

# The beauty industry

From the perspective of beauty buyers in the U.S. and UK



### **BUYING PREFERENCES AND ATTITUDES**

### Skincare products are their most common beauty purchase

% in the U.S./UK who have purchased the following beauty products in the last month



69% | 55%

Skincare products



**58%** | **17%** Make-up/

cosmetics



**57%** | 64% Personal grooming products



**55% | 47%** Hair styling products



41% | 14%



Female

Nail polish/ products



Male

39% | 22% Hair coloring products



30% | 28% Exfoliating products



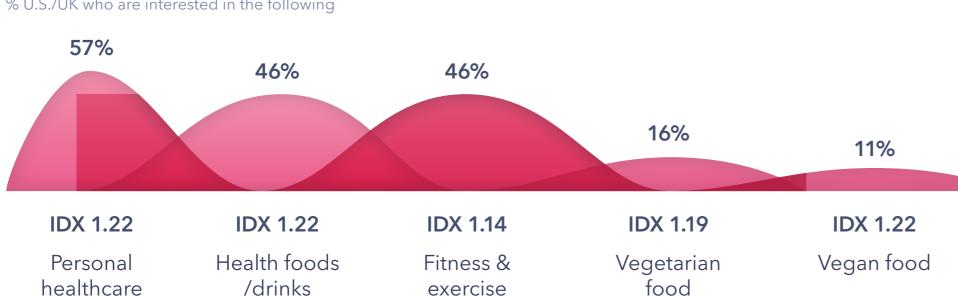
# 22% | 13%

Other beauty

products

## They take an active interest in their health

% U.S./UK who are interested in the following



exercise



44% try to buy natural/organic

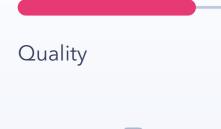
1 in 3 go to the

gym at least once a week

products

## Brand status and transparency are important to them

% U.S./UK who say the following factors are important when buying beauty products



**69**% ★ ★

Sustainable/recyclable



21%

**65**%

Affordability

Ethical credentials



20%

Sustainably-sourced materials

**36**% Clear list of

**17**% &

ingredients

Innovative product design **35**%

on how to use

Clear instructions



Vegan/organic ingredients

# Highest over-index

Most distinctive factor when buying beauty products, against the average internet user in the UK and U.S.



**IDX 1.56** 

# **Ethical credentials**

**GEN X** (aged 37-55)



**IDX 1.33** 

### **TOP 25% INCOME GROUP** Innovative product design



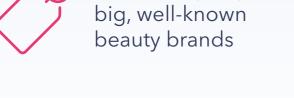
**IDX 1.70** 

# WHAT THEY EXPECT FROM BRANDS

## among beauty buyers

Brand authenticity is as important as renown







brands to be authentic

**56%** want

with beauty brands

3 in 10 are comfortable

when evaluating brands

Trustworthiness is a key consideration



accessing their personal data



reliable

3 in 4 want

brands to be

### They want greater overlap between the beauty and the wellness industry % U.S./UK who would like to see more of the following from beauty brands in the future



On-the-go beauty kits



CBD-infused beauty products



Products inspired by local culture/heritage



Products celebrating

foreign cultures

**MILLENNIALS** 

(aged 23-36)





**GEN X & BABY BOOMERS** 

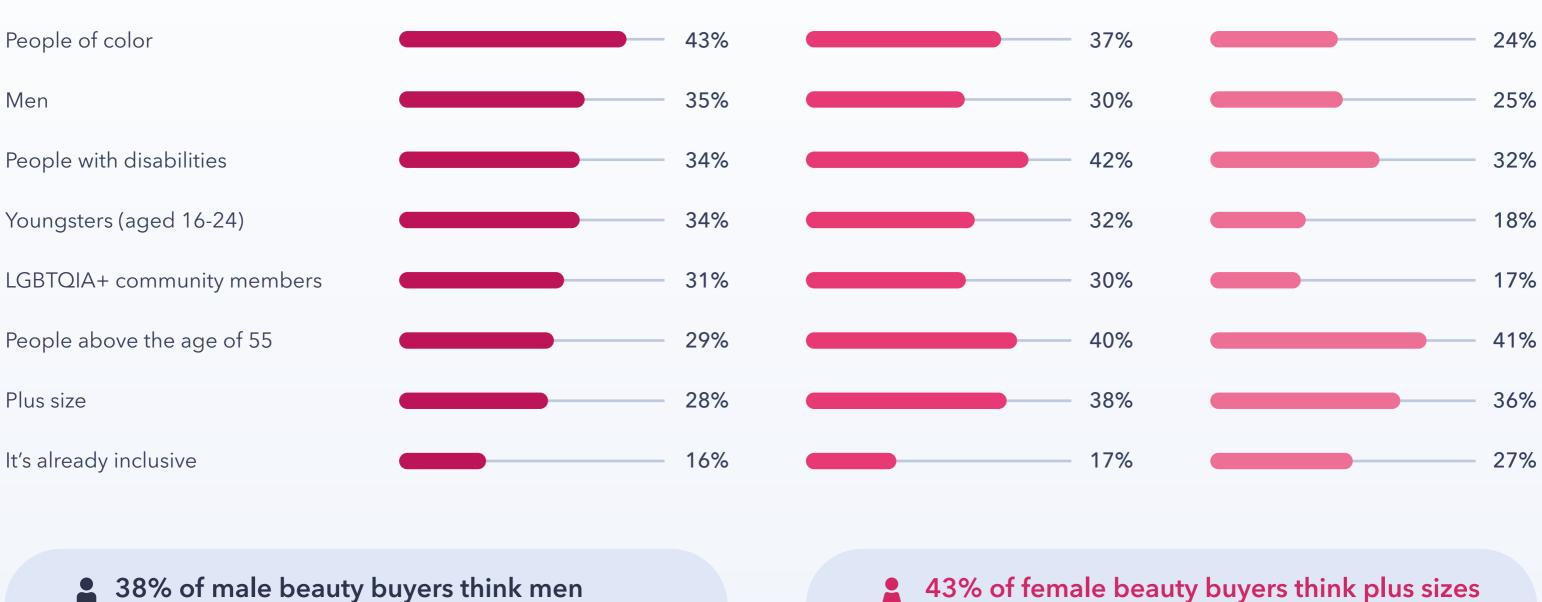
(aged 37-64)

### They want the beauty industry to be more inclusive % U.S./UK who think the following groups should be better represented by the beauty industry

THEIR HOPES FOR THE FUTURE OF THE BEAUTY INDUSTRY

## **GEN Z**

(aged 16-22)





36% | 31%

Skin-scanning devices

that customize skin-

care regimens

Enthusiasm toward beauty tech exists and is highest in the U.S. % in the U.S./UK who are interested in using the following beauty products/services in the future

should be better represented (IDX 1.67)

**28**% | **21**%

recommendations

algorithms)

Personalized skincare

(based on machine learning

18% | 14%

3D-printed face masks

**26**% | **19**%

should be better represented (IDX 1.48)

UK

beauty products

23% | 16% Post-workout products

23% | 13% Monthly beauty memberships

33% | 26%

Smart mirrors

Augmented reality apps to try on makeup

U.S.

**17**% | **12**% On-demand stylists **17**% | **10**%

Voice technology

offering beauty

Gender-neutral

**25**% | **17**%

Highest over-index Most distinctive beauty products/services wanted in the future, against the average internet user in the UK/U.S.

**MALE BEAUTY BUYERS FEMALE BEAUTY BUYERS** Post-workout products Augmented reality apps to try on makeup





Voice technology offering beauty advice

advice



**TOP 25% INCOME GROUP** 

Unless otherwise stated, all figures are taken from GlobalWebIndex's December 2019 custom survey of 2,436 U.S. and 0ur Q3 2019 wave of research among 24,813 U.S. and 10,115 UK internet users aged 16-64.

Among this cohort there were 2,084 (U.S.) and 1,992 (UK) beauty buyers in our custom survey aged 16-64; and 75,397 (UK) and 13,698 (U.S.) beauty buyers in our Q3 2019 wave of research. Beauty buyers are defined as those who have bought any of the following in the last month: skincare products; personal grooming products; hair styling products; hair coloring products; exfoliating products; nail polish/products (only included in our custom survey) and other beauty products. www.globalwebindex.com | @globalwebindex