



EXECUTIVE INSIGHTS

## What Do Gen Zers Really Want in Beauty and Personal Care?

Generation Z (born between 1996 and 2010) comprises just 20% of the U.S. population today.<sup>1</sup> But over time, this cohort will gain market share over older generations as it matures and acquires more purchasing power. That makes Gen Z a key demographic for beauty and personal care (BPC) brands to win — especially since Gen Z is the most brand-loyal generation (see Figure 1).

**Figure 1**  
US attitudes toward brand loyalty by generation across industries (2022)

Percentage of responses

Attitude	Gen Z	Millennial	Gen X	Baby boomer
Loyal to some companies, but <b>will buy from competitors</b>	71	75	77	85
Frequently buys from certain companies, but <b>not loyal to them</b>	65	66	67	70
Loyal to some companies, and <b>will pay more to shop with them</b>	64	60	61	47
<b>Not loyal</b> to any company	22	27	26	36

Below median ● ● Above median ● ●

Note: Generations defined as the following ages: Gen Z (18-25), Millennial (26-40), Gen X (41-55), Baby boomer (56-75)  
Source: Insider Intelligence; L.E.K. research and analysis

When it comes to BPC, not only does this digitally native generation think differently than other generations, but it also interacts with and shops for brands differently. BPC brands will have to refine their go-to-market strategies to specifically attract and retain Gen Zers. These young adults are looking for authentic brands that engage with them where they're spending time and meet them where they're shopping.

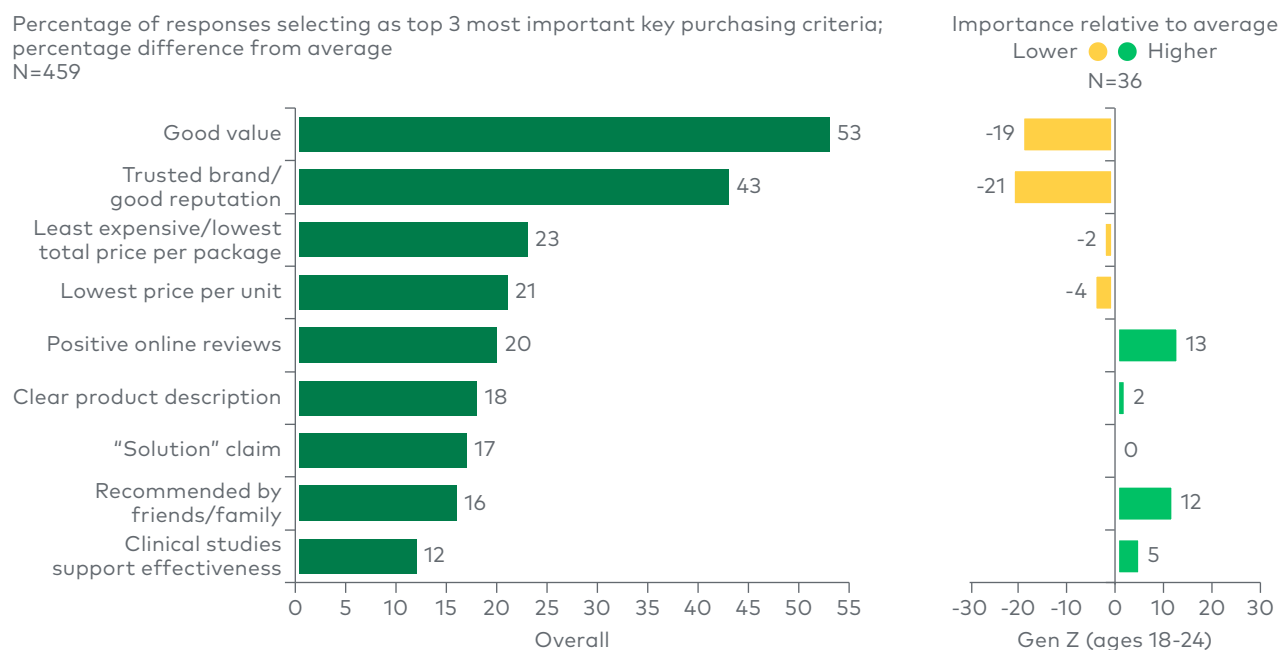
## Getting real about authenticity

Gen Zers want to connect with brands that align with their values. This can include a brand that’s authentic and has a clear message, one that’s backed up by real reviews from users or one that has partnerships that reflect brand values. Given the importance of authenticity, user-generated content (UGC) is critical to winning over Gen Z. Generally, UGC is considered more trustworthy and transparent than brand- or influencer-generated content because real users produce it. The result is greater engagement, connection and brand loyalty.

Even so, influencers remain useful for expanding brand reach. Compared with top influencers and traditional celebrities, midtier and micro-influencers are often viewed as more approachable and organic. These influencers have fewer than 500,000 followers, making them seem more like peers to those who follow them. This strong and loyal fan base has higher levels of engagement than fans of top influencers, offering brands the opportunity for a better return on investment. Consider that 54% of Gen Z consumers cite making a purchase based on a recommendation from a social media influencer compared to 26% of the general population.<sup>2</sup>

Consistent with the theme of trust and authenticity, Gen Zers place greater weight on reviews and recommendations from family and friends when selecting BPC products. This is fundamentally different from older generations, which are more likely to emphasize value and brand reputation (see Figure 2).

**Figure 2**  
Top key purchase criteria for BPC products by generation



Note: BPC=beauty and personal care  
Source: Byrdie; Insider Intelligence; Kyra 2022 Gen Z State of Beauty Report; Power Reviews; L.E.K. research and analysis

## Feeling their best selves

As part of its focus on authenticity, Gen Z believes that beauty comes from within. More so than other generations, Gen Z closely associates beauty with intrinsic values — including inner confidence, being comfortable in your own skin and embracing yourself.

A top 2023 trend on TikTok is “ugly beauty.” This style promotes messy makeup and unconventional beauty looks. This isn’t the first time TikTok trends have eschewed societal beauty standards. Last year, bleached eyebrows featured on fashion runways trended on the app. Gen Z is comfortable challenging traditional beauty standards as unrealistic and overly focused on perfection. They prefer self-expression and acceptance that is true to who they are.

A related trend is a minimalistic approach to makeup. “Skinstreaming,” previously dubbed “skinminimalism,” has risen in popularity. Hashtags like #MinimalistSkincare and #BasicSkincareRoutine continue to be popular on TikTok and Instagram. The goal of skinstreaming is to pare down the number of skincare products for a faster, easier and cheaper routine. Less time and attention spent on beauty encourages people to go unfiltered and forget covering up or fixing flaws.

## Engaging with the digital generation

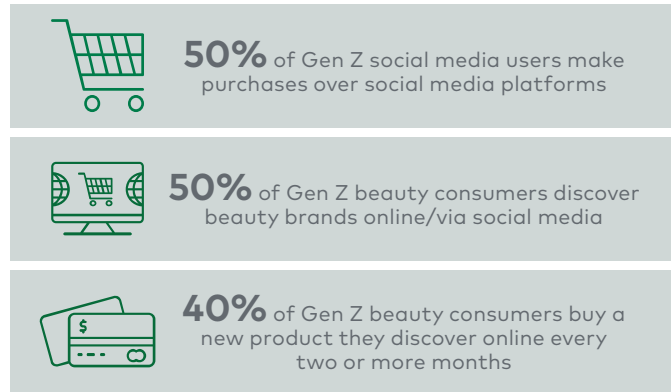
Gen Zers are the first to grow up with daily usage of the internet. Compared to the average millennial who uses three screens, the typical Gen Zer uses five.<sup>3</sup> To reach the younger cohort, brands should focus on being digital first. And given how quickly Gen Z moves across platforms and devices, a brand’s emphasis should be on a cohesive and seamless experience.

These digital natives are accustomed to multiple sources demanding their attention at once. Their average attention span for an ad is just eight seconds.<sup>4</sup> They’re constantly consuming information or communicating across platforms. Capturing the attention of Gen Z requires engaging, easy-to-digest content.

As a result, this generation values video content. They’re watching influencer tutorials for before-and-after transformations, new beauty and skincare routines, and specific products or looks. Compared with previous generations who visited the department store makeup counter, these teens and young adults are turning to TikTok and other social media platforms to learn about beauty and skincare products. In fact, 29% of Gen Zers (versus 16% of all adults) cite social media as the type of advertising they pay most attention to.<sup>5</sup> They also actively

convert over social media platforms – 50% of Gen Z social media users report making beauty purchases this way (see Figure 3).

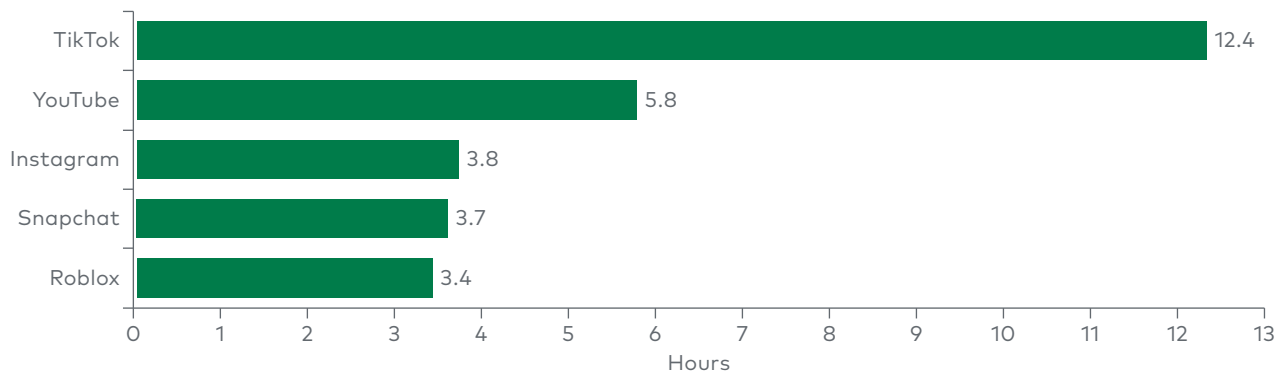
**Figure 3**  
Percentage of Gen Z shoppers who use social media when making their purchase decisions



Note: Gen Z adults include ages 18-24  
Source: Insider Intelligence; Kyra 2022 Gen Z State of Beauty Report; Retail Leader; L.E.K. research and analysis

TikTok has captured the screens and eyes of Gen Zers, with 83% of U.S. teens reported to be using the app at least monthly.<sup>6</sup> They're also highly engaged, spending triple the amount of time on TikTok than they do on Instagram or Snapchat (see Figure 4).

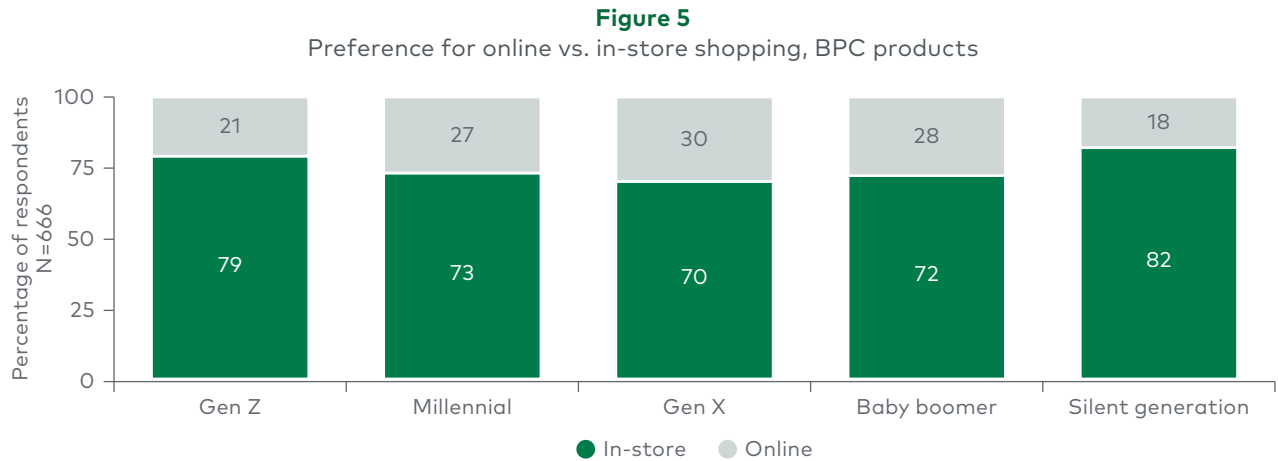
**Figure 4**  
Time spent weekly with select apps by US Gen Z,\* September 2022



\*Ages 16-25  
Source: Insider Intelligence

### Meeting them where they are

When shopping for BPC products, all generations prefer to purchase in-store. This goes for personal care products (76% of all generations, on average) as well as beauty products (70%). Across BPC products combined, Gen Z falls in line with the average preference for in-store shopping at 79% (see Figure 5).

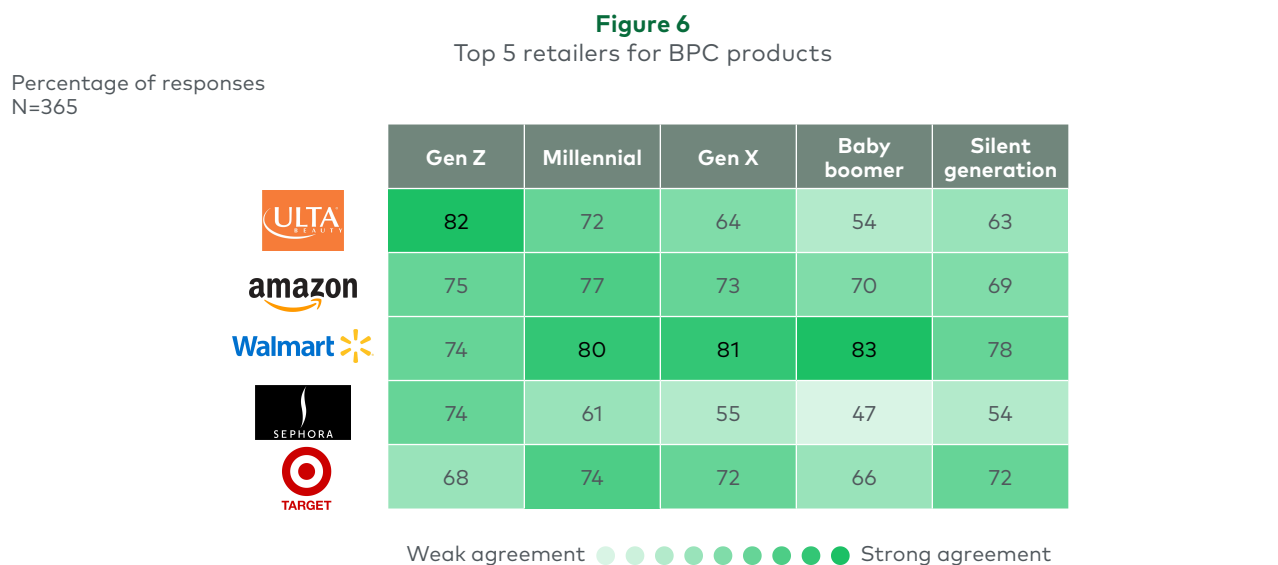


Note: BPC=beauty and personal care  
Source: L.E.K. survey

Gen Zers who prefer in-store shopping do so because the ability to touch, feel, test and compare across products can't be replicated online. They also enjoy the discovery process, especially for BPC products.

In contrast, the Gen Zers who would rather shop online for BPC products value the convenience it provides and the quick checkout experience. They also like the efficiency of online shopping for BPC products. They can easily order what they need and avoid crowds and lines.

Consumers, especially the digitally native Gen Zers, are likely to increase their online shopping over time. Brands that use technology to personalize the experience or aim to replicate the touch-and-feel opportunity that in-store shopping offers are likely to win over these consumers (see Figure 6).



Note: BPC=beauty and personal care  
Source: L.E.K. survey

Additionally, the buy now, pay later (BNPL) services that are most common online are highly popular among Gen Z. The majority of Gen Zers (55%) say they've used BNPL services, compared to 49% of millennials, 31% of Gen Xers and only 16% of baby boomers.<sup>7</sup> These services are a great way to capture and convert Gen Z consumers who haven't yet built up credit.

For beauty products, Ulta Beauty is a winner among Gen Zers, followed by Amazon and Walmart. Older generations prefer Amazon and Walmart, with millennials being the only other generation to consider Ulta a top-five favorite retailer. Ulta has put greater emphasis on its loyalty program as well as on personalization in-store and online. The retailer also offers a range of beauty price points (mass to prestige) as well as celebrity beauty brands that tend to appeal to Gen Zers.

### **A generation with its own take on BPC**

Gen Z is a critical generation for brands to reach. Gen Zers are loyal consumers who will continue to claim a larger share of BPC spend as their disposable incomes increase.

This digital generation wants to engage with BPC brands in a seamless fashion. As they swiftly move across devices, brands need to ensure a consistent experience. At the same time, and despite being strongly influenced by digital advertising, Gen Zers still value the in-store shopping experience for their beauty products. Technology to enhance in-store shopping and replicate the consumer experience across online and in-store will remain critical for engaging with this segment of shoppers. Brands and retailers can also use technology to differentiate themselves by replicating the try-and-feel element of in-store shopping through video content, product imagery and personalized recommendations based on prior purchases.

Gen Z also wants brands to honor their brand image in an authentic way – one that's true to the brand and consistent across values and products. Transparency and honesty are critical to building trust with Gen Zers. Brands should encourage UGC and reviews from real consumers. Additionally, midtier and micro-influencers should be part of brands' go-to-market strategy. They have higher levels of engagement and greater perceived authenticity than top influencers and can help broaden a brand's reach.

For more information, please contact [strategy@lek.com](mailto:strategy@lek.com).

## Endnotes

<sup>1</sup>Source: Insider Intelligence; Brookings; United States Census Bureau

<sup>2</sup>Marketing Dive, "Gen Z relies on influencers for purchase decisions, Kantar says." <https://www.marketingdive.com/news/gen-z-relies-on-influencers-for-purchase-decisions-kantar-says/582890/>

<sup>3</sup>MNI, "Marketing To Generation Z (It's time to forget about Millennials)." [https://www.mni.com/blog/research/marketing-to-generation-z-it-s-time-to-forget-about/article\\_e1ec8b94-053f-11e9-9bbb-638dddb33ff3.html](https://www.mni.com/blog/research/marketing-to-generation-z-it-s-time-to-forget-about/article_e1ec8b94-053f-11e9-9bbb-638dddb33ff3.html)

<sup>4</sup>Ibid.

<sup>5</sup>CivicScience, "Which Types of Ads Resonate With Gen Z?" <https://civicscience.com/which-types-of-ads-resonate-with-gen-z/>

<sup>6</sup>Insider Intelligence, "Gen Z is the social video generation, and TikTok is its platform." <https://www.insiderintelligence.com/content/gen-z-social-video-generation-tiktok-its-platform>

<sup>7</sup>Insider Intelligence; Afterpay; Kyra 2022 Gen Z State of Beauty Report

## About the Authors



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