

# Beauty Influencers - US - April 2021

Report Price: £3695 | \$4995 | €4400

The 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:

- The crucial role beauty influencers play in product discovery
- How communication strategies need to evolve to keep up with shifting beauty ideals
- The blurring of physical and digital lives and what it means for the industry



"COVID-19 has accelerated the divide of the social media landscape. With consumers spending more time at home and online, engagement across social media platforms has increased and the role of beauty influencers has never been stronger. However, the highly sensitized events over the past year has seen more influencer and brand 'call outs'."

- Clare Hennigan, Senior Beauty & Personal Care

## nalyst Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	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
- · Key issues covered in this Report
- Definition
- COVID-19: US context

#### **EXECUTIVE SUMMARY**

- What's happening now
- Influencers play crucial role in product discovery, integral to customer acquisition
- Brands that transcend from advocacy to activism will win with consumers
- Renovate communication strategies to align with Americans' shifting beauty ideals
- What's next
- Retailers personified: increasing autonomy transforms influencers' role as brand intermediaries into curators
- Create space for brand loyalists on private internet communities and boost repeat purchase rate
- Blurring physical and digital lives creates white space for technological beauty innovation

#### **MARKET FACTORS**

- How to drive uplift and generate sales
- Take Gen Z's love of Tik Tok's entertainment value to the next level for continued engagement

Figure 1: Reasons for using TikTok, December 2020

 Improve customer acquisition and build connections through micro-communities

Figure 2: Youth To The People - Clubhouse Promotion

- Will beauty be #cancelled?
- Social media callouts are the modern day boycotts
- Renovation via reconciliation
- Reduce toll on mental health and boost inspiration with realistic and inclusive influencer campaigns
- Influencers are addressing pay inequities
  Figure 3: Instagram post Inclusion rider
- The advancement of 5G could give rise to new forms of communication
- New regulation in the UK could resonate in the US
  Figure 4: Instagram post #Filterdrop
- Impact of COVID-19 on beauty influencers

#### 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.



- Lockdown (March 2020-June 2020)
- Re-emergence (July 2020-December 2021)
- What Mintel anticipates during recovery (2022-2025)

#### WHO IS WINNING AT SOCIAL MEDIA MARKETING?

- Brand founders and influencers using their platforms for activism
- Brands that genuinely address unrealistic beauty standards are poised for future success
  - Figure 5: Skin positivity: top account mentions Global
- Consumers will gravitate to brands that prioritize the quality of influencer partnerships
- Brands that are transparent with their audience will create loyal customers and inspire repeated purchase

#### **MARKET OPPORTUNITIES**

- Instagram "Guides" create room for nuance on social media Figure 6: Instagram Guides
- Digital beauty innovation sees brands tap into gaming communities
- Anticipate increased expectations of security via shoppable content on social platforms
- Will the beauty industry enter the NFT "chat"?
- Celebrate influencer autonomy with exclusive collaborations

#### THE CONSUMER - KEY TAKEAWAYS

- Tackle misinformation with beauty experts
- Growth of new platforms opens doors for more influencers and opportunities to expand reach
- Capitalize further on Millennials willingness to spend by genuinely understanding what they need to hear
- Discounts and incentives drive men to purchase
- Influencers play a crucial role in product discovery
- Beauty brands that don't appear relatable risk backlash

## **INFLUENCER LANDSCAPE**

Who follows beauty influencers?

Figure 7: Share of influencer followers, by age and gender, December 2020

#### TYPES OF BEAUTY INFLUENCERS

Tackle misinformation with beauty experts
 Figure 8: Types of influencers followed, December 2020

#### 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.



#### Build relationships with women through brand communities

Figure 9: Select types of influencers followed, by gender, December 2020

Gen Z adults feel personally connected to influencers

Figure 10: Bubble x Skincare by Hyram

Figure 11: Select types of influencers followed, by generation,

December 2020

#### **BEAUTY INFORMATION SOURCES**

Instagram and YouTube remain top destinations for beauty information . . . for now

Figure 12: Beauty information sources, December 2020

Reach Gen X with age-inclusive digital marketing

Figure 13: Select beauty information sources, by generation, December 2020

#### **REASONS FOR FOLLOWING BEAUTY INFLUENCERS**

Boost inspiration by partnering with diverse influencers
 Figure 14: Reasons for following beauty influencers, December 2020

Emphasize product efficacy to appeal to older Millennials

Figure 15: Azelaic acid Instagram post

Figure 16: Select reasons for following beauty influencers, by generation, December 2020

Motivators vary by platform preference

Figure 17: Select reasons for following beauty influencers, by select social media visits daily, December 2020

#### BEHAVIORS TOWARD BEAUTY BRANDS AND INFLUENCERS

Influencer recommendations drive purchases

Figure 18: Behaviors toward beauty brands and influencers, December 2020

• Discounts and incentives motivate men to purchase

Figure 19: Behaviors toward beauty brands and influencers – I do this, by gender, December 2020

· Drive purchases by promoting brand values online

Figure 20: Pull Up for Change - Make It BLACK

Figure 21: Behaviors toward beauty brands and influencers – I do this, by generation, December 2020

 Small but mighty: Tumblr and Reddit communities spark engagement

Figure 22: Supergreat

#### 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

#### Beauty Influencers - US - April 2021

#### Report Price: £3695 | \$4995 | €4400

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



Figure 23: Select behaviors toward beauty brands and influencers – I do this, by select daily social media visits, December 2020

#### ATTITUDES TOWARD INFLUENCERS

Influencers play crucial role in product discovery

Figure 24: Instagram post - Cocokind

Figure 25: Attitudes toward influencers, December 2020

Focus on quality over quantity

Figure 26: Select attitudes toward influencers, by generation, December 2020

Expect more micro-influencers across social media apps

Figure 27: Select attitudes toward influencers, by select social media visits daily, December 2020

#### INTEREST IN INNOVATIVE CONTENT

 Beauty brands that don't appear relatable risk facing backlash

Figure 28: Glow Recipe - Instagram Post

Figure 29: Interest in innovative content, December 2020

Tap into gamer communities to meet men "where they are"
 Figure 30: Select interest in innovative content – More of, by gender, December 2020

#### APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

#### **APPENDIX - THE CONSUMER**

Figure 31: TURF analysis – Reasons for following, December 2020

Figure 32: Table – TURF analysis – Reasons for following, December 2020

Methodology

Figure 33: Interest in innovative content – CHAID – Tree output, December 2020

Figure 34: Interest in innovative content – CHAID – Table output, December 2020

Methodology

#### 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.