

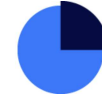


The Beauty E-commerce Landscape

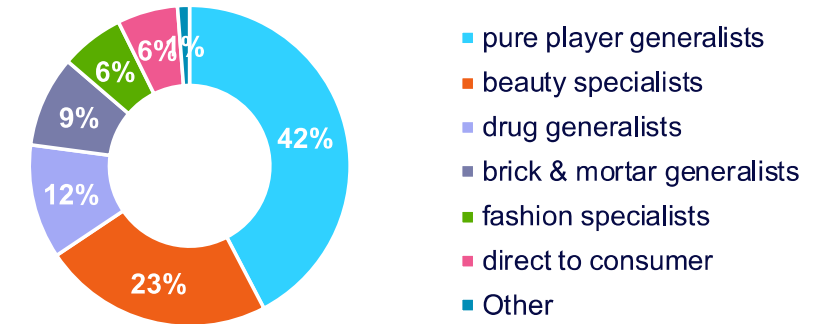


Top 10 E-commerce beauty merchants

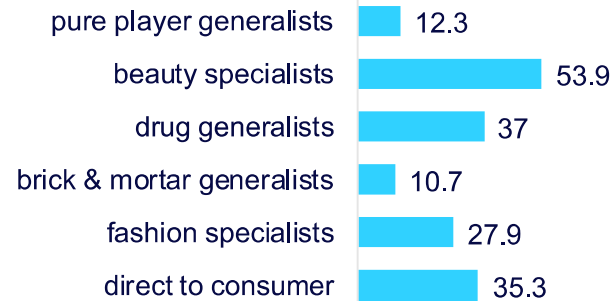
1. **amazon**
2. **LOOKFANTASTIC**
3. **Boots**
4. **ebay**
5. **ASOS**
6. **cult BEAUTY**
7. **JOHN LEWIS & PARTNERS**
8. **SEPHORA**
9. **BEAUTY PIE™**
10. **TikTok**



Value share of E-commerce beauty merchant types



Average order size £

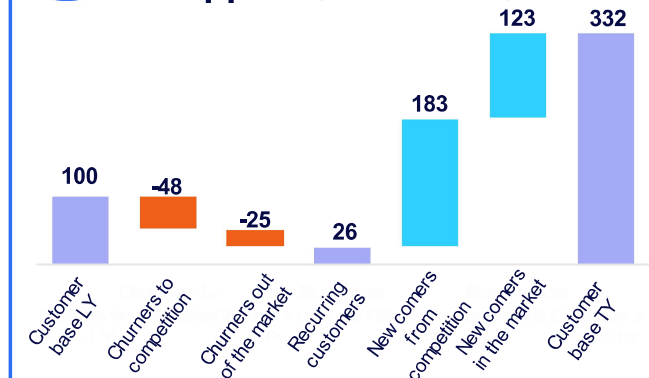


Shopper age

	pure player generalists	beauty specialists	drug generalists	brick & mortar generalists	fashion specialists	direct to consumer	Other
Market	42.3%	23.2%	11.5%	9.2%	6.4%	6.1%	1.3%
Gen. B – [-1959]	55.5%	11.4%	14.9%	10.5%	2.6%	3.9%	1.2%
Gen. X – [1960-1979]	44.7%	20.3%	12.7%	11.1%	5.0%	5.2%	1.0%
Gen. Y – [1980-1994]	39.6%	25.8%	10.6%	9.1%	7.0%	6.4%	1.5%
Gen. Z – [1995-]	41.5%	24.4%	10.9%	6.0%	8.2%	7.4%	1.6%



Evolution of TikTok beauty shoppers (YTD 2023 vs YAGO)



Source : Foxintelligence by NIQ, UK calibrated Beauty E-commerce read - MAT data to 9th April 2023