

A spotlight on the LGBTQIA+ Beauty Consumer

June 2025

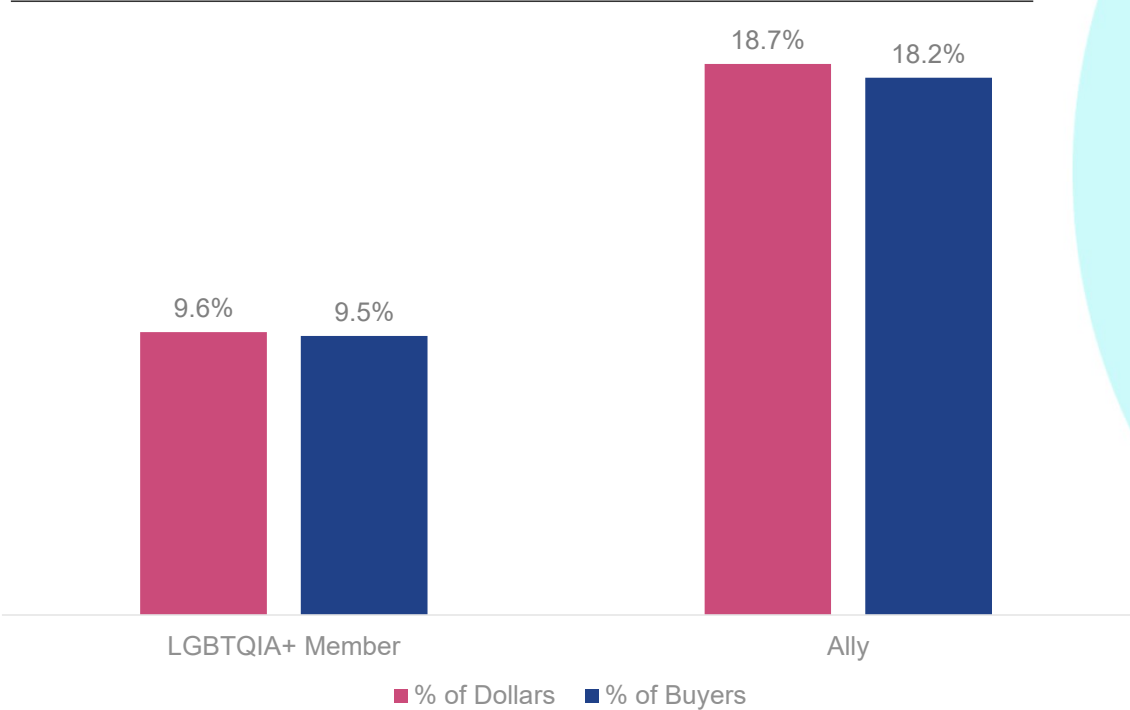
NielsenIQ

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Members of the LGBTQIA+ community and Allies are almost on par in beauty spend compared to their percent of buyers

LGBTQIA+ and Ally dollars vs buyers



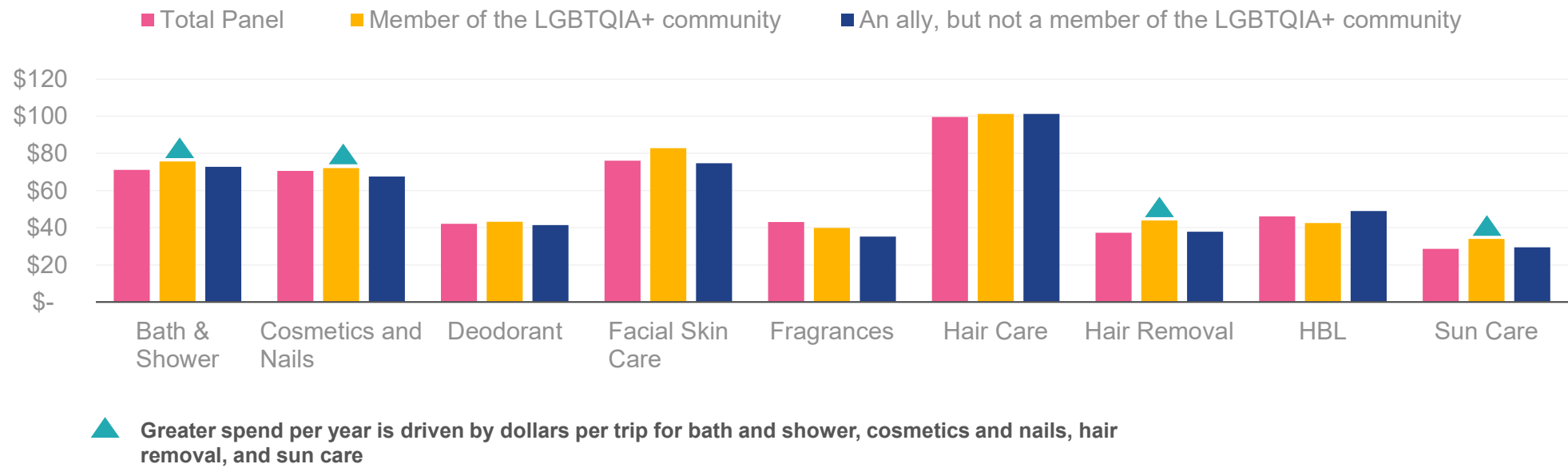
Source: NielsenIQ, Total US Homescan Panel Survey latest 52 weeks ending 3/29/2025



LGBTQIA+ beauty care outspending in bath & shower, deodorant, facial skin care, hair removal, and sun care

Item buying rate (\$ per year)

Largest opportunity for the LGBTQIA+ Community to close the spend gap is HBL



Source: NielsenIQ, Total US Homescan Panel Survey latest 52 weeks ending 3/29/2025

LGBTQIA+ buyers seeing strong dollar growth in a few key categories

 Strong growth categories for the LGBTQIA+ consumer compared to total panel*

Bath Additives
Epsom Salts
Facial Skin Appliances

Lip Cosmetics
Nail Polish
Nail Polish Remover

Sunscreen
Self-Tanner

Hair Spray
Electric Razor
Hair Growth Product

Source: NielsenIQ, Total US Homescan Panel Survey latest 52 weeks ending 3/29/2025. *greater than 15% difference in \$ % chg for LGBTQIA+ buyers compared to total panel

Despite the critical need for allies, support for the community has waned from corporations

The decline in Pride 2025 is driven by several factors:

Political and Social Climate

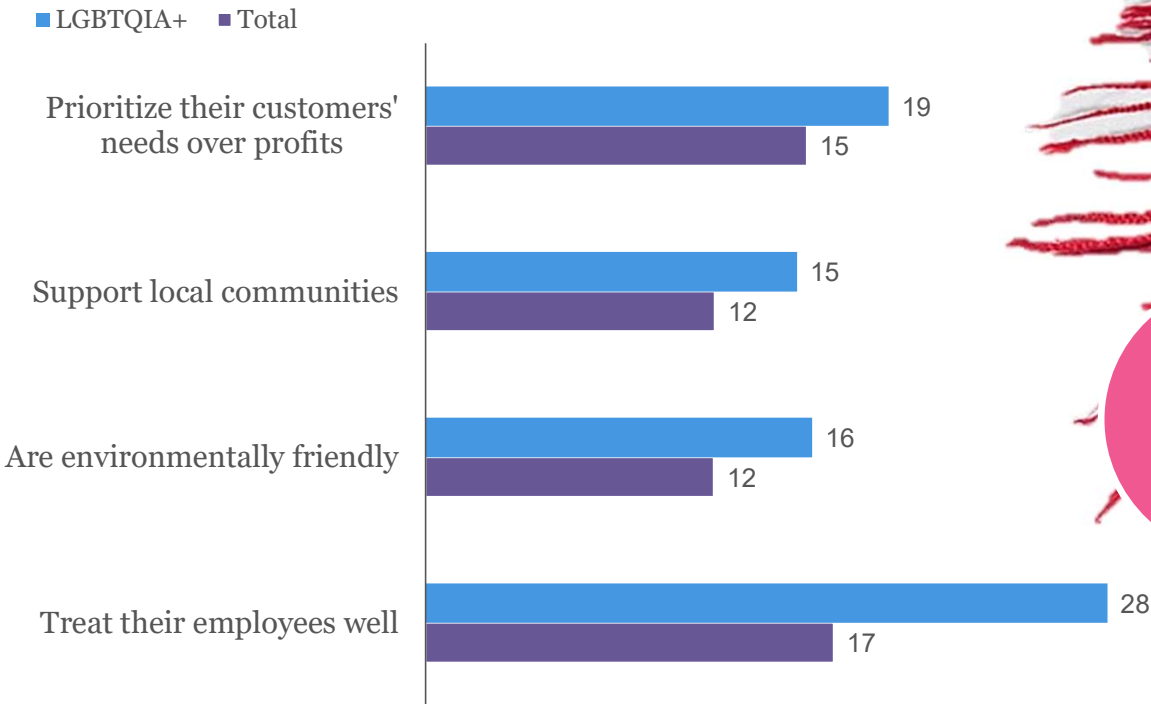
Economic Considerations

Public Visibility Concerns

Backlash from Conservative Groups

LGBTQIA+ community members are more concerned with support of employees and communities from a brand compared to total US

Reasons to trust a brand (%)



51%

of LGBTQIA+ consumers are not too favorable or unfavorable towards large businesses compared to 35% for total US

Source: NielsenIQ Consumer Life Survey 2025

Shopping LGBTQIA+ owned brands is a way to support the community year-round, not just during Pride month

about - face

- Cosmetics
- +19.4% vs. YA
- Founded by Halsey, this high-performance cosmetics brand is vegan, clean, and cruelty free and empowers self expression.

MAKEUP BY MARIO

- Cosmetics
- \$ +16.1% vs. YA
- Founded by Mario Dedivanovic this popular cosmetics line delivers high quality, professional makeup to its consumers. As the world's most followed makeup artist, he has taught and popularized revolutionary makeup techniques, igniting viral trends through education, social media, and innovation.



- Cosmetics
- +65.3% vs. YA
- Founded by Kim Chi (Sang-Young Shin), a well-known drag queen, makeup artist, and television personality. This cosmetics line offers consumers fun products at affordable price with a goal to make you feel like your best self.



- Hair Care
- +4.2% vs. YA
- Founded by Jesseca "Judy" Dupart, a hair stylist turned entrepreneur and executive producer. Jesseca turned her passion for hair styling into a viral hair care brand.



According to the National LGBT Chamber of Commerce...

American LGBT-owned businesses contributed an estimated **\$1.7 trillion** to the US economy

By shopping LGBTQIA+ owned brands, you are supporting the community year-round. Support to these brands allows them to...

- Promote inclusivity
- Advocate for self-expression
- Give back to the community

Source: NielsenIQ Omnishoper Panel Total US Latest 52 weeks ending 4/19/2025

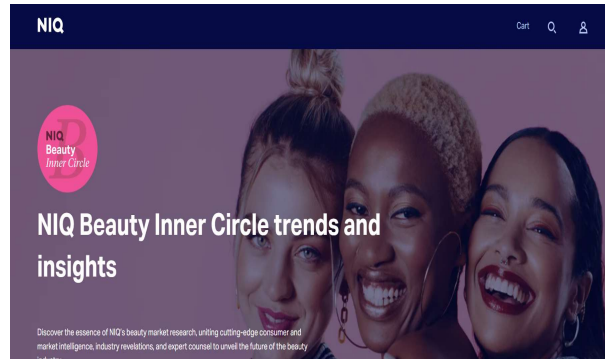
Thank You!
For more information, get in touch!



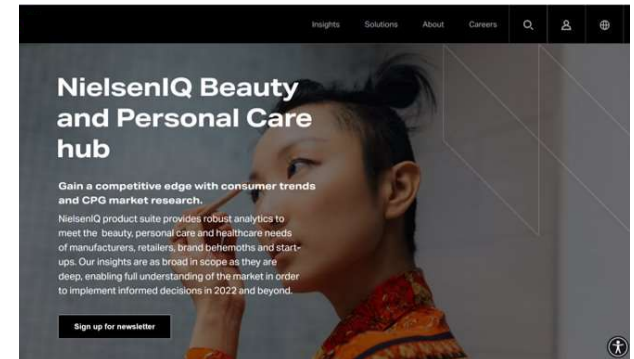
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