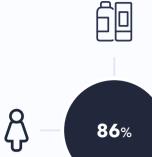


Beauty beyond COVID-19

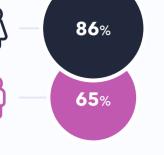
BEAUTY BEFORE THE PANDEMIC

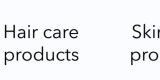
For women, beauty products ranked among the "essentials"

% of female/male internet users in the U.S./UK who used the following products at least fortnightly before the outbreak













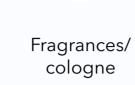








Beauty products



55%

45%

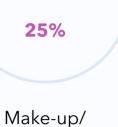


Pre-coronavirus, beauty buyers were 54% more likely to discover brands via product samples

Online beauty buying was centered around make-up

% of global pre-coronavirus beauty buyers who purchased the following products online each month





cosmetics



Shampoo



Skincare products







buyers, those who buy it online are...

Among make-up



Top brands used % of global pre-coronavirus beauty buyers who used the following beauty brands at least once a week **Top country**

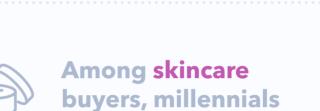






Argentina

62%





STAY-AT-HOME BEAUTY HABITS

Simplicity and ease are the new beauty standards

% of female/male beauty buyers in the U.S./UK who say the following about their daily beauty routine since the outbreak

Male Female Worn less make-up than before 58% 14% Simplified my daily skincare/beauty routine 43% 34% Bought products online more often than before 43% 45% Bought from sustainable and natural beauty brands 15% 24% Invested in more products that help the condition of my skin 14% 24% Bought fewer, but more expensive, products than before 11% 21%

Around one-third of beauty buyers are more likely to buy beauty products online post-outbreak

are...



BRAND DISCOVERY AND FUTURE EXPECTATIONS

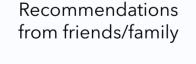
10% 19%

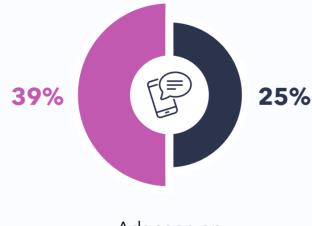
For Gen Z, peer advice and social ads take center stage

Moved away from big brand names to support smaller ones

% of beauty buyers in the U.S./UK who tend to discover skincare/beauty brands or products in the following ways

46% 54%



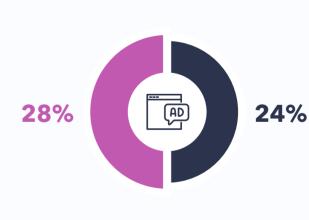


Ads seen on social media

32% 20%

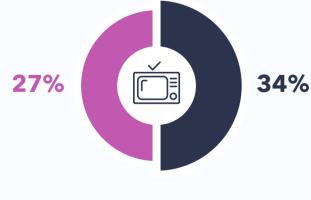
Gen Z (aged 18-23)

Posts/reviews from expert bloggers/vloggers

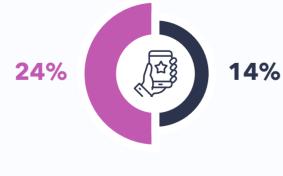


Ads seen on websites

All Beauty Buyers



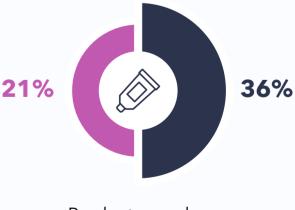
Ads seen on TV



Updates on a brand's social media page



Endorsements from celebrities or influencers



Product samples

45%

43%

32%

28%

28%

26%



47% of beauty buyers mainly use social media to research products to buy



Beauty buyers still want to try before they buy % of beauty buyers in the U.S./UK who would be interested in seeing

their favorite skincare/beauty brands offer more of the following

Ability to try products at home before buying

Cleaner products Eco-friendly products Education about what ingredients are used

Education about the benefits of the ingredients used

DIY salon quality products for home-use Ability to virtually "try-on" products

online - such as providing home samples or online tutorials

emulating the "in-store" experience

Brands need to find ways of

Online tutorials