



Beauty Evolves: Are You Ready?

Highlights from the
CEW State of Beauty 2024

NIQ



The Full View™

NIQ's Full Beauty Promise

At NielsenIQ's Beauty Vertical, our mission is to empower manufacturers and retailers across the beauty landscape with the most comprehensive insights and analytics - all grounded in the industry's most trusted data.

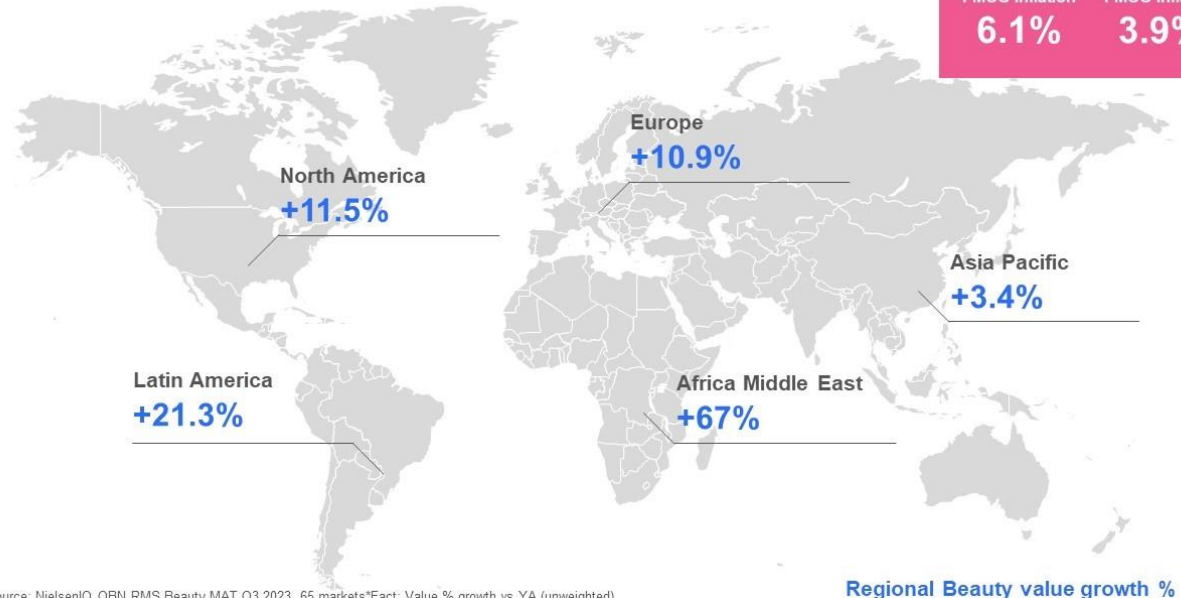
We deliver a Full View of the beauty consumer – wherever they shop, enabling strategic decision-making with confidence.

With our unique offerings and beauty expertise, we help our clients act on the trends and consumer behaviors that will impact their business today and in the future.

A global success story

Globally, beauty remains a massive growth category, with strong sales across regions

A global success story, beauty continues to grow



Local nuance drives unique trends



US

- Celebrity brands
- Beauty Dupes
- Scalp Health



Brazil

- Curly/coily hair care
- Ingredient-based beauty
- Multifunctional with focus on anti-oily



UK

- Menopausal beauty
- K Beauty
- "Skinification"



India

- Ayurvedic ingredients
- Minimalism
- Male Beauty



China

- Local brands
- Natural health ingredients
- High tech beauty



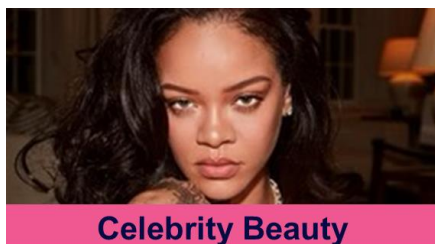
Indonesia

- Halal ingredients
- Custom made solutions
- UV Skincare

Source: NielsenIQ RMS Beauty MAT Q3 2023, 65 markets

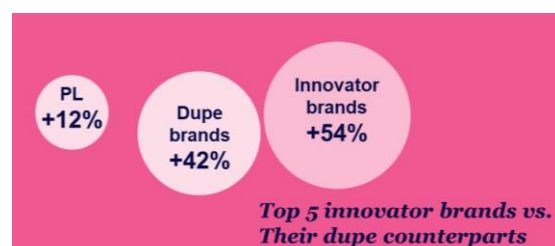
*Fact: Value % growth vs YA (unweighted)

Consumers are open to new products, experiences, and brand options



Dupes are not just copies

They transcend the notion of mere imitations; they emerge as powerful catalysts driving category growth



Driving new consumers to niche categories

98%

of shoppers stated that discovering dupes has expanded their regular beauty routine.

Setting spray +1.3pts - Primer +2.1pts - Bronzer +0.5pts

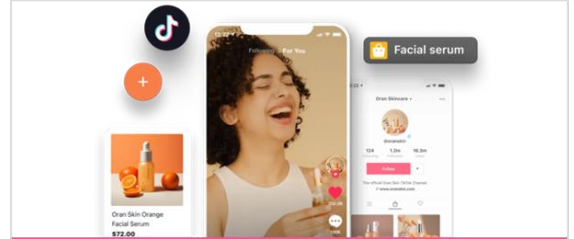
Source: 1. Dupeshop survey 2023 2. NielsenIQ Omnishopper Panel Total US Latest 52 weeks ending 12/2/2023 vs YA. Penetration point change

The evolution in where consumers shop

Consumers no longer adhere to the conventional modes of shopping; instead, they embrace a dynamic mix of platforms.



Retail Consolidation



TikTok Shop



Amazon's Rise



Future of DTC

Amazon - the big winner of 2023

In an era where consumers explore a myriad of shopping channels, Amazon stands out, continually distancing itself from the competition.

Amazon the big winner of 2023

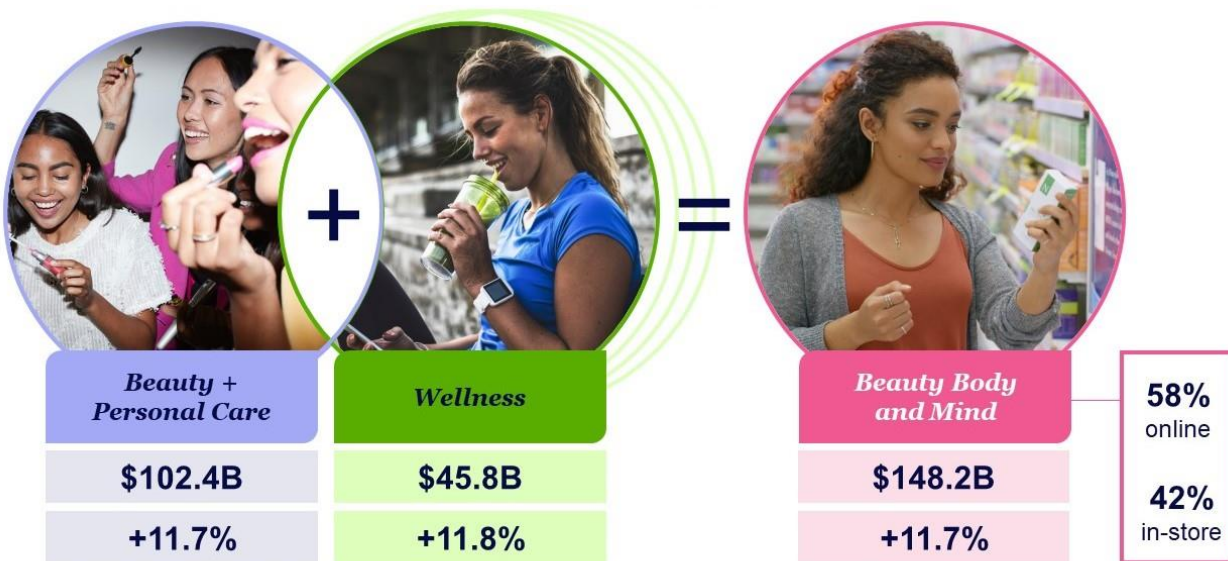


Note: Size of bubble denotes \$ size of channel

Source: NielsenIQ Omnishopper Panel, Total US Latest 52 weeks ending 12/02/2023

The consumer view of beauty is expanding

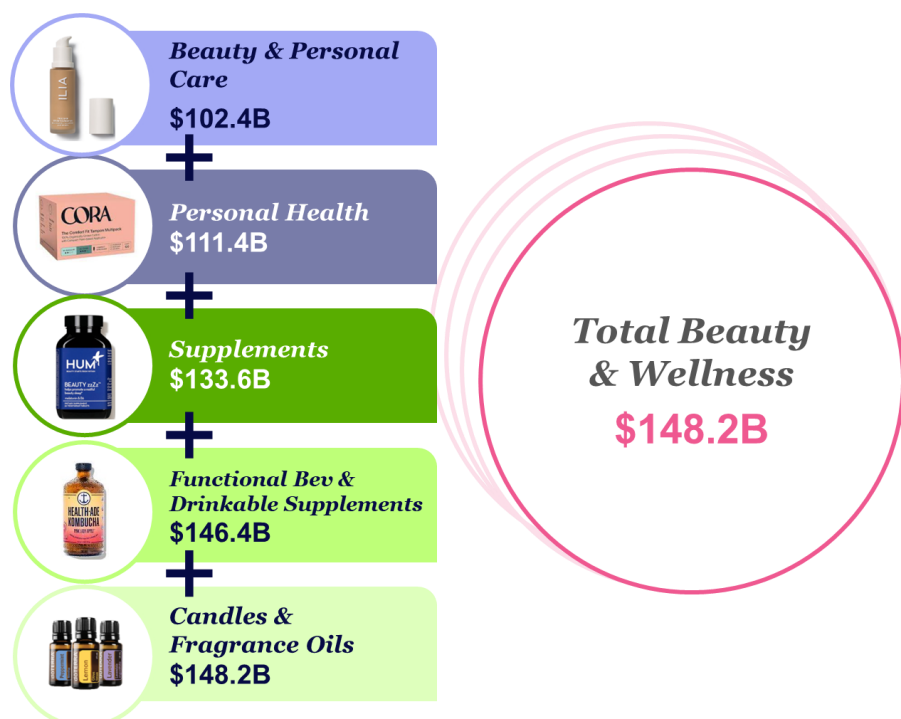
Consumers are increasingly considering beauty not only in terms of surface appearance but also in relation to how it makes them feel.



Source: NielsenIQ Omnishopper Panel Total US Latest 52 weeks ending 12/30/2023 vs YA. Dollar percent change Beauty and Wellness is Bath & Shower, Cosmetics & Nail, Deodorant, Facial Skin Care, Fragrance, Hair Care, Hair Removal, HBL, Sun Care, Beverages, Health /Nutrition Shakes/Powders, Supplements, Candles + Fragrance Oils, Toothpaste + Whitening Kits, Lubricants + Massagers, and Fem Wipes, Pads, Liners, + Tampons

Beauty + Wellness expands the market by 45%

Wellness is driving the expansion of the beauty category into the beauty + wellness market, merging closely related categories influenced significantly by ingredients and benefits.



Source: NielsenIQ Omnishopper Panel Total US Latest 52 weeks ending 12/30/2023

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CEW 2024 State of Beauty Special Offer

NIQ Beauty is pleased to share our CEW Insight Deals!

Take advantage of our special discounts on a selection of hot topics & key trend reports.

All pricing is valid through February 29, 2024!

TikTok Shop Data

Early adopter package includes:

- FY23 TikTok Shop Sales Data (launch to year end)
- Demographic Profiles of TikTok Beauty Buyer + Full Q1 2024 update (delivered in April '24)

CEW Offer:
\$10k includes 2 free reports

Click [here](#) to order.

Beauty Inner Circle BOGO

Purchase two reports for the price of one!

Available reports include The Intersection of Beauty & Wellness, Celebrity Beauty Brands, Black Beauty Consumer, Beauty Innovation, Sun Care Category Overview and more.

CEW Offer:
\$4,750 for two reports (value \$9,500)

Click [here](#) to order.

Act now! These deals won't last long!

Contact your NIQ partner for more details

How NIQ can help you

Solutions for the Beauty industry



True Omni Beauty Consumer Behavior

Understand evolving **consumer habits** to develop **data-backed plans** and **tailor-made strategies** unique to your customers wherever they shop.



Innovate to Meet the Ever-changing Consumer Demand

With **innovation**, **renovation**, **strategy**, and go-to-market **optimization**, NIQ BASES is your partner for success.



Revenue Management Optimization

Ensure the right **pricing** and **promotion** strategy with more **granular** data and more **accurate** recommendations.



Uncover Blind Spots and Stay Ahead of Emerging Trends

NIQ measurement is the global industry standard for **quality data** on **product movement**, **market share**, distribution, price and other **market-sensitive** information in 90+ countries across digital platforms.



Win the Digital Shelf

Improve sales **performance** and retailer **collaboration** through **predictive** analytics from cutting-edge **profitability**, assortment, and supply chain AI solutions.



The Power of Product Attribution

Measure the market through the lens of **claims**, **certifications**, and ingredient-level product **characteristics** for **insight** into what's important to **consumers**.

At your service

Meet the team

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About NIQ

NIQ, the world's leading consumer intelligence company, reveals new pathways to growth for retailers and consumer goods manufacturers. With operations in more than 100 countries, NIQ delivers the most complete and clear understanding of consumer buying behavior through an advanced business intelligence platform with integrated predictive analytics. NIQ delivers the Full View.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit [NIQ.com](https://www.niq.com)