

GenX Factor!

Unlocking the global beauty market's best kept secret

Brought to you by NIQ, SPATE & World Data Lab



Your Presenters Today

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SPATE

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Lead*

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 **WORLD DATA LAB**

*VP of
Product, Tech
& Insights*

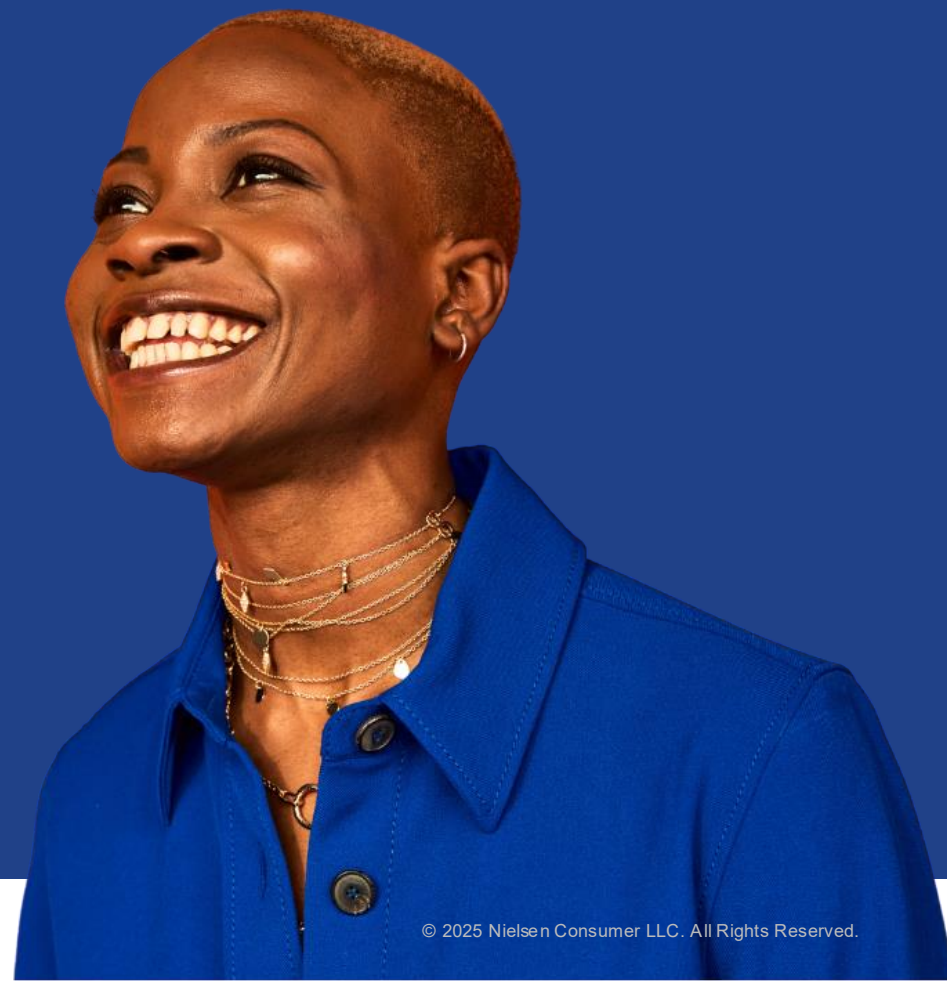
Gen X – A key part of the *full* generational puzzle

Read the full report to understand how each age demographic engages with beauty



The 2034 Global Beauty Market

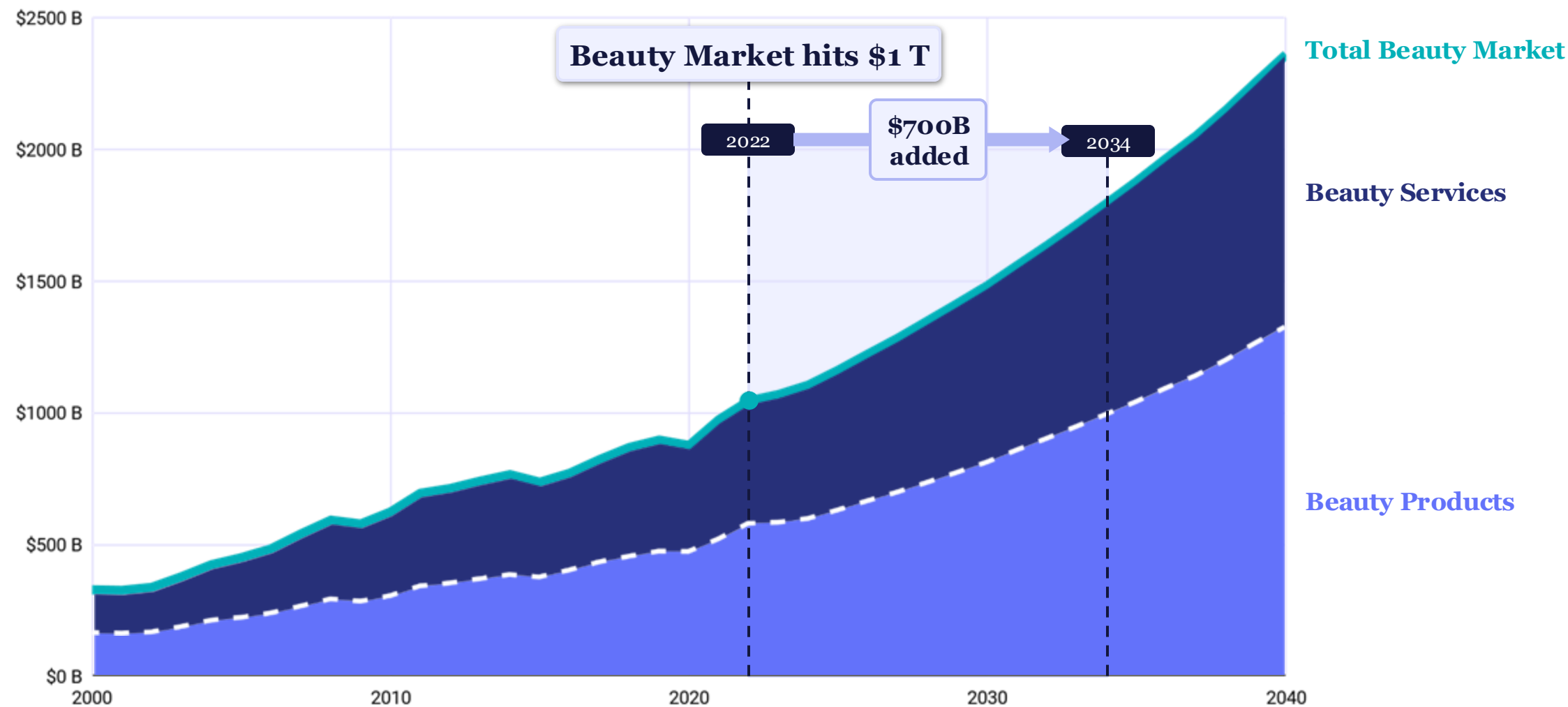
Charting the next 10 years of beauty



Beauty's Spending Growth Opportunity Breaks the Trillion-Dollar Threshold

Nominal USD

Over the next 10 years a further \$700B of spending will be added across services and products

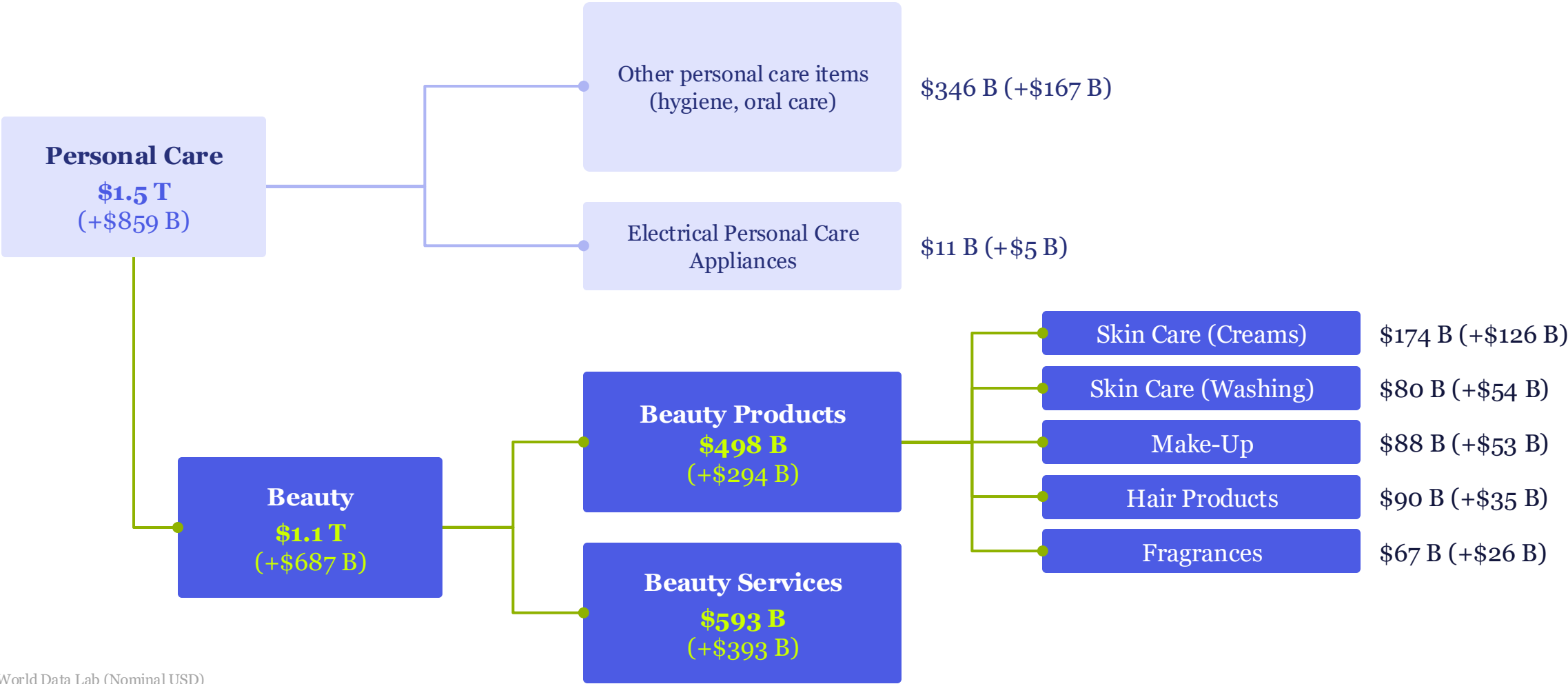


Source: World Data Lab (Nominal USD)

The Full Picture Of The Beauty Market Landscape Growth

Beauty’s expansive and growing market encompasses both products and services

Beauty Spending Projections (2024)



Source: World Data Lab (Nominal USD)

Decomposing 2024 and 2025 Beauty Spending Growth

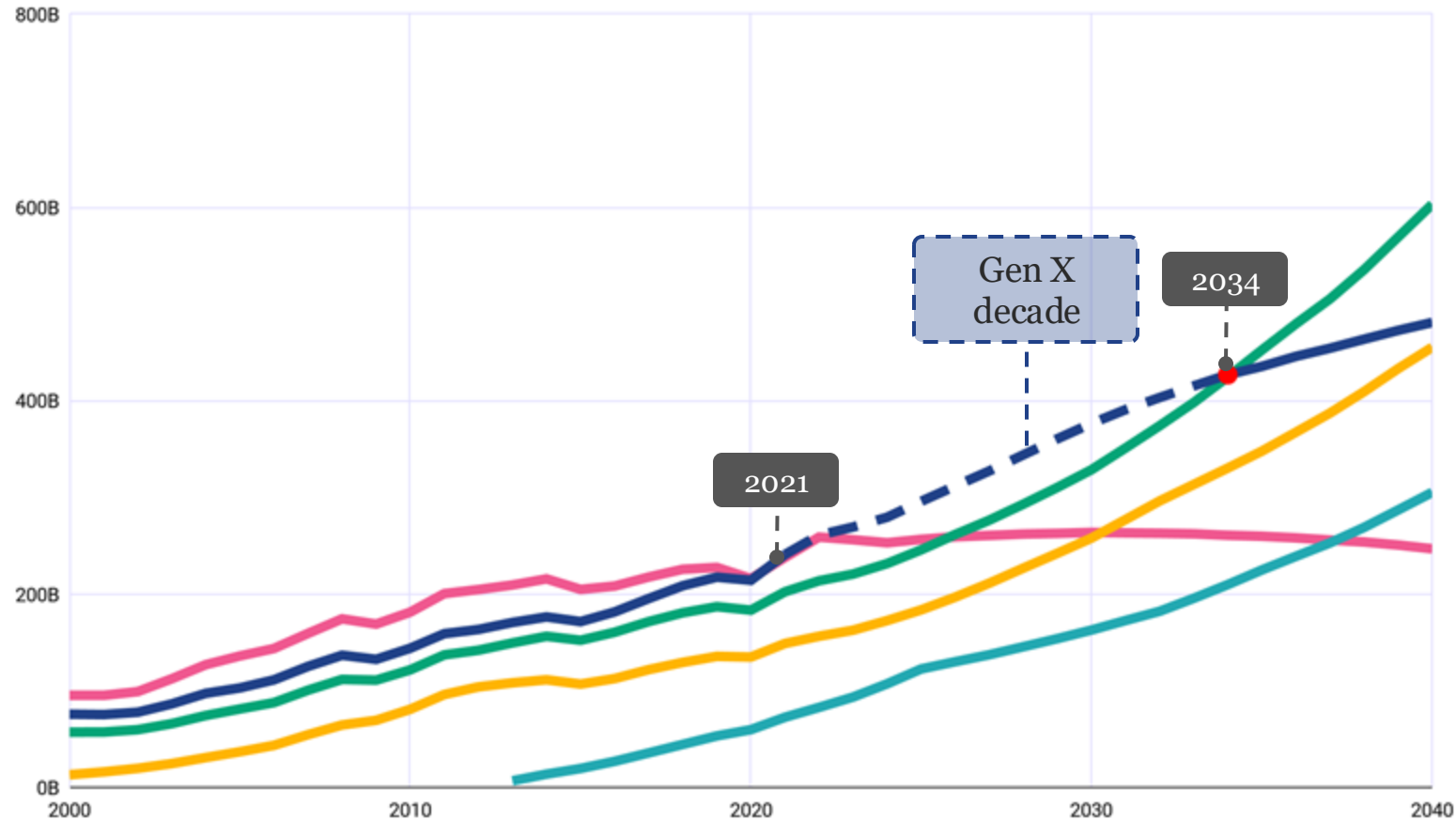


	2024	2025
Beauty Growth	+\$51B	\$56B ↑
Inflation	56.7%	51.9% ↓
Income Effect	26.6%	29.9% ↑
New Consumers	16.7%	18.1% ↑

Beauty's Decade Of Gen X

Gen X are beauty's most important spenders and will continue to be so until 2034 when they will spend \$430Bs on Beauty

Beauty Expenditure (in billions) by Generation Overtime



Generation

- Baby Boomers (1946-1964)
- Gen-X (1965-1980)
- Millennials (1981-1996)
- Gen-Z (1997-2012)
- Alpha (2013-2025)

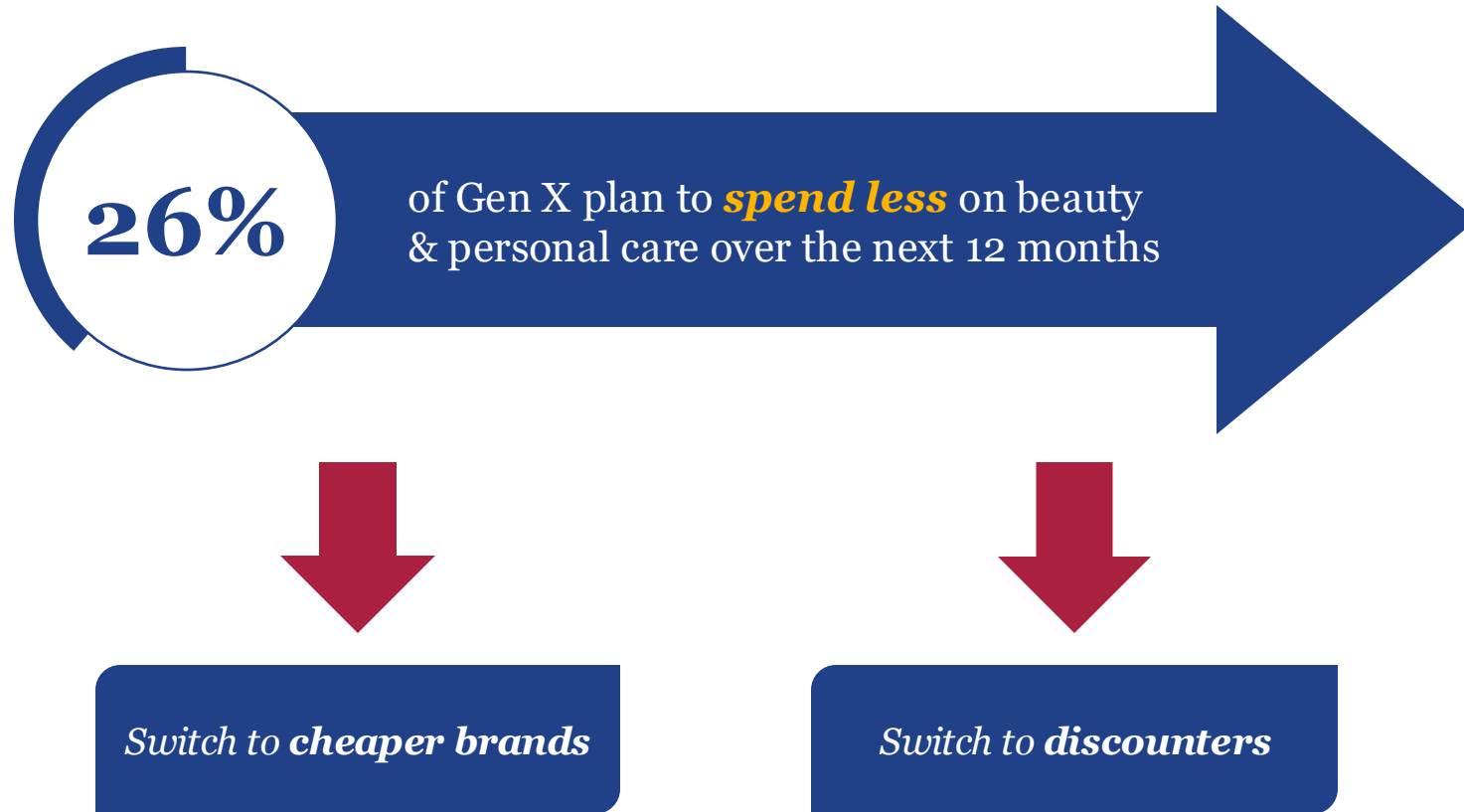
Myth-busting Gen X

To reignite Gen X's love of beauty, understand who they are and what they want



Gen X's Excitement For Beauty Needs Reinvigoration

There is a lack of enthusiasm for beauty amongst Gen X consumers as concentration focuses on the younger generations
– reignite Gen X's beauty passions to unlock their spending power



Source: NielsenIQ Mid Year Consumer Outlook

Gen X lead varied and active lives as much as any generation

Beyond the stereotypes, Gen X are a cohort of contrasts & complexities

Gen X KPIs (US) 

75%

Of Gen X beauty buyers don't have children in the household

37%

Of Gen X feel *younger* than their age

47%

Regularly exercise / play sports
(*more than Gen Z*)



Source: NIQ Consumer Life 2024 (US)

NielsenIQ



WORLD DATA LAB

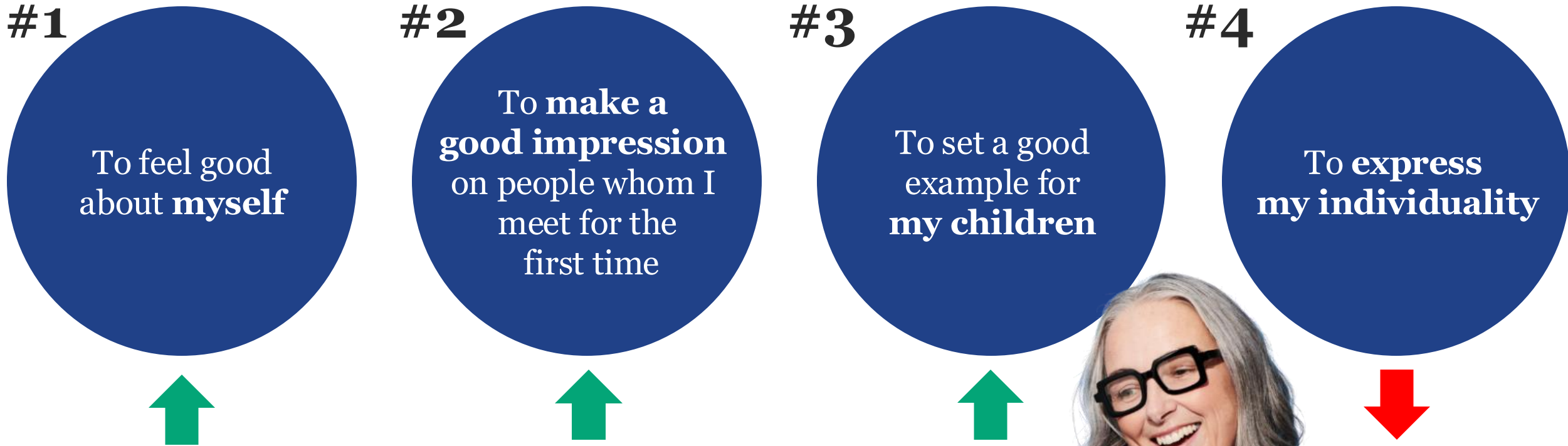
SPATE

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Gen X's Beauty Routines Are About *Feeling Good*

Beauty for Gen X is rooted in self-care, with routines that prioritize personal well-being over external expectations

Why I try to look my best – Gen X - Major reasons



Source: NielsenIQ Consumer Life 2024 | Arrow indicates higher or lower % vs total generations

Is anti-aging at its expiry date?

Consumers are no longer just looking for “anti-age” as a benefit – looking for specific and longevity focused results instead



Only 19% say these needs are met by most existing brands



Source: NIQ Consumer Survey 2024 – Q: For Beauty & Cosmetics, how important are the following benefits or trends for you as a consumer? Anti-aging
Singapore, Malaysia, Indonesia, Philippines, Vietnam, Thailand, Taiwan, Hong Kong, China, Japan, South Korea, Australia, New Zealand, India
NIQ Consumer Panel – France (Gen X), Great Britain (Age 45-54), Thailand (Age 45-55) – MAT Sept 2024
Source: NielsenIQ Product Insider Trending Attributes 6 months through April 2024



Gen X's channel choices are dynamic and modern

A preference for convenient locations and wide assortments leads Gen X to buying beauty in all-in-one destinations

Convenience

Price

Loyalty

Assortment

Ecommerce

Gen X penetration over indexed in **86%** of markets Analyzed (beauty)

Higher share of beauty with Gen X in 8 / 10 markets analyzed (EU)

amazon

Higher share of cosmetics with Gen X in 10 / 10 markets analyzed (EU)

TEMU



Source: NIQ Consumer Survey APAC 2024 | Which factors do you consider important when choosing where to shop? Gen X - Singapore, Malaysia, Indonesia, Philippines, Vietnam, Thailand, Taiwan, Hong Kong, China, Japan, South Korea, Australia, New Zealand, India | NIQ Consumer Panel Data: US, Mexico, Brazil, UK, France, Germany, Italy, Spain, Indonesia, Thailand, Australia, South Africa - MAT July 2024 – Total Beauty (Cosmetics, Fragrances, Hair Care, Skin Care)
Image source: Amazon, TEMU

Gen X are active and engaged on social media

TikTok's takeover as a beauty powerhouse doesn't have an age limit

35%

of Gen X are likely to **search social media** (e.g. TikTok) for product information *before* **a traditional search engine** (e.g. Google)

38%

of Gen X use social media as their **primary source to learn about new products and services**



Source: NIQ Mid Year Consumer Outlook 2024

Getting **ahead** of the trends

*Uncovering Gen X's needs with the latest trends
Google and TikTok trends*



3.5B Total
Gen X
Related
Beauty Views

Makeup - 53.0% ←

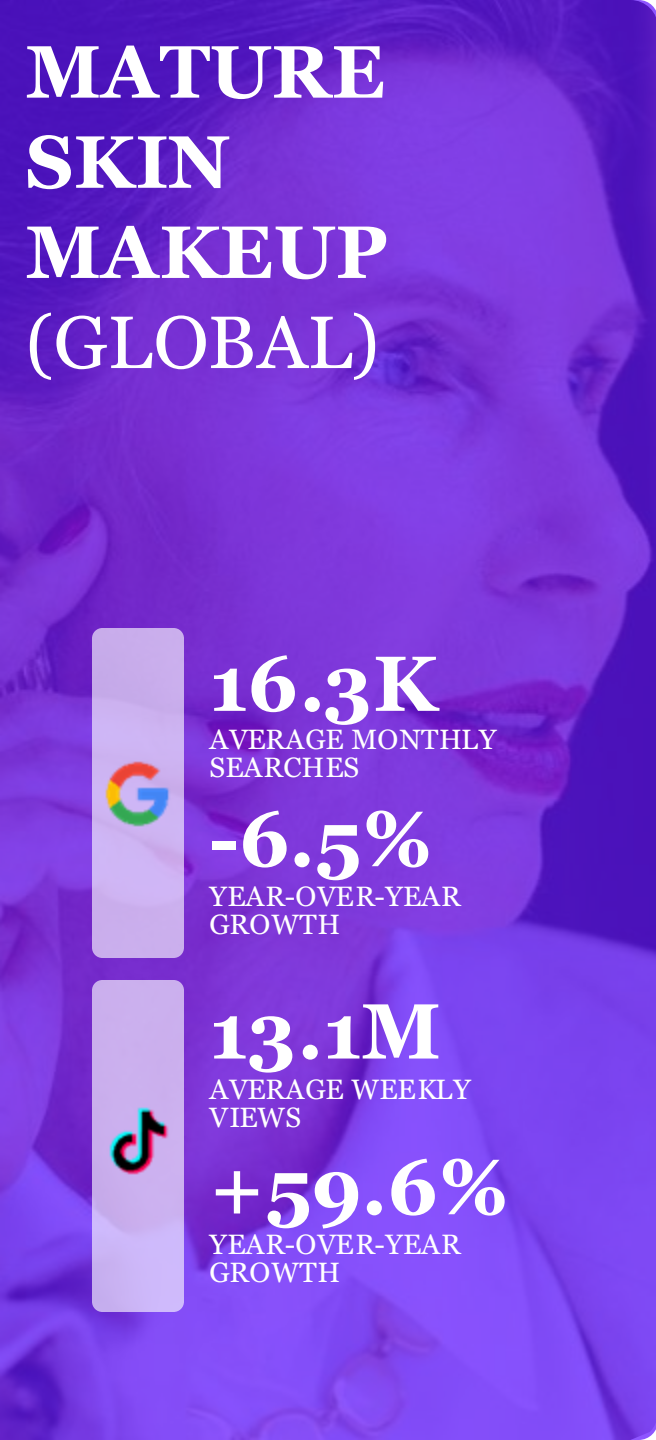
Skincare - 27.6%

Hair - 1.1%.



hashtag	views ↓	yoy
#skincareover40	7.4M	121.6%
#makeupover40	6.9M	75.1%
#over40makeup	2.3M	21.0%
#skincareover50	2.1M	55.2%
#beautyover40	1.6M	85.8%
#over50makeup	1.3M	87.4%
#makeupover50	1.1M	55.4%
#over40skincare	948.0K	-4.1%
#over50beauty	682.8K	6.5%
#over40beauty	532.0K	106.4%

Data Source: Global TikTok October 20, 2024; Top hashtags with available historical growth



MATURE SKIN MAKEUP (GLOBAL)



16.3K

AVERAGE MONTHLY
SEARCHES

-6.5%

YEAR-OVER-YEAR
GROWTH



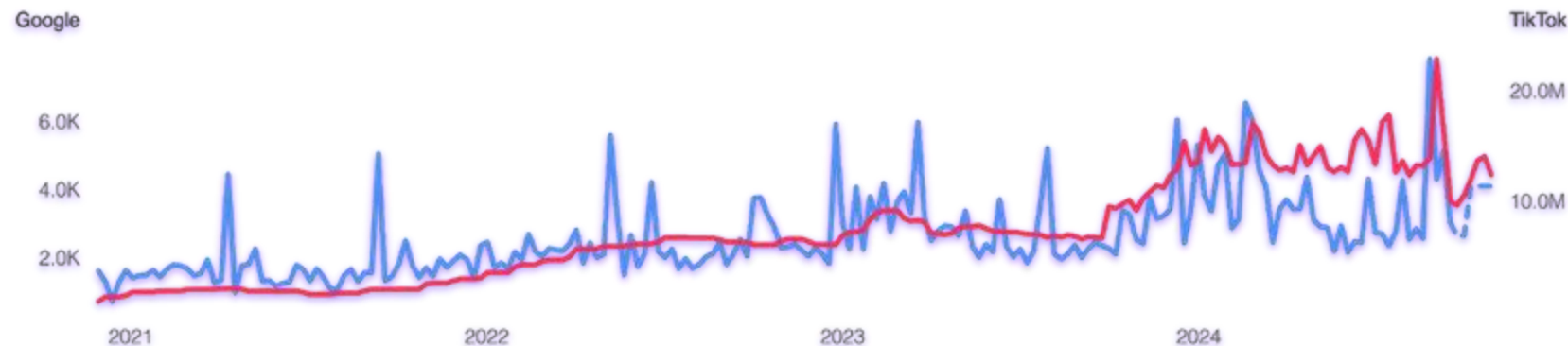
13.1M

AVERAGE WEEKLY
VIEWS

+59.6%

YEAR-OVER-YEAR
GROWTH

Google (Global) TikTok (Global)



Top Search Queries

best makeup for mature skin

makeup for mature skin

mature skin makeup

good makeup for mature skin

makeup for mature skin over 60

best drugstore makeup for mature skin

best makeup for mature skin drugstore

what is the best makeup for mature skin

In the past three years, awareness of makeup routines and products for mature skin has grown. While Google searches on this topic have recently declined globally, TikTok conversations continue to rise.

Top search queries reveal consumer goals, from seeking age-specific makeup to affordable drugstore options.

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Source: Global Search from Oct 2023 to Sept 2024 vs. Oct 2022 to Sept 2023; Global TikTok ending October 27, 2024

MATURE SKIN MAKEUP (GLOBAL)



16.3K
AVERAGE MONTHLY
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-6.5%
YEAR-OVER-YEAR
GROWTH



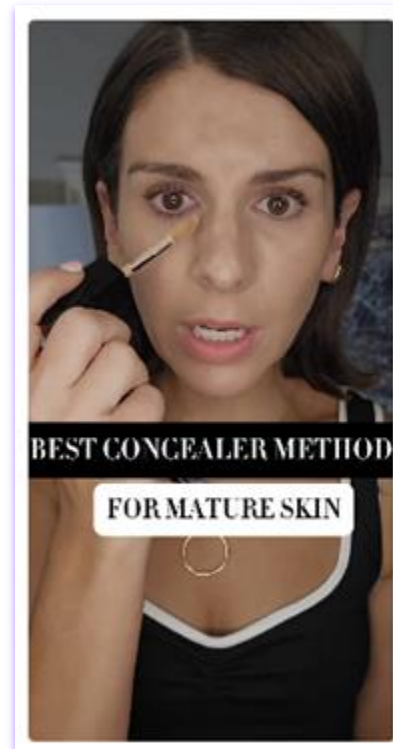
13.1M
AVERAGE WEEKLY
VIEWS

+59.6%
YEAR-OVER-YEAR
GROWTH

Spate explores the top **concern** hashtags viewed alongside Mature Skin Makeup on TikTok:



#wrinkles:
318.4K views
[@sherri1223](#)



#undereyecircles:
191.2K views
[@katealbertmua](#)



#hoodedeyes:
155.4K views
[@jaderainbeauty](#)

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MATURE SKIN MAKEUP (GLOBAL)



16.3K

AVERAGE MONTHLY
SEARCHES

-6.5%

YEAR-OVER-YEAR
GROWTH



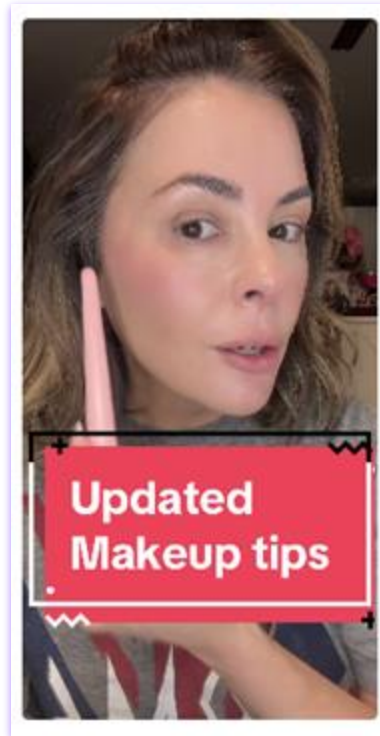
13.1M

AVERAGE WEEKLY
VIEWS

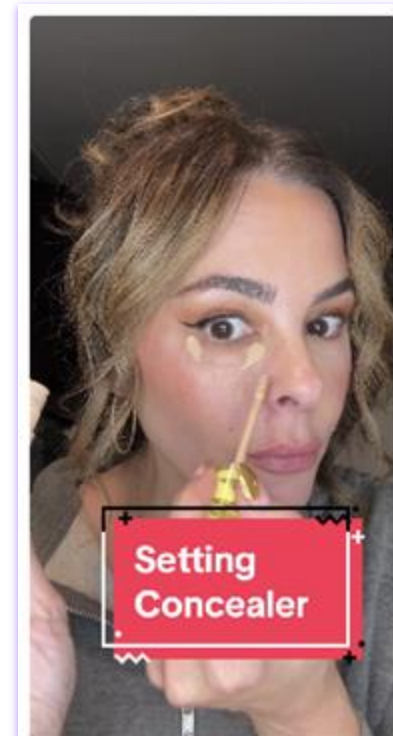
+59.6%

YEAR-OVER-YEAR
GROWTH

Spate explores the top **product format** hashtags viewed alongside Mature Skin Makeup on TikTok:



#blush:
357.7K views
[@ericataylor2347](#)



#concealer:
286.6K views
[@ericataylor2347](#)



#eyeshadow:
268.7K views
[@kimlightupyourface](#)

SPATE

LAURA GELLER (GLOBAL)



1.2M

AVERAGE MONTHLY
SEARCHES

+11.8%

YEAR-OVER-YEAR
GROWTH



853.3K

AVERAGE WEEKLY
VIEWS

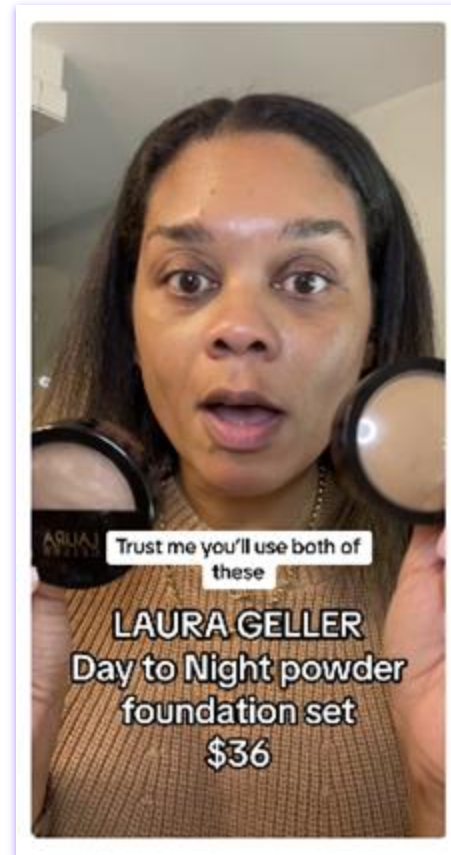
+145.2%

YEAR-OVER-YEAR
GROWTH



@stk1979

Shop



@stk1979

Shop

The hashtags **#matureskin**, **#over40makeup**, and **#over40** are the most viewed among demographics, highlighting the brand's strong appeal to Gen X and older audiences.

64.0% of the views of Laura Geller are from **TikTok Shop** content.

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NUTRAFOL (GLOBAL)



1.3M
AVERAGE MONTHLY
SEARCHES

+11.1%
YEAR-OVER-YEAR
GROWTH



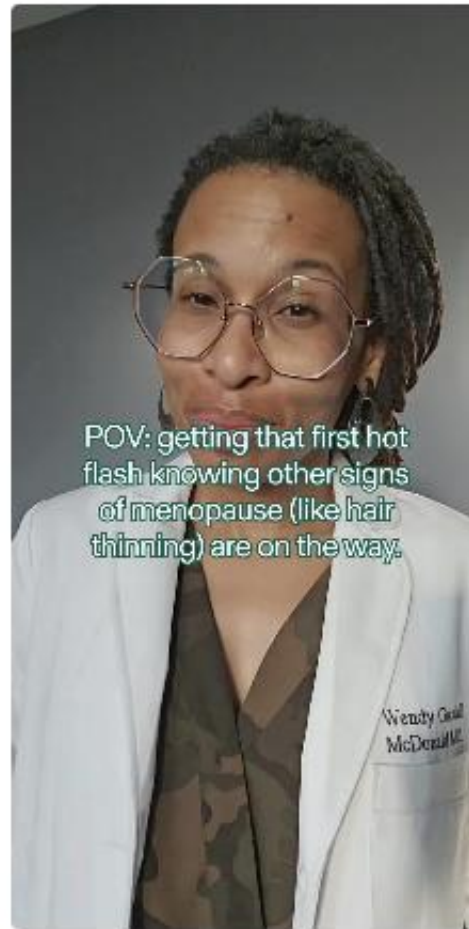
4.0M
AVERAGE WEEKLY
VIEWS

+30.7%
YEAR-OVER-YEAR
GROWTH



@dreverywoman

Paid



@dreverywoman

Paid

#postmenopause,
#menopause, and
#perimenopause are the
top-viewed related hashtags
alongside Nutrafol, indicating
the growing attention towards
hair loss concerns among a
mature female audience.

*Views are driven by a paid
collaboration between
Nutrafol and
@dreverywoman, an
OBGYN who creates
content centered around
female health.*

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Categories Require Strategies

*Diving into the category nuances of Gen X's
beauty buying patterns*

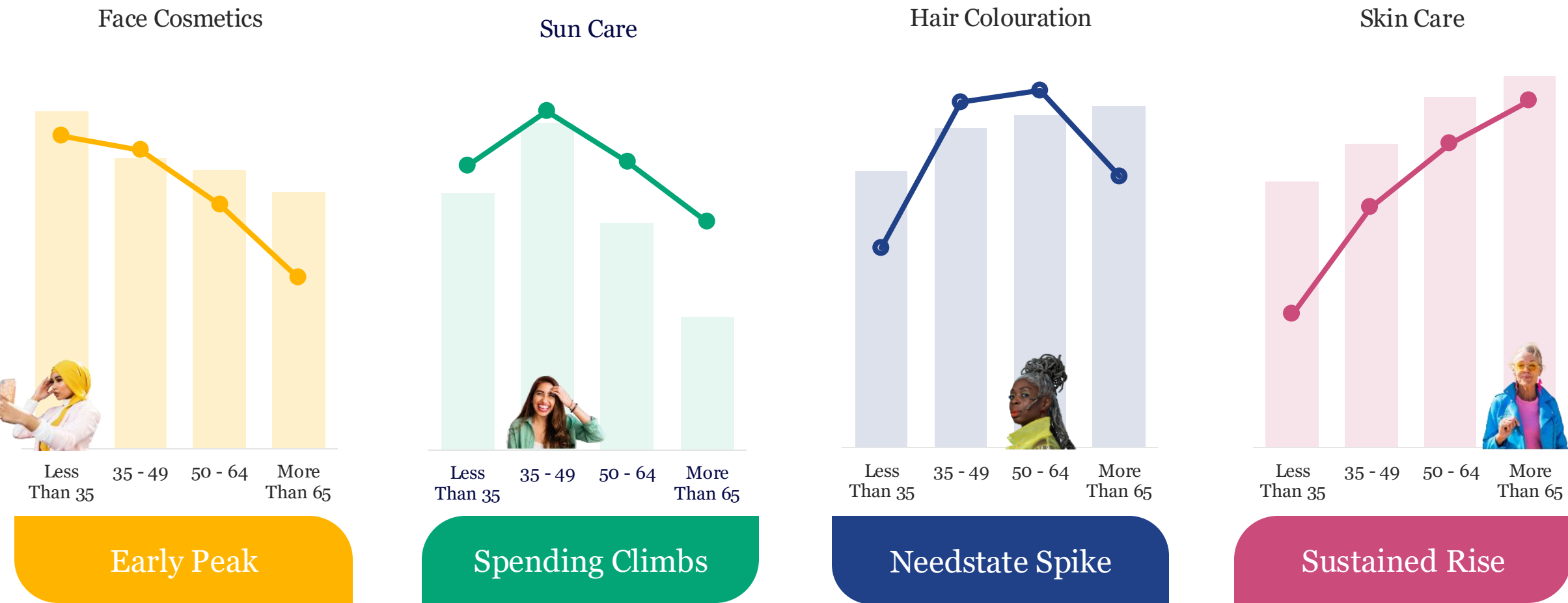


Navigate The Varied Generational Journeys Of Beauty Categories

Age-related changes in needs, wealth and motivations drive evolutions in penetration and spending



EU6 Penetration & Spend per Buyer - MAT Q2 2024



Source: NIQ Consumer Panel Data – MAT Q2 2024 – EU6 (Great Britain, France, Spain, Italy, Germany, Portugal)

Buyer recruitment is still on the cards

Prioritize trade up European Gen X in saturated hair care categories - makeup demonstrates the most potential to recruit buyers

Personalize & Premiumize

Expand routines

Grow Penetration

Shampoo & Conditioner

Hair Styling

Fragrances



Skin Care



Sun Care

Makeup



Source: NIQ Consumer Panel Data – MAT Q2 2024 – EU6 (Great Britain, France, Spain, Italy, Germany, Portugal) – Age 50-64

Mapping Gen X's Future Growth Path

Pinpoint Gen X's future spending hotspots



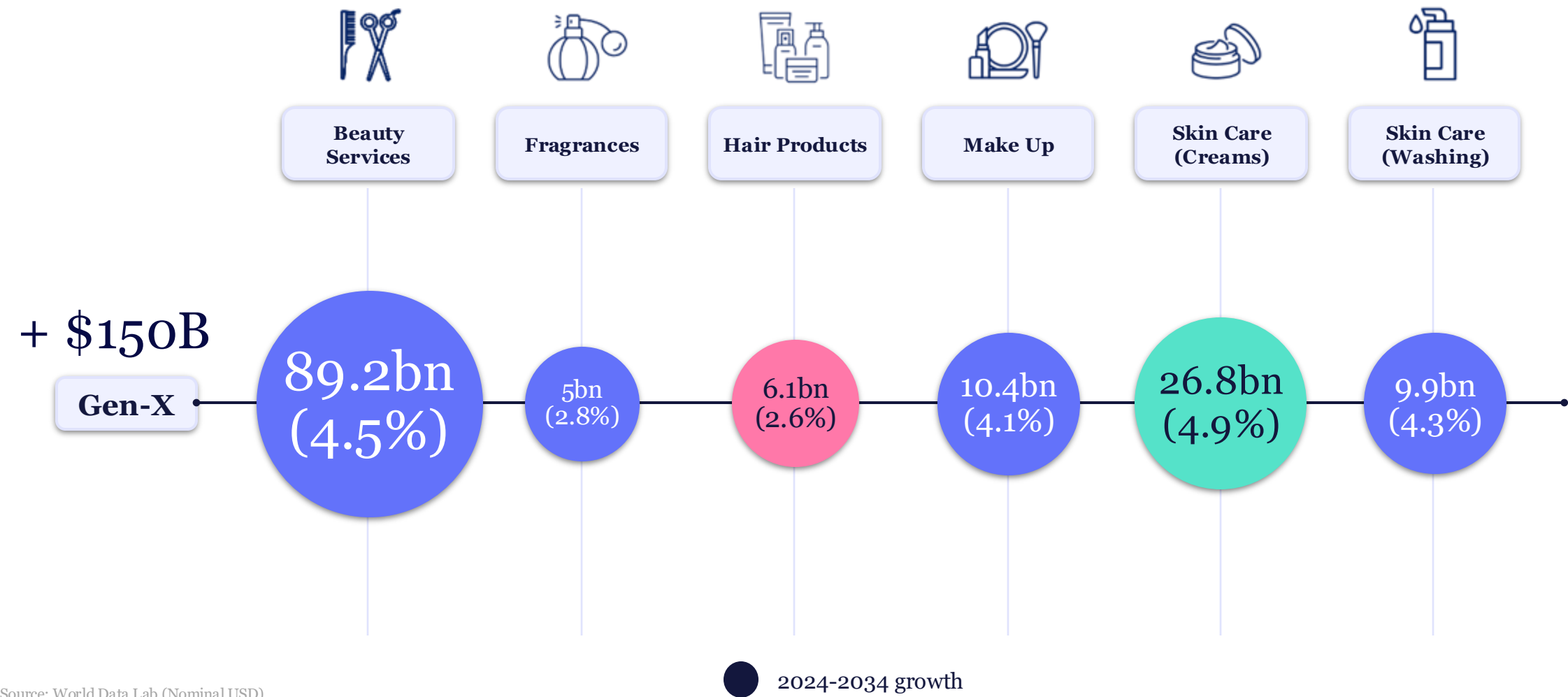
Gen X's Category Growth

Gen X

Nominal USD

Gen X is a quarter trillion-dollar business, but category growth is uneven

Category growth 2024-2034 and CAGR

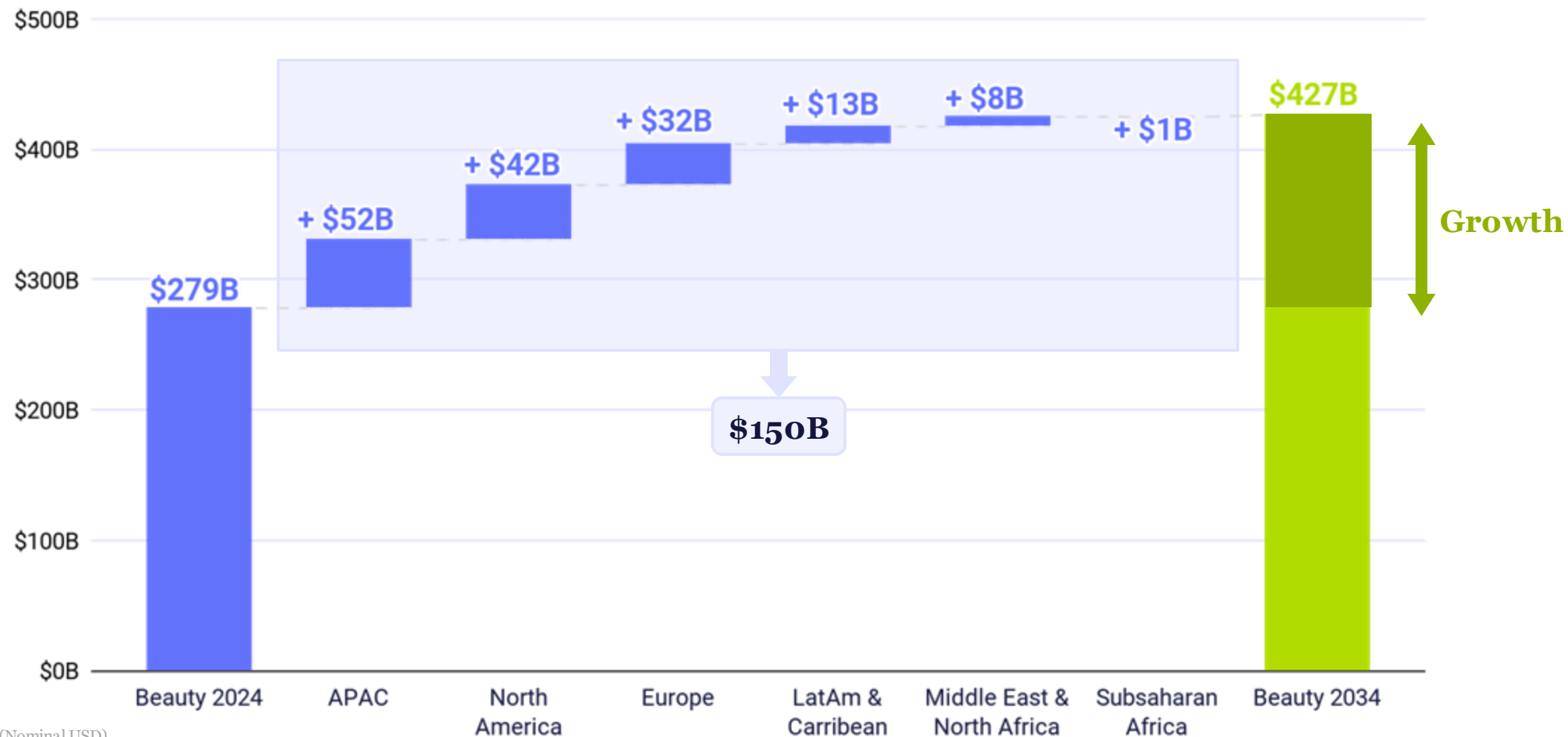


Source: World Data Lab (Nominal USD)

Gen X's Geographic Growth

APAC and North America will generate over half of the beauty growth for Gen-Xers in the next 10 years

Gen X Beauty Spending Projections by Regions

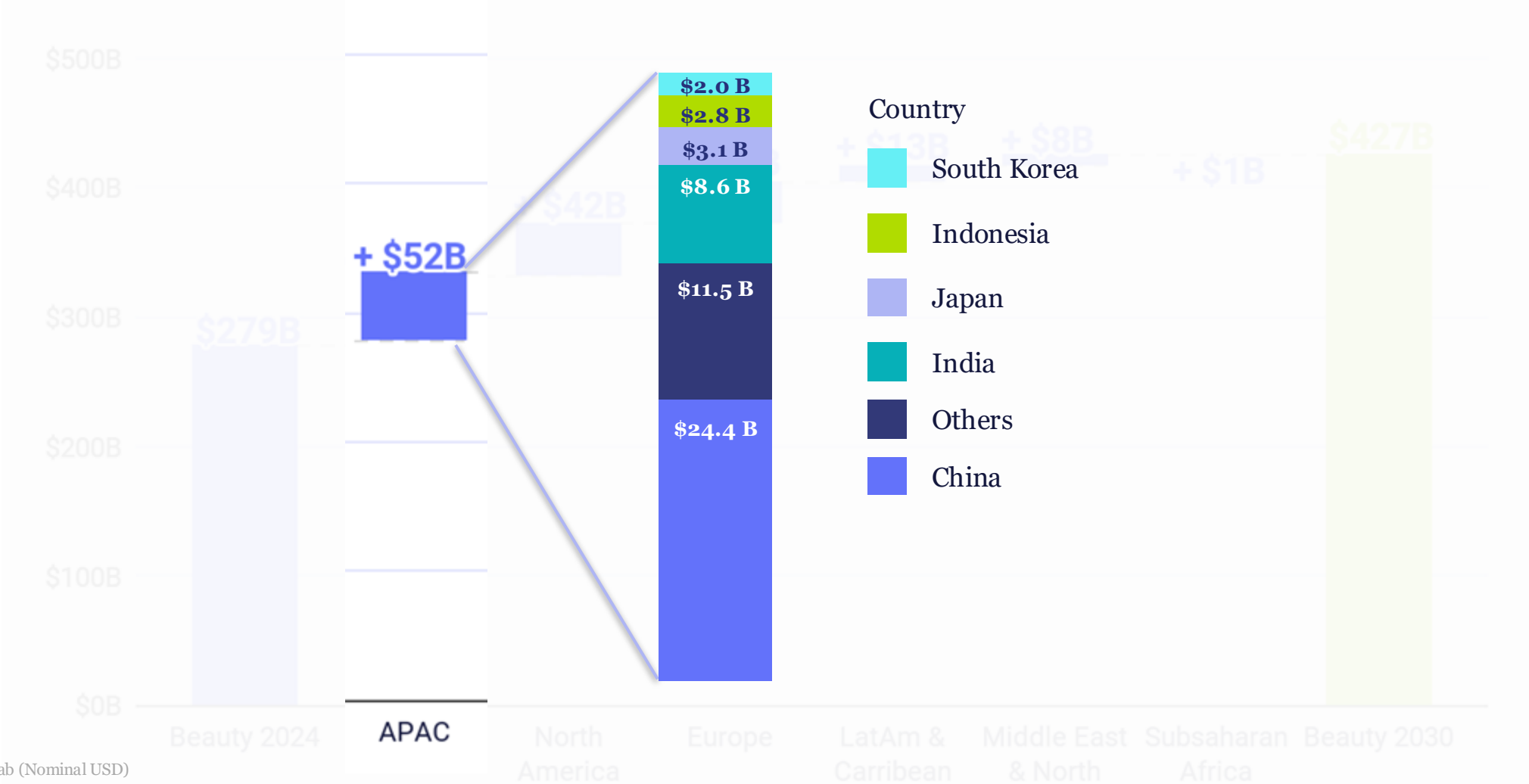


Source: World Data Lab (Nominal USD)

Gen X's Geographic Growth

Growth from the APAC region will largely be driven by two regional powerhouses – China and India

Gen X Beauty Spending Growth by 2034 - APAC

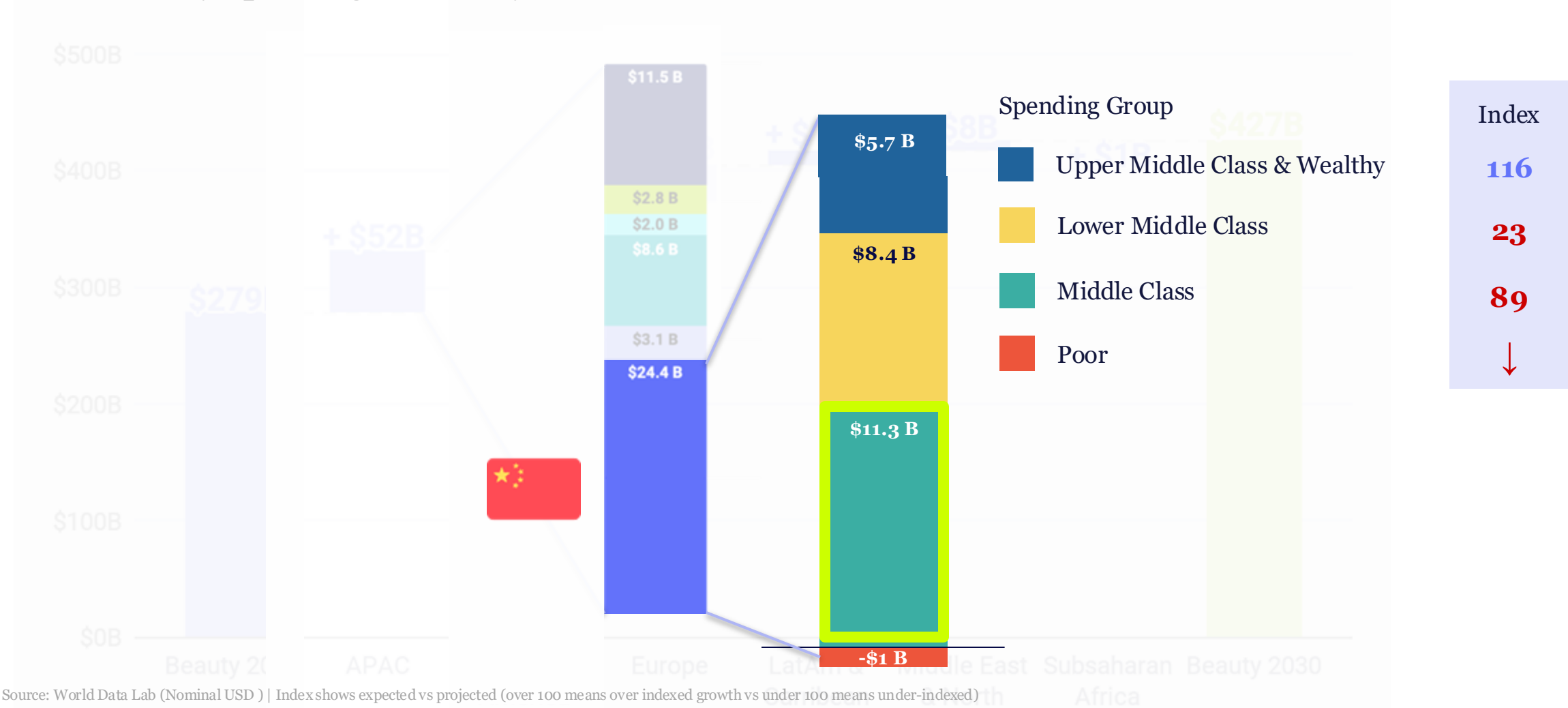


Source: World Data Lab (Nominal USD)

Tailoring Gen X strategies to a growing middle class

In China, the wealthy are over indexed while the middle class drives demand.

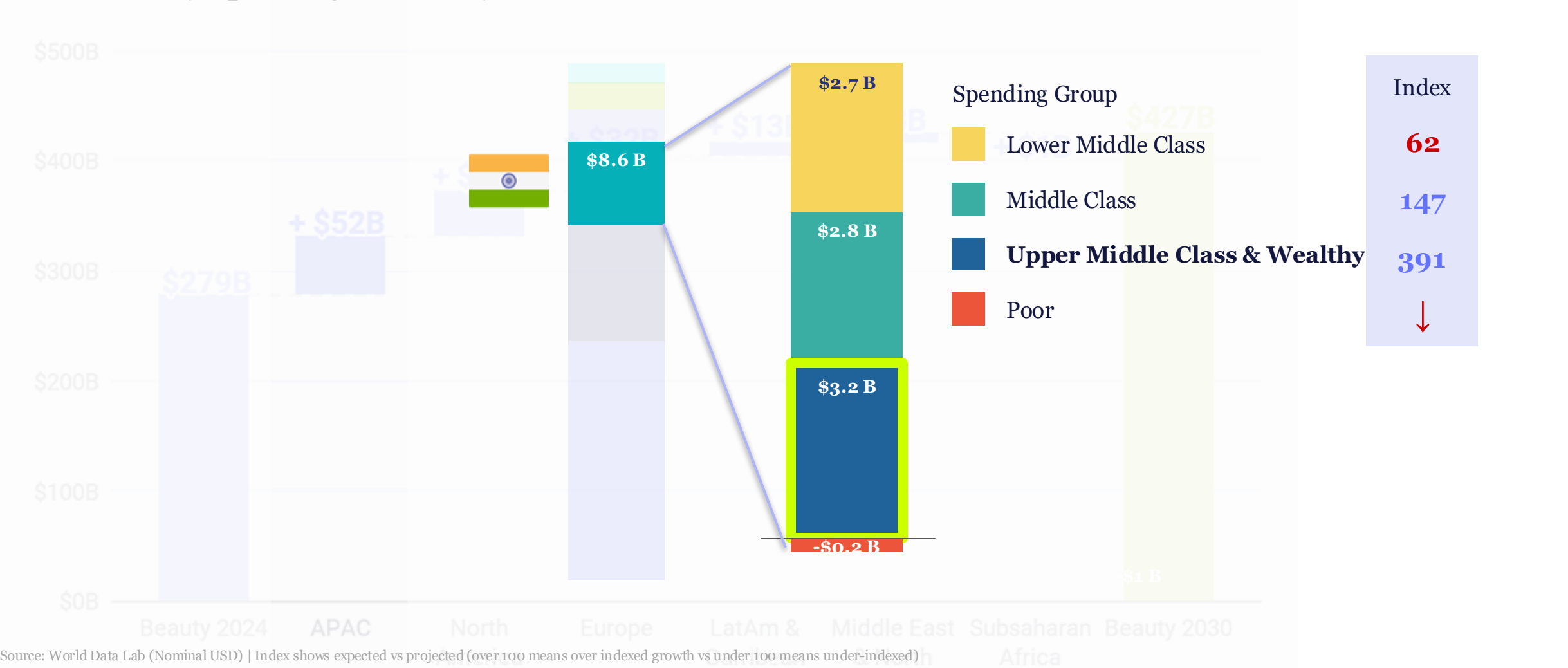
Gen X Beauty Spending Growth by 2034 - China



Capitalizing on the emergence of a new market for luxury

In India, the wealthy are massively over indexed and set to drive demand

Gen X Beauty Spending Growth by 2034 - India



Engaging Beauty's \$430B generation

*Gen X will be spending \$430B on beauty in 2034
– Will you be part of their journey?*



Top Takeaways

\$430B

Spend in 2034

1 in 5

feel needs are not met by all existing brands

4 in 10

use social media to find new products

53%

of Gen X TikTok views are make-up

Harness Beauty's Gen X Factor

No One Size Fits All

Gen X spans a wide spectrum of geographies, lifestyles, and evolving needs. Winning strategies must align with real market dynamics, addressing the distinct preferences of this diverse and ever-changing consumer group.

Reignite Gen X's Beauty Passions

To unlock Gen X's spending power, ensure that they don't get lost in the Gen Z marketing rush. Break through the noise with strategies that represent the real needs and faces of Gen X through product testing to launch.

Meet Gen X Where They Are

Gen X gravitates toward convenient, all-in-one platforms like TEMU and Amazon that offer beauty alongside everyday essentials. With beauty services driving over half their spending—and \$89B in growth forecasted over the next decade—brands must claim their place in these space.

Stay Ahead With Early Trend Signals

Education doesn't have an age limit – The growing community of Gen X makeup enthusiasts highlights the opportunity to engage through age-specific makeup tips and collaborations with creators that speak to their preferences and concerns.



Over to you – Live Q&A

Submit your questions to ask your presenters about beauty



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