



The Gen Z Beauty Consumer

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INTRODUCTION

Scope

Key takeaways

STATE OF PLAY

Gen Z now almost a quarter of the global population, with Middle East and Africa leading
Gen Z's coming of age coincides with significant dynamic changes in post-pandemic economy
Youth unemployment and income challenge the spending power of Gen Z
Inflationary pressures to remain high, exacerbating Gen Z's price sensitivity
Gen Z's concerns contribute to appetite for emotional wellness and positive life experiences

EXPLORING THE GEN Z BEAUTY CONSUMER

Who is the Gen Z beauty consumer?

Gen Z links beauty with intrinsic values, holistic health and emotional wellness

For Gen Z, beauty is about individualistic expression

As digital natives, much of their consumer journey takes place via smartphones

Smartphone usage, however, differs across developed and emerging markets

Being yourself is a higher priority among Gen Z than replicating specific beauty aesthetics

Pragmatism and a quest for experiences drive Gen Z shopping preferences

Gen Z prefer minimalistic daily beauty routines, but use expressive make-up occasionally

Gen Z has a looser perception of traditional gender norms

Gen Z male consumers show fewer reservations in exploring beauty products

Value remains key for the Gen Z consumer

GEN Z-FOCUSED BEAUTY

Skin concerns among Gen Z centre around acne

Gen Z hair concerns centre around scalp care, amid growing consciousness of textured hair

CASE STUDIES: GEN Z-FOCUSED BEAUTY

Local sourcing, transparency and carbon footprint set to emerge

US-based clean beauty brand Kinship opts for community-led product development

US-based Topicals addresses chronic skin conditions while advocating inclusivity

Florasis draws from culture and uses digitally-native approach to win over Chinese Gen Z

Peacefull's values and ingredients resonate with Gen Z in the United Arab Emirates

US-based Glossier thrives among millennials, but struggles to pivot to Generation Z

Dr. Barbara Sturm branches out to Gen Z through microbiome skin care line

Brands popular among Gen Z focus on clean beauty claims while keeping prices accessible

DIGITAL AND RETAIL ENVIRONMENT

Gen Z leans into digitalisation, especially in creating beauty user-generated content

Virtual experiences key to Gen Z consumer journey, but physical world still dominates

Most beauty brands are not shy about experimenting online while a few remain sceptical

Social media, social commerce success essential to succeed in Gen Z beauty

A closer look: Livestreaming and social commerce drive Gen Z consumption in China

A closer look: How digital strategies of C-beauty brands resonate with Gen Z

Retailers must adapt to flexible and value-driven approaches when targeting Gen Z

Digital presence is key to attract Gen Z, regardless of developed or emerging beauty market

FUTURE OUTLOOK

Generation Z: Projections by market in population and share of population, 2022-2032

Key Takeaways

Understanding the Gen Z beauty consumer: Challenges and solutions

How to win with Gen Z: Prospects for mass beauty and personal care

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