

The beauty industry

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



BUYING PREFERENCES AND ATTITUDES

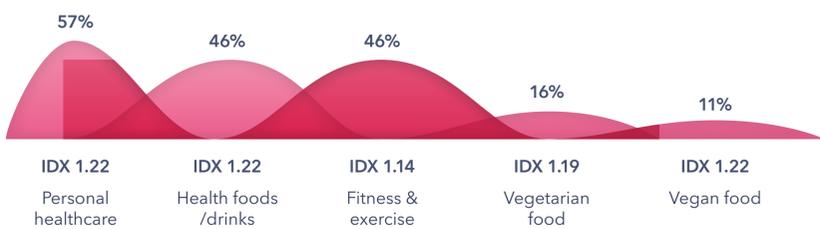
Skincare products are their most common beauty purchase

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



They take an active interest in their health

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



44% try to buy natural/organic products

1 in 3 go to the gym at least once a week

Brand status and transparency are important to them

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



Highest over-index

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

GEN Z & MILLENNIALS (aged 16-36)
Vegan/organic ingredients



IDX 1.56

GEN X (aged 37-55)
Ethical credentials



IDX 1.33

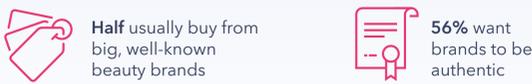
TOP 25% INCOME GROUP
Innovative product design



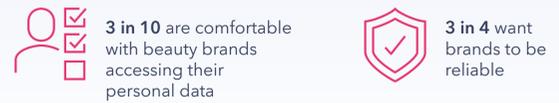
IDX 1.70

WHAT THEY EXPECT FROM BRANDS

Brand authenticity is as important as renown among beauty buyers



Trustworthiness is a key consideration when evaluating brands



They want greater overlap between the beauty and the wellness industry

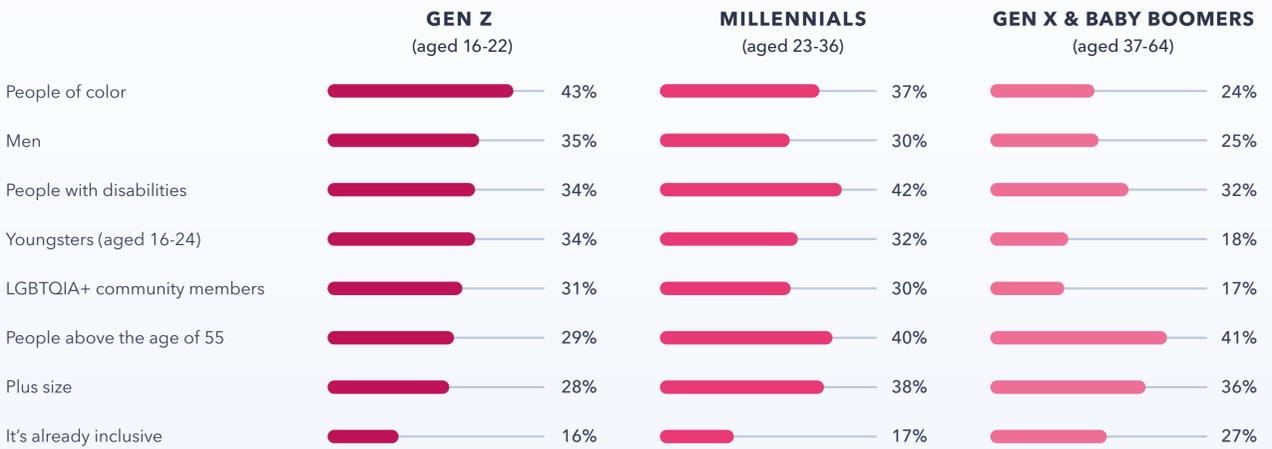
% U.S./UK who would like to see more of the following from beauty brands in the future



THEIR HOPES FOR THE FUTURE OF THE BEAUTY INDUSTRY

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



38% of male beauty buyers think men should be better represented (IDX 1.67)

43% of female beauty buyers think plus sizes should be better represented (IDX 1.48)

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



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
Post-workout products



IDX 1.52

FEMALE BEAUTY BUYERS
Augmented reality apps to try on makeup



IDX 1.52

TOP 25% INCOME GROUP
Voice technology offering beauty advice



IDX 1.69