

The Native American beauty consumer

November 2022

Statement of purpose

Native Americans are underrepresented in the beauty industry, but it is an important segment of the population to consider. This is a growing, multicultural cohort that is active in the beauty space.

In this analysis we will take a closer look at the Native American beauty consumer to see what she is buying and how she shops the beauty category through a holistic omni channel lens.





The Native American population

Native Americans households are a small, but diverse group



Total population

9.7M

3% of U.S. pop

64% identify as multiracial

25%

of population falls
between ages 18-34

33

Median age compared
to 39 total U.S.



23%

have college + degrees

\$57k

Median HH income



2.97

Average size of Native HH,
compared to 2.54 of total U.S.

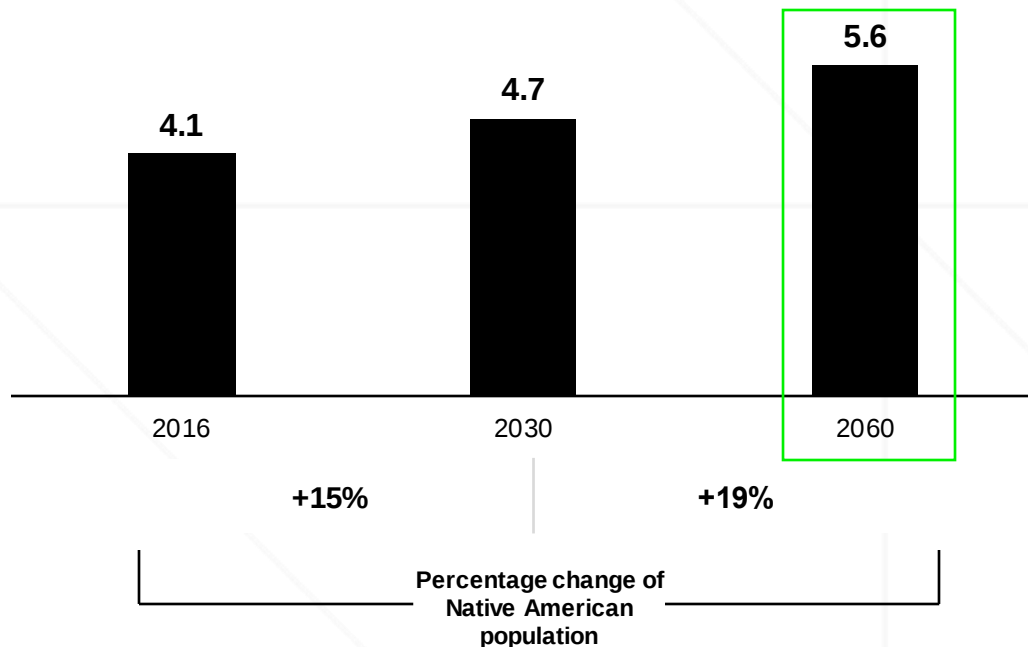
1.2x

more likely to be multilingual
than total population

Native American population is projected to grow by 38% over the next 46 years

Native American population alone* to reach 5.5 million by 2060

Projected Native population 2020 to 2060



The Native American population alone* will grow exponentially over the span of decades, adding to increasing BIPOC representation in the United States.

Source: <https://www.census.gov/content/dam/Census/library/publications/2020/demo/p25-1144.pdf>

*Data does not include projection of Native Americans that identify as more than one race

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Indigenous buying power is increasing

Indigenous buying power 2000-2018

Native American buying power reached \$115 billion in 2018. This is a 185% increase since 2000.

This is due to an increase in population of Native Americans and those who identify as multiracial Indigenous people. The increase in total consumer spending can also be attributed to a rise in American and Alaska native-owned businesses, which grew at 5x the national average.



+15%

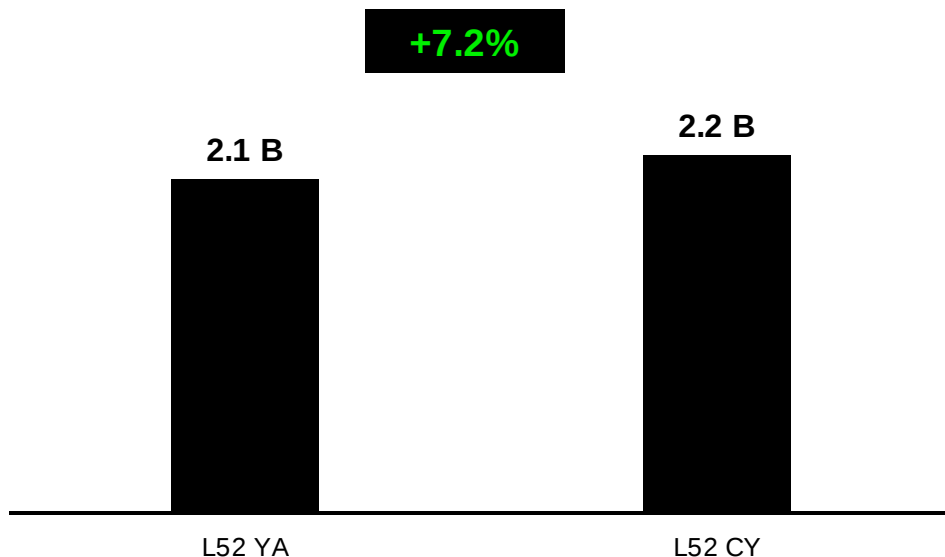
**Growth of Native
American-owned
businesses from
2007 to 2012**



Native Americans and beauty: A deep dive

Native American beauty dollar volume grew 7.2% since last year, under pacing total U.S. beauty growth of 8.6%

Dollar sales % chg vs YA



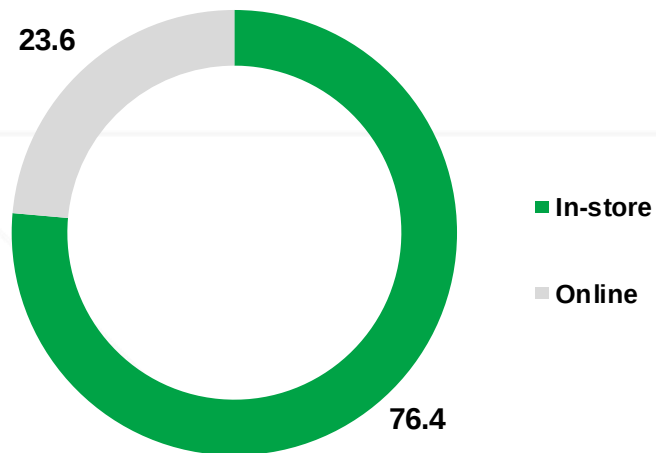
Native Americans make up 2.8% of beauty buyers, and spend 2.9% of the dollars

Native Americans spend more on beauty and personal care per year driven by more frequent trips

	Dollars per year	Dollars per trip	Trips per year
Total U.S.	\$337.70	\$14.93	22.6
	2% more	-0.04% less	2% more
Native American	\$344.70	\$14.88	23.2

Native Americans are more likely to shop in store

Native American beauty and personal care dollar share



	\$ % Chg	\$ shr index to total U.S.
In-store	+2%	107
Online	+27%	82

Native American channel share index to total U.S.

Under indexed

- Pure Play
- Drug
- Grocery
- Club

Over indexed

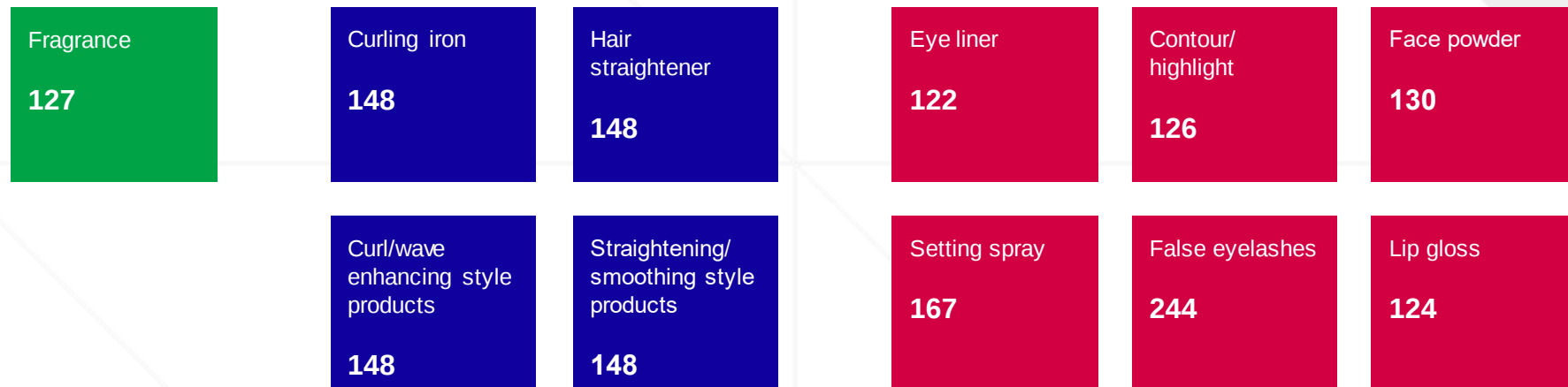
- Mass
- Beauty specialty
- Department store
- Dollar

There is opportunity where Native Americans are under indexing in facial skin care, hair removal, and sun care

Bath & shower 97\$ index Individual penetration: 79.9% Native American vs 82.0% Total U.S.	Cosmetics & nail 111\$ index Individual penetration: 76.4% Native American vs 77.1% Total U.S.	Deodorant 100\$ index Individual penetration: 63.2% Native American vs 66.2% Total U.S.
Facial skin care 88\$ index Individual penetration: 47.8% Native American vs 52.0% Total U.S.	Fragrance 127\$ index Individual penetration: 20.2% Native American vs 18.6% Total U.S.	Hair care 105\$ index Individual penetration: 83.8% Native American vs 84.2% Total U.S.
Hair removal 81\$ index Individual penetration: 55.0% Native American vs 58.1% Total U.S.	HBL 97\$ index Individual penetration: 57.6% Native American vs 57.0% Total U.S.	Sun care 72\$ index Individual penetration: 23.6% Native American vs 29.1% Total U.S.

Native Americans are more likely to spend their dollars in fragrance, hair care, and cosmetics

Over indexing categories by dollar share



Native Americans are over indexing with brands that are a variety of price points

Over indexing brands by dollar share

Hair care	Cosmetics
       	        

Supporting Native American owned brands often means supporting their local communities



**Cheekbone
Beauty**



Prados Beauty



**Blended Girl
Cosmetics**



Skwálwen



Ah-Shi



Niawen



Sister Sky



Sequoia



Satya



The Yukon Soaps Company

Indigenous owned beauty brands all have themes of:

- Sustainability
- Ethically sourced
- Clean ingredients
- Giving back to their community

Indigenous influencers are using their platforms to empower cultural expression and promote social causes



Khadija Red Thunder

Actress & Model

354K+ followers
on Instagram

Khadija Red Thunder says her **Chippewa Cree** heritage influenced her perception of beauty, "...my home was really about being beautiful and maintaining a healthy lifestyle."



Quannah Chasinghorse

Activist & Model

489K+ followers
on Instagram

The **Lakota** activist works to have her culture properly represented in mainstream industries with her initiatives to redefine beauty.



Trixie Mattel

*Drag Artist & Founder of **Trixie Cosmetics***

3M+ followers
on Instagram

Inspired by their **Ojibwe** upbringing, Trixie uses cosmetics as a means for visual and cultural expression.



Tia Wood

Activist & Content Creator

331k+ followers
on Instagram

With over 1.5 million TikTok followers, Tia educates her audience by featuring **Cree** and **Salish** art into her content.

Key takeaways

Native Americans are a valuable beauty consumer

The Native American population in the U.S. is growing and spending \$2.2B on beauty per year. They are spending more per buyer each year compared to the average buyer and are active in the fragrance, hair care, and cosmetic categories.

Native American owned brands are often reflective of cultural values

Many of the top Native American owned brands are created through sustainable and ethical methods, mirroring trends seen in the beauty category today. These brands reflect the traditional values of their indigenous founders by using sustainable packaging and clean ingredients as well as philanthropic efforts by giving back to their communities.



Thank you.

For more information visit our insights hub at:
niq.com/beauty