

Diversity in Beauty - UK - February 2021

Report Price: £2195 | \$2995 | €2600

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 impact of COVID-19 on the beauty consumer.
- How consumers define a diverse beauty brand.
- Issues faced when buying BPC products and opportunities for brands and retailers.
- The impact of diversity issues when buying BPC products.
- Attitudes towards diversity in beauty.
- Perceptions of well-known brands and opportunities in brand attributes.

With 46% of BPC buyers being more likely to buy from a brand/retailer that takes a stand on issues related to minority groups than one that doesn't, beauty brands can no longer sit on the fence when it comes to these. Having an opinion does not mean being political, however; only 13% of adults consider the taking of a political stand on issues relating to minority groups as a top three factor for a diverse beauty brand.

COVID-19 has exacerbated existing societal differences. Those on the lowest incomes have been most impacted, being most likely to cut back spend on BPC. In addition, those from BAME groups have been disproportionately impacted by infection rates, and are also overrepresented in the industries that have been hardest hit by job losses. This will see the economic divide increase between those who can afford discretionary beauty products and those who can't.

A threat to beauty brands now comes from remaining silent on issues relating to diversity, as those that don't have an opinion risk losing consumers to those that do, particularly younger consumers. Many brands are driving DEI practices behind the scenes, and sharing this with consumers can be a way to show the authenticity of such measures – particularly as consumers are increasingly seeing diversity as a tick-box exercise for beauty brands.



“The events of summer 2020, which saw the BLM movement gain momentum, have had reverberations across all industries and not just politics. In BPC, brands and retailers can no longer stay silent on topical issues related to diversity and equality, as many consumers seek to buy from those that align with their values.”

– Roshida Khanom, Category Director BPC

Buy this report now

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

Diversity in Beauty - UK - February 2021

Report Price: £2195 | \$2995 | €2600

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

There are also opportunities for well-known brands to support and be a platform for smaller, minority-owned brands particularly as 23% of BPC buyers seek out brands owned by a minority.



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.

Buy this report now

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

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Products covered in this Report

EXECUTIVE SUMMARY

- Impact of COVID-19 on BPC

Figure 1: Short, medium and long-term impact of COVID-19 on BPC, 18 January 2021

- The market
- The rippling effects of the BLM movement
- Companies and brands
- Make beauty accessible for all abilities
- Innovate by lifestage rather than age
- The consumer
- Shake it up from the inside out

Figure 2: Definition of a diverse beauty brand, December 2020

- Skin tone issues aren't limited by ethnicity

Figure 3: Issues faced when purchasing BPC products, December 2020

- Time to take a stand

Figure 4: BPC buying behaviours when it comes to issues relating to minority groups, December 2020

- Authenticity is essential

Figure 5: Attitudes towards diversity in BPC, December 2020

- Well-known brands have space to grow

Figure 6: BPC brand perceptions, December 2020

ISSUES AND INSIGHTS

- Addressing the differences COVID-19 has highlighted
- The issue of authenticity
- Time to take a stand

THE MARKET – KEY TAKEAWAYS

- BLM movement reverberates through all industries
- Many are priced out of BPC
- Beauty can break barriers in-store

MARKET DRIVERS

- The rippling effects of the BLM movement
- How white is White?

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.

Buy this report now

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

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

Figure 7: Ethnicity, by skin tone, December 2020

- **The government improves access for disabled people**
- **Brexit could impact UK's diversity**
- **Gender inequality remains a real issue**

Figure 8: Financial situations compared with a year ago, by gender, October 2020

- **The great economic divide**

Figure 9: Adding to savings and reducing mortgage debt in last three months and next three months, by socio-economic group, October 2020

- **Cater to the over-55s in-store**

Figure 10: Trends in the age structure of the UK population, 2015-25

- **Breaking the gender barriers**

Figure 11: Attitudes towards gender stereotypes and gender politics in advertising, by gender, October 2019

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Promote Black-owned businesses**
- **Showcase authenticity through NPD and communication**
- **Make beauty accessible for all**

LAUNCH ACTIVITY AND INNOVATION

- **Communicate for all hair textures**
- **Hormonal skincare could inspire NPD in haircare**

Figure 12: Hormonal skincare launches, 2020

- **From anti-ageing to mindful ageing**

Figure 13: Skincare for ageing skin, 2020

- **Supporting Black-owned skincare**

Figure 14: Freya + Bailey Natural Skincare and 4.5.6 skincare, 2019 and 2020

- **Power to the people**

Figure 15: Community-inspired/generated beauty brands, 2020

- **Time to go beyond foundation in makeup**

Figure 16: Prime Beauty, November 2020

- **Make beauty accessible for all**

Figure 17: Guide Beauty Cosmetics, December 2020

Figure 18: VictoriaLand Beauty, December 2020

- **Celebs launch diverse ranges**

Figure 19: EleVen by Venus Unrivaled Sun Serum (US), 2020

ADVERTISING AND MARKETING ACTIVITY

- **Getting it wrong...and owning up to it**

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

Figure 20: Munroe Bergdorf for L'Oréal, June 2020

- **The ASA tackles stereotypes**
- **Standing up for textured hair**
- **Catering for different abilities**

Figure 21: Alterna Haircare accessibility adjustments, December 2020

- **Driving authenticity in advertising**
- **Consumers want information**
- **Give a platform to others**

THE CONSUMER – KEY TAKEAWAYS

- **COVID-19 exacerbates inequalities**
- **Represent from the inside out**
- **Take a stand, don't bow down**

IMPACT OF COVID-19 ON THE BEAUTY CONSUMER

- **Lifestyles of the over-55s have been particularly impacted**

Figure 22: Worry and extreme worry related to COVID-19 impacting lifestyles, by age, 8-16 December 2020

- **Professional hair brands can target over-55s**

Figure 23: Visited a hairdresser/barber in the last 3 months, by age, December 2019 and December 2020

- **BAME groups have been hard hit**

Figure 24: Spend on BPC products compared with before COVID-19/coronavirus, 8-16 December 2020

- **Online retailers have to be more inclusive**

Figure 25: Beauty/grooming purchase behaviours since the start of the COVID-19/coronavirus outbreak, 11-22 June 2020

DEFINING DIVERSITY

- **It's all about the product**

Figure 26: Definition of a diverse beauty brand, December 2020

- **Race is a bigger issue than gender right now**
- **Time to shake it up at the top**
- **Keep up age-positive messages**

Figure 27: Agreement with the statement "A diverse beauty brand is one that promotes positive messages about ageing", by gender and age, December 2020

- **Young people want brands to be political**

Figure 28: Agreement with the statement "A diverse beauty brand is one that takes a political stand on issues that impact minority groups", by age, 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.

Buy this report now

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

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

ISSUES FACED WHEN BUYING BPC

- **Consumers struggle to match products to their needs**
Figure 29: Issues faced when purchasing BPC products, December 2020
- **The age issue differs by gender**
Figure 30: Issues finding BPC products suited to their age, by age and gender, December 2020
- **Improve in-store access for hidden disabilities**
Figure 31: Issues related to reading information or accessing physical stores for BPC shopping, by age, December 2020
- **Drive communication in new ways**
- **Ease the online experience**
- **Educate sales assistants on changing consumer needs**

ATTITUDES TOWARDS BUYING BPC

- **Take a stand**
Figure 32: BPC buying behaviours when it comes to issues relating to minority groups, December 2020
- **Representation is important**
- **Young people put their money where their ethics are**
Figure 33: Behaviours relating to boycotting a BPC brand/retailer for racism or lack of representation, by age, December 2020
- **Promote minority-owned businesses**

ATTITUDES TOWARDS DIVERSITY IN BPC

- **BPC remains female-centric**
Figure 34: Attitudes towards diversity in BPC, December 2020
- **The issue of tokenism**
- **People with disabilities have been left behind**
- **Show greater body diversity for men**

BRAND PERCEPTIONS

- **NIVEA and Dove can push the boundaries of empowerment**
Figure 35: BPC brand perceptions, December 2020
- **L'Oréal Paris can drive authenticity with ongoing efforts**
- **The Body Shop can drive gender-inclusive messaging**
- **MAC Cosmetics only stands out to its target consumer**
Figure 36: MAC Cosmetics brand perceptions, by gender, December 2020

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **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.

Buy this report now

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: £2195 | \$2995 | €2600

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

- **Consumer research 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.

Buy this report now

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](https://www.mintel.com)**.