to 9 in 10 beauty and wellness shoppers.
- 2 Avoid buzzwords and vague claims**  
Shoppers want to make responsible purchasing decisions. Empower them to do so by steering clear of buzzwords and jargon.
- 3 Be transparent about your products**  
In an industry where mistrust of sustainability claims is widespread, brands can win shoppers' loyalty by being transparent about their products, listing ingredients and sharing detailed sustainability information.
- 4 Seek out independent verification**  
Avoid suspicion of 'marking your own homework' by having your claims verified by a relevant external body. Independent, third-party verification is the customer's most trusted source of sustainability information.

## About Provenance

Provenance powers sustainability claims you can trust. The global leader in sustainability marketing technology, Provenance helps brands and retailers share credible, compelling and fact-checked social and environmental impact information at the point of sale. Provenance's technology is already increasing conversion rates, brand value and market share for 160+ leading beauty brands and retailers, including Cult Beauty, DOUGLAS, The Ordinary, Urban Decay, Glow Recipe and By Terry. Provenance is a mission-driven, independent B Corp; their vision is a world where citizens can make informed buying decisions that positively impact both people and planet.

[provenance.org](https://provenance.org)



# “ What people are saying about Provenance

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**Oriele Frank, Chief Product and Sustainability Officer, and Co-founder, ELEMIS**

The consumer ultimately is very confused. They don't know what they can recycle really. If every brand in the UK was signed up to Provenance, that would give the consumer more awareness.

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**Peter Wübben, Director of Corporate Communications and ESG, DOUGLAS**

Customers want to make conscious buying decisions, but to do so they need more information and transparency on products. I am sure that companies like Provenance can make a difference in this respect.

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**Alicia Hickey, Head of Sustainability and Social Causes, Cult Beauty**

So much has changed in just the last two to three years, we're seeing so many more brands championing sustainability and a very high percentage of new brands joining Provenance — which is fantastic as we move towards setting our 'minimum standards' goal. Having the Proof Points clears up the disconnect between what well-meaning marketing teams think they can publish and what the standards actually are for sustainability claims.

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**Sarah Brown, Founder, Pai Skincare**

The various certifying bodies have a big job to do in education. They've got to demystify standards for customers and so that's why I'm delighted with Provenance because it explains what the standards are consistently at every consumer touch point. My hope is that Provenance will be a global tech platform so wherever you are in the world, and whatever your level of understanding, you can click on it and it will tell you simple and clear information.

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**Audrey Bois Nicolai, Head of Brand, NOBLE PANACEA**

I do think sometimes people can lose trust in brands, but the type of labels provided by Provenance bring strong authority and advocacy. They confirm that the claims you are seeing are true.

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**Jill Jago, Co-Founder and Chief Sustainability Officer, Vermouth**

When I saw what Provenance was doing, I thought that's exactly what's needed. It's just taking the burden of research away from our customers so they can just trust this is a good product, it's ethical, it's sustainable, and I'm gonna love it.

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**Ben Grace, Founder, SBTRCT Skincare**

It's very important that we build our credibility and I think what's been fantastic for us in partnering with Provenance is that it gives us credibility in the space. And it's very important to us that our customers understand what we're saying about our products and why they are better for the environment.

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**Laura Rudoe, Founder, Evolve Organic Beauty**

Independent certifications really help Evolve Organic Beauty to stand out in a confusing market and provide our customers with transparent information on the leading work we do to be ethical and sustainable. We have organic, natural, vegan, cruelty free, living wage, plastic negative and climate positive certifications. Provenance helps us, and our customers, by providing independent verification so that we share our progress clearly and consistently.

# Appendix

Figure 12: In your opinion, how trustworthy are claims made by beauty and wellness brands about sustainability and social impact?

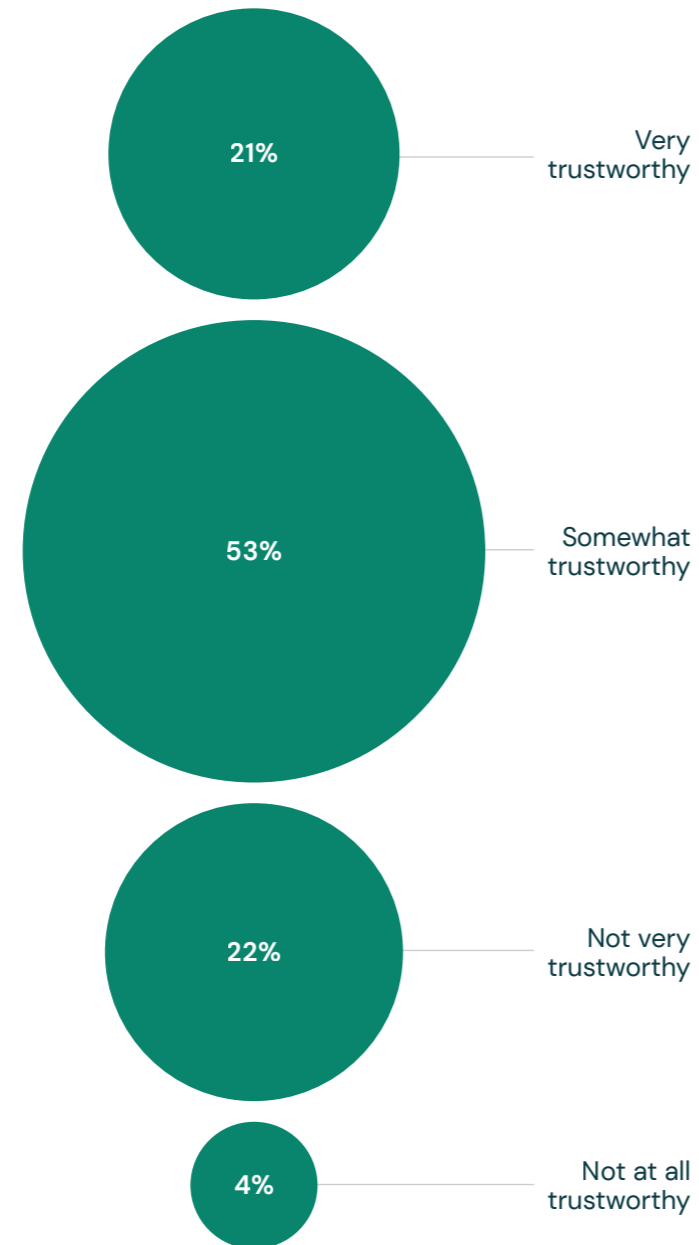


Figure 13: How important are sustainability and ethics-related considerations when you are buying beauty and wellness products?

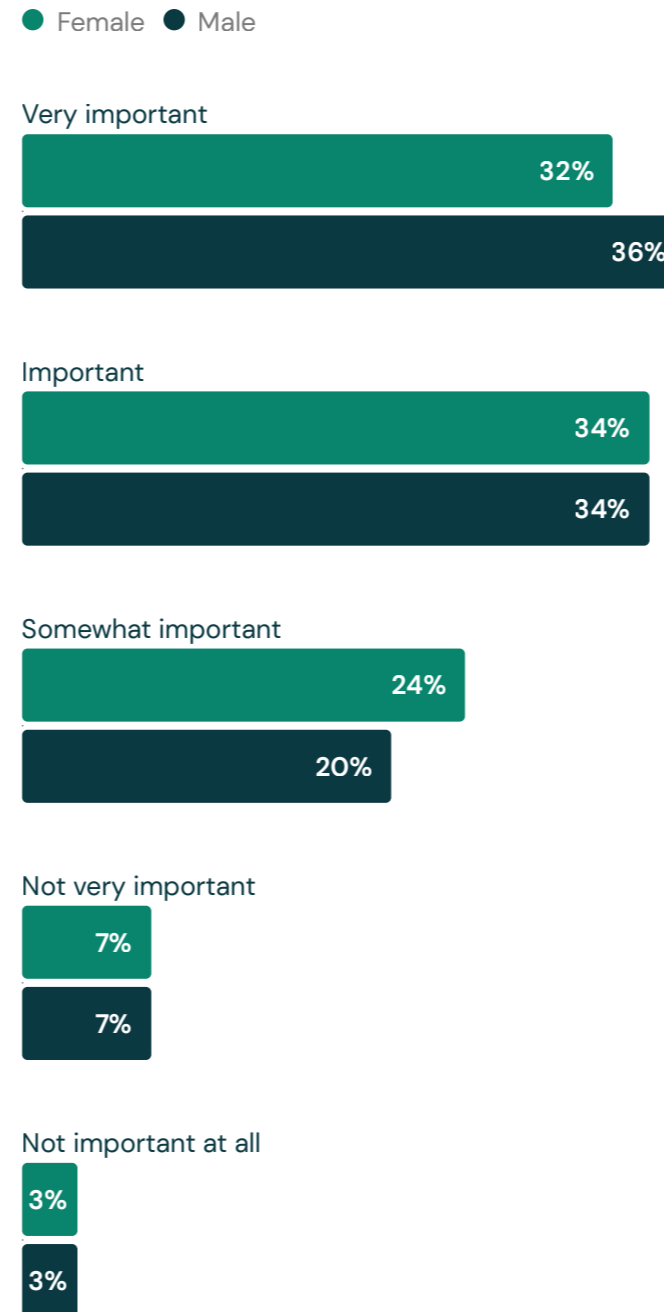
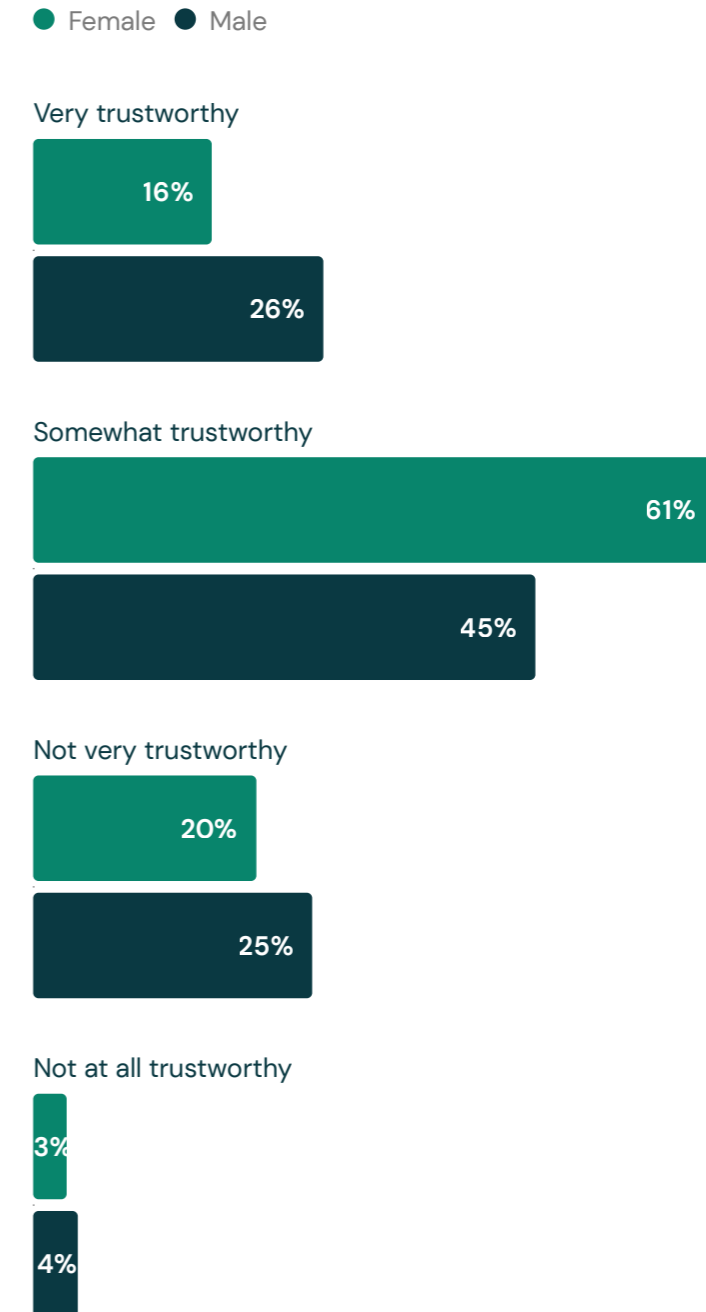
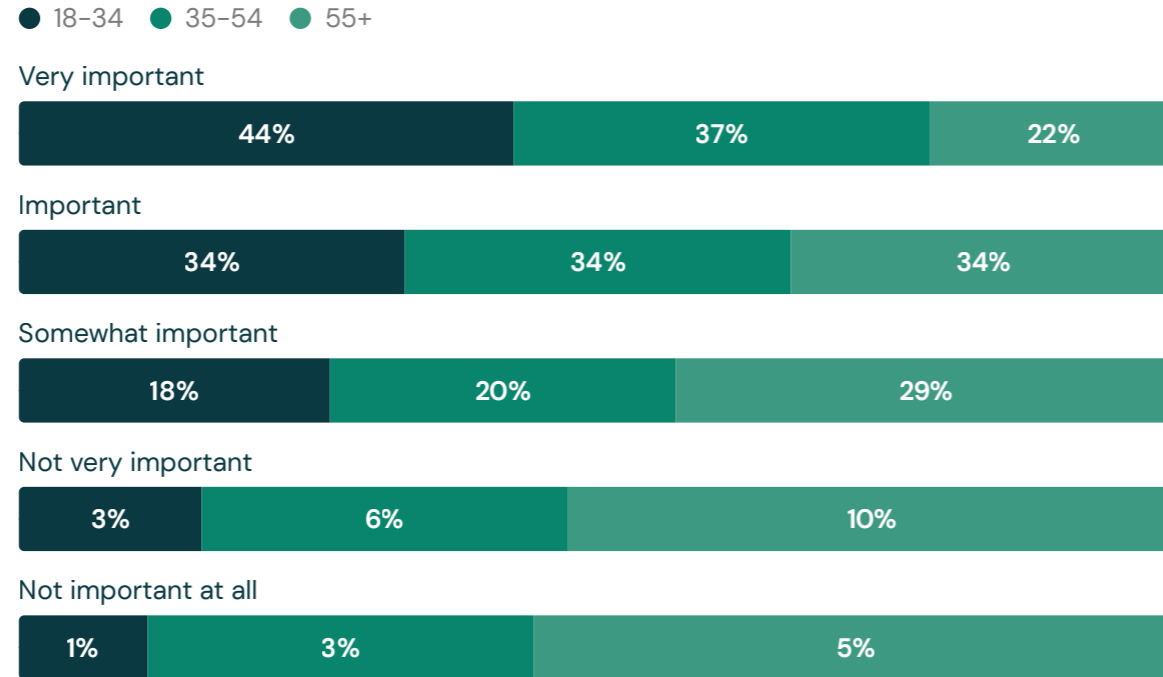


Figure 14: In your opinion, how trustworthy are claims made by beauty and wellness brands about sustainability and social impact?

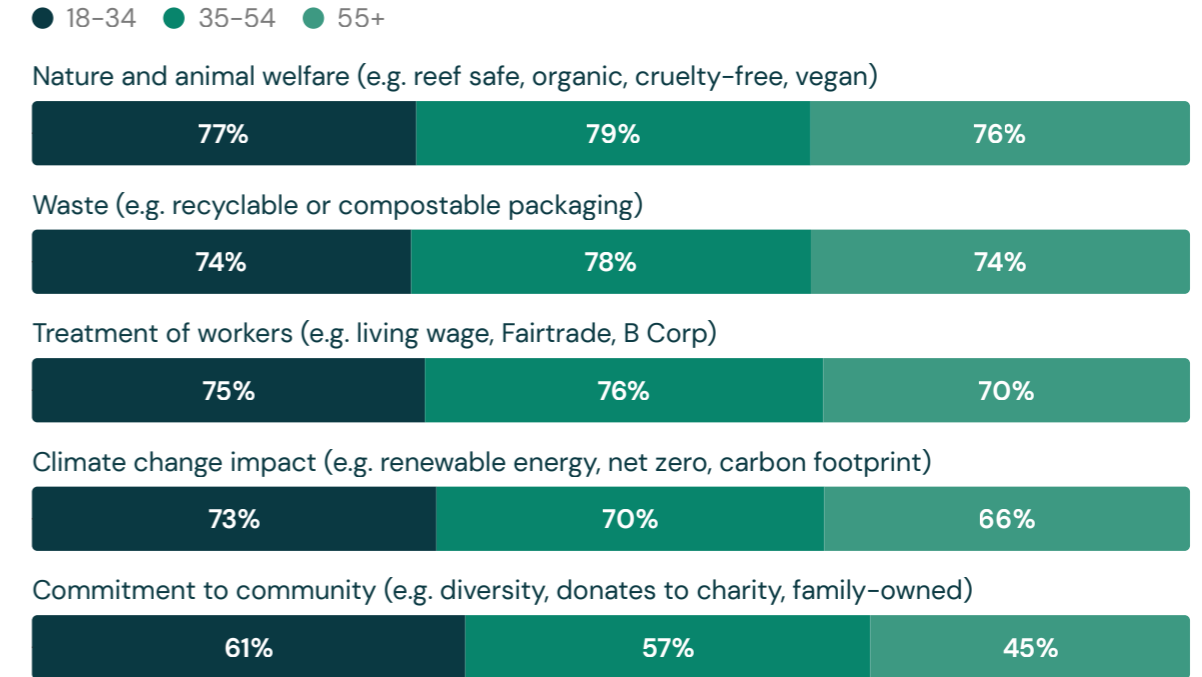


# Appendix

**Figure 15: How important are sustainability and ethics-related considerations when you are buying beauty and wellness products?**



**Figure 16: Proportion of respondents saying that the following sustainability and ethics-related considerations are 'very important' or 'important' when they are buying beauty and wellness products**



# Appendix

## Engagement with Provenance Proof Points

Table 1 below shows the level of engagement with different types of Provenance Proof Points. 'Coral Reef Safe' and 'Scientifically Tested' come out on top, with click-through rates of 2.16% and 1.71%, respectively.

### Table 1: Top 10 most engaged with Provenance Proof Points (based on shopper click-through rate)

1. Coral Reef Safe
2. Scientifically Tested
3. Clinically Tested
4. PETA Cruelty Free
5. Renewable Energy
6. FSC
7. PETA Cruelty Free & Vegan
8. Partly Recyclable Packaging
9. Female Owned Business
10. Vegan

Based on ~165,000 impressions; data collected from 1st July – 31st August 2022.



[provenance.org/beauty](https://provenance.org/beauty)

