



The Skinny on Skincare — Part II

There can be no denying the important and fun role skincare plays in the daily routine of beauty consumers. In part two of our three part, special Beauty By The Numbers™ Series on skincare we asked more than 4,600 beauty consumers to tell us their thoughts on skincare trends, big ideas for skincare innovations and future offerings, what types of skincare she buys (and why), what she thinks about generics, how facial skincare kits factor into her beauty routine, and much more.

Most Appealing Skincare Trend By Age

| Age | Gen Z (18 – 24) | Millennials (25 – 38) | Gen X (39 – 53) | Baby Boomer (54+) |
|-----|---------------------------------------|--|-------------------------------|-------------------------|
| #1 | Natural (72%) | Natural (63%) | Age specific (76%) | Age specific (84%) |
| #2 | Life proof (61%) | Life proof (58%) | Natural (61%) | Natural (58%) |
| #3 | Organic (59%) | Organic/ age specific/ local ingredients/ anti-pollution (55%) | Organic/ anti-pollution (55%) | Organic (50%) |
| #4 | Local ingredients/ personalized (55%) | Generic (54%) | Life Proof (53%) | Generic (49%) |
| #5 | Anti-pollution/ generic (54%) | Personalized (51%) | Skincare boosters (52%) | Skincare boosters (45%) |

Why Doctor Brands Appeal to Her

- 63% clinically tested
- 55% scientifically-proven to work
- 44% the products work for me
- 31% brand has strong customer following
- 30% brand is always innovating

Most Appealing Skincare Trends

- 64% age-specific skincare
- 63% natural skincare
- 54% organic, life proof, and anti-pollution skincare
- 52% formulated with local ingredients
- 51% generic skincare

Why Doctor Dispensed/ Professional Clinical Skincare Brands Appeal to Her

- 61% trust my doctor
- 50% they are clinically-tested
- 41% scientifically-proven to work
- 35% products work for me
- 24% believe the products are superior to retail doctor brands

Why She Uses Mass Skincare

- 83% products are affordable
- 73% they are easy to find/buy
- 47% the products work for me
- 18% brands have strong customer following



Why She Uses Luxury Skincare

- 69% the products work for me
- 53% the ingredients are superior
- 35% brands have a strong customer following
- 28% easy to find/buy



Why She Uses K-Beauty

- 62% the products work for me
- 44% believe K-beauty skincare offers better results
- 44% they are affordable
- 36% ingredients are superior
- 35% believe products are superior to skincare products developed elsewhere

Generic Skincare Is A Winner

68% buy generic/store brand facial skincare products

Why She Likes Generic Skincare

| Age | All | Gen Z (18 – 24) | Millennials (25 – 38) | Gen X (39 – 53) | Baby Boomer (54+) |
|--|-----|-----------------|-----------------------|-----------------|-------------------|
| Less expensive | 85% | 87% | 83% | 76% | 79% |
| Ingredients are the same | 44% | 38% | 42% | 47% | 54% |
| They work! | 35% | 39% | 35% | 36% | 29% |
| As effective as name brand products | 33% | 33% | 34% | 32% | 32% |
| I trust the store to make quality skincare | 17% | 18% | 16% | 19% | 16% |

Why She'd Try Generic Skincare

- 72% positive product reviews
- 54% friend/family recommendation
- 41% consumer or clinical claims (i.e. 95% saw a reduction in fine lines and wrinkles)
- 32% clinical claims (i.e. based on a clinical study...)

Why She Doesn't Use Generic Skincare

- 34% have in the past and they are poor quality
- 28% don't believe generics work as well as name brand
- 24% generics are lesser quality
- 23% name brand products are superior in quality
- 22% can't easily find product reviews/claims/benefits
- 21% Current branded products work
- 19% may contain harmful chemicals/ingredients



Skincare Kits Are A Hit

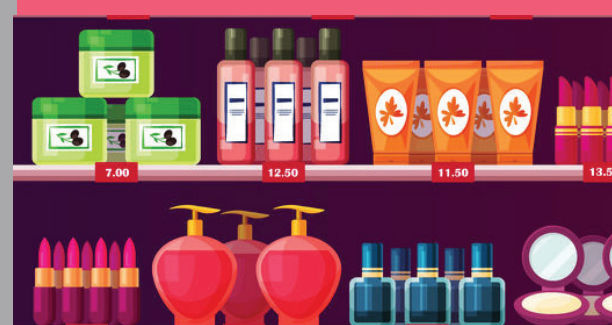
- 61% buy facial skincare products as a kit or set
- 55% would consider giving a skincare kit as a gift
- 75% would like to receive a skincare kit as a gift

Why She Loves Skincare Kits

- 76% convenient to buy as a kit
- 62% easy to understand how/when to use them
- 52% saves me money
- 46% best results come from products made to be used together
- 36% designed to address a specific need that I have

Retailers She Trusts For High Quality Generics

- 65% Target
- 44% Walmart
- 39% Walgreens/ CVS
- 31% Whole Foods
- 28% Trader Joe's



What Would Make Kits Attractive

| Age | All | Gen Z (18 – 24) | Millennials (25 – 38) | Gen X (39 – 53) | Baby Boomer (54+) |
|--|-----|-----------------|-----------------------|-----------------|-------------------|
| Address specific age concerns | 54% | 46% | 51% | 58% | 59% |
| Value priced | 77% | 80% | 77% | 76% | 79% |
| Proof that kit works better than single products | 53% | 55% | 53% | 51% | 53% |
| Label clearly explaining time to use kit | 33% | 38% | 34% | 31% | 31% |

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