



THERE'S A MARKET FOR MEN'S COSMETICS—AND A GENERATION GAP

An Ipsos Point of View

Authors: Carlos Aragon, Wendy Wallner, Kristy Click, and Kate Barker

GAME CHANGERS



KEY FINDINGS:

- Overall, 15% of heterosexual men 18–65 in the U.S. currently use male cosmetics and makeup, and an additional 17% would consider using them in the future.
- In a deep-dive study of current or potential users, Ipsos found that men under 35 and over 50 have very different attitudes and motivations for using grooming, cosmetics and skincare products.
- Roughly one-third of all men are open to using cosmetics. 73% of males 51+ said they would not consider using any cosmetics, versus only 37% of males 18–34.
- Males 18–34 are more open to using products like BB/CC Creams, mascara, foundation, bronzer and concealer.

As Ipsos peeks behind the curtain of men's buying behaviors, new research shows a younger generation of men have expressed increased interest in purchasing male cosmetics in recent years, exposing an opening for brands to target this cohort and signaling a likely evolution in the definition of masculinity.

Here's what brands need to know if they want to tap into the massive growth potential in this audience.

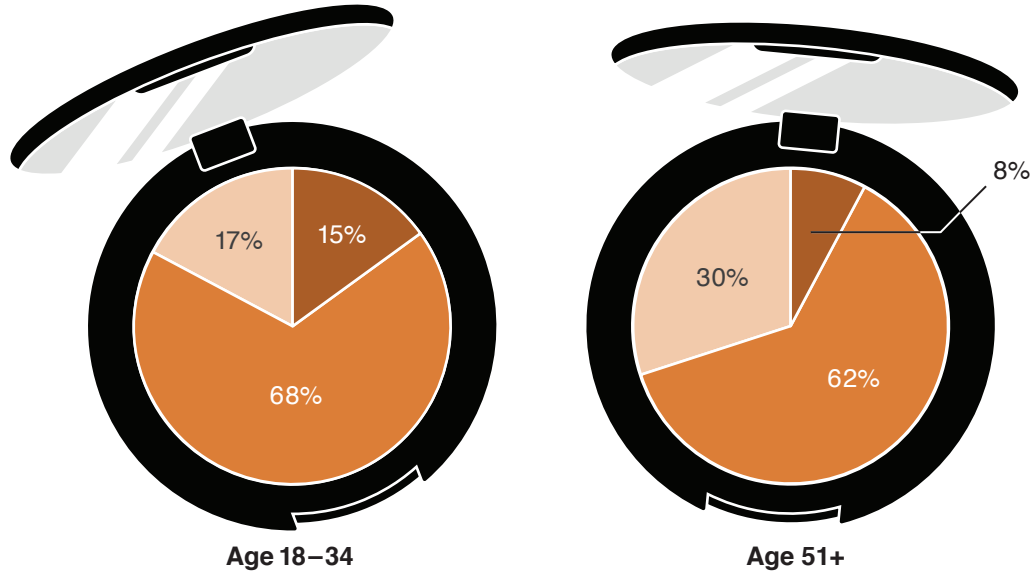
Overall, 15% of heterosexual men ages 18–65 in the U.S. currently use male cosmetics and makeup; an additional 17% would consider using it in the future, an expansion that would double the size of the market. In a deep-dive study of current or potential users, Ipsos found that men under 35 and over 50 have very different attitudes and motivations for using grooming, cosmetics and skincare products.

The base for all subsequent data is U.S. males 18+ who are heterosexual and among the 32% who are

current or prospective future users of cosmetic products.

Usage of grooming/cosmetics among heterosexual males

■ Past usage ■ Current usage ■ Future usage



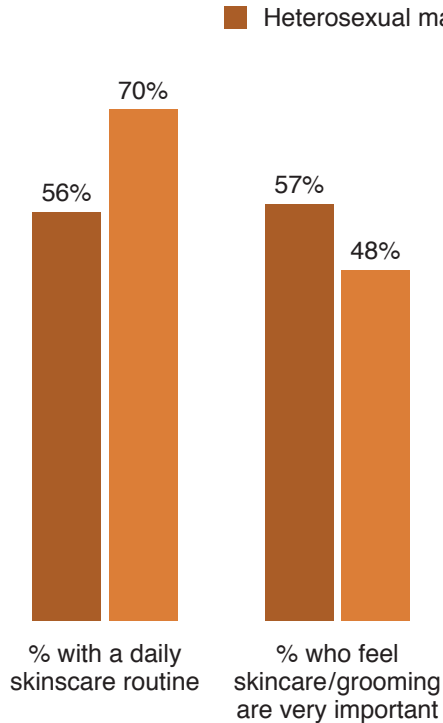
Q: Have you ever or would you consider using cosmetics as part of your grooming routine?



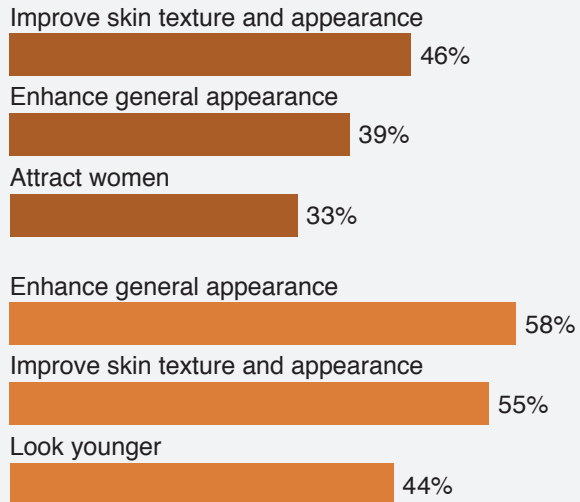
Another Ipsos study explored additional details about the men's cosmetics market, including thoughts and concerns around cosmetics, the

purchase funnel, attitudes toward masculinity and cosmetics and thoughts on brands and retailers.

Background (Grooming & Skincare)



Top motivations for using grooming, skincare, and cosmetics



As both studies show, the generation gap may be the trickiest part of this market for brands to navigate. Males who are 51 or older are more likely to have significant concerns about aging and people knowing they use cosmetics. They require more gentle handling and discretion to encourage them to purchase cosmetics as they are more vocal about threats to their masculinity from being seen as wearing cosmetics.

For older men, value propositions will need to emphasize the benefits of discrete cosmetics usage and provide them with ways to purchase and use the products privately.

Brands' approaches to younger men may take a different form than other age groups. Ipsos finds that males 18–34 are much more comfortable about cosmetics and people knowing that they use cosmetics. They will buy cosmetics online and in-store, from traditional men's and women's brands, and are more open to using products like BB/CC Creams, mascara, foundation, bronzer, and concealer.

Despite the generation gap, there is considerable openness to males of all ages using cosmetic products than Ipsos has observed historically. This has been fueled by the anonymity of the e-commerce buying environment and concern about social media appearances.



Grooming and skincare

Ipsos finds that males 51+ are more likely to have a daily skincare routine, whereas younger men do it less often. When it comes to motivations for grooming and skincare, males 51+ are motivated by a desire to look younger and enhance their general appearance. Males 18–34 don't feel the pressure to look younger but do want to look as good as possible to attract women.

Cosmetics attitudes and considerations

When Ipsos pivoted from “grooming and skincare” to “cosmetics,” there was an immediate and significant change in attitudes and perceptions. While overall, roughly 1/3 of all men are open to using cosmetics, 73% of males 51+ said they would not consider using any cosmetics versus only 37% of males 18–34. Males 51+ are also far more hung up on gender roles, with one of their most common objections to using cosmetics being that it is for women. For males 51+, this is going to be the major hang up that needs to be overcome. But when looking at younger men, we have clearly reached the tipping point where cosmetics for males has reached majority acceptance. Unless future generations reverse course, this space looks to be poised for substantial growth.

Buying cosmetics and skincare products

Ipsos finds males 18–34 are slightly more likely to buy cosmetics from a “traditional men's brand” (47% very likely) compared to a “traditional women's brand,” (42%), but generally don't have a strong feeling about it. Conversely, males 51+ are much

less likely to buy from a “traditional women's brand” (18% very likely) and are only somewhat more interested in buying from “traditional men's brands” (28% very likely). Among males 18–34, 42% are very comfortable buying in-person and 80% would be open to using an app or virtual tool to try on or buy cosmetics and skincare products. Conversely, only 15% of males 51+ are very comfortable buying in person but 48% would consider or have used an app or virtual tool to buy cosmetics or skincare products.

Here's what men want

So what will inspire men to actually buy cosmetics? Ipsos ran different models looking at what would drive purchases from (a) traditional “men's brands (War Paint, Manscaped, Brickwell, etc.)” and (b) traditional “women's brands (Ulta, Sephora, Macy's, etc.)”

The key drivers of purchase behavior differ significantly between males 18–34 and those over 51. To drive purchases from males 18–34, traditional men's cosmetic brands should emphasize two things:

- How cosmetics will improve their physical appearance and help them cover up blemishes and defects
- How cosmetics are broadly accepted and “for guys like me.”

The key drivers are slightly different for males over 51. This audience is also driven by improving their physical appearance, particularly in a professional setting. However, they aren't comfortable with other people being aware that they use cosmetics and want discrete ways to purchase and use the products that don't threaten their masculinity.



WHAT'S NEXT:

- Heterosexual males of all ages are open to using cosmetics as part of their skincare and grooming routine, but they must be approached differently.
- Early adopters are using male cosmetics, but convincing men that the products have gone mainstream will require a concerted effort similar to the one undertaken to get men to use body wash, face wash, body spray and similar men's grooming products.
- Brands must address the needs and expectations of customers—ones that include maintaining their perception of masculinity, boosting confidence and a sense of identity.

About the Authors

Carlos Aragon

Vice President, US Channel Performance

Carlos.Aragon@ipsos.com

Wendy Wallner

SVP, Client Officer

Wendy.Wallner@ipsos.com

Kristy Click

SVP, Client Officer

Kristy.Click@ipsos.com

Kate Barker

SVP, US Customer Experience

Kate.Barker@ipsos.com

About Ipsos

At Ipsos we are passionately curious about people, markets, brands, and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions. With a strong presence in 90 countries, Ipsos employs more than 18,000 people and conducts research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals.