

Report Price: £3695 | \$4995 | €4400

e above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Older Gen Zs more likely to avoid a brand they don't believe in
- Younger Gen Zs still rely heavily on parents
- Purchase influencers change as Gen Zs mature



"Generation Z consists of an array of young consumers at different stages in life. This diverse age range can be a challenge for brands as some Gen Zs are completely dependent on their parents, while others are branching out on their own for the first time." - Alison Gaither, Beauty & Personal Care Analyst

Buy this report now		
Visit	store.mintel.com	
emea	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
America	s +1 (312) 943 5250	
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

- The issues
- Older Gen Zs more likely to avoid a brand they don't believe in

Figure 1: Select barriers to purchasing, older Gen Z, March 2019

- Younger Gen Zs still rely heavily on parents
 Figure 2: Select shopping behaviors, younger Gen Z, March 2019
- Purchase influencers change as Gen Zs mature Figure 3: Select purchase influencers, by age, March 2019
- The opportunities
- While Gen Zs rely on parents to purchase beauty, they ultimately choose the products

Figure 4: Select shopping behaviors, younger Gen Z, March 2019

 In-app shopping provides opportunities for impulse buys online

Figure 5: Retailers shopped by channel (net)*, adult Gen Z, March 2018

- Focus on face masks
- What it means

THE MARKET - WHAT YOU NEED TO KNOW

- Diverse segments lead to greater sales
- Gen Z is influenced by influential influencers
- Politics are almost as important as culture

MARKET BREAKDOWN

- Color cosmetics remains on top
 Figure 6: Share of sales in beauty and personal care market, by category, 2018 (est)
- Fragrance remains on the decline Figure 7: Percentage change in beauty sales, by segment, 2018 (est)

THE INFLUENCE OF INFLUENCERS

• Generation Z trusts influencers' recommendations

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

WHO IS GENERATION Z?

• Generation Z is the younger sibling of Millennials in both size and spending

Figure 8: Share of US population, by generation, 2018 (est)

- Growing Hispanic population bodes well for category gains Figure 9: Generations by Hispanic origin, 2018
- To Gen Zs, activism is in their DNA Figure 10: Mintel Little Conversation Episode #13: Politics, preferences and Gen Z

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Genderless, easy to use beauty simplifies a complicated market
- Gen Zs are becoming more research savvy, but at a cost

WHAT'S WORKING?

- Simple, easy to use products resonate with younger Gen Zs
- Genderless breaks down barriers in the beauty aisle

WHAT'S NEXT?

- Blue light claims will engage the social media generation Figure 11: Online resources for learning about beauty products, younger vs older Gen Z, March 2019
- The Green Generation

THE CONSUMER – WHAT YOU NEED TO KNOW

- Routines expand with age
- Gen Zs become more reliant on social media as they mature
- Generation Z is full of activists; however, they still prioritize efficacy
- The power of scent does not last forever
- Gen Zs rely on their parents, but it is temporary
- Face masks lead usage, clean beauty isn't far behind

BEAUTY ROUTINES

- Skincare, haircare lead routines beyond personal hygiene Figure 12: Beauty routines, younger Gen Z, December 2017 and March 2019
- As younger Gen Zs mature, they become more adventurous Figure 13: Select beauty routines, younger Gen Z, by age, March 2019
- Hispanics over index for hairstyling, less invested in skincare Figure 14: Beauty routines, younger Gen Z, by Hispanic origin, March 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

 Older Gen Zs exhibit expanding routines due to increased independence

Figure 15: Beauty routines, older Gen Z, March 2019

• Usage is driven by women; however, men are still engaged Figure 16: Beauty routines, older Gen Z, by gender, March 2019

RESOURCES FOR LEARNING ABOUT BEAUTY PRODUCTS

 Younger Gen Zs rely on family and friends to learn about BPC

Figure 17: Resources for learning about beauty products, younger Gen Z, March 2019

 Young women utilize several resources, young men trust family

Figure 18: Resources for learning about beauty products, younger Gen Z, by gender, March 2019

- Older Gen Zs experiment with learning resources Figure 19: Resources for learning about beauty products, younger vs older Gen Z, March 2019
- Young women express interest in social media as a learning resource

Figure 20: Resources for learning about beauty products, older Gen Z, by gender, March 2019

BARRIERS TO PURCHASING

- Gen Zs are activists, but still value efficacy
 Figure 21: Barriers to purchasing, younger Gen Z, March 2019
- Older Gen Zs focus on ingredients over specialized products

Figure 22: Select barriers to purchasing, younger vs older Gen Z, by age, March 2019

 Young men are apprehensive about using beauty products made for women

Figure 23: Barriers to purchasing, younger Gen Z, by gender, March 2019

PURCHASE INFLUENCERS

 Scent and convenience still lead among purchase influencers

Figure 24: Purchase influencers, younger Gen Z, March 2019

 Both genders are driven by functional benefits; women look beyond function

Figure 25: Purchase influencers – Any rank, younger Gen Z, by gender, March 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- 18-24 year olds lose interest in scent Figure 26: Purchase influencers, older Gen Z, March 2019
- Men still value scent, women choose peer reviews Figure 27: Select purchase influencers – Any rank, older Gen Z, by gender, March 2019

SHOPPING BEHAVIORS AND RETAILERS SHOPPED

 Parents may be paying, but younger Gen Zs are choosing the products

Figure 28: Shopping behaviors, younger Gen Z, March 2019

- Financial freedom affects shopping sentiment Figure 29: Shopping behaviors, younger Gen Z, by age, March 2019
- Mass merchandisers remain on top, though specialty shopping is still strong

Figure 30: Retailers shopped, older Gen Z, March 2019

 Convenient retailers dominate in-store, fall short online and in-app

Figure 31: Retailers shopped by channel, adult Gen Z, March 2018

Figure 32: Retailers shopped, by channel (net)*, adult Gen Z, March 2018

INTEREST IN BEAUTY TRENDS

- Young women especially interested in face masks Figure 33: Interest in beauty trends, younger Gen Z, by female, March 2019
- Clean, customized face masks drive interest and usage Figure 34: Interest in beauty trends, older Gen Z, March 2019
- Clean, active beauty products inspire women to make a change

Figure 35: Interest in beauty trends (net)*, older Gen Z, by gender, March 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Abbreviations
- Abbreviations

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	emea	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100





About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**