



15 Beauty Trends from Ipsos

GAME CHANGERS

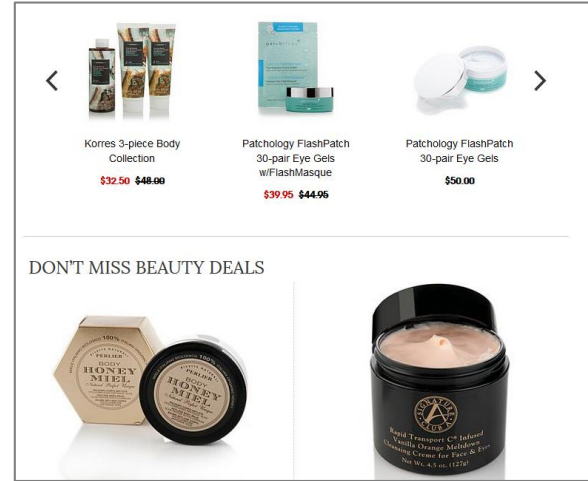


1

Path-to-Purchase and E-Commerce



Consumers follow very different paths depending on occasions and relationships with the category and brand.



E-Commerce is emerging with price and increased choice being the prime drivers of buying online. Convenience and trust are key elements of site selection.

2

Subscription-based Models

New e-commerce business models will evolve, particularly direct to consumer and subscription. Since a high % of beauty purchases are replenishment, this will be relevant.



3

On-Demand Beauty

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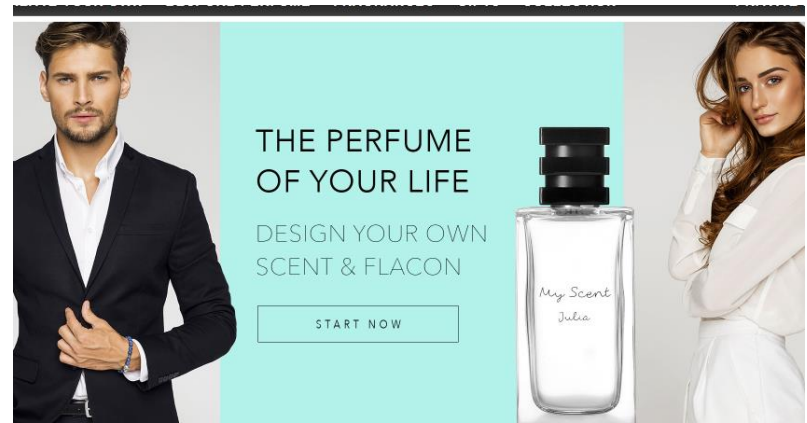
Leave a Message

Time poor consumers are demanding on-the-go beauty, which includes speedy services in-store and to-the-door mobile beauty treatments. UK-based Blow launched as the ‘Uber of beauty’ by offering manicures, blow dries and massages that can be done at home, office, or wherever the client desires (and got investments from Unilever). Madison Reed in the US offers 15-minute root touch ups and Skin Laundry in London offers 15-minute treatments.

4

Customization

Similar to other markets, consumers in the beauty market desire customization and the ability to do it yourself. Companies like Benefits (which offers custom makeup kits) and Unique Fragrance (which lets you design your own scent) are capitalizing on this trend.



5

Going Virtual

Consumers are beginning to integrate virtual reality into their lives with new apps, in-store experiences and packaging that let them more deeply engage with brands.

For example, YouCam offers a virtual makeover and hairstyle studio with hundreds of makeup and beauty products for a digital makeover.

Selfie Cam

Empower your selfie
with filters for every occasion!



6

Blending of Brands

Consumers are more and more using a blend of mass and prestige brands, and also blending within brands (so less buying Clinique 1,2,3 and mixing brands for each step).



7

Proliferation of niche brands

There is a proliferation of small, niche brands - in make up in particular – launched by make up celebrities and others with authentic reasons to believe.

In response, there have been multiple acquisitions of these edgy, niche brands by global beauty companies: Estee Lauder bought Becca, Too Faced, and GlamGlow; L’Oreal Group bought IT Cosmetics; and COTY acquired Bourjois cosmetics in addition to online retailer Younique.



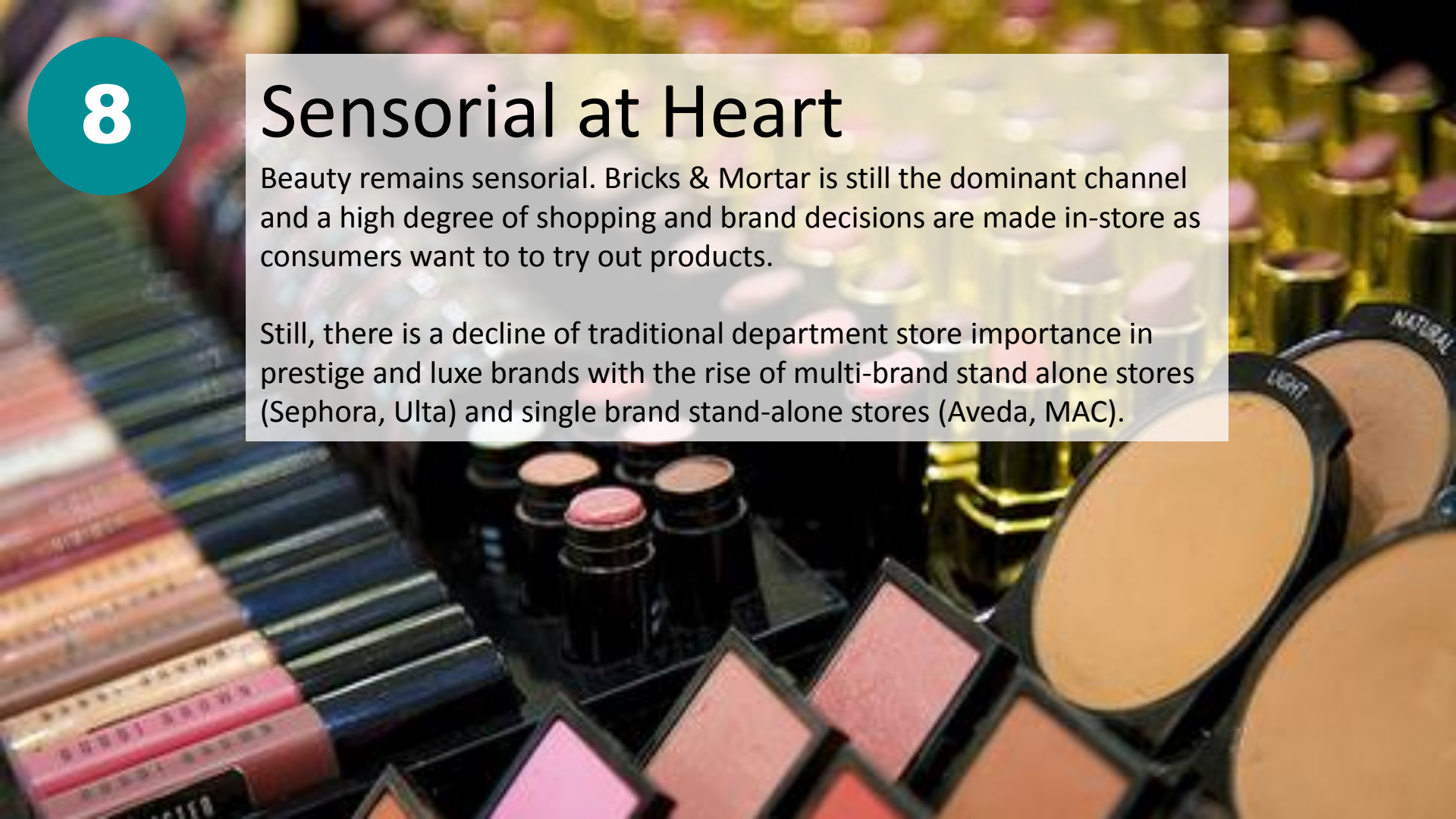


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Sensorial at Heart

Beauty remains sensorial. Bricks & Mortar is still the dominant channel and a high degree of shopping and brand decisions are made in-store as consumers want to try out products.

Still, there is a decline of traditional department store importance in prestige and luxe brands with the rise of multi-brand stand alone stores (Sephora, Ulta) and single brand stand-alone stores (Aveda, MAC).



9

Rise of Male Grooming

Men are taking the bull by the horns when it comes to skin care and makeup. They are adopting beauty regimens with discipline and passion and aren't afraid to use products like cover-ups, moisturizers, and anti-aging creams. Moreover, they have built up a presence on the beauty vlogging scene and are now featured in ads from L'Oreal and Maybelline.



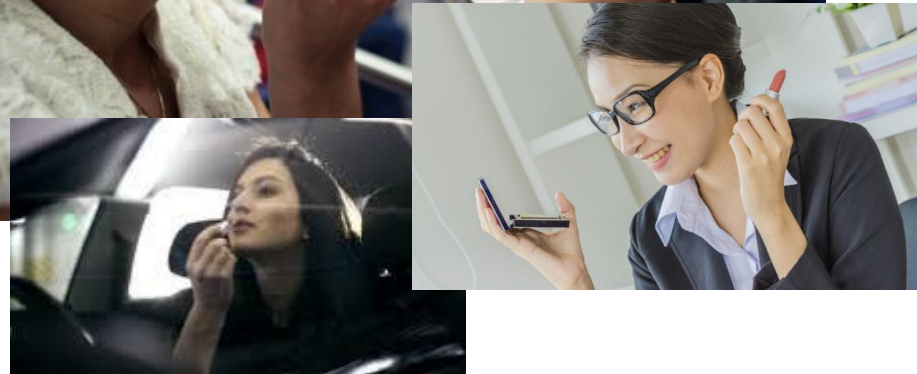
L'Oréal brought on a male spokesmodel, Jake-Jamie Ward, to launch a new concealer palette. Jake-Jamie has more than 16,000 subscribers on YouTube and 13,000 followers on Instagram.

10

Differentiating Usage Occasions

Consumers are looking for products that are designed for different usage occasions, i.e., different times of days and different occasions (day cream, night cream, at-work cream, at-the-gym cream, etc.) Take the Trish McEvoy Correct & Brighten Pen, which is a pump pen that lets users quickly cover up blemishes and circles throughout the day.

Packaging will have to keep up – whether it's single-use, spray or stick format – in order to adapt to work, commute time, and other occasions.



11

Digital vs. Traditional Touchpoints

Pre-shopping digital touchpoints are an important and growing influence...but traditional touchpoints still play an important role – especially in driving awareness of both products and beauty trends.



12

Gen Z: A Different Set of Values

Gen Z is a critical segment in the beauty market – but they are much different than their Millennial counterparts.



13

K-Beauty

K-Beauty, short for Korean Beauty, is an umbrella term that encompasses not just Korean skin care and makeup products, but also its culture and outlook towards beauty and grooming in general. K-Beauty has become a dominant force in Asia and is seeking to gain a foothold in the global market. Masks are a part of this trend.



14

Naturalness

There is a strong trend for “natural/naturality/naturalness” all around the world in beauty markets – even stronger in face care.



15

Transparency

There is more and more an expectation of transparency and safety by consumers – everywhere.

**BUILD
TRUST
THROUGH
TRANSPARENCY**