

BEAUTY, GROOMING & COSMETICS ONLINE SHOPPING CONSUMER SURVEY FINDINGS //2023


Space48



CONTENTS

Page 2

Survey at a glance & key findings

Page 3

Key findings continued

Page 4

Who we surveyed

Page 5:

Quality is a must- have and other factors shoppers deem important

Page 6

What is a great online customer experience?

Page 7

Shopper statements

Page 8

Influencers are must-have and other decisive factors when purchasing from a brand.

Page 9 - 11

What do Boots, Amazon & LOOKFANTASTIC have in common?

Page 12

Shoppers struggle to determine their perfect shade and other shopper pain points

ATRBRUSH
MINERAL PRIMER
15 ml / 0.5 fl oz

CONTENTS

Page 13

Price influences purchase and other decision factors.

Page 14

Retention through subscriptions

Page 15

Shopper journeys

Page 16 - 19

How to leverage YouTube, TikTok, Instagram and Google

Page 20

Sustainability, inclusivity, and diversity

Page 21

Closing words





SURVEY AT A GLANCE

The consumer landscape is changing - fast! Are you on the pulse of current health, beauty and grooming trends? Well, don't miss out on what our latest survey has revealed. We surveyed over 100 people across the UK to discover their primary motivators when shopping for beauty, grooming and cosmetic products online. Our findings offer fascinating insights into how modern consumers think about spending, product selection, online experiences, content, product advertising, influencers and trust in different brands. Read on to find valuable insights into your customer's minds to help with your online strategy for 2023.

KEY FINDINGS

Shoppers expect quality and value

- 92% of shoppers identified product quality as essential when navigating virtual aisles for beauty and grooming products.
- 75% of respondents chose price as their number one influencer when it comes to purchasing a product.

Shoppers like to research

- 88% of shoppers spend more time researching before buying online than they would if shopping in-store.
- 44% of respondents watch videos on Youtube to learn new skincare, beauty & grooming tips.
- 40% of respondents use Instagram to discover new skincare, beauty & grooming products.

KEY FINDINGS CONTINUED

Shoppers seek recommendations

- 90% of shoppers rank brands that use influencers as a deciding factor in their purchase decision.
- 82% seek out customer reviews before purchasing a beauty or grooming product.
- 49% are influenced by friends and family when it comes to product recommendations.

Shoppers seek guidance

- 60% of shoppers list needing help finding the ideal shade as their biggest challenge when shopping for beauty items.
- 62% of shoppers would buy from a brand that offers an online, quiz-like experience that recommends the right products for their needs.
- 89% of shoppers would buy from a brand that sends free samples to try the products before purchase.

Shoppers seek ethical brands

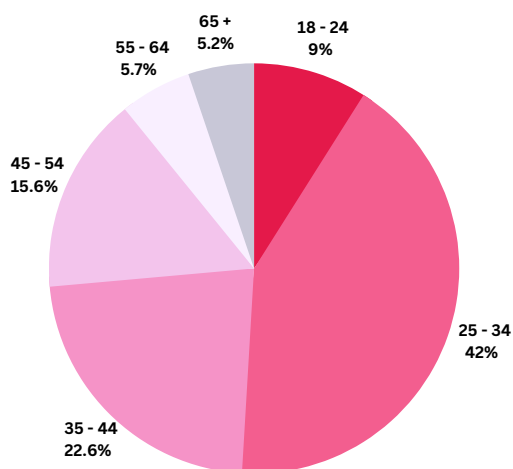
- 78% of respondents say they're more likely to buy beauty, grooming and cosmetic products from sustainable packaging brands.
- 66% of shoppers will only buy from brands that advertise cruelty-free testing.
- 54% of shoppers prefer brands that are inclusive when it comes to product lines and marketing.



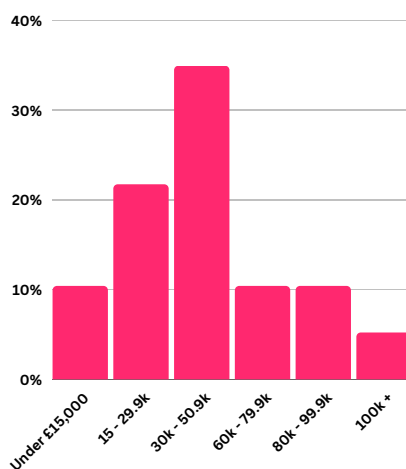


WHO WE SURVEYED

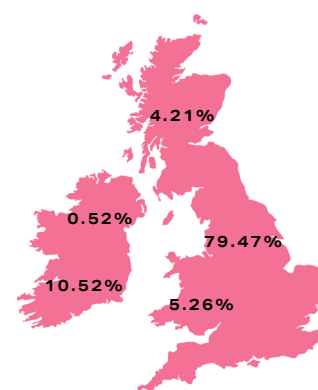
AGES



HOUSEHOLD INCOME



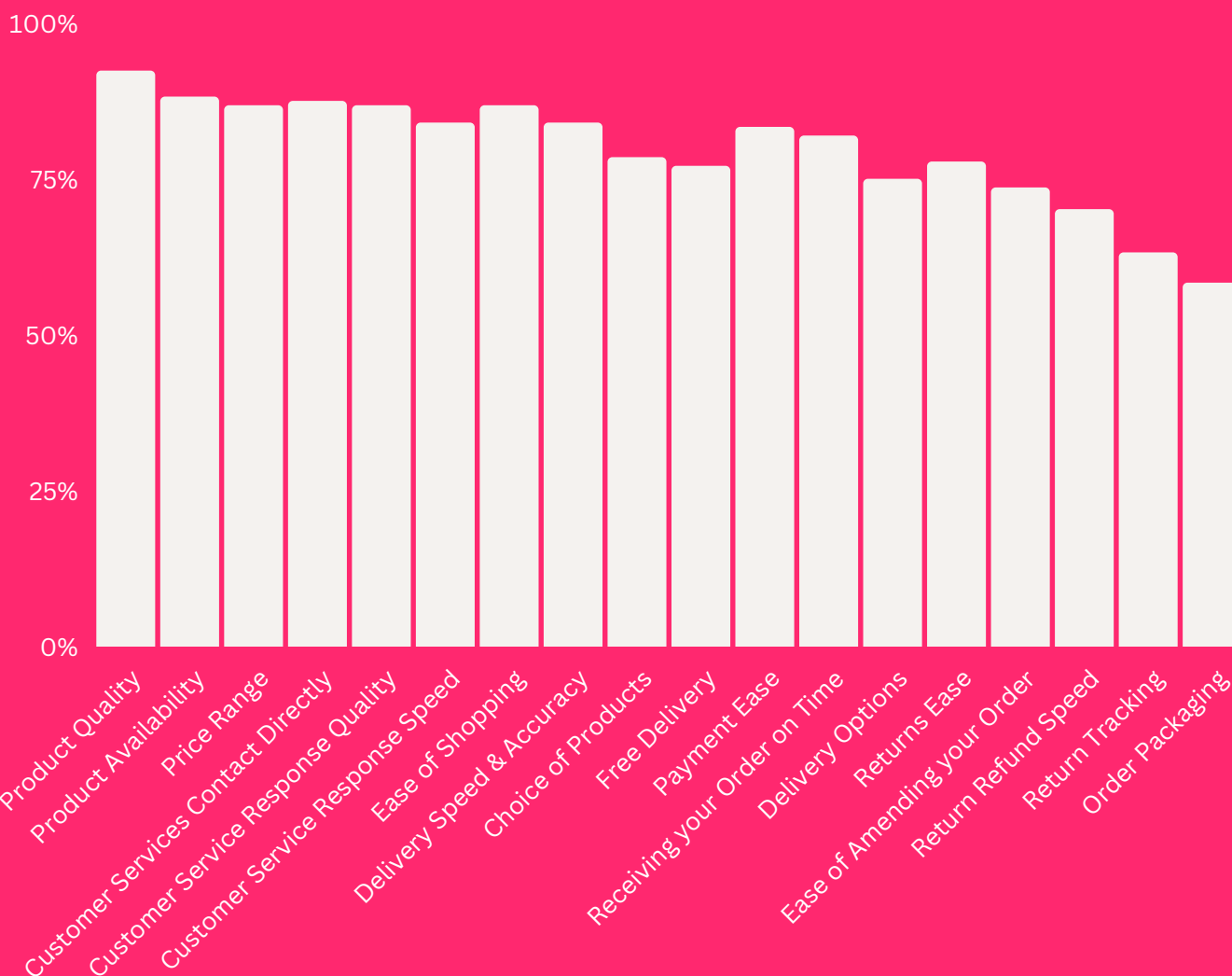
LOCATION



Our survey of 144 responses reveals a snapshot of the UK and Ireland. The majority demographic shows: 42% are young professionals between 25-34, 34.91% have established financial footing with an income range of £30K-£50k, primarily residing in England (79%).

QUALITY IS A MUST-HAVE

When shopping online for beauty and cosmetics, high-quality products, availability, and affordability are the core criteria among shoppers. An overwhelming majority of 92% of shoppers identified product quality as essential when navigating virtual aisles for beauty and grooming products. Reliable product availability at 88.19% and a favourable price range at 86.80% were two other primary attributes for buyers when making a purchase decision. Moreover, additional essentials such as delivery times, customer service experiences and how easy it was to shop online also seemed important to lesser extents when shopping for beauty and cosmetics in the digital sphere.



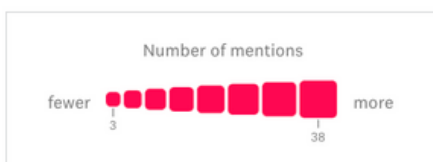
WHAT'S A GREAT ONLINE CUSTOMER EXPERIENCE?

A great customer experience online is essential to the modern shopper. The respondents voiced some key themes, which included quick and appropriate responses from customer services, websites that are easy to navigate, the ability to compare products on price, reviews and quality, product availability and accurate descriptions. Respondents enjoy the convenience of effortless product searches, speedy checkouts via Apple Pay and further satisfaction with next-day delivery options plus free returns. By considering each aspect when creating an online customer journey, brands can become confident that they offer a great customer experience.



Easy find looking

quality reviews Clear checkout issues process smooth
 choose returns free great fast efficient use shipping
 Easy use needs Ease delivery good shop customer
 price purchase **products** items contact quickly
 find website able quick easy order response
 service want problem customer service time
 easy navigate search available sitefree delivery
 Easy navigate website payment process easy find



SHOPPER STATEMENTS

88%

I spend more time researching before buying online than I would if I was shopping in-store

With the shift from in-store to online shopping, many consumers are researching and considering their purchases more carefully than they would in-store. As such, it is more important than ever for brands to create content that will provide buyers with the same guidance on their purchase journey as an assistant in a store. This could include detailed answers to frequently asked customer queries or a guided quiz tool to help customers determine which product is ideal. These strategies all ultimately serve the same purpose - providing easily accessible assistance so that customers can complete their purchase journey with confidence and accuracy.

81%

I am more likely to buy products I have used before online than I am when I am shopping in-store

With shoppers more likely to purchase products they have already purchased before when shopping online than in-store, companies should consider the power of advertising campaigns and curating the best-selling items for those campaigns to drive sales. Strategic execution of this plan can help brands strengthen existing customer relationships while increasing brand recognition and encouraging repeat purchases. Considering which products appeal to an existing audience and analysing purchasing trends can boost traffic, click-through rates and overall conversions. Smartly crafted advertising campaigns can increase brand loyalty and demonstrate that a company pays attention to customer needs and preferences.

55%

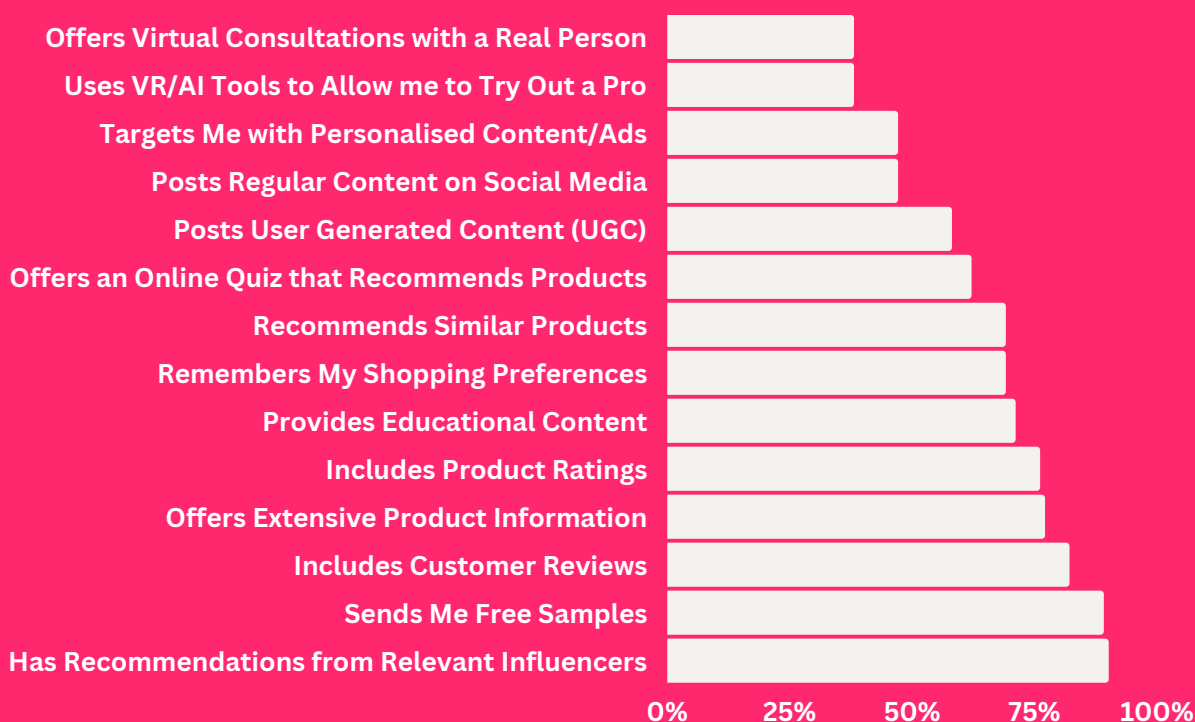
I am more likely to try new brands when shopping online than when I am shopping in-store

The findings that respondents are more likely to try new brands when shopping online than in-store presents an incredible opportunity for businesses hoping to gain new customers. With the right strategy, leveraging the benefits of purchasing through a digital platform - convenience, personalisation, and customisation - can help brands capture shoppers' attention and incentivise them to try something different. Investing time into understanding how consumers interact with digital touchpoints before, during and after their purchase journey should help shape meaningful strategies designed specifically to engage and convert digital audiences.

INFLUENCERS ARE THE DECISIVE FACTOR FOR SHOPPERS

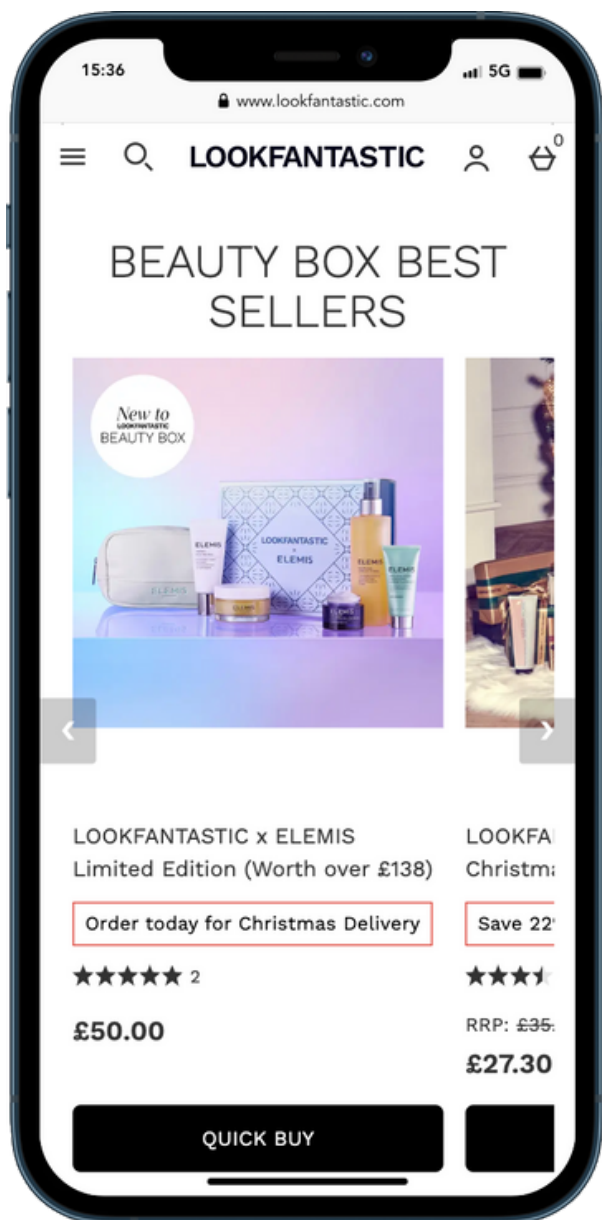
Consumers are becoming more discerning on what beauty brand they want to invest in, so it's not surprising that having relevant influencer recommendations (90%) and being sent free samples (89%) rank so highly when asked "On a scale of most likely to least likely, how likely are you to buy cosmetics, grooming, beauty products from brands that do the following?". Also topping the list was customer reviews (82%), further cementing the idea that customers want independent opinion or guidance before making an informed purchasing decision.

The data also shows that extensive product information (PIM) is essential in helping guide shoppers (77%). Creating descriptions that stand out, featuring products with magazine-style high-quality images, ingredient compositions, and specific packaging and production information, is key in helping shoppers make their selections. Additionally, tutorial videos featuring experts or influencers and curated reviews and ratings can help guide customers through purchasing. All these elements help create a more successful shopping experience for consumers.



WHAT DO BOOTS, AMAZON & LOOKFANTASTIC HAVE IN COMMON?

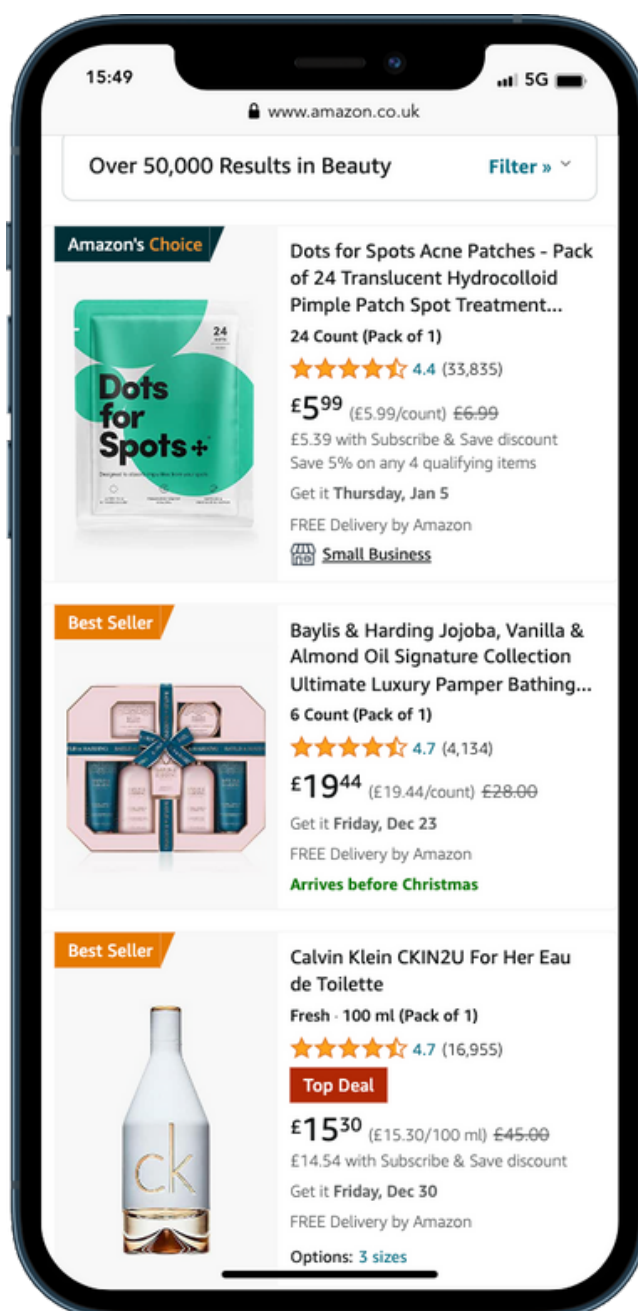
It seems that Amazon, Boots and LOOKFANTASTIC have the online beauty market cornered; our respondees have named them their go-to websites for purchasing products in the cosmetics and grooming categories. So what is causing these top three retailers to stand out from the rest?



LOOKFANTASTIC is one of the top three beauty online retailers due to its comprehensive features. Regular promotions keep customers engaged and loyal, while their wide variety of beauty and skincare products provide shoppers with many choices. Discounts further incentivise purchases, making the latest must-have beauty items more accessible. Beauty boxes are also popular among users, creating monthly excitement for subscribers. A community forum provides a place for customers to engage with each other, exchange tips and advice and offer feedback on products or services. Navigation around the site is intuitive and user-friendly, while an excellent on-site search helps shoppers quickly find what they are looking for. Reviews provide additional information to shoppers, and product descriptions are detailed enough that buyers can make informed choices. Inspirational content adds another layer to the overall experience, while curated collections make it easier than ever before to curate your makeup look or routine at an affordable price. All in all, these features combine to create an outstanding shopping experience that is hard to beat!

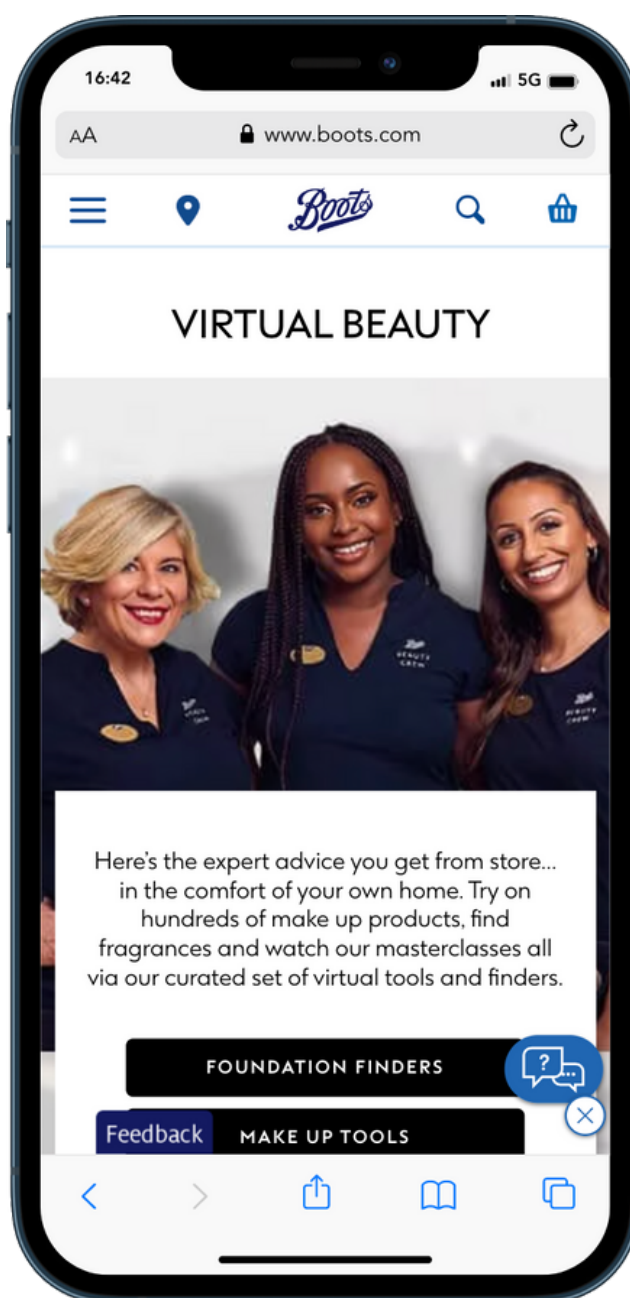
AMAZON

Among our respondees, Amazon is one of the top three beauty and grooming online retailers for many reasons. It offers an unmatched selection with over 50,000 SKUs in the beauty and grooming category for customers. Amazon Prime customers have access to free and rapid delivery. Additionally, customer reviews provide insight and a sense of security when making purchases, knowing fellow Beauty Gurus have tested and approved them already. Not only that, but Amazon's convenience and quick path to purchase appeal to those looking for fuss-free shopping experiences; one-click checkout has enabled Amazon to gain a competitive edge in this area. Moreover, the platform allows brands to provide detailed product descriptions, image galleries and keyword insertion, which are beneficial for high search rankings on Amazon - like how Google rewards complete content with more prominent listings. Brands utilising Amazon to sell their products should also be prepared to create Amazon-specific copy and visuals for platform success.



BOOTS

It's easy to see why Boots was chosen as one of the top three health, beauty and grooming sites by our respondents. Its success is due to a range of factors: its large selection caters to all types of consumers, and with the click-and-collect option, shoppers can quickly get products at their convenience. Customers also benefit from advantage points when purchasing from Boots, allowing them to accumulate rewards. On top of that, the website is easy to navigate due to its simple layout and powerful on-site search tools. Furthermore, shoppers get the same advice as if they were in the store, with the added ability to virtually try on hundreds of makeup products and find fragrances right from the comfort of their own homes. With its online health hub, Boots provides shoppers with a central location to get everything they need in the realm of health, beauty, cosmetics and grooming - making it a one-stop shop for beauty buffs everywhere!

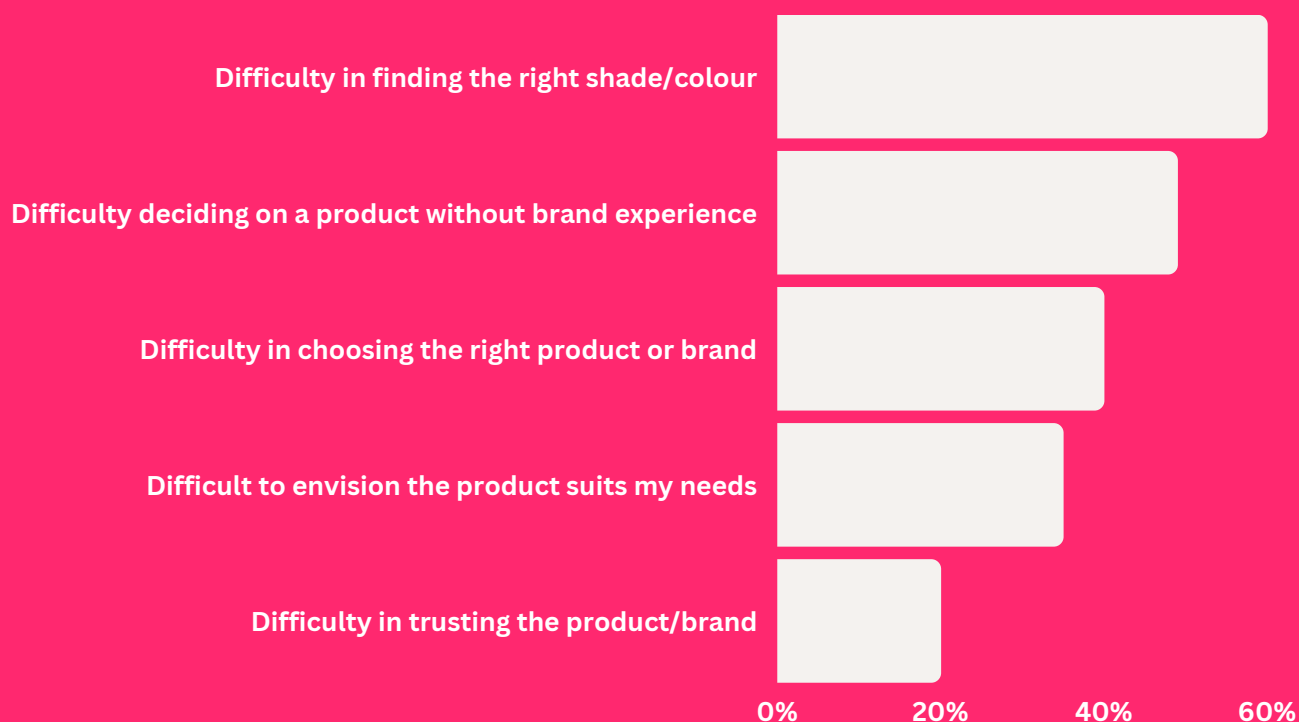


SHOPPERS STRUGGLE TO DETERMINE THEIR PERFECT SHADE

With the growth of online shopping for beauty products, it's increasingly important that brands remove pain points from the buying journey to satisfy customers. Most importantly, 60% of shoppers need help finding the ideal shade as their biggest challenge when shopping for beauty and grooming items - ahead of selecting or trusting a product or brand. To counteract this, brands must provide solutions that take customers' needs into account and streamline their journeys. Customising initiatives such as shade finder quizzes, images with various scale shades and skin tones, and AR virtual try-on options can help buyers easily navigate online and discover the right product for them.

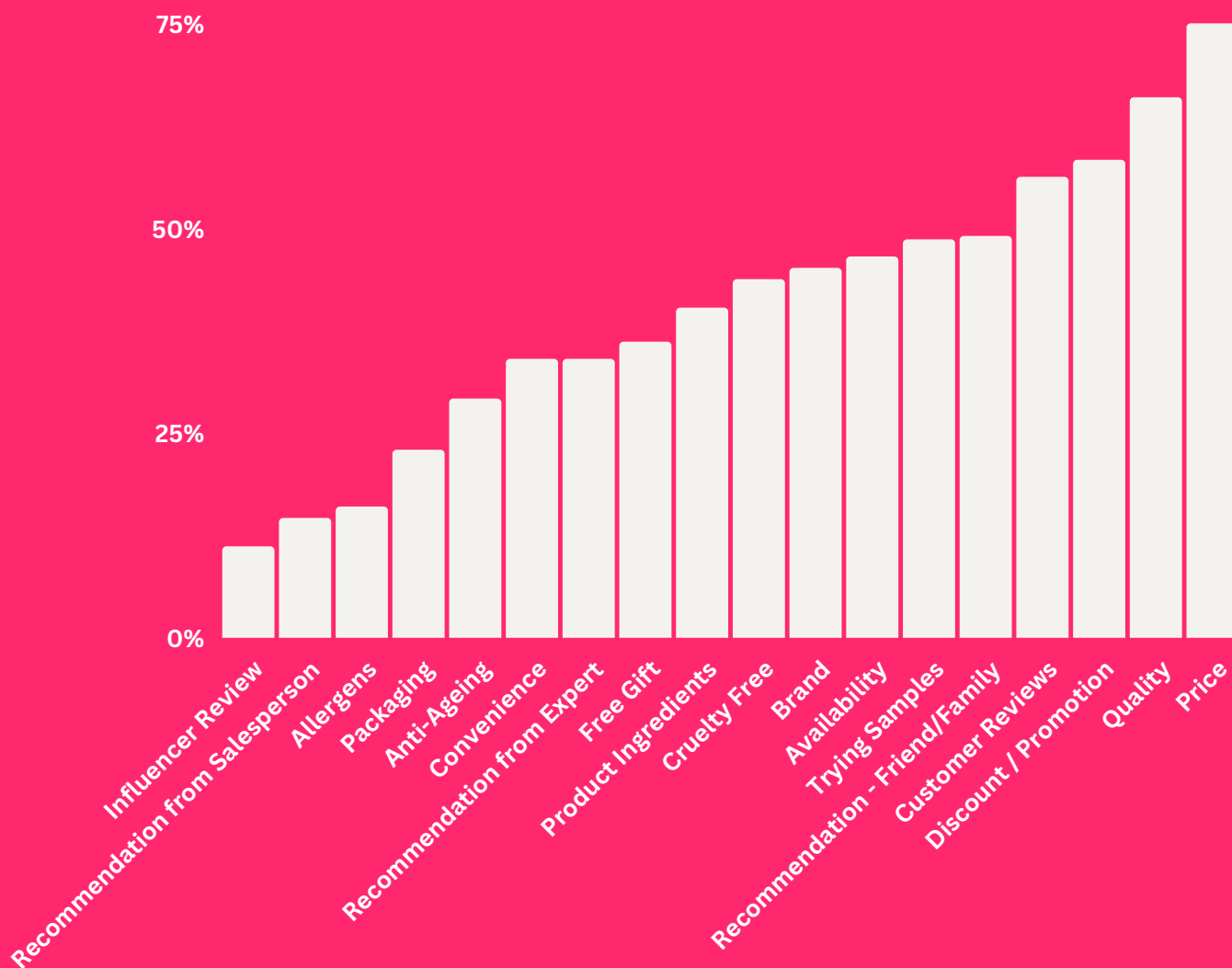
Generating trust from potential customers can be achieved by establishing a strong online presence, creating content that resonates with your target audience, and tailoring marketing strategies to effectively meet their needs and interests.

Overall, overcoming shopper pain points will benefit beauty brands by building trust, driving sales conversions and reinforcing customer loyalty.



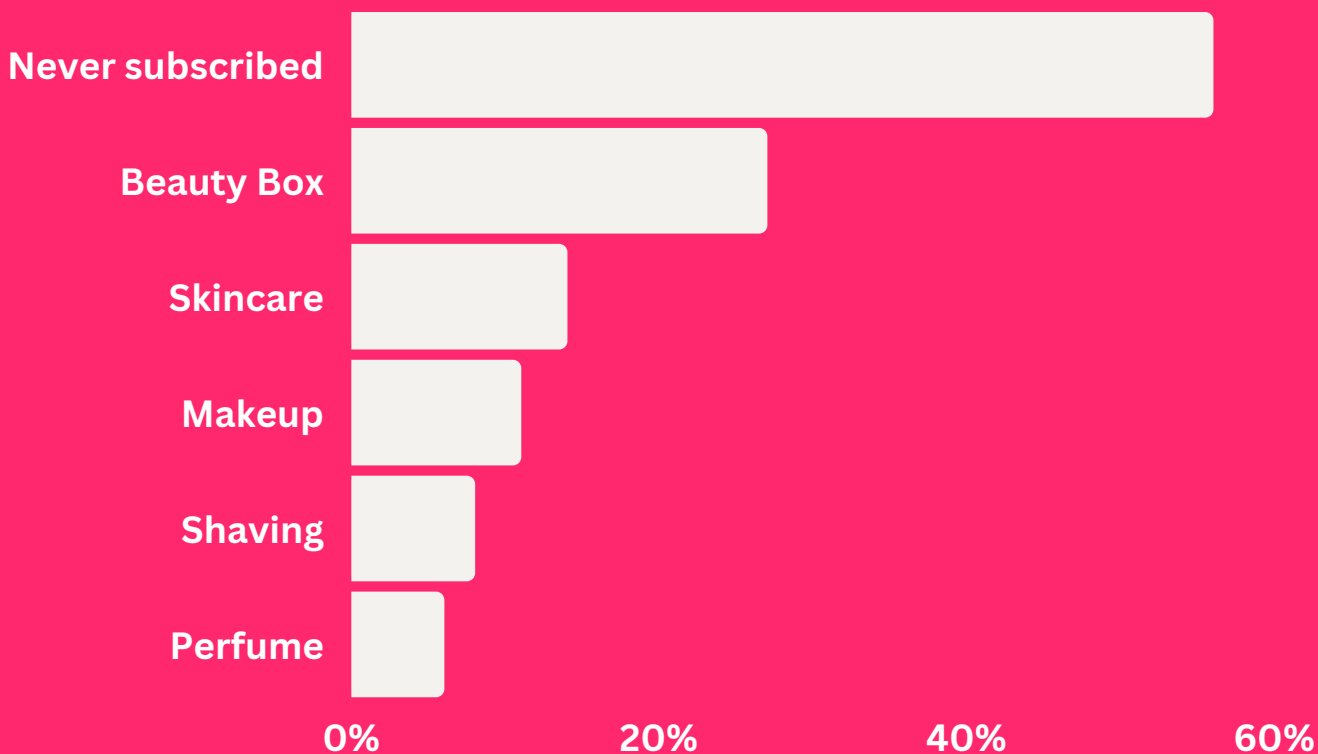
PRICE INFLUENCES PURCHASE

Price is undoubtedly one of the most significant factors when deciding which skincare or beauty products to buy. Our survey revealed that 75% of respondents chose price as their number one influencer. In second place, not far behind with 66%, was quality, followed by promotions and discounts at 59%, with customer reviews filling out the top four at 57%. Clearly, customers are looking for value and will prioritise the most cost-effective solutions, but they won't sacrifice quality to save money. Furthermore, even though customer reviews aren't in the first place, 57% of respondents still mentioned them, proving that people care about what other shoppers have to say and benefit from this advice when making decisions regarding beauty products.



RETENTION THROUGH SUBSCRIPTIONS

Although 56% of respondents have never subscribed to a beauty, grooming, or cosmetics box, the potential in this area should not be overlooked as the subscription economy continues to grow. According to Whistl, health and beauty subscriptions are expected to reach £92 million by 2025. Of those who have made a subscription, beauty boxes make up the largest percentage at 27%, followed by skincare (14%), make-up (11%), shaving (8%), and perfume/aftershave (6%). Subscriptions allow brands to build lasting relationships with customers while broadening their bottom line in the long run. Those within the industry should take advantage of this tactic to increase customer loyalty and further success.



WHERE DO THEY START THEIR SHOPPING JOURNEY?

Our survey results revealed that when it comes to digital shopping journeys, Google Search (72%), Brand website (63%), and Amazon (41%) were the top three most commonly used channels for initiating a purchase. Other channels such as Instagram, Facebook, TikTok, YouTube, Pinterest, Brand Apps and Google Shopping Ads were also favoured by some shoppers. To gain further insight, we asked respondents to describe their last beauty purchase journey – from the starting point until their purchase and what drove their choice. Analysing customers' personal shopping preferences and behaviours can greatly benefit marketers' decision-making processes, leading to optimised utilisation of digital channels during campaigns or product launches.



72% of shoppers begin their digital shopping journey with Google Search

"I wanted an AHA toner. Googled different brands, looked at reviews on different sites. Decided on the Ordinary brand so then looked at which site would be best to order from e.g price, reliability of the company, free delivery, points earned with the company. I ended up ordering through John Lewis as the price was good, information on the website good, had reviews, delivery free to my local Waitrose the next day."



63% of respondents go direct to brand website to begin their shopping journey

"I was looking for a face mask product to use repeatedly. I went straight to the superdrug website and searched around on there. I looked for a product that was in my price range and cruelty free. I'd been looking in stores and didn't find anything good which is why I looked online. I found a good product then ordered it, paying with my debit card."



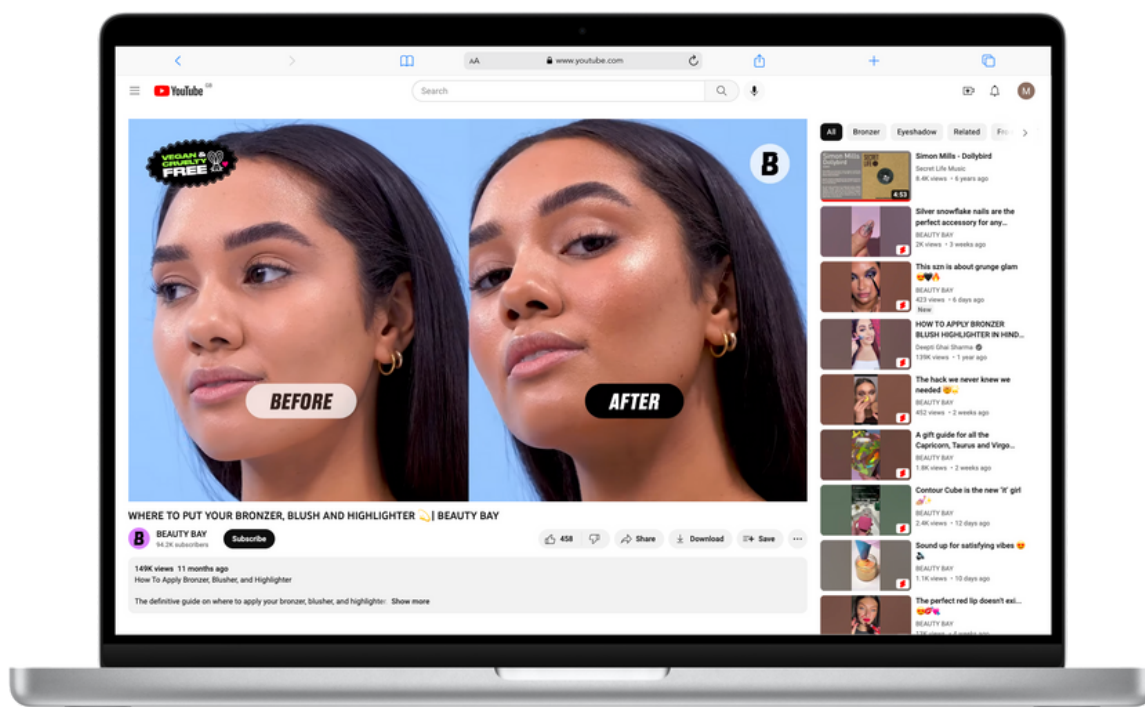
41% of respondents begin their shopping journey on Amazon

"My previous shaver broke so I searched Amazon for one that had good reviews, was cheap and a brand I recognised/trusted."

YOUTUBE FOR EDUCATION



YouTube has become an essential part of the purchase journey for beauty products. Unsurprisingly, the results from surveyed customers indicated that the most popular outcome (by 44%) was "I watch videos on YouTube to learn new skincare, beauty & grooming tips". This is followed by 41% of respondents watching videos to learn how to apply make up and new trends and 35% to understand skincare routines. This data confirms how powerful YouTube is for learning about beauty products. Brands should consider this when crafting their content strategies, ensuring they create high-quality video content specifically aimed at their target demographic on the platform. Beauty Bay displays mastery of this tactic with its 95,000-subscriber YouTube channel contributing to its active community and compelling educational beauty videos.



44%

Watch videos on Youtube to learn new skincare, beauty & grooming tips

41%

watch videos on YouTube to learn how to apply make up and new trends

35%

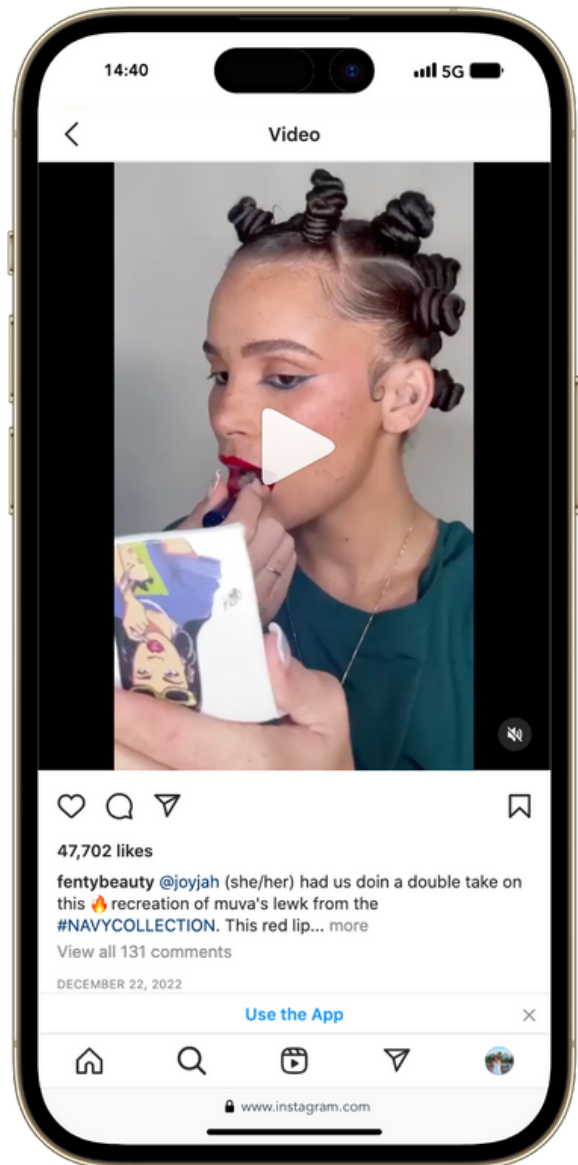
watch videos on YouTube to understand skincare routines

INSTAGRAM FOR DISCOVERY



Our research has shown that Instagram plays a major role in shoppers' journeys for beauty and grooming products. In response to a list of statements, the most popular outcome was "I have purchased a product as a result of viewing content on Instagram" at 45%, with the second and third most popular outcomes being "I use Instagram to discover new skincare, beauty & grooming products" (40%) and "I use Instagram to learn new skincare, beauty & grooming tips (38%). This data clearly illustrates that brands should include Instagram in their omnichannel strategies. By creating quality content surrounding beauty and grooming products, they can take advantage of this platform's immense potential.

The hashtag #beautytips has over 10 million posts showing its relevance in the industry. Brands such as Fenty Beauty demonstrate how successful an Instagram campaign can be through their diverse range of inclusive content.



45%

purchased a product as a result of viewing content on Instagram

40%

use Instagram to discover new skincare, beauty & grooming products

38%

use Instagram to learn new skincare, beauty & grooming tips

TIKTOK FOR INFLUENCE



TikTok has become a powerful force with the potential to boost product visibility and purchase intent significantly. Our survey found that 22% of respondents have purchased something due to viewing content on the platform, and 21% use it to discover new products, tips, and hacks. Although these figures appear lower compared to YouTube and Instagram, GenZ forms a large portion of TikTok's fan base; this number could significantly rise if more respondents in this age group were surveyed.

A case in point is CeraVe's success; its popularity skyrocketed after one viral TikTok post, showing that influencers are an effective way to harness TikTok's influence over both GenZs, as well as older demographics. As such, brands should not dismiss TikTok but instead, embrace the wider opportunities it presents for creating genuine connections with their target audiences.



22%

purchased a product as a result of viewing content on TikTok

21%

use TikTok to discover new skincare, beauty & grooming products

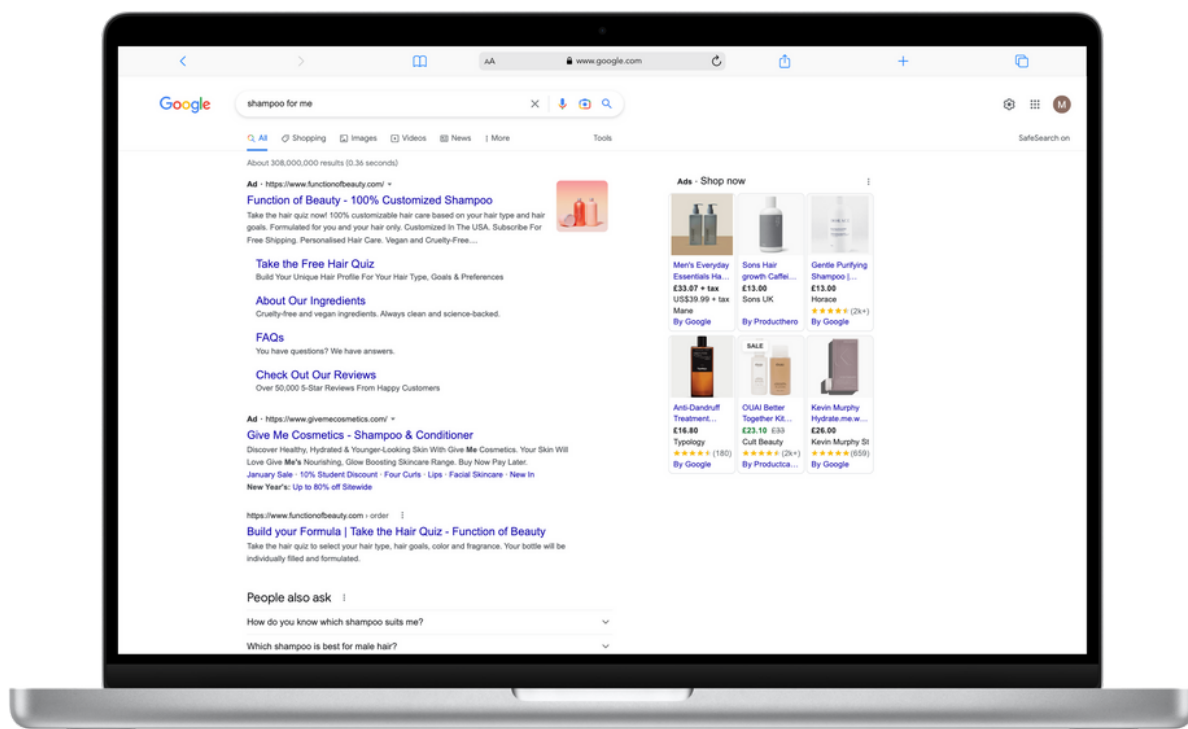
21%

use TikTok to learn new skincare, beauty & grooming tips

GOOGLE IS KING



The survey results clearly indicate that Google Search is indeed king when it comes to beauty. With 71% of people purchasing a beauty product and 74% visiting a retailer as a result of Google search, beauty brands must optimise their content and SEO strategies for the best possible organic visibility on Google. Investing in Paid Google Ads will also ensure your products have higher visibility and can help you reach more users than ever. An example of this would be the Function of Beauty, winning the top spot for the term 'shampoo for me' amongst many other brands. For organic search, hair quizzes appear to be the preferred content source, with Aveda featured most prominently. Thus, beauty brands must plan their SEO and content strategies meticulously to stay ahead.



74%

has visited a beauty retailer as a result of Google search

71%

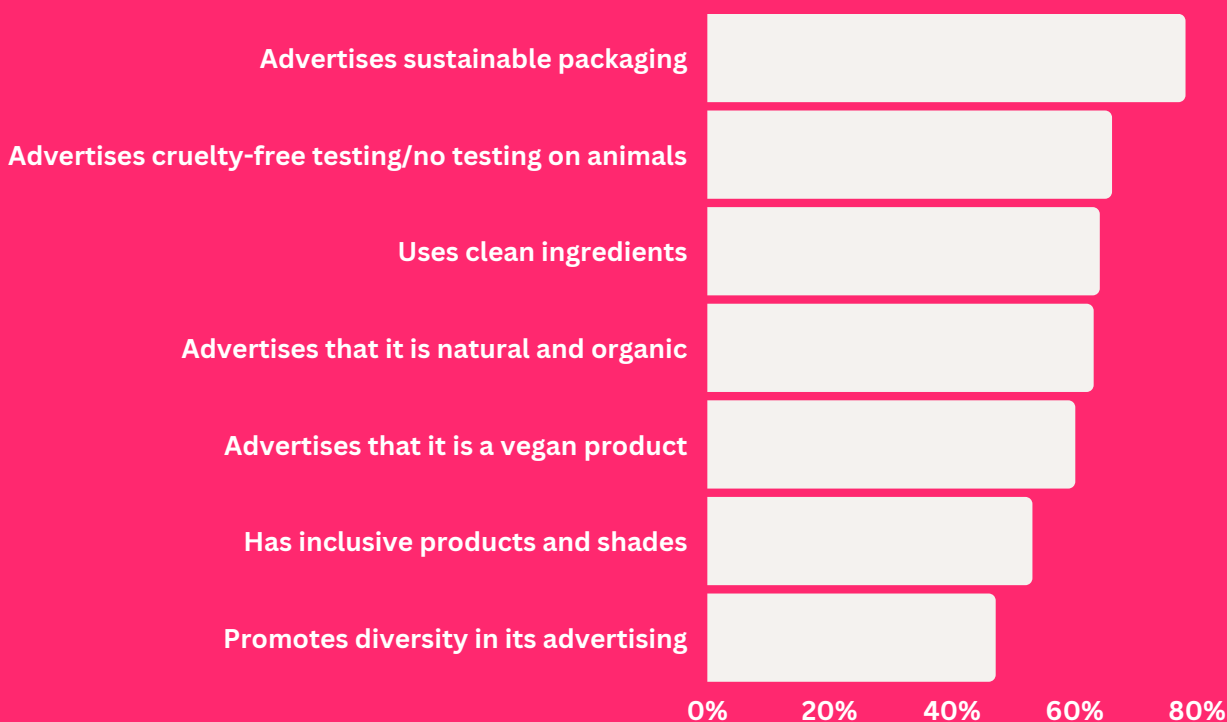
have purchased a beauty product as a result of a Google search

59%

rank Google as its preferred source to get beauty information

INVEST IN SUSTAINABILITY

With 78% of respondents saying they're more likely to buy beauty, grooming and cosmetic products from brands that offer sustainable packaging, it's clear that sustainability is a key selling point for many consumers. In our throwaway culture, more and more people are looking for brands that invest in protecting the environment. If your brand needs to be on board with sustainability, now is the time to switch. Sustainability is essential not only for the planet but also for attracting conscious shoppers. Other factors that appeal to shoppers include cruelty-free testing, vegan products, clean ingredients, natural and organic formulas, inclusive advertising, and products/shades that appeal to a wide range of skin types, complexions, races, ages, and genders. When it comes to marketing your brand, diversity should be a key priority. By promoting sustainable practices and inclusivity in your advertising, you can reach a wider audience and tap into the growing demand for ethical beauty products.





CONCLUSION

Our survey uncovered some interesting insights into how people shop online for beauty, grooming and cosmetic items. We learned that consumers prioritise quality and affordability, turning to digital resources like Google searches or social media platforms such as YouTube and TikTok for influencer reviews and product education before making a purchase decision. Recommendations from customer product reviews are also highly valued, as well as guidance from virtual tools and online quizzes. Additionally, brands with a clear ethical focus and embracing sustainability gain an edge with customers over those without. Finally, crafting a great customer experience includes taking into account small details such as having detailed descriptions of products with clear photos, allowing effortless product searches through filters, speedy checkouts via Apple Pay, and offering next-day delivery options that make the shopping experience even more enjoyable. Understanding these findings will help you create an effective strategy for your beauty, grooming, or cosmetics brand.

THANK YOU!

We hope you found our Beauty, Grooming & Cosmetics Online Shopping Consumer Survey findings 2023 useful. The guide's purpose is to support brand managers in the beauty, grooming & cosmetics industry with helpful advice and insight into consumer minds.

Want to get in touch with us? **Contact us here**, and one of our ecommerce experts will be in touch to have a friendly chat.

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