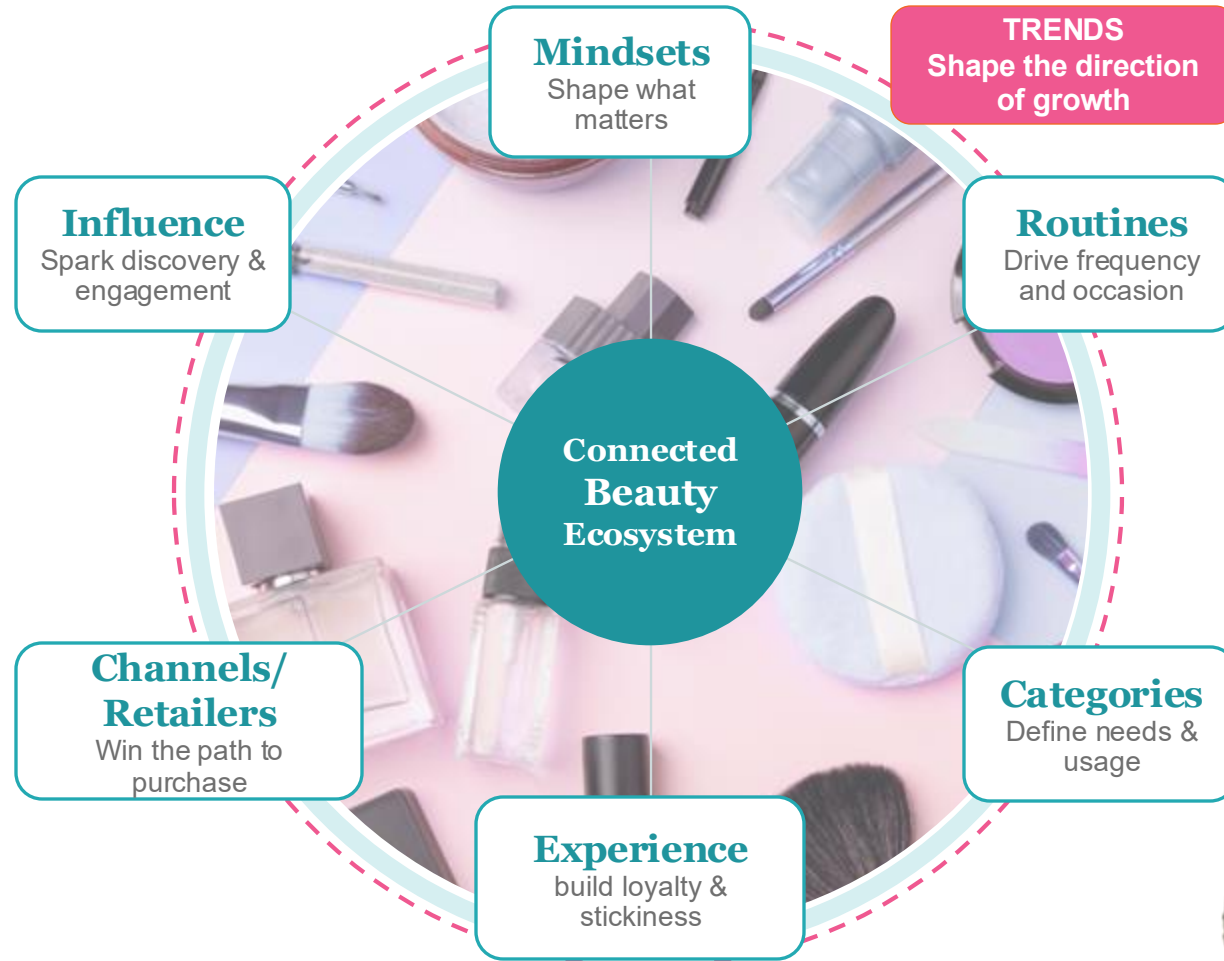




Beauty Decoded

Your Guide to Beauty in KSA - Report Preview

NIQ delivers a fully connected view of beauty -
bringing together the forces that truly shape consumer decisions into one seamless ecosystem



Decoding the Saudi Beauty Journey

Understanding the forces shaping beauty in Saudi Arabia — and where brands can win.

Beauty is culturally rooted and value-driven



Beauty reflects religious and cultural values such as modesty, cleanliness, dignity, and self-respect, while still enabling personal expression and identity.

Consumers are highly informed and intentional



Beauty shoppers are confident, knowledgeable, and purposeful - making decisions based on what works for them, integrating beauty into self-care, wellbeing, and daily routines.

Influence comes from a multi-layered ecosystem



Decisions are shaped by a mix of social media, content creators, peers, experts, and in-store experiences - balancing online inspiration with offline reassurance and validation.

The shopping journey is dynamic and spans across channels



Shoppers move seamlessly between online and offline touchpoints, choosing channels and retailers based on their needs, the category, and their stage in the shopping journey.

Loyalty isn't fixed - It's earned



Product loyalty is earned through performance, but retailer and channel choice remains fluid—driven by availability, trust, efficacy, value, and consistency.

Understanding Saudi Beauty Market and Trends

How the market is evolving and how
shoppers are engaging with it



Understanding Saudi Beauty: Built on Discipline & Holistic Care

In Saudi Arabia, *beauty is built from within* - where discipline, wellbeing, and consistent routines work together to create long-term confidence and visible results.

1

Beauty is discipline-led

- ➔ Built through consistent routines, not quick fixes
- ➔ Focus on long-term care and balance

2

Beauty is deeply holistic (inside & out)

- ➔ Beauty linked to physical health, mental wellbeing, and confidence
- ➔ Seen as a lifestyle, not just product use

3

Foundations come before products

- ➔ Priority on sleep, nutrition, hydration, and exercise
- ➔ Products play a complementary role

4

Supplements enable “beauty from within”

- ➔ Strengthen the body’s foundation and restore balance & energy
- ➔ Viewed as responsible self-care, supporting both inner stability and outer confidence

5

Balance of routine and enhancement

- ➔ Combination of disciplined lifestyle + external solutions (e.g. injectables)
- ➔ Enhancements refine results, but do not replace core habits

72% 

use vitamins or supplements

Saudis turn to supplements to reinforce the body’s foundation, supporting balance, energy and long-term wellbeing. Supplements are viewed as a responsible form of self-care that strengthens what the body lacks, helping maintain both inner stability and outer confidence.

A close-up photograph of a hand holding a credit card over a payment terminal. The hand is positioned over the terminal's keypad. In the foreground, a white shopping bag is visible, partially obscuring the lower part of the terminal. The background is blurred, showing a person wearing a patterned garment. A large teal circle is overlaid on the left side of the image, containing the title and subtitle.

Saudi Beauty Shopper Journey

Understanding the end-to-end shopper journey in a rapidly evolving beauty market

In Saudi beauty, the path to purchase is not linear - it's orchestrated

Consumers blend online convenience with in-store reassurance, resulting in a *hybrid, multi-channel journey*. Purchases are spread *across channels*, each fulfilling a *different role* based on trust, validation, convenience, and value.



Base (Total respondents):1000
CU14a. From where do you mostly purchase your 'autocode categories from CU3' from?

Future of Beauty

Building Emotional Connections For True
Brand Affinity

NielsenIQ



Future of Beauty: From Access to Experience

The future of beauty in Saudi Arabia will be defined not by access, but by *how seamlessly brands deliver trust, guidance, and consistency* across an increasingly connected journey

Optimization

- Beauty in Saudi Arabia is well-served and accessible
- The next opportunity lies in refining the experience, not expanding supply
- Growth will come from fixing friction, not adding more products

Consistency & depth

Shoppers expect:

- Reliable availability (especially trending/viral products)
- Deeper, more specialized assortments

AI will enhance the journey

AI is already embedded in beauty routines

- It acts as a support layer
- Success depends on:
 - Credibility
 - Transparency
 - Integration with human expertise

Loyalty

- Today, loyalty is driven by ease, reliability, and reassurance—yet remains highly conditional, eroding quickly when availability, trust, value, or experience fall short.
- Future winners will build stronger emotional connection and stickiness

Expertise and guidance

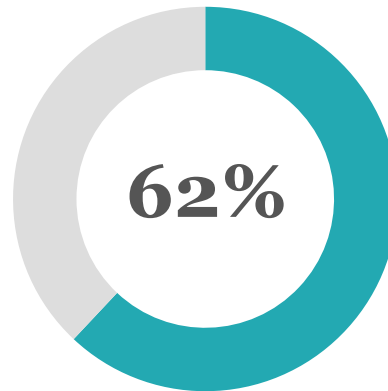
Informed consumers still seek:

- Reassurance from experts
 - Meaningful, personalized guidance
 - Winning brands will combine: Content + in-store expertise + digital support
- Expertise becomes a competitive advantage, not just a service

The Future of Beauty & AI: Enhancing the Journey

AI Is Becoming a Natural Step in the Beauty Journey — Shaping How Consumers Explore, Validate, and Refine Their Choices

AI Usage in Beauty



AI can strengthen brand relationships. With interest high, brands have a clear opportunity to use AI meaningfully and build trust.

How AI Is Used Today



Quick Checks & Reassurance

- AI is used to validate ingredients and claims, helping consumers feel more confident in their choices.



Basic Routine Guidance

- AI helps consumers build and refine routines across skincare, haircare, and supplements.



Early discovery (no commitment)

- AI enables private, judgment-free exploration in the early stages of the journey.



Thank You

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