



Know your environment.
Protect your health.

Findings From A National Survey Of Likely 2016 General Election Voters February 2016



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Key Findings

- **Everybody Uses Personal Care Products**
- **Few Have Any Idea How Minimal Current Regulations On Chemicals Are**
- **Voters See Chemicals As A Serious Threat And Overwhelmingly Support Stricter Regulations**
- **Voters See The Chemicals In Personal Care Products As A Serious Threat And Support Stricter Regulations**
- **Voters Overwhelmingly Support An Important Government Role In Regulating Personal Care Chemicals**
- **Choosing To Fight Regulations On Personal Care Chemicals Could Have A Significantly Adverse Impact On A Company's Reputation And Bottom Line**

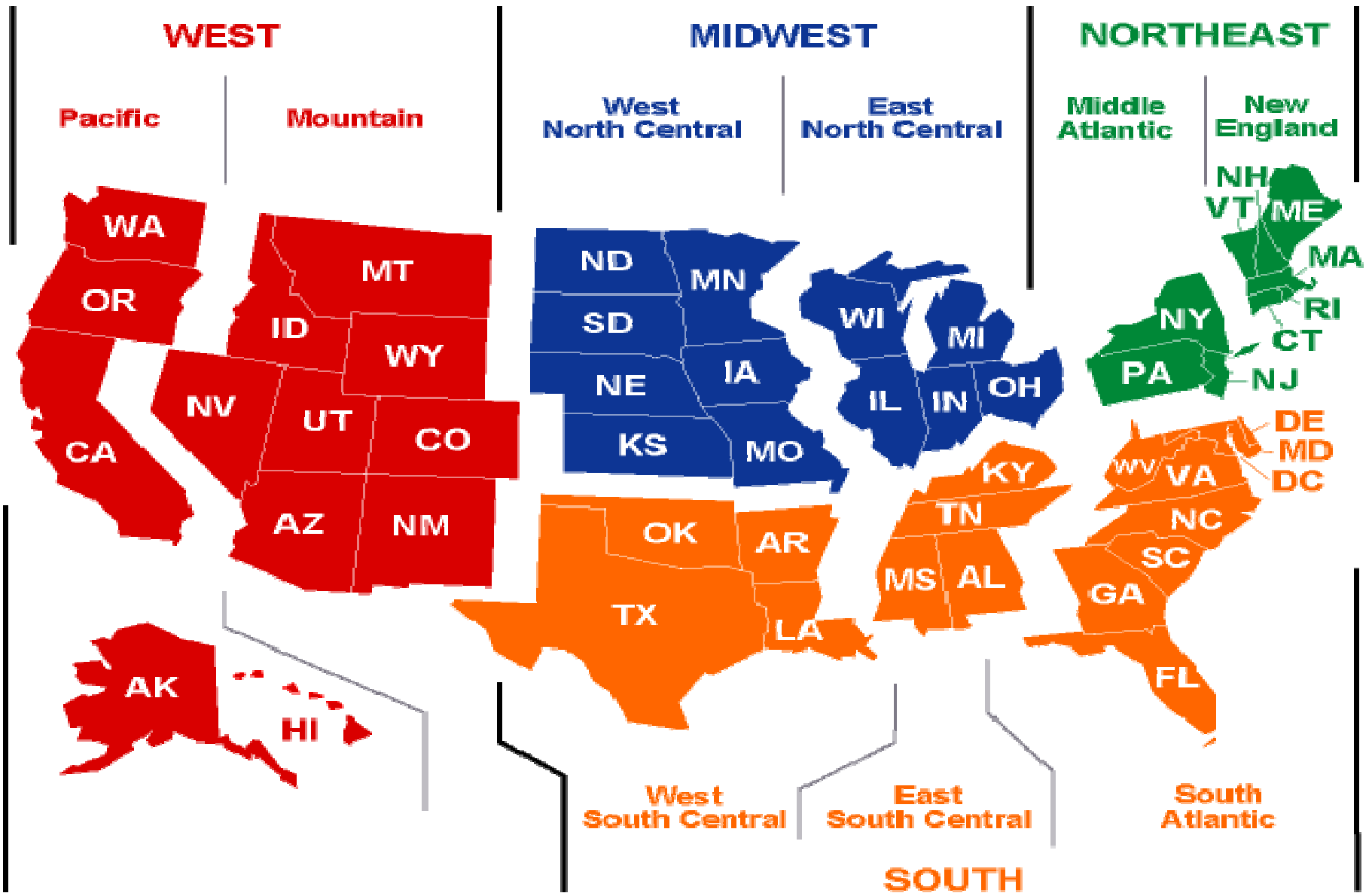


Methodology

- Survey of 800 Likely 2016 General Election Voters Nationwide Conducted Jointly By The Mellman Group And American Viewpoint
- Interviews conducted February 8-11, 2016
- Margin of error +/- 3.5% (higher for subgroups)



Census Region And Divisions





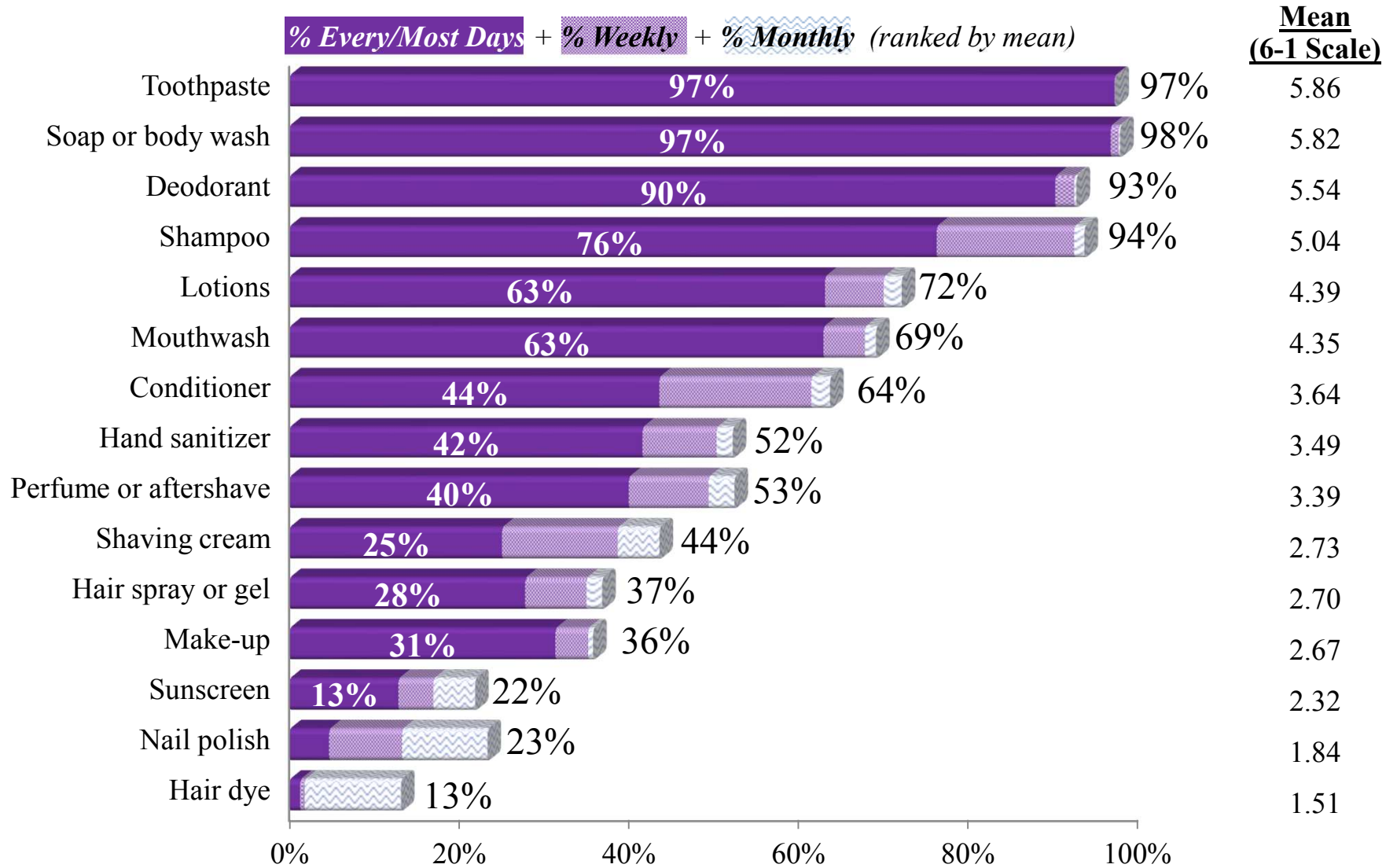
Everybody Uses Personal Care Products





Toothpaste, Soap, Deodorant And Shampoo Are In Universal Frequent Use, While Hair Dye, Nail Polish, And Sunscreen Are Used Less

Now I am going to list several personal care products and ask how often you use each of those products:





Not Surprisingly Use Of Certain Personal Care Products Differs Greatly By Gender

% Weekly+ By Gender	Men	Women
Toothpaste	97%	97%
Soap or body wash	99%	97%
Deodorant	93%	92%
Shampoo	91%	94%
Lotions	50%	88%
Mouthwash	71%	66%
Conditioner	46%	76%
Hand sanitizer	46%	55%
Perfume or aftershave	45%	54%
Shaving cream	62%	18%
Hair spray or gel	23%	46%
Make-up	2%	65%
Sunscreen	11%	22%
Nail polish	1%	24%
Hair dye	1%	2%





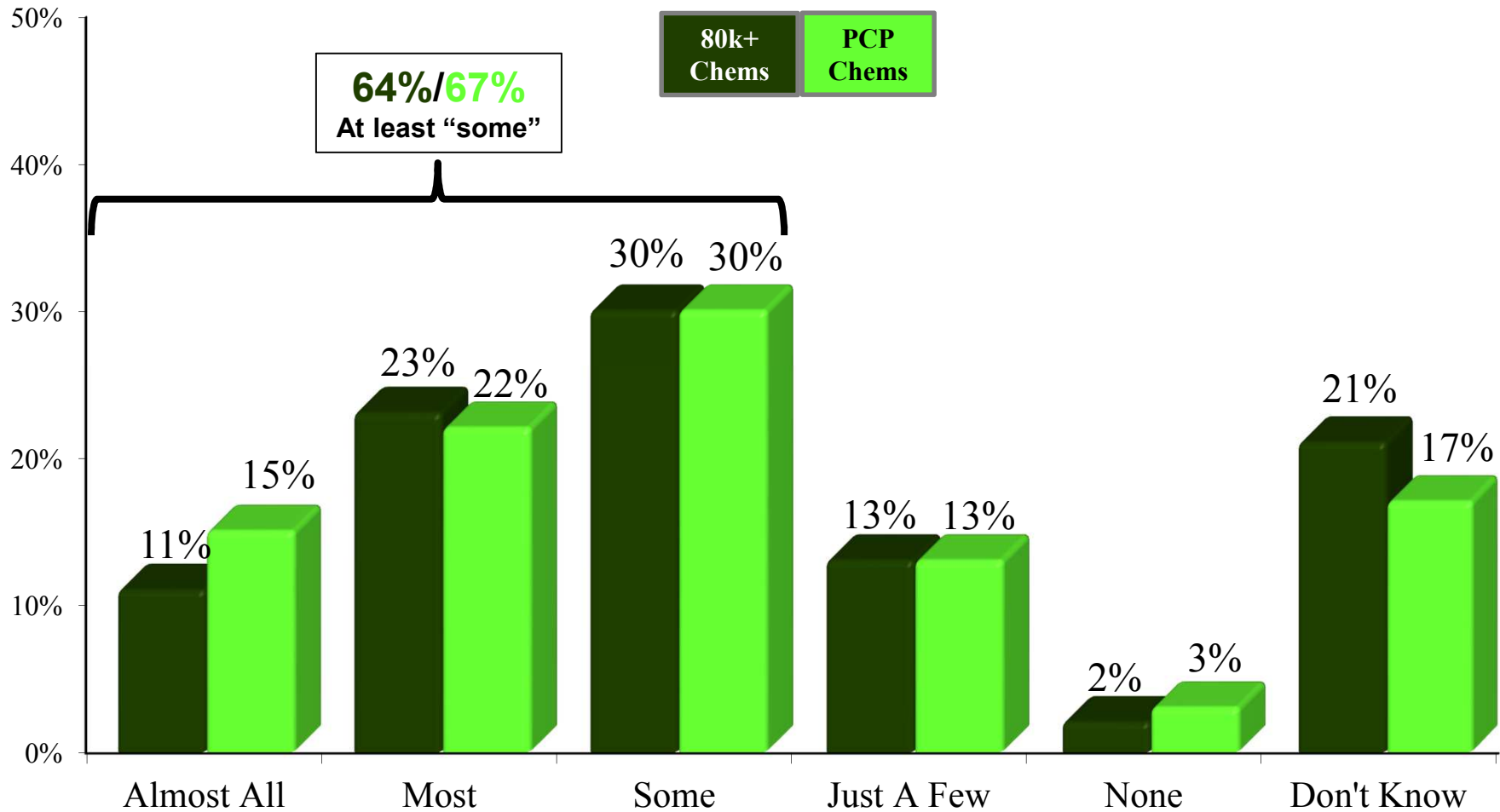
**Few Have Any Idea How Minimal
Current Regulations On Chemicals Are**





Most Vastly Overestimate The Proportion Of Chemicals And Personal Care Products That Have Been “Cleared” By The Government

As far as you know, about what proportion [of the over 80,000 chemicals used / of the chemicals used in personal care products, like makeup, toothpaste, and lotions] in the U.S. have been cleared by the government?





Views Are Similar Across Subgroup, Though GOPers Are A Bit More Likely To Think Personal Care Product Chemicals Have Been Cleared

<i>Proportion of 80k+ Chemicals Cleared</i>	Most / Almost All	Some	Just A Few / None	Don't Know
Democrat ID	27%	27%	17%	29%
Independent ID	37%	31%	16%	16%
Republican ID	39%	31%	12%	19%
Young Women	35%	30%	11%	23%
Young Men	33%	36%	18%	12%
Older Women	27%	28%	18%	27%
Older Men	44%	24%	12%	21%
Upper/Upp-Middle	42%	29%	19%	10%
College Middle	38%	31%	10%	21%
Non-Coll Middle	30%	30%	13%	27%
Working/Lower	28%	28%	19%	25%
White	35%	31%	16%	18%
Non-White	31%	25%	12%	32%
Northeast	38%	26%	14%	22%
Midwest	41%	29%	10%	20%
South	29%	35%	13%	22%
West	31%	24%	24%	21%
Have Kids <18	30%	34%	14%	21%
No Kids <18	36%	28%	15%	22%

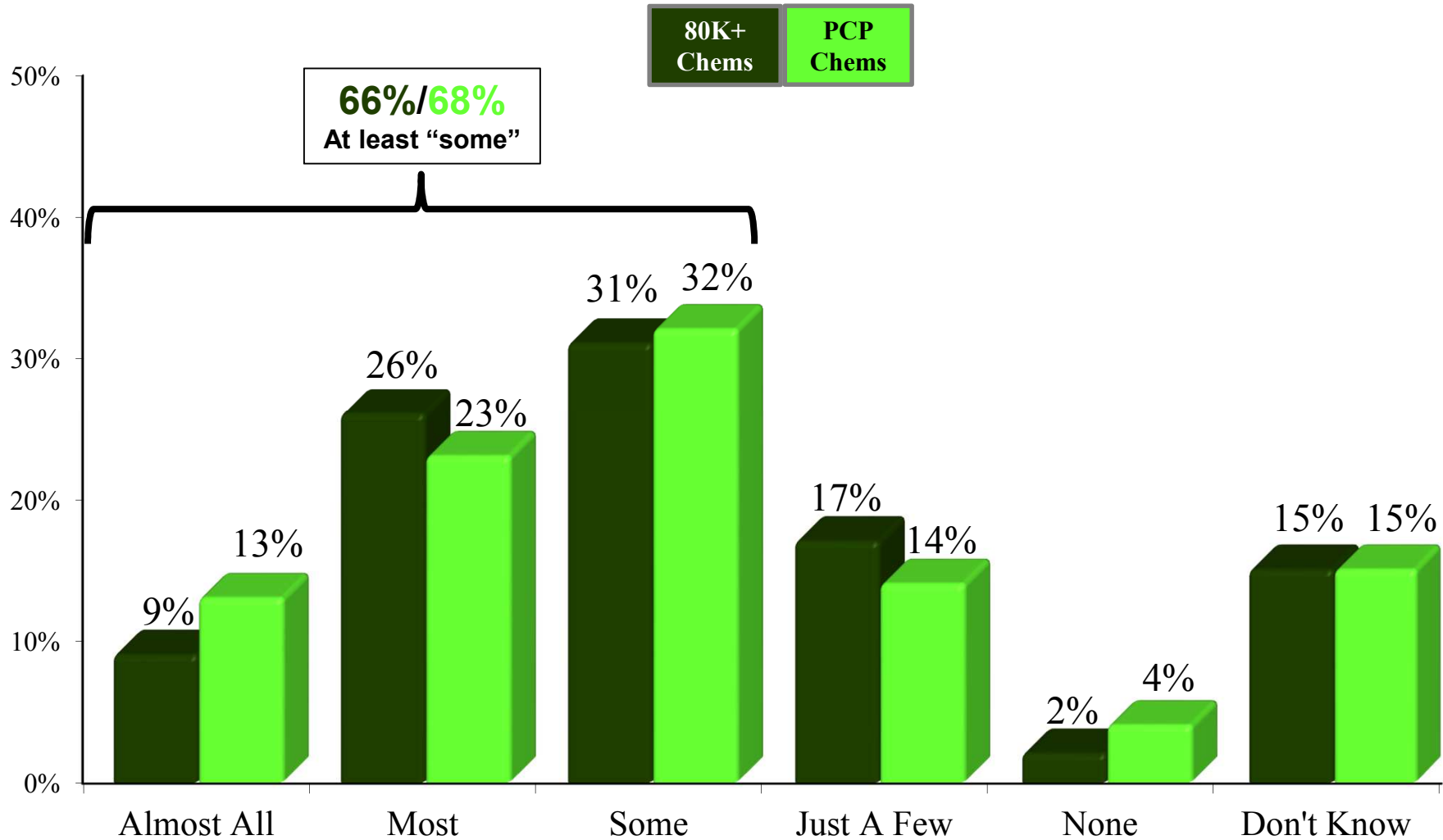
<i>Proportion of PCP Chemicals Cleared</i>	Most / Almost All	Some	Just A Few / None	Don't Know
Democrat ID	35%	32%	17%	16%
Independent ID	36%	30%	17%	17%
Republican ID	42%	27%	15%	16%
Young Women	39%	35%	14%	13%
Young Men	44%	33%	16%	6%
Older Women	32%	27%	16%	25%
Older Men	35%	24%	20%	20%
Upper/Upp-Middle	35%	31%	18%	16%
College Middle	42%	35%	11%	11%
Non-Coll Middle	41%	26%	17%	16%
Working/Lower	31%	29%	20%	20%
White	37%	32%	16%	15%
Non-White	39%	25%	17%	19%
Northeast	26%	45%	11%	18%
Midwest	41%	27%	15%	17%
South	40%	24%	19%	17%
West	39%	30%	18%	13%
Have Kids <18	46%	28%	13%	12%
No Kids <18	33%	31%	17%	19%





Whether Asked About All Chemicals Or Those Used in Personal Products, Most Also Overestimate What Proportion Of Chemicals Are “Regulated” By The Government

As far as you know, about what proportion [of the over 80,000 chemicals used / of the hundreds of chemicals used in personal care products, like makeup, toothpaste, and lotions] in the U.S. are regulated by the federal government?





Views Are Similar Across Subgroup, Though Again GOPers Are More Likely To Perceive Regulations

<i>All Chemicals Regulated</i>	Most / Almost All	Some	Just A Few / None	Don't Know
Democrat ID	28%	35%	21%	16%
Independent ID	38%	30%	18%	14%
Republican ID	38%	30%	19%	13%
Young Women	36%	29%	14%	22%
Young Men	40%	34%	23%	4%
Older Women	25%	29%	24%	22%
Older Men	41%	35%	16%	8%
Upper/Upp-Middle	39%	34%	19%	9%
College Middle	41%	31%	16%	12%
Non-Coll Middle	31%	31%	21%	17%
Working/Lower	29%	31%	21%	19%
White	33%	34%	21%	12%
Non-White	40%	23%	13%	23%
Northeast	28%	35%	23%	13%
Midwest	46%	26%	14%	15%
South	31%	35%	18%	16%
West	33%	30%	24%	13%
Have Kids <18	34%	34%	18%	15%
No Kids <18	35%	30%	20%	15%

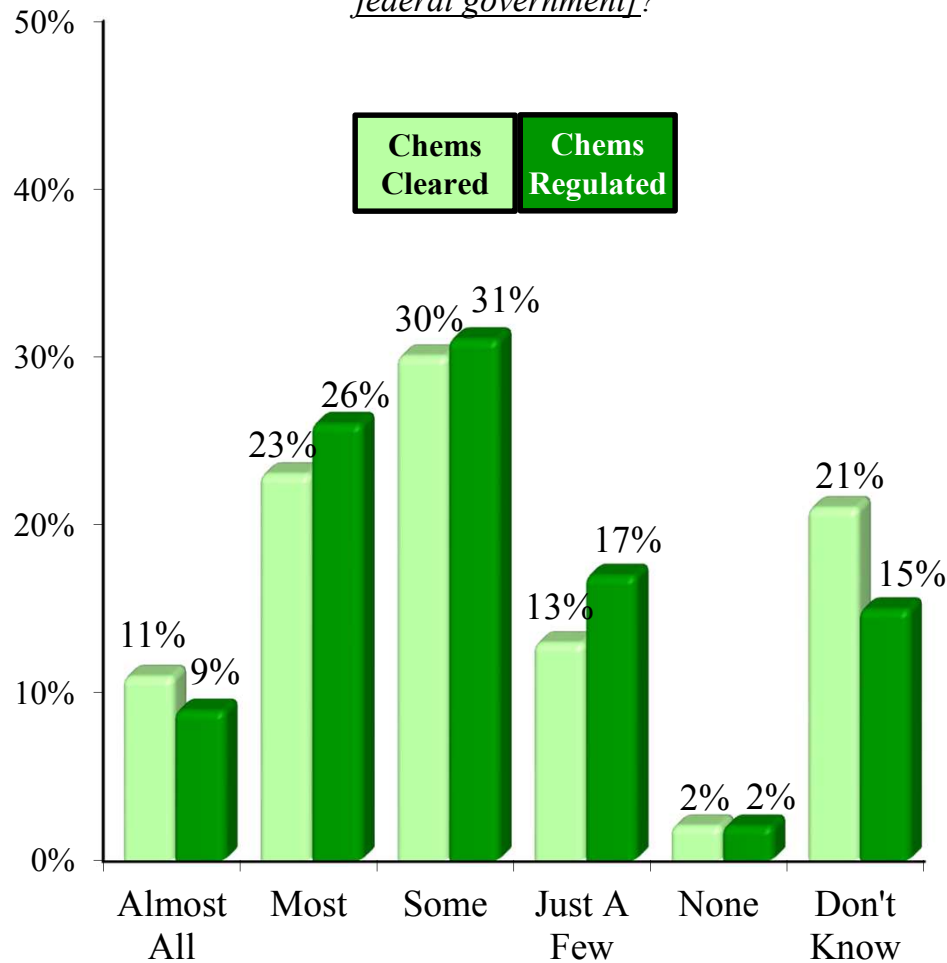
<i>PCP Chemicals Regulated</i>	Most / Almost All	Some	Just A Few / None	Don't Know
Democrat ID	32%	34%	16%	18%
Independent ID	29%	34%	21%	16%
Republican ID	48%	26%	16%	10%
Young Women	40%	34%	14%	12%
Young Men	36%	37%	22%	5%
Older Women	37%	23%	18%	22%
Older Men	31%	35%	15%	19%
Upper/Upp-Middle	35%	37%	20%	8%
College Middle	34%	35%	18%	13%
Non-Coll Middle	41%	30%	14%	14%
Working/Lower	31%	29%	20%	20%
White	35%	33%	18%	14%
Non-White	38%	32%	10%	19%
Northeast	36%	39%	14%	12%
Midwest	36%	32%	15%	17%
South	39%	27%	18%	16%
West	30%	32%	24%	13%
Have Kids <18	44%	26%	21%	10%
No Kids <18	32%	35%	16%	17%



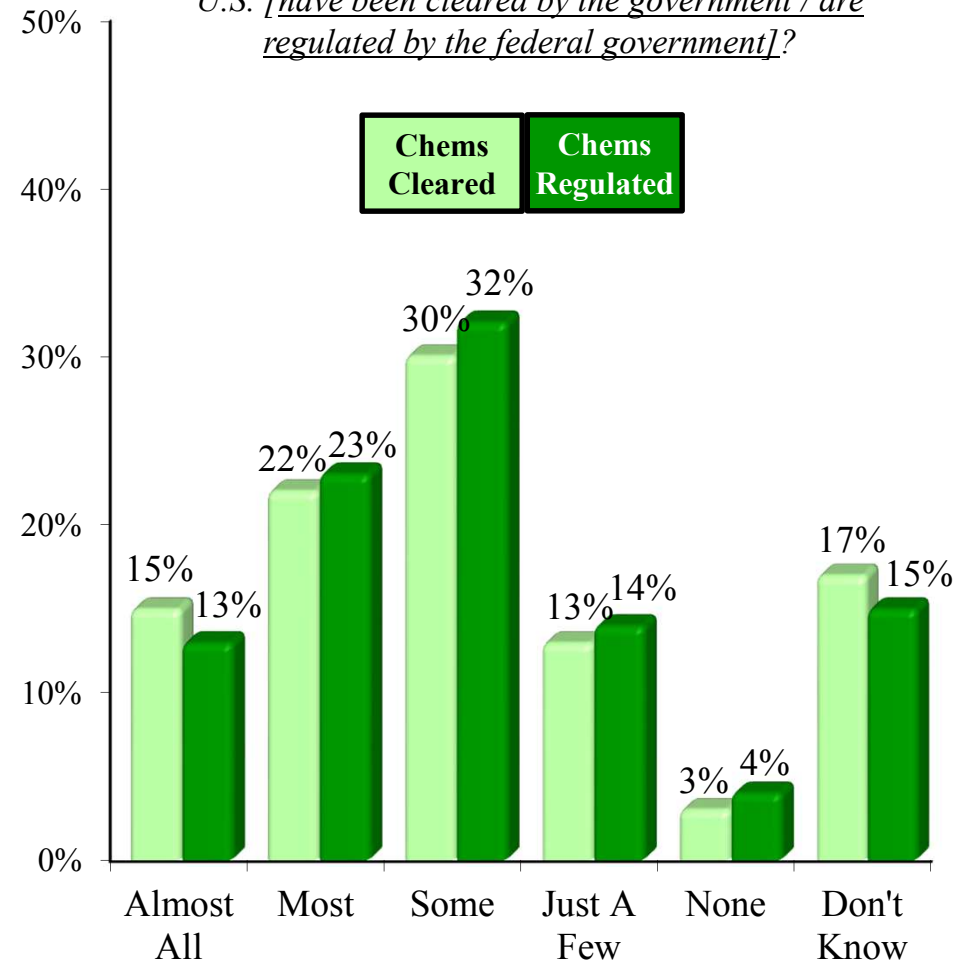


Beliefs About The Government Clearing Chemicals Closely Mirror Beliefs About Gov't Regulating Them

As far as you know, about what proportion of the over 80,000 chemicals used in the U.S. [have been cleared by the government / are regulated by the federal government]?



As far as you know, about what proportion of the hundreds of chemicals used in personal care products, like makeup, toothpaste, and lotions, in the U.S. [have been cleared by the government / are regulated by the federal government]?





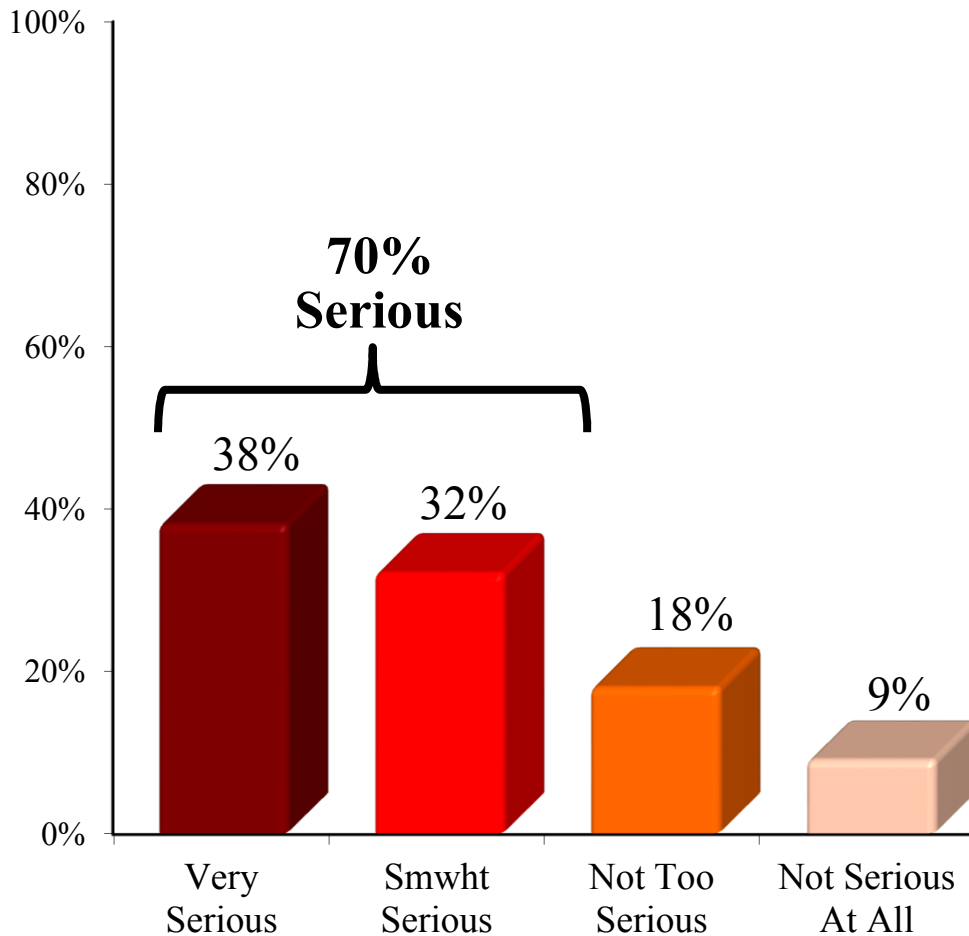
Voters See Chemicals As A Serious Threat And Overwhelmingly Support Stricter Regulations





7-In-10 Believe The Threat From Using Toxic Chemicals In Day To Day Life Is Serious

Generally speaking, how serious is the threat posed by exposure to toxic chemicals in day-to-day life?



By Key Group	Serious	Not Serious
Democrat ID	77%	19%
Independent ID	66%	31%
Republican ID	66%	31%
Young Women	83%	15%
Young Men	60%	38%
Older Women	72%	23%
Older Men	64%	34%
Upper/Upp-Middle	65%	32%
College Middle	70%	26%
Non-Coll Middle	70%	26%
Working/Lower	73%	25%
White	67%	30%
Black	80%	16%
Hispanic	76%	21%
Northeast	76%	22%
Midwest	65%	31%
South	71%	26%
West	69%	30%
Have Kids <18	71%	27%
No Kids <18	70%	27%

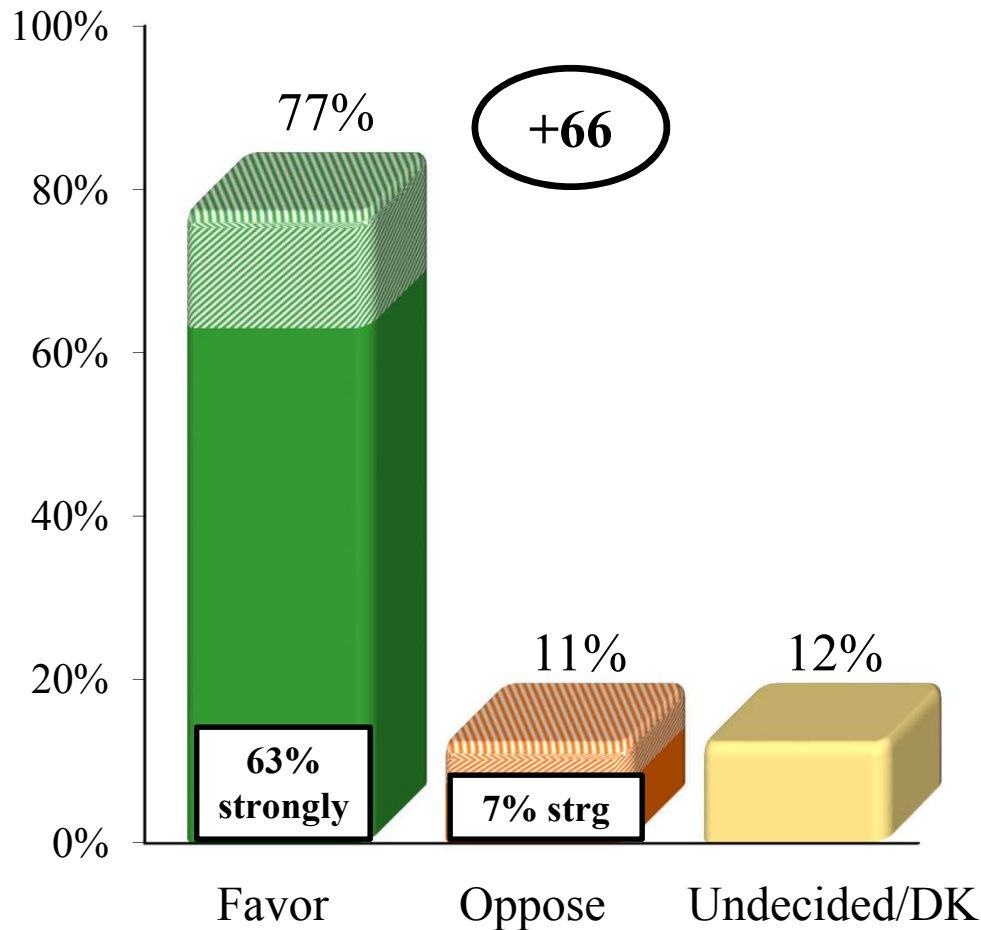




Support Is Overwhelming For Stricter Regulations On Chemicals To Ensure Safety

Support Is Broad And Deep Across Party & Other Segments

Do you favor or oppose stricter regulations on chemicals used in the U.S. to ensure their safety?



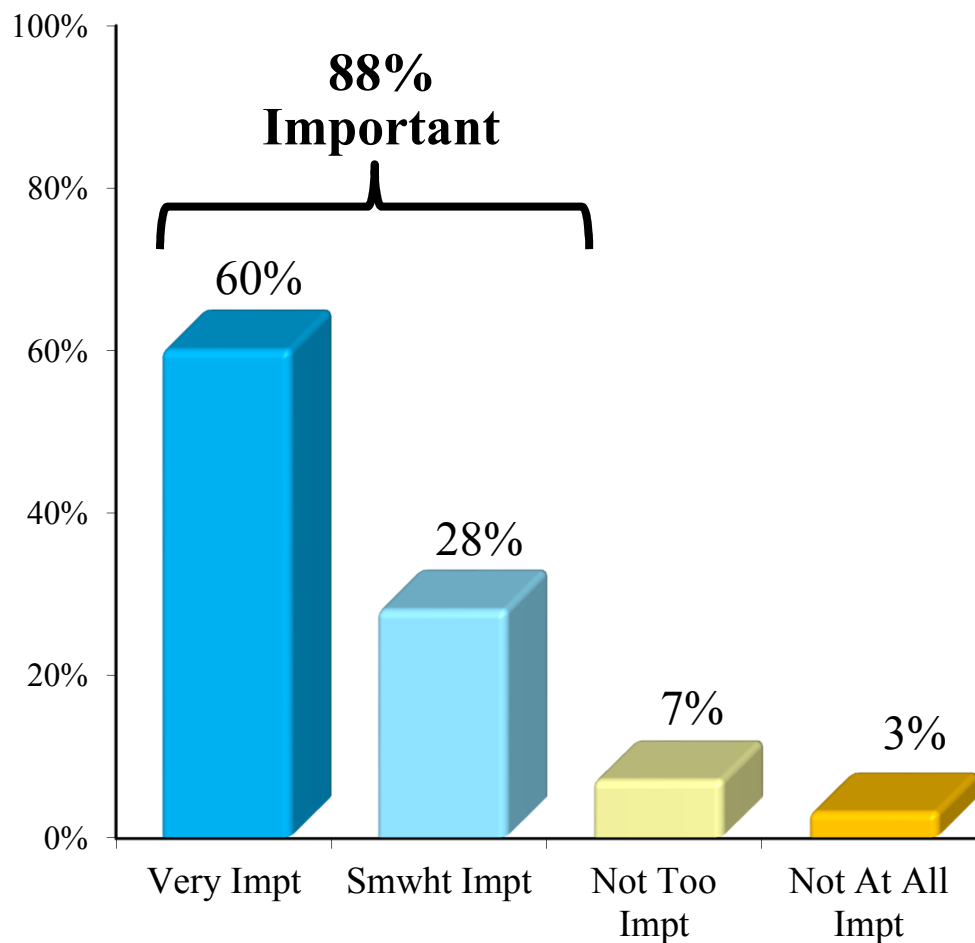
By Key Group	Favor	Oppose
Democrat ID	84%	8%
Independent ID	78%	10%
Republican ID	69%	16%
Young Women	90%	4%
Young Men	71%	14%
Older Women	79%	9%
Older Men	69%	18%
Upper/Upp-Middle	73%	15%
College Middle	79%	9%
Non-Coll Middle	77%	12%
Working/Lower	78%	10%
White	76%	11%
Black	81%	16%
Hispanic	86%	8%
Northeast	77%	8%
Midwest	79%	12%
South	74%	12%
West	79%	12%
Have Kids <18	80%	10%
No Kids <18	76%	12%





A Majority Say It Is Very Important To Tighten Controls On Chemicals, And Nearly 9-In-10 Say It Is At Least Somewhat Important

How important is it to tighten controls on chemicals used in the U.S. to ensure their safety?



By Key Group	Important	Not Impt
Democrat ID	97%	2%
Independent ID	86%	11%
Republican ID	81%	17%
Young Women	98%	2%
Young Men	81%	17%
Older Women	93%	4%
Older Men	80%	17%
Upper/Upp-Middle	85%	15%
College Middle	91%	7%
Non-Coll Middle	87%	11%
Working/Lower	90%	7%
White	87%	11%
Black	94%	5%
Hispanic	96%	4%
Northeast	89%	8%
Midwest	89%	9%
South	90%	8%
West	85%	13%
Have Kids <18	88%	11%
No Kids <18	89%	9%





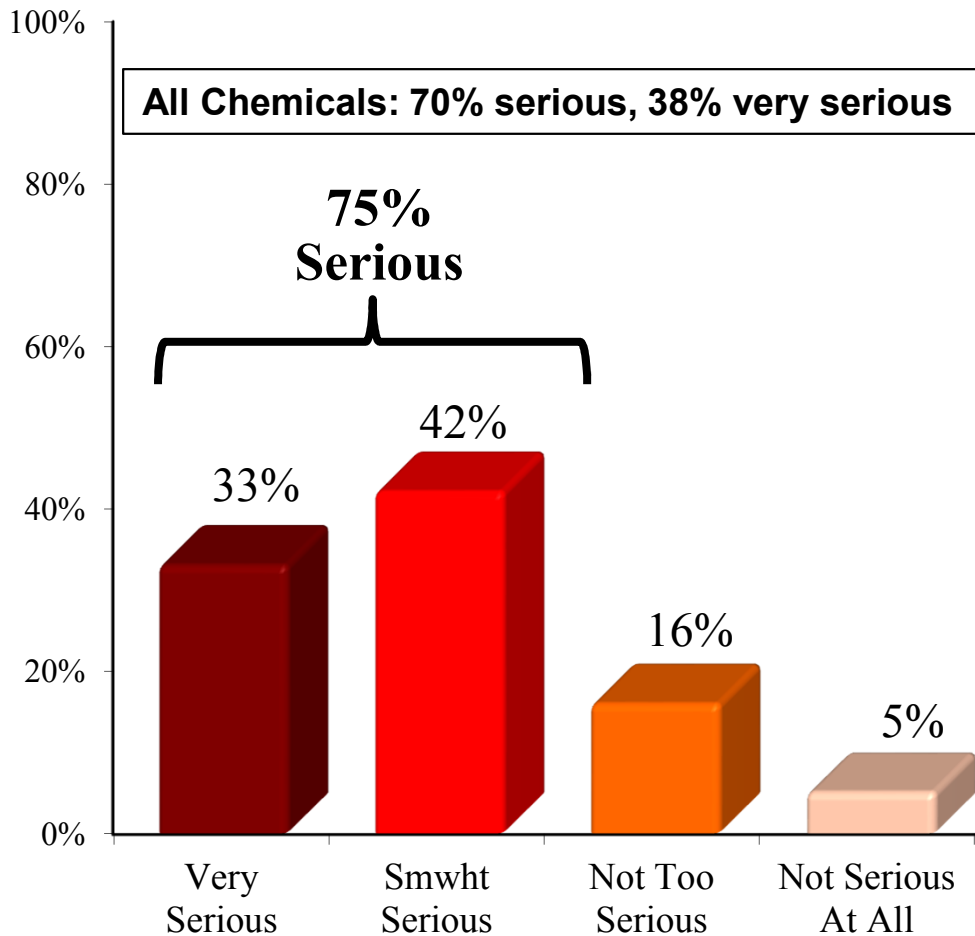
Voters See The Chemicals In Personal Care Products As A Serious Threat And Support Stricter Regulations





Three-Quarters Believe Chemicals In Personal Care Products Pose A Serious Threat

Generally speaking, how serious is the threat posed by exposure to chemicals used in personal care products like makeup, toothpaste, and lotions?



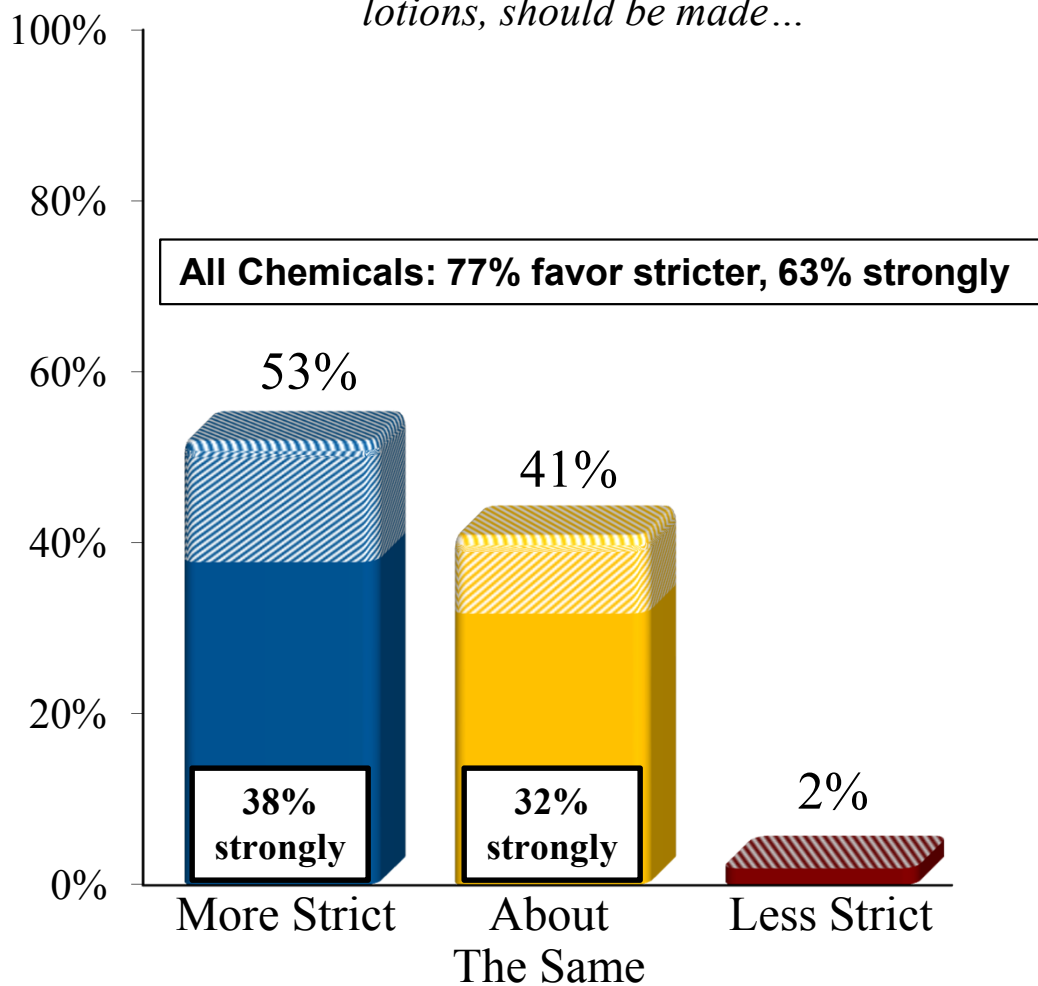
By Key Group	Serious	Not Serious
Democrat ID	85%	10%
Independent ID	74%	20%
Republican ID	64%	34%
Young Women	84%	11%
Young Men	68%	30%
Older Women	78%	18%
Older Men	67%	25%
Upper/Upp-Middle	71%	26%
College Middle	74%	21%
Non-Coll Middle	75%	22%
Working/Lower	78%	16%
White	71%	23%
Black	92%	7%
Hispanic	87%	13%
Northeast	80%	14%
Midwest	73%	23%
South	74%	22%
West	75%	22%
Have Kids <18	73%	23%
No Kids <18	75%	20%





A Majority Want Stricter Regulations On Personal Care Products

Do you think regulations on personal care products, like makeup, toothpaste, and lotions, should be made...



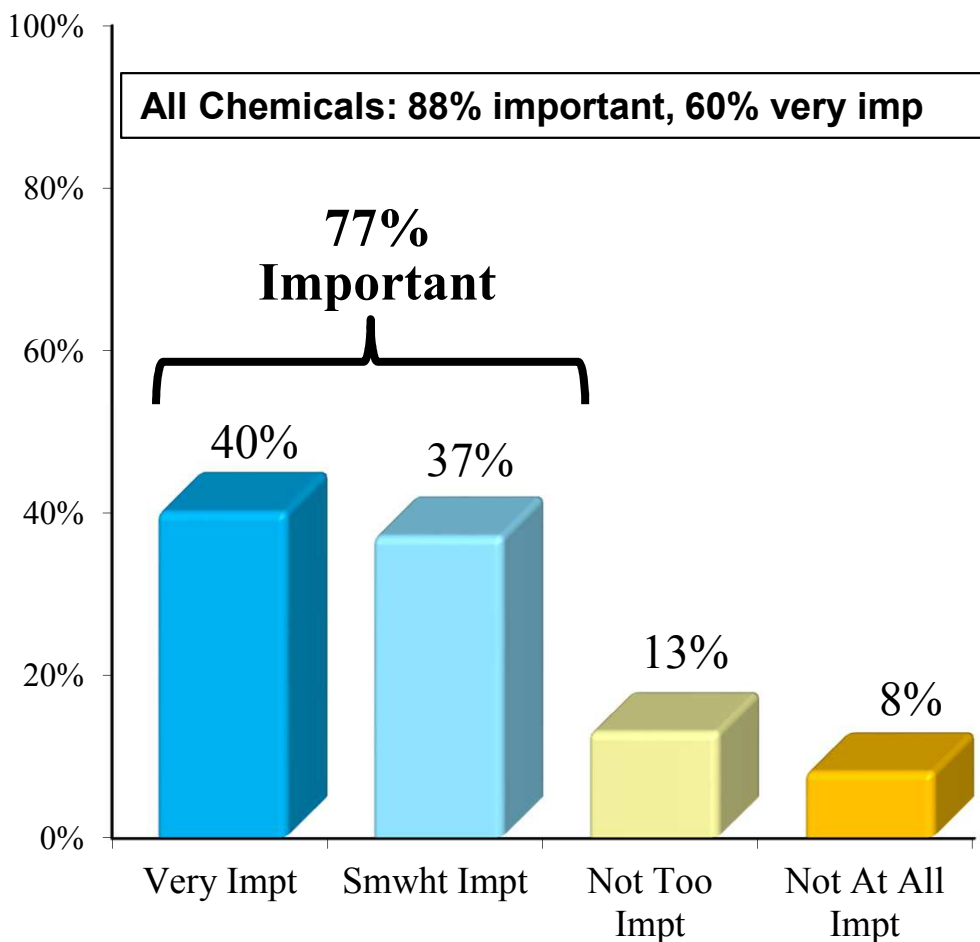
By Key Group	More Strict	About Same / Less
Democrat ID	61%	36%
Independent ID	56%	40%
Republican ID	40%	57%
Young Women	62%	36%
Young Men	45%	52%
Older Women	56%	37%
Older Men	46%	50%
Upper/Upp-Middle	58%	38%
College Middle	49%	48%
Non-Coll Middle	49%	48%
Working/Lower	57%	39%
White	53%	44%
Black	58%	40%
Hispanic	57%	39%
Northeast	56%	39%
Midwest	51%	46%
South	50%	46%
West	56%	41%
Have Kids <18	52%	46%
No Kids <18	53%	43%





A Large Majority Say It Is Important To Make Regulations On Personal Care Products More Strict

How important is it to you that regulations on personal care products, like makeup, toothpaste, and lotions, be made more strict?



By Key Group	Important	Not Impt
Democrat ID	86%	12%
Independent ID	74%	23%
Republican ID	69%	30%
Young Women	89%	11%
Young Men	69%	28%
Older Women	79%	19%
Older Men	69%	28%
Upper/Upp-Middle	76%	24%
College Middle	78%	21%
Non-Coll Middle	77%	20%
Working/Lower	77%	21%
White	75%	23%
Black	92%	7%
Hispanic	84%	16%
Northeast	77%	21%
Midwest	74%	24%
South	76%	21%
West	80%	20%
Have Kids <18	75%	24%
No Kids <18	77%	20%





Voters Overwhelmingly Support An Important Government Role In Regulating Chemicals Used In Personal Care Products





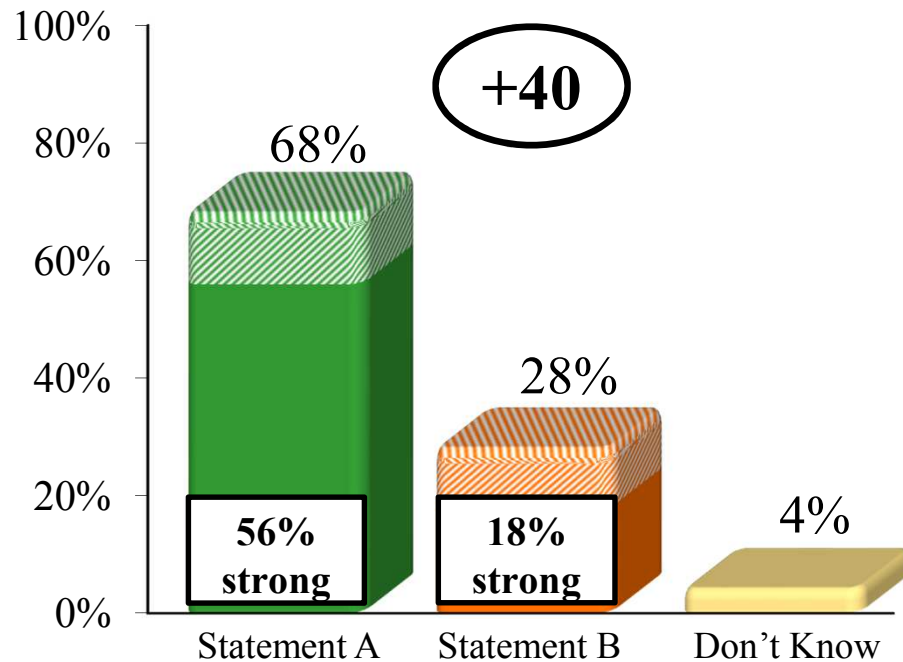
A Large Majority Believe Government Should Ensure Chemicals In Personal Care Products Are Safe After Hearing Arguments From Both Sides

Which of the following statements comes closer to your point of view?

Statement A. The government should make certain that chemicals that end up in my body from the use of personal care products, like makeup, toothpaste, and lotions, are safe.

OR

Statement B. There are too many government regulations already. People should decide for themselves if they want to use personal care products without government interference.



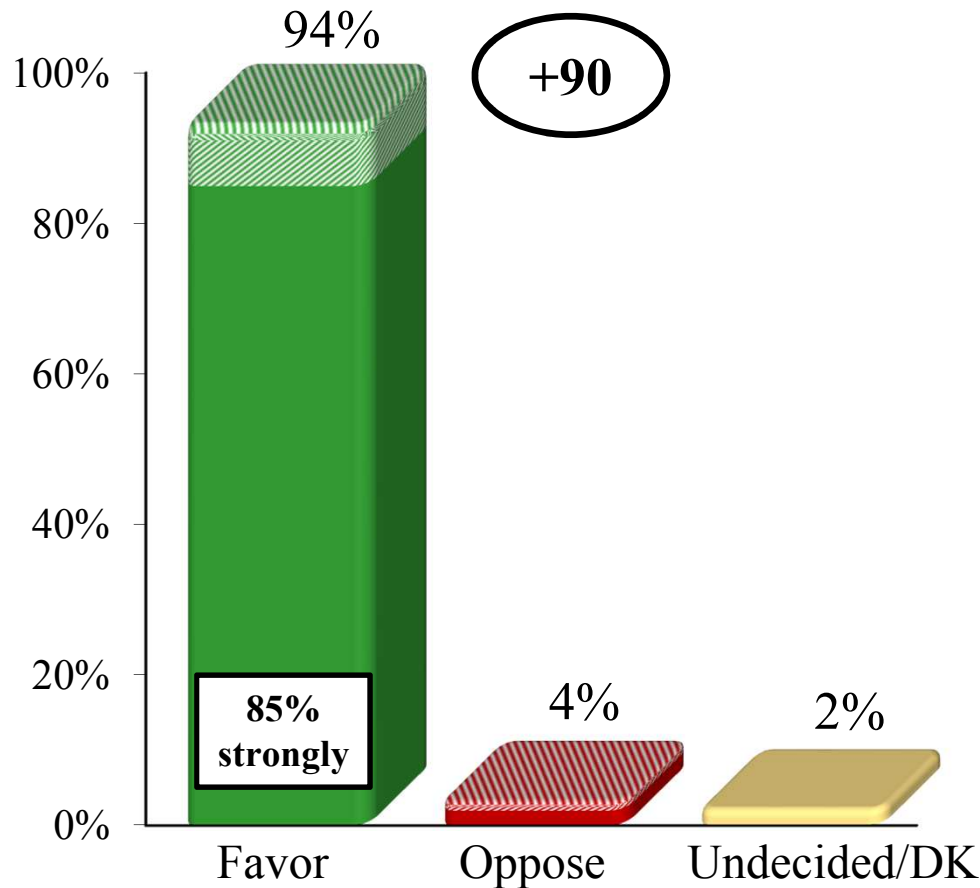
By Key Group	Statement A	Statement B
Democrat ID	82%	15%
Independent ID	68%	28%
Republican ID	52%	43%
Young Women	75%	21%
Young Men	62%	37%
Older Women	69%	26%
Older Men	66%	29%
Upper/Upp-Middle	70%	25%
College Middle	73%	23%
Non-Coll Middle	56%	40%
Working/Lower	75%	21%
White	66%	29%
Black	75%	23%
Hispanic	82%	18%
Northeast	66%	27%
Midwest	67%	30%
South	69%	26%
West	68%	28%





Support For Mandatory Notification Of Injury Is Nearly Unanimous

Do you favor or oppose requiring companies that make personal care products, like makeup, toothpaste, and lotions, to notify the government if their products have injured consumers?



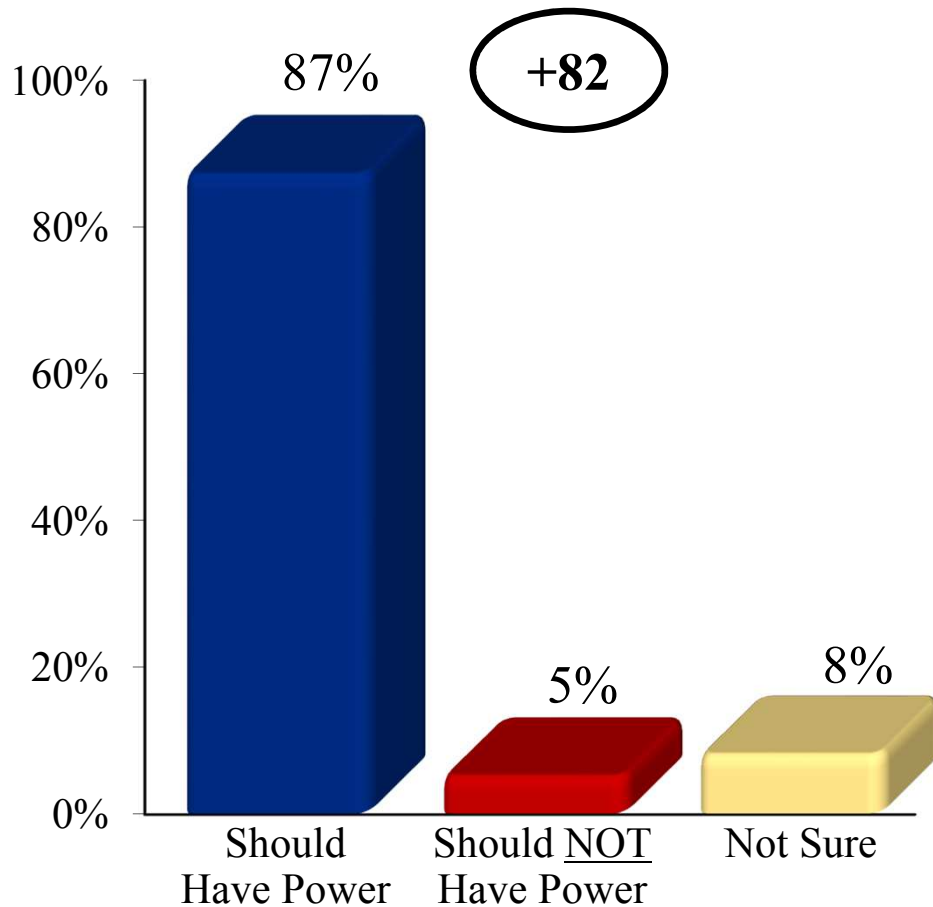
By Key Group	Favor	Oppose
Democrat ID	96%	1%
Independent ID	92%	5%
Republican ID	92%	5%
Young Women	96%	2%
Young Men	91%	4%
Older Women	94%	4%
Older Men	93%	4%
Upper/Upp-Middle	95%	3%
College Middle	94%	5%
Non-Coll Middle	92%	3%
Working/Lower	94%	3%
White	93%	4%
Black	95%	0%
Hispanic	97%	1%
Northeast	93%	2%
Midwest	92%	5%
South	95%	2%
West	93%	4%
Have Kids <18	93%	5%
No Kids <18	94%	3%





A Vast Majority Support Government Authority To Order A Recall

Do you think the government should or should not have the power to order a recall of personal care products containing toxic chemicals, or aren't you sure?



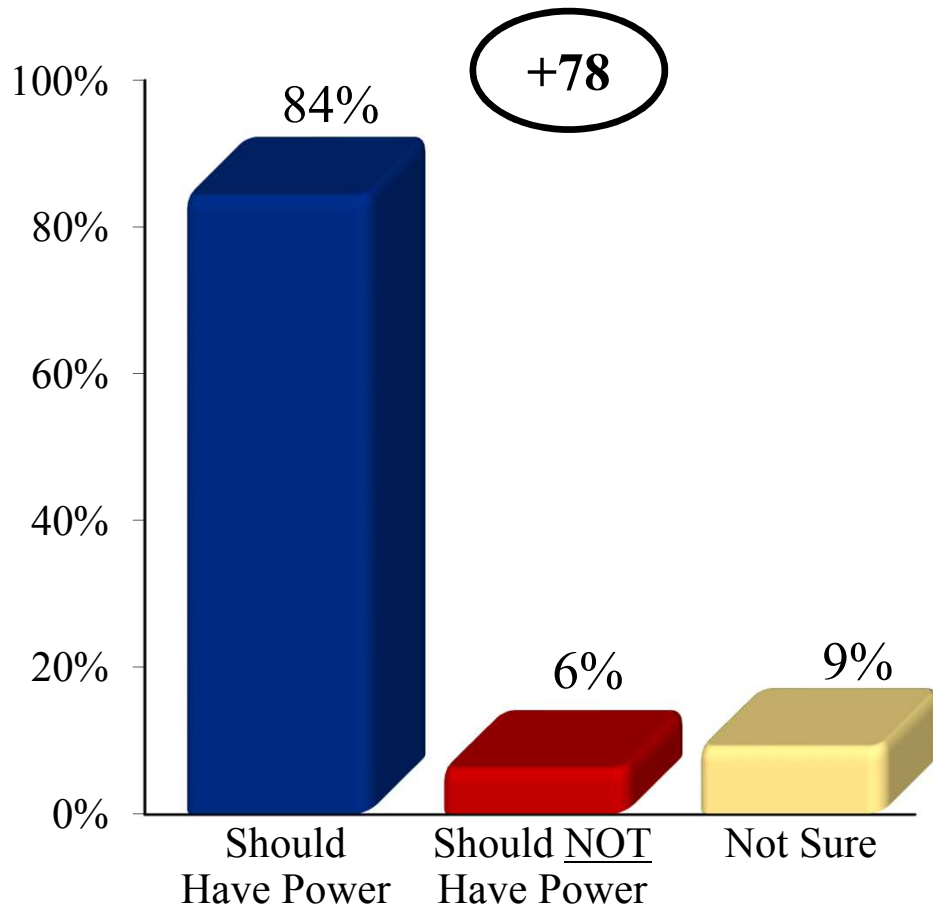
By Key Group	Should Have Power	Should NOT Have Power
Democrat ID	94%	1%
Independent ID	86%	5%
Republican ID	82%	9%
Young Women	94%	1%
Young Men	82%	7%
Older Women	89%	6%
Older Men	85%	6%
Upper/Upp-Middle	92%	2%
College Middle	86%	6%
Non-Coll Middle	86%	6%
Working/Lower	88%	5%
White	86%	6%
Black	95%	1%
Hispanic	90%	0%
Northeast	90%	4%
Midwest	87%	3%
South	88%	5%
West	84%	7%





Similarly, An Enormous Majority Supports Ingredient Disclosure Requirements

Do you think the government should or should not have the power to require companies to disclose to the government ingredients in personal care products, or aren't you sure?



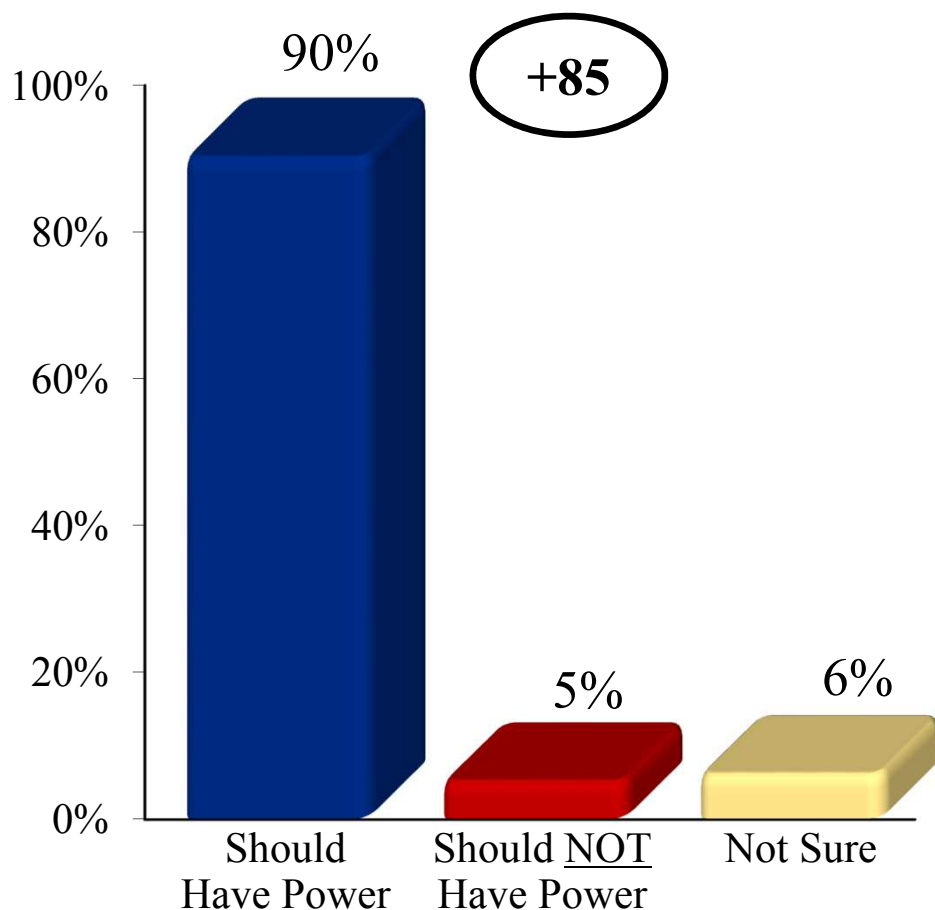
By Key Group	Should Have Power	Should NOT Have Power
Democrat ID	90%	1%
Independent ID	82%	9%
Republican ID	81%	9%
Young Women	90%	3%
Young Men	81%	8%
Older Women	85%	6%
Older Men	81%	8%
Upper/Upp-Middle	86%	4%
College Middle	88%	7%
Non-Coll Middle	82%	6%
Working/Lower	84%	7%
White	83%	7%
Black	92%	2%
Hispanic	88%	2%
Northeast	86%	5%
Midwest	84%	7%
South	84%	6%
West	83%	8%
Have Kids <18	90%	4%
No Kids <18	83%	7%





Essentially Everyone Believes The Government Should Have The Power To Compel Clean And Safe Production

Do you think the government should or should not have the power to require companies to produce personal care products in a clean and safe environment, or aren't you sure?



By Key Group	Should Have Power	Should NOT Have Power
Democrat ID	95%	1%
Independent ID	89%	4%
Republican ID	84%	10%
Young Women	96%	0%
Young Men	83%	9%
Older Women	92%	4%
Older Men	87%	6%
Upper/Upp-Middle	86%	6%
College Middle	89%	5%
Non-Coll Middle	91%	4%
Working/Lower	92%	3%
White	89%	6%
Black	94%	1%
Hispanic	94%	2%
Northeast	88%	4%
Midwest	90%	5%
South	90%	5%
West	90%	5%
Have Kids <18	91%	5%
No Kids <18	89%	5%



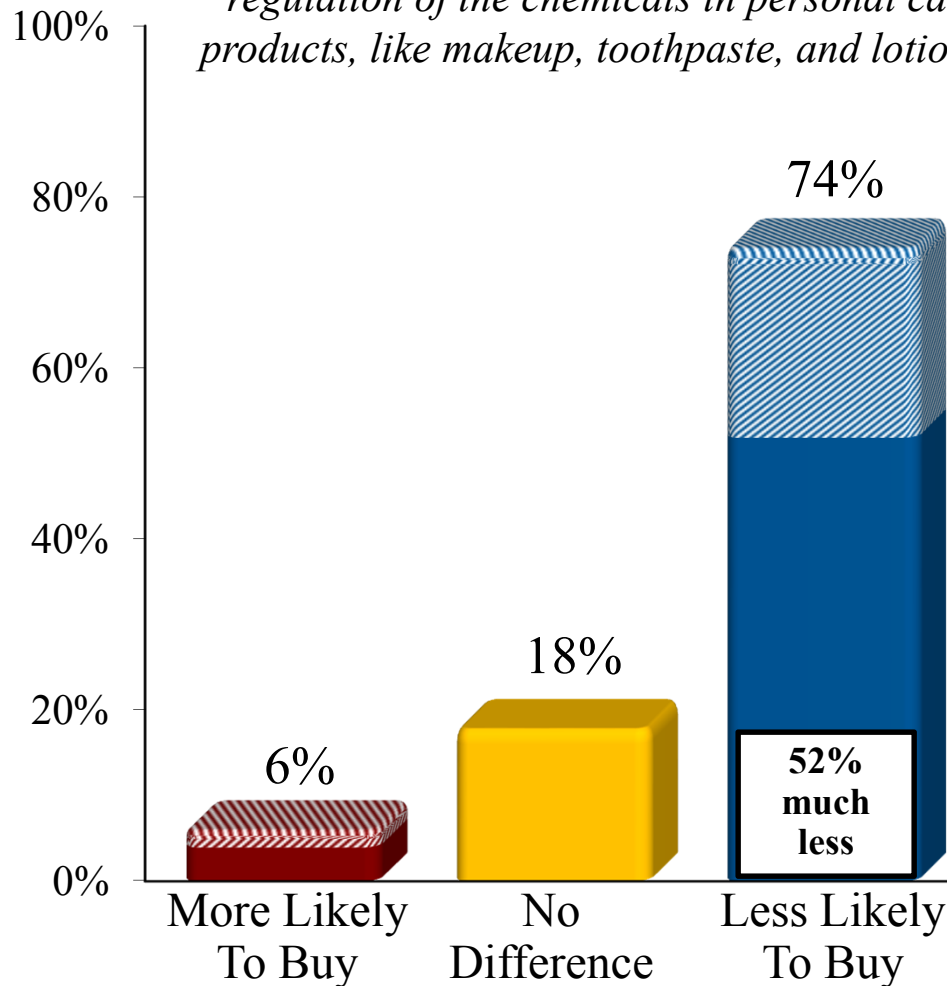


**Choosing To Fight Regulations On
Personal Care Chemicals Could Have A
Significantly Adverse Impact On A
Company's Reputation & Bottom Line**



Nearly Three-Quarters Would Be Less Likely To Buy From A Company That Was Fighting Against Regulations, And A Majority Would Be Much Less Likely To Buy

How would you feel about buying a company's products if you found out that they were fighting regulation of the chemicals in personal care products, like makeup, toothpaste, and lotions?



By Key Group	No Difference/ More Likely	Less Likely
Democrat ID	17%	83%
Independent ID	23%	75%
Republican ID	33%	64%
Young Women	20%	78%
Young Men	30%	69%
Older Women	21%	77%
Older Men	26%	72%
Upper/Upp-Middle	26%	74%
College Middle	23%	75%
Non-Coll Middle	27%	73%
Working/Lower	21%	77%
White	25%	73%
Black	18%	82%
Hispanic	25%	75%
Northeast	25%	72%
Midwest	23%	76%
South	23%	75%
West	26%	73%
Have Kids <18	26%	71%
No Kids <18	23%	76%



Strategic Conclusions

- Voters are concerned about exposure to toxic chemicals in their everyday life, including those used in personal care products, and believe they represent a serious threat
- There is a widespread misimpression that chemicals are already heavily regulated in the US and have been checked for safety
- Voters make little distinction between chemicals being “regulated” vs. “cleared”
- Support for stricter regulation is strong and robust,
- Companies that fight these regulations risk consumer backlash
- This issue cuts across traditional partisan lines





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