

BEAUTY RETAILING: IN-STORE AND ONLINE – US – 2023

Beauty is an ever-evolving category. Product efficiency, improved shopping experiences, and ethical conduct are major focus areas to appeal to consumers.



Marisa Ortega, Retail & eCommerce Analyst



Beauty Retailing: In-store And Online - US - 2023

This report looks at the following areas:

- The impact of macroeconomic factors on the beauty and personal care market
- Beauty and personal care items purchased
- How and where consumers shop for beauty and personal care items
- Purchase drivers and considerations
- Attitudes toward shopping for beauty and personal care

Overview

Purchases of beauty and personal care items are nearly back to levels seen before the pandemic. It's essential for brands to maintain their focus on innovation, effectiveness, and consumers' heightened attention to health in order to continue to drive purchases.

Ongoing economic pressures are prompting consumers to make more discerning choices and look beyond just price when shopping for beauty and personal care products. Brands that offer efficient formulations and added value through convenience or moral conduct would help consumers justify spending in the category.

Consumers' attention to excessive multi-step routines and sustainability issues could potentially slow category growth, particularly among younger demographics who are critically assessing their consumption habits. Thus, it's crucial for brands to demonstrate value beyond basic functionality, as well as communicate efforts tied to supporting the environment.



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Moving forward, the increased focus on selfcare and holistic wellness will continue to present opportunities to cater to consumers in new ways and increase product usage.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

The beauty and personal care consumer fast facts

Items purchased

- Beauty and personal care purchases rebound from the drop off seen in recent years
- Beauty and personal care purchases rebound from the drop off seen in recent years
 - Graph 1: items purchased, 2019-23
- Opportunities to bring age-inclusive beauty to the forefront
 - Graph 2: items purchased, by age, 2023
- Jones Road Beauty harnesses inclusive marketing
- The influence of multicultural consumers in BPC is on the rise
 - Graph 3: items purchased, by race and Hispanic origin, 2023
- Leverage personalized offerings to increase engagement among multicultural consumers
- Eadem dives into the nuances of multicultural consumers

Retailers shopped

- Preferences for personalization and convenience impact where consumers shop
 - Graph 4: retailers shopped for beauty and personal care, in the past 12 months – NET – Any shopping, 2023
- Kohl's expands its partnership with Sephora
- Enhance the omnichannel shopping experience
 - Graph 5: retailers shopped for beauty and personal care products, in the past 12 months, 2023
- Attract younger beauty shoppers through category expertise, personalization and a seamless online shopping experience
 - Graph 6: retailers shopped, by age – NET – Any shopping, 2023
- Focus on value and inclusive representation to appeal to multicultural consumers
 - Graph 7: retailers shopped, by race and Hispanic origin – NET – Any shopping, 2023

Retailer drivers

- Affordability and product variety are the factors with the most influence when deciding where to shop for beauty and personal care
 - Graph 8: retailer drivers, 2023
- Younger consumers focus on more than the transaction when shopping for beauty
 - Graph 9: retailer drivers, by gender and age – NET – Any rank, 2023
- Multicultural consumers present a unique set of preferences when choosing where to shop
 - Graph 10: retailer drivers, by race and Hispanic origin – NET – Any rank, 2023

Purchase drivers

- Support consumers, especially men, to maintain their beauty/grooming regimens
- Support consumers, especially men, to maintain their beauty/grooming regimens
 - Graph 11: purchase drivers, by gender, 2023
- The brand Huron gets males' attention through deals
- A shift towards wellness positively impacts beauty and personal care
 - Graph 12: purchase drivers, by age – select responses, 2023
- Trinny London promotes its in-store appointments as a pick-me-up time

Category approach

- Engage consumers through technology, but don't forget the importance of human interaction
 - Graph 13: category approach, by gender, 2023
- Consumers, especially multicultural segments, want affordability without compromising on quality
 - Graph 14: category approach, by race and Hispanic origin, 2023
- Consumers are turning to cost-efficient options to maximize the value for their money

Purchase considerations

- Price, brand name and ingredients: the main factors behind purchasing decisions
- Price, brand name and ingredients: the main factors behind purchasing decisions
 - Graph 15: purchase considerations, 2023
- Beauty shoppers want products that fulfill their promises
 - Graph 16: purchase considerations, by gender, 2023
- Prose focuses on effective and sustainably sourced ingredients
- Recommendations shape beauty purchasing decisions
 - Graph 17: purchase considerations, by age, 2023

Sources of information

- Leverage owned channels to build and maintain consumers' trust
 - Graph 18: beauty and personal care sources of information, 2023
- The convenience and relatability of social media make it a preferred source for beauty and personal care information

- Graph 19: beauty and personal care sources of information, by age, 2023
- Danessa Myricks engages consumers through educational content

Attitudes toward shopping for beauty and personal care

- Earn consumers' trust and loyalty by facilitating pre-purchase research
 - Graph 20: attitudes toward shopping for beauty and personal care, by gender – NET – Any agree, 2023
- Clinique takes steps to help males find the products they need
- Adults aged 25-34 invest their time and money in the category
 - Graph 21: attitudes toward shopping for beauty and personal care – NET – Any agree, 2023
- Rare Beauty launched a limited edition lipstick to support the Rare Impact Fund
- Use evolving technologies to add value to the beauty shopping experience
 - Graph 22: attitudes toward shopping for beauty and personal care – NET – Any agree, 2023
- Demonstrate a genuine commitment to supporting good causes to appeal to all – especially underserved segments
 - Graph 23: attitudes toward shopping for beauty and personal care – NET – Agree, 2023
- Fussy highlights its commitment to the people and the planet alongside profits

Shopping behaviors

- Consumers are putting in the work to ensure products meet their needs
 - Graph 24: beauty and personal care shopping behaviors in the last 12 months, by gender and age – NET – At least sometimes, 2023
- Social media is a must to cater to digitally-savvy beauty shoppers
 - Graph 25: beauty and personal care shopping behaviors in the past 12 months, by age – NET – At least sometimes, 2023
- Glossier benefits from the integration of social and commerce capabilities
- Consumers overall, and particularly Hispanic beauty shoppers, are prioritizing their financial stability
 - Graph 26: beauty and personal care shopping behaviors in the past 12 months, by race and Hispanic origin – NET – At least sometimes, 2023

Areas of interest

- Consumers want to explore BPC products without a financial obligation
 - Graph 27: areas of interest, 2023
- e.l.f. leverages social media for product exploration
- Sampling is key to drive discovery
 - Graph 28: areas of interest, by gender and age, 2023
- Increase category potential through personalization offerings
 - Graph 29: areas of interest, by race and Hispanic origin, 2023

COMPETITIVE STRATEGIES

- Glossier expands its distribution through Sephora
- Ulta Beauty launches a movement toward positivity

- Soda brand Poppi taps into beauty with a limited-edition collaboration
- Charlotte Tilbury partners with Elton John for a holiday campaign

Opportunities

- Key opportunities

THE MARKET

Market context

Market drivers

- Inflation remains elevated
- The US economy is resilient
 - Graph 30: GDP change from previous period, Q1 2013–Q3 2023
- Consumer sentiment aligns with economic improvements
 - Graph 31: consumer Sentiment Index, 2007–23
- Technology plays a critical role in the beauty industry
- Corporate social responsibility initiatives influence purchase decisions
- Demand for diversity and inclusivity in beauty is on the rise

Market size and forecast

- US retail sales and forecast of beauty and personal care products, at current prices, 2018–28
- The beauty and personal care market continues to normalize

Segment performance

- Skincare and bodycare – industry essentials
- Cosmetics – sustain growth
- Haircare – slow and steady years ahead

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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