



Craft

The Oversimplification of Gen Z

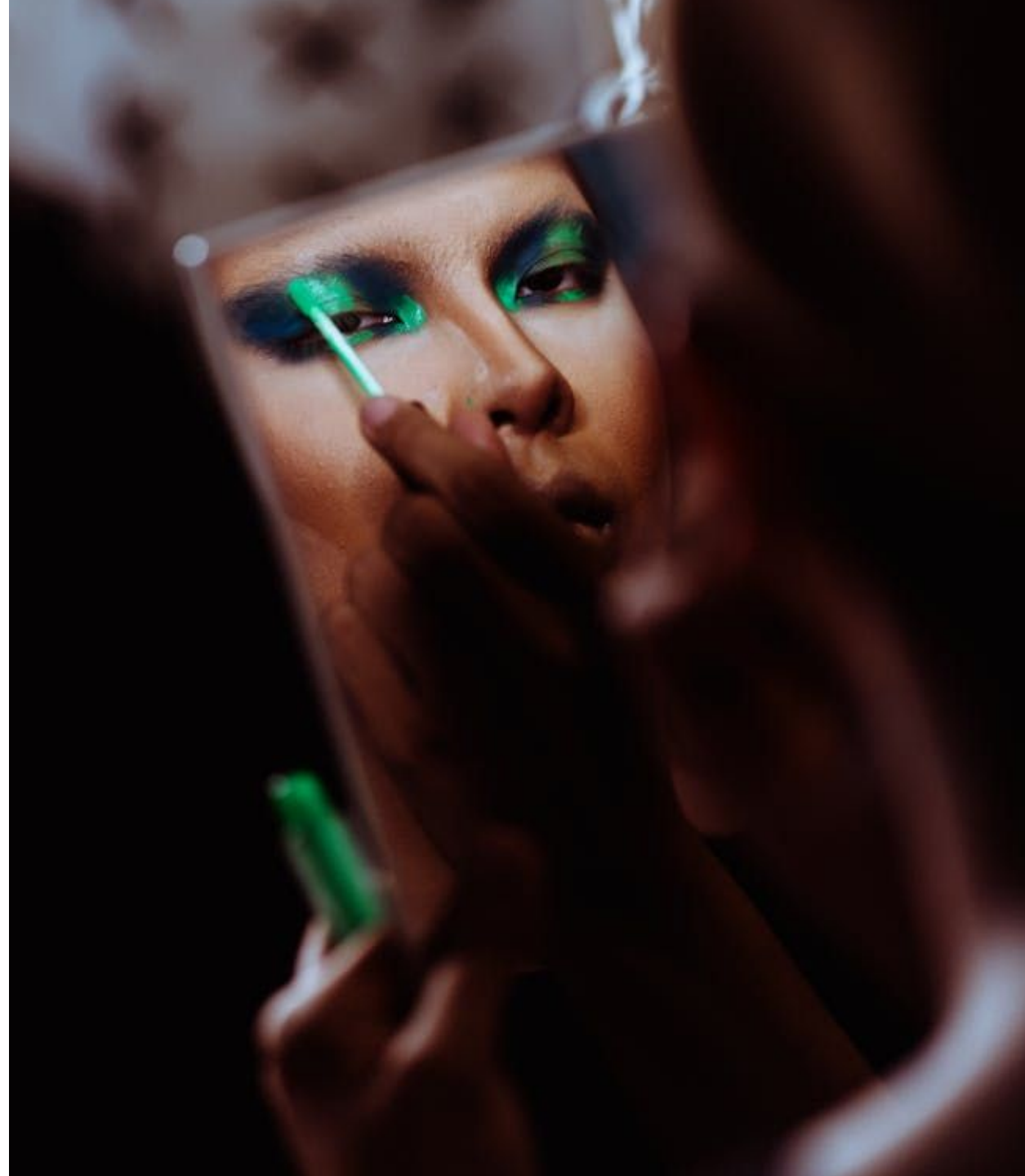
Unpacking Gen Z's complex relationship with beauty; and how to win with them in comms



Craft
MEDIA
LONDON

What this document contains

- **Who are Gen Z?**
 - Understanding the core behaviours of this audience that influence their relationship with beauty
- **Five behavioural contradictions shaping Gen Z's relationship with beauty**
 - Dispelling behavioural myths commonly associated with Gen Z
 - What impact this has on their relationship with beauty
 - How to use comms to win with this audience; and who's doing it well





**At Craft we
think
differently**

Craft Media sits at the intersection of brand, media & creative.

We consult on all communications – paid, owned, earned and shared.

We deliver communications strategies and plans that have been proven to impact positively on business results.

Our clients range from large international players to ambitious startups.

You won't find a smarter, friendlier group of Strategists and Planners to work on your business.

If you're interested in finding out more, drop us an email: hello@craftmedia.london or visit www.craftmedia.london



Craft can help across a wide range of communications

Campaigns

Comms Framework
Paid Media Planning (ATL & BTL)
Owned & Earned Comms
Influencer Strategy

Market Understanding

Market Analysis
Competitor Analysis
Social Media Trend Reports
Competitor Spend Reporting

Audiences

Audience Deep Dives
Audience Segmentation
Growth Audiences

Reviews & Training

Annual Planning
Optimal Spend Levels
Comms Touchpoint Audit
In-House Training



**Why have Craft
commissioned
this report?**

**The beauty industry is changing and evolving quicker than any other category.
The unprecedented acceleration of tech, culture & communications have created
more opportunities than ever for beauty brands to thrive.
So it's a battle for attention to win beauty buyers' share of wallet.
Meaning it's more important than ever for Beauty brands to understand how to win
with today's beauty customers to future-proof growth.**

**Critical to this growth is winning with Gen Z.
They are the generation that will ultimately wield the most spending power.
But they aren't a straightforward cohort to understand.
There are nuances & tensions in their behaviour;
which often aren't picked up in broad trend reports.**

**Using a blend of quant, qual and behavioural data,
We have unpicked how this affects their relationship with beauty brands,
The influence of communications,
The brands that are doing this well,
To understand how beauty brands can win with this cohort today.**



**TLDR; W hat do we
want you to leave
with?**

A deep understanding of the beauty industry's most interesting cohort, Gen Z, and their relationship with beauty;

Inspired and energised by the possibilities to engage this cohort via communications



Our methodology

1

Use quant tools to identify key behavioural nuances in relation to other generations



2

Verified these findings with behavioural data & wider industry sources & reports



3

Identified key themes that are pertinent for beauty brands



4

Analysed which brands are doing it well, and implications for comms



Understanding Gen Z's relationship with beauty

**A macro look at this audience and the
behaviours that influence their
relationship with beauty**



Who are Gen Z?

Born between 1997 – 2012

The youngest Gen Zs are currently 12 and oldest are 27. They're at very different life stages, with some finishing school, going to university, entering the workplace or even approaching 30.

A lot is reported on this generation



Power-hungry hedonists? Survey reveals what drives generation Z

Global poll shows cohort values achievement and fun, although their definitions might differ from previous generations



Generation Z: 'The Loneliest, Least Resilient Demographic Alive'

Will Gen Z be the first generation not to experience imposter syndrome?



Gen Z's Top 50 Most Inclusive Brands



Beauty brands love them because they are reported to be...

Beauty curious

45% report they try new brands every 2-3 months

Beauty literate

85% have a regular skincare routine

Have big spending potential

By 2030, Gen Z will represent **1/4** of the world's population

Brand loyal

60% willing to keep buying from their favourite brands



**But there's more to
this generation than
the media reports**

They are coming of age in an era of instability & change

Unfavourable economic climate impacting their opportunities

UK inflation at 40 year high
Consumer Prices Index, 12-month rate



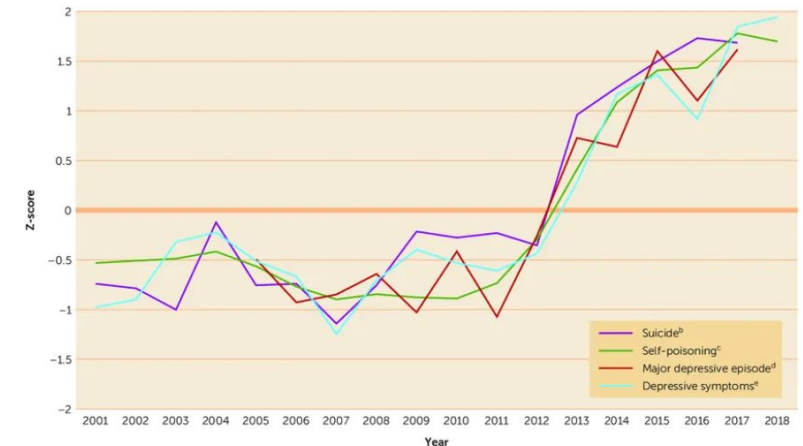
Pre-1989 figures from ONS historic CPI data
Source: Office for National Statistics

B B C

An unstable political & socio-economic environment globally



An era of unfiltered information online correlating with mental health issues



Indicators of poor mental health among U.S. girls and young women, 2001-2018 a





So their behaviour is often contradictory

Confident › Insecure

Inclusive › Superficial

Experimental › Conformist

Digital Natives › Digital Fatigue

Environmentally Passionate › Environmentally Passive

Affecting their beauty buying habits



**Accepting of all skin › Striving
for perfection**

Standing out › Wanting to fit in

Research savvy › Impulsive

**Environmental choices ›
Money-saving priorities**



“It's never been more important for beauty brands to **adapt** to the needs of this ever-changing cohort”



This report will cover five key themes

1

Beauty is External

Feeding Gen Z's obsession with beauty perfection through comms

2

Routine is Paramount

Understanding how to become part of Gen Z's routine-building behaviour

3

They want to Stand Out to Fit In

How to adapt to Gen Z's desire to stand out, whilst also having a sense of belonging to a tribe

4

Love / Hate Relationship with Social

The importance of 360 planning to engage Gen Z across every available touchpoint

5

Not So Sustainable

How to engage Gen Z through their "sustainable" behaviours

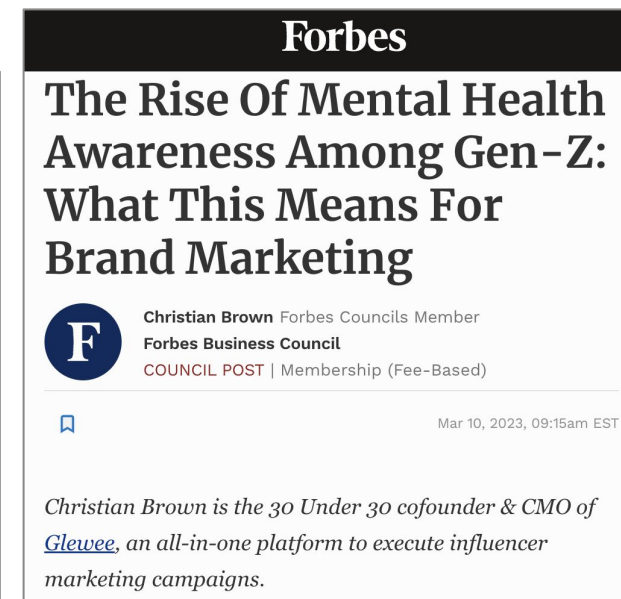
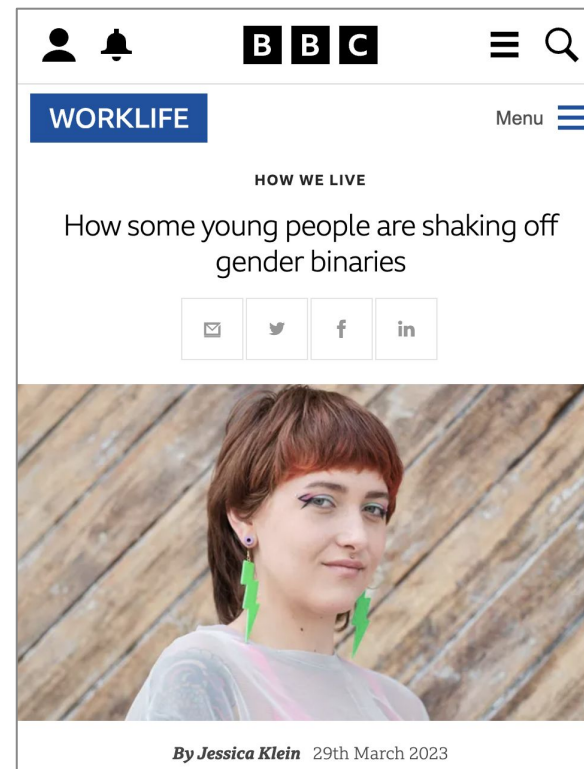


1. Beauty is external

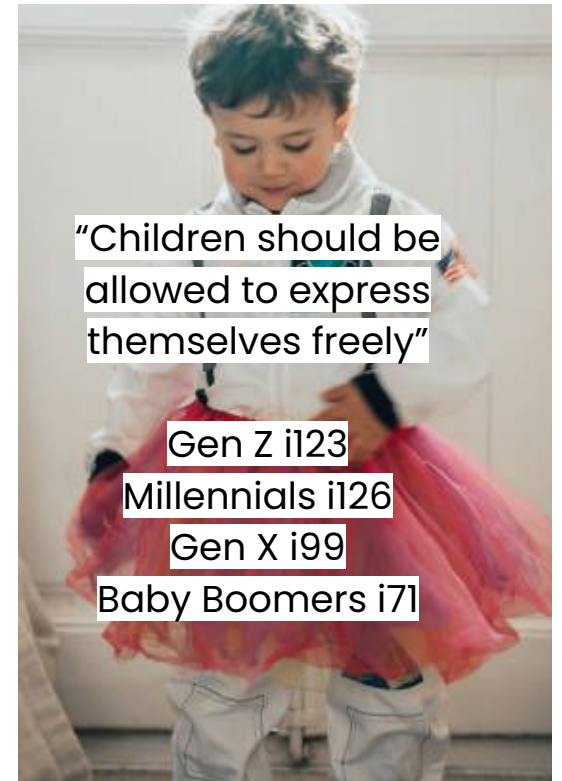
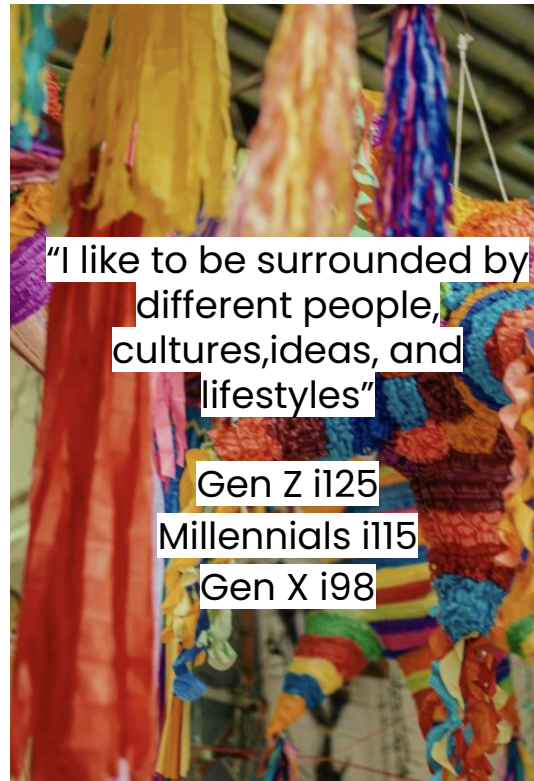
A contradiction of internal vs external expectations



Gen Z are often lauded as the most open and accepting generational cohort



The data tells us that there is truth in this





**But there is an interesting tension in
internal vs external expectations**

Internal openness and
acceptance

vs.

A rigid expectation on
how they are viewed
externally

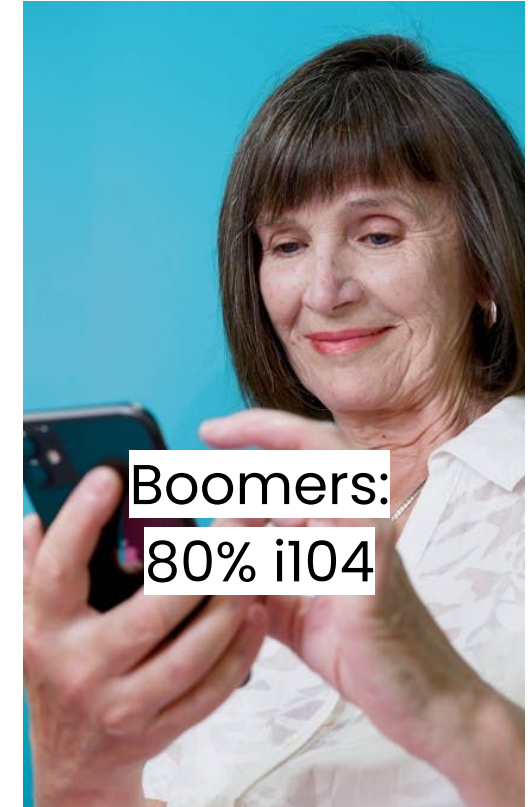
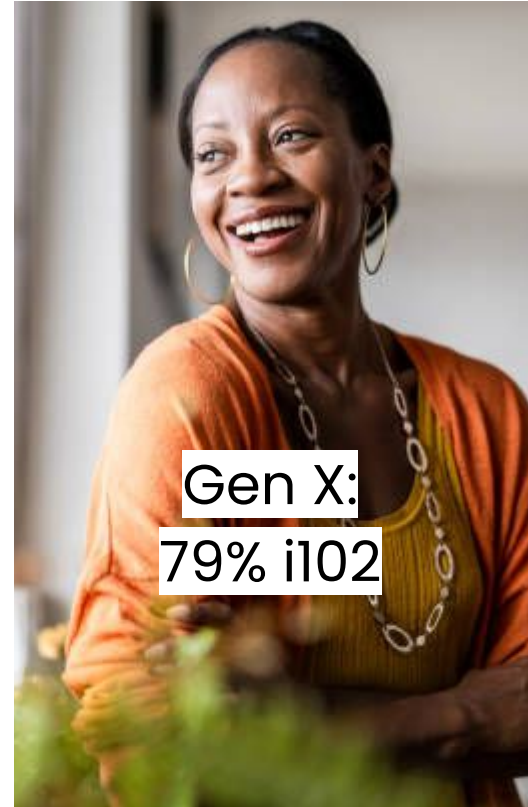
Whilst open and accepting internally, they hold themselves to extremely high standards of beauty

- A/A It is important to me to always look perfect
32% i158
- A/A People's opinion on my appearance is very important to me
48% i150
- A/A It is important to be attractive to others
46% i117

More so than any other general cohort



And ultimately believe that beauty is external facing



Gen Z is the generation that is least likely to agree that:
Beauty comes from within



This is as true for the US as it is for the UK

**52% i115
agree**

*I take care of my
self-appearance*

**50% i116
believe**

*their physical
appearance is
important to
their life*

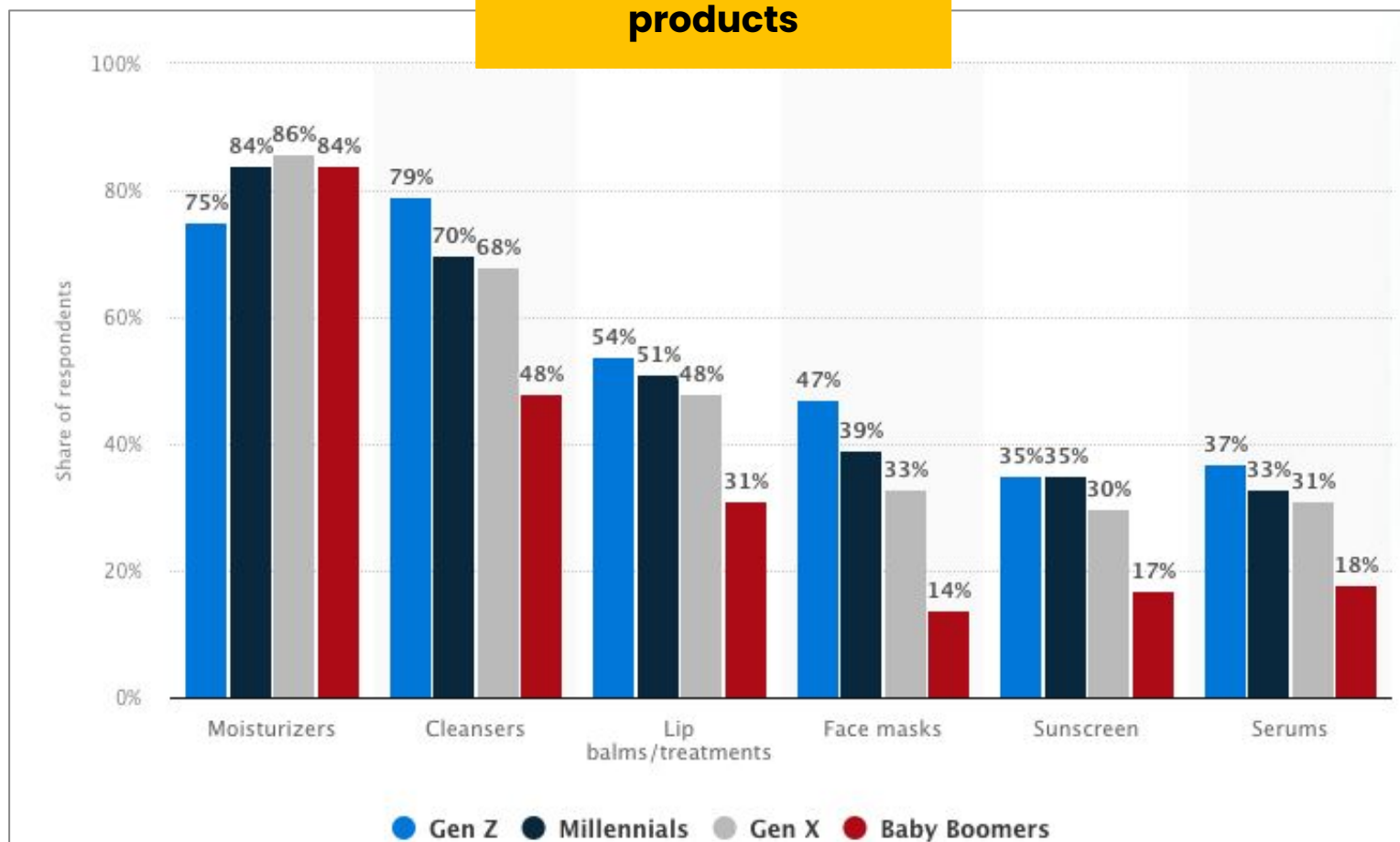
**26% i118
believe**

*their physical
appearance
defines their
identity*



This is culminating in an audience obsessed with beauty

Buying into more products



Buying into them younger

A survey by The Pull Agency found that **60% of Gen Z purchase beauty products before they are 14 years old**, compared to just 39% of millennials and 23% of those over 55.

Buying them more often

State of Beauty, **40% of Gen-Z are buying a new beauty product they find online every two months or more**

They are avid consumers of beauty content, relying on information, reviews and tutorials to keep up to date

62% of Gen Z beauty consumers digitally research beauty/personal care before purchasing

WGSN, Gen Z: Building New Beauty White Paper

"32% of Gen Z say that without YouTube tutorials, their look wouldn't be nearly as good."

Paramount "How Gen Z is changing the Face of Modern Beauty

Self-educated Gen Z 'skintellectuals' seek information before they buy, using sources like Beautypedia

WGSN, Gen Z: Building New Beauty White Paper



With access to this information 24/7 through their fingertips, they are (arguably) the most educated generation

"Gen Z are very much 'skintellectuals'"

"Gen Z 'skintellectuals' actively research ingredients... at an earlier age than their millennial predecessors did"



But this influx and constant connectedness can feel overwhelming

"The volume of calls wanting seemingly perfect skin and features has increased 100%.

Clients want skin that looks like that of a filtered photo or image"

Flavio Refrigeri
Founder, Clinica Fiore Skin Medica



Not only is the constant pursuit of beauty pushing the boundaries of “everyday” beauty



It is also making it
difficult for brands
to cut through

+8,350%

growth in beauty-related content views
worldwide on YouTube from 2008 to 2018 (from
2bn to 169bn)

+1,046%

growth in the term "skincare" appearing in
UK company names from 2000s to 2010 (from
32 to 367)

10x

growth in the proportion of registered live
companies using the term "beauty" in their
name from 2000 vs 2020 -significantly more
than any other word



**What impact is this having
on their relationship with
beauty?**

**Gen Z's
unprecedented
access to
information has
developed an
increased
awareness and
understanding of
specific beauty
concerns**

27%

less likely than the average
adult to claim to have
"normal" skin type (Gen Z
i73, vs Millennials i80, Gen X
i102, Boomers i127)



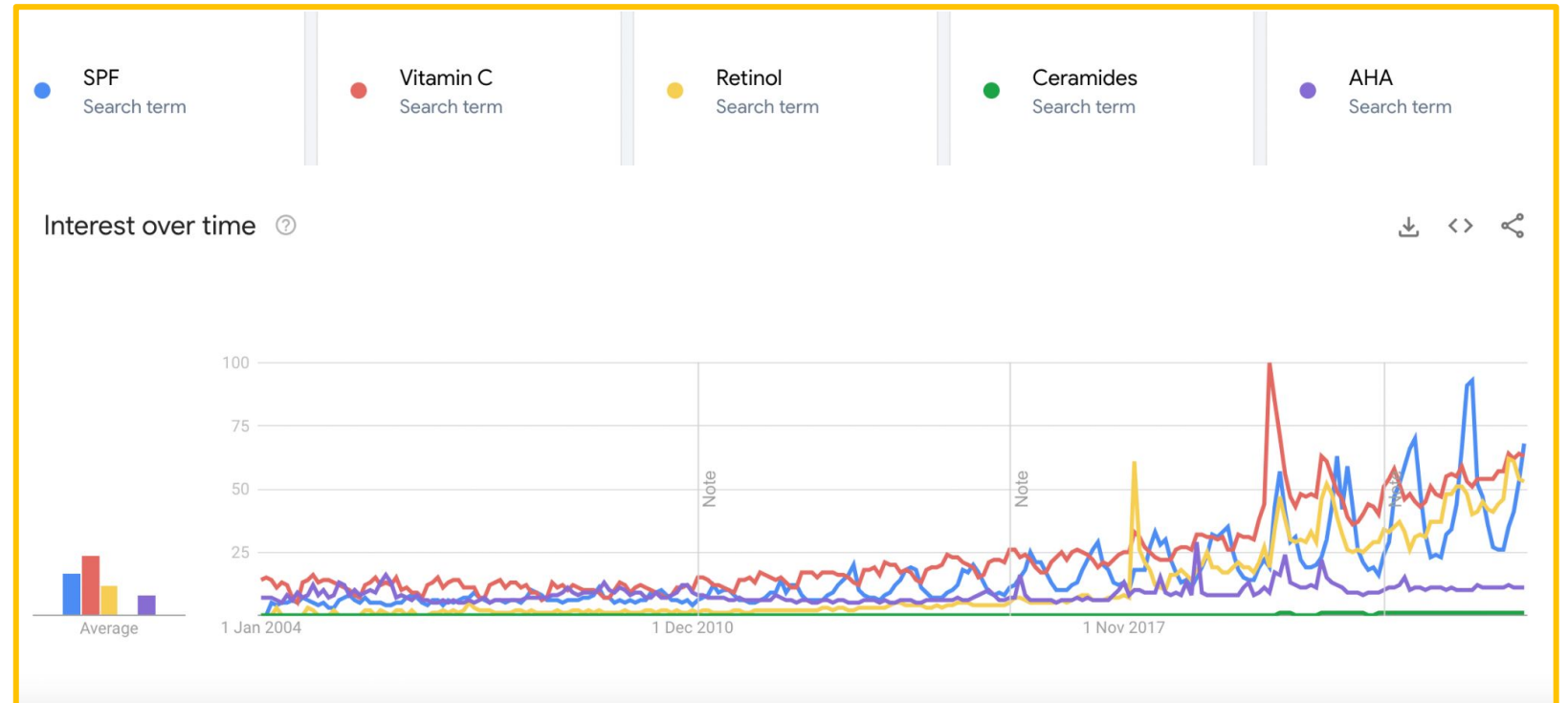
Along with how to tackle these concerns through specific products or ingredients

Gen Z “skintellectuals” actively research ingredients

Glossy.co

“We saw searches for ingredients start to climb rapidly, particularly within the skincare category, growing over 229 per cent year on year,” says Rachel Horsefield, chief executive of THG Beauty.

Vogue Business



Similarly to Millennials, close to half of Gen-Z report checking product ingredients and doing extensive research on their benefits before purchasing, compared with one-third of Gen-X (born 1965 to 1979) and one-fifth of Boomers (born 1945 to 1964).

Business of Fashion

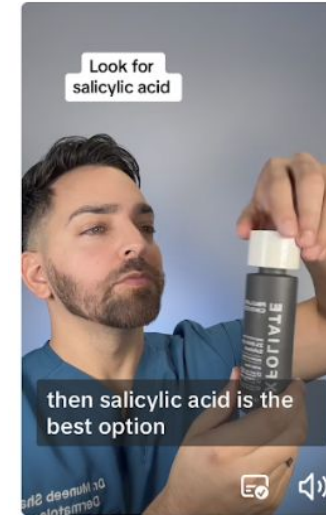
They enter into a brand through a product first

Popular brands on TikTok (their preferred beauty channel) are often anchored in a hero product.

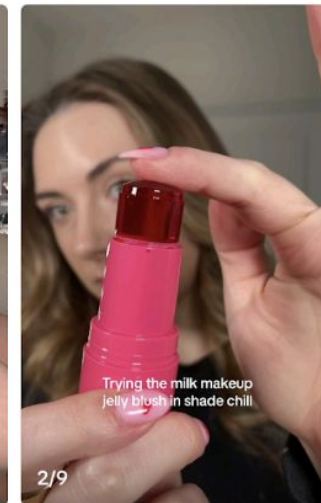
A quick search of these popular brands will demonstrate a disproportionate number of videos dedicate to said hero product.

Source: TikTok Hashtag Tool

Paula's Choice = BHA Exfoliant



Milk Make Up = Jelly Blush



**They are
constantly on the
pursuit of the next
new thing in
beauty**

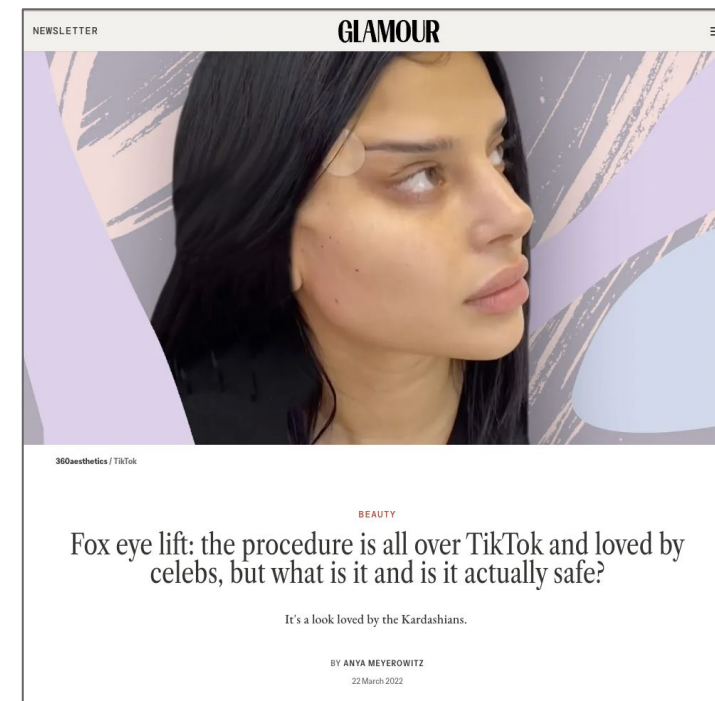
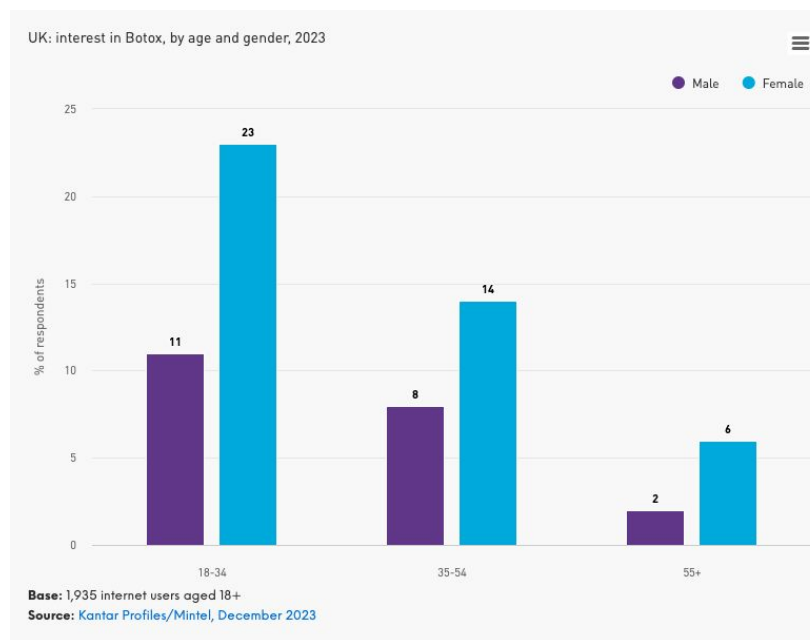


**45% say they try
new beauty
brands every two
to three months**
Mckinsey

As a result, they are the generation most open to new methods for achieving their beauty ideal

A/A I would consider having cosmetic surgery/A cosmetic procedure
29% i 131

More interested in botox than any other generation



With non invasive cosmetic procedures gaining popularity in their number one channel for beauty (TikTok)

**Beauty brands that cut
through the clutter are
those that elevate hero
products through the lens
of Gen Z beauty behaviours**

Beauty is External: Implications for comms

1

Spotlight ingredients and take them front and centre

Make it easy for consumers to navigate to your product through an ingredient first approach.

2

Double down on your “best bet” to cut through

Be honest about your suite of products.

Back the “winning horse” as the intro to your broader range and brand.

3

Inject a bit of drama

Whether it’s in the product itself, the packaging, or the comms, in order to stand out, bring the drama!

Extra points if the drama can easily travel through TikTok (make it visual).

1. Spotlight ingredients and take them front and centre

Make it easy for consumers to navigate to your product through an ingredient first approach



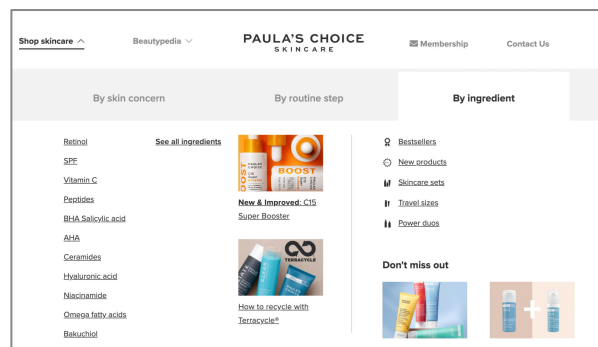
Ingredient first approach permeating across a number of different ways

Ingredient first product (and packaging)

Skin concern + ingredient

Make it easier to navigate through owned

Fuelling other categories (skincare makeup)



2. Double down on your “best bet” to cut through

Be honest about your suite of products.

Back the “winning horse” as the intro to your broader range and brand.



Glossier Milky Jelly Cleanser: The first of Glossier's products launched. Remained as Glossier's only cleanser product until 2021.



Brands are prioritising being known for one thing before introducing to everything

BEAUTY IS EXTERNAL



3. Inject a bit of drama

Extra points if the drama can easily travel through TikTok (make it visual).



Examples of how brands have injected a bit of drama in their comms

In the product itself



In the product application



In comms



2. Routine is paramount

How to be a part of Gen Z's routine-building behaviour





**Youth Culture has been
known for rebelling
against the status quo.**

**And Gen Z seem to see
themselves in the
same light**

**UK "I like taking risks" i186
USA "I always take risks" i197**

But Gen Z are taking up less risky behaviors than the Millennials that came before them

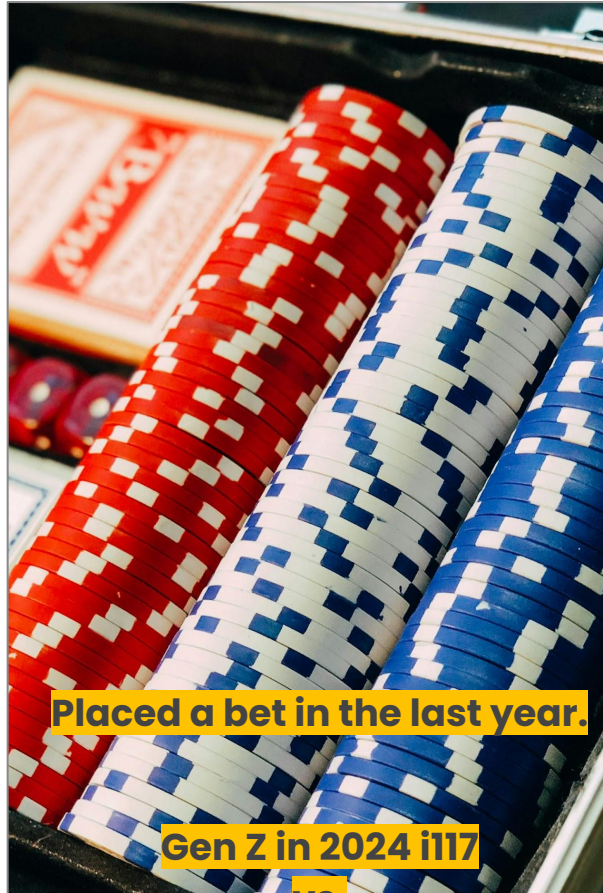


"I really enjoy a night out at the pub"

Gen Z in 2024 i126

vs.

Millennials in 2016 i153

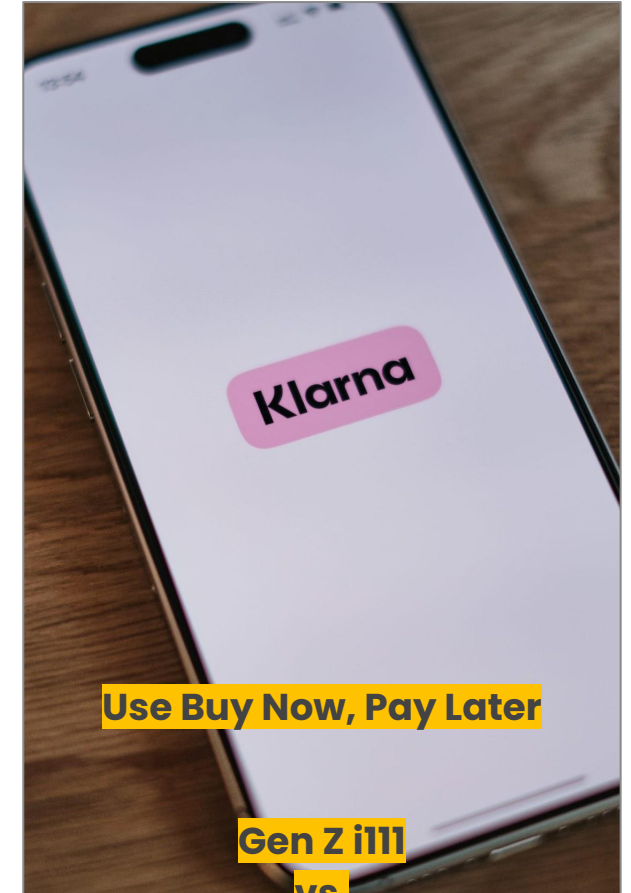


Placed a bet in the last year.

Gen Z in 2024 i117

vs.

Millennials in 2016 i136



Use Buy Now, Pay Later

Gen Z i111

vs.

Millennials i145



Instead they prioritise their routines in an attempt to be perfect

Follow routines as much as older generations

- "I like to follow a well organised routine"
i106 Gen Z

They take care of their health to improve their appearance

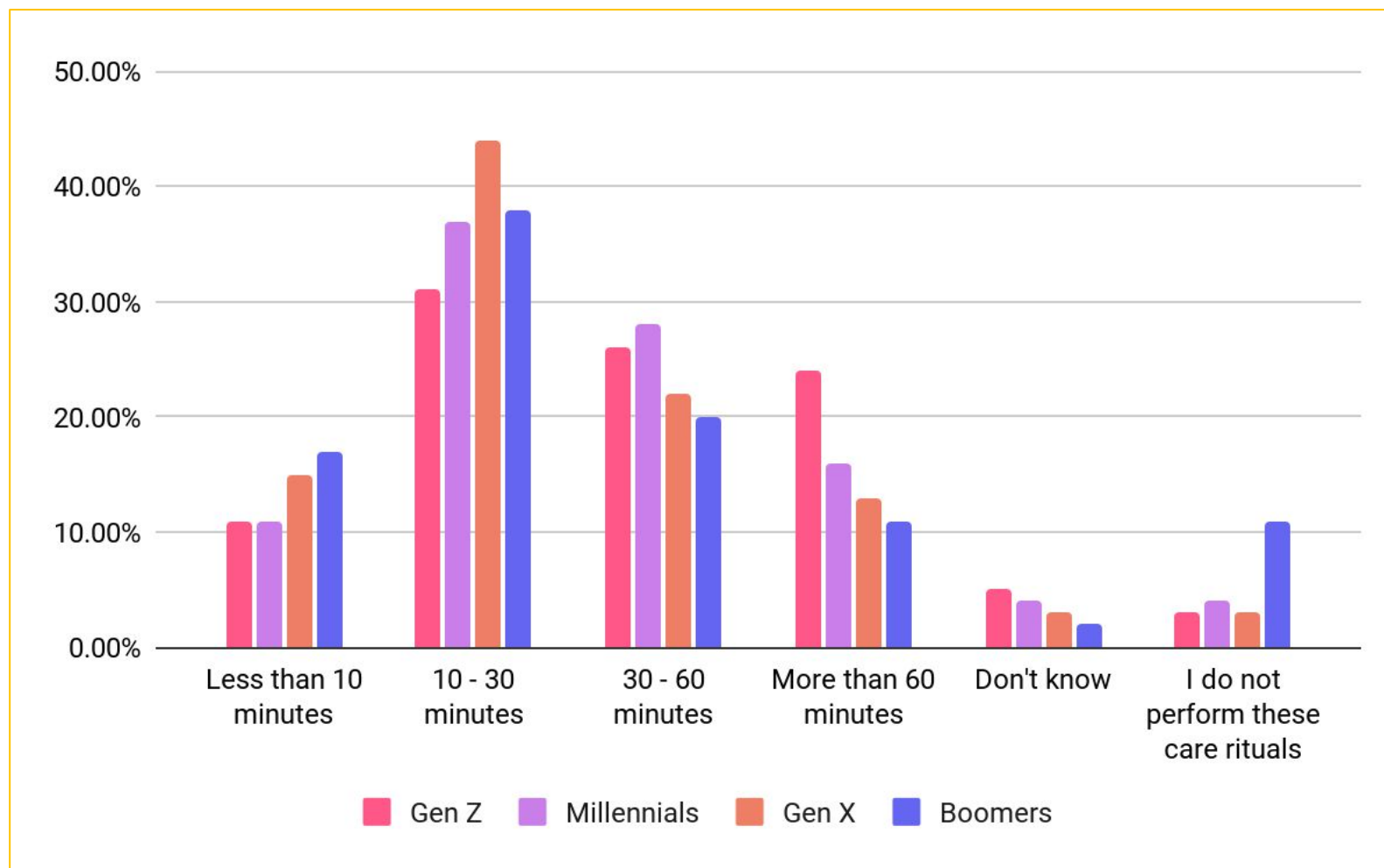
- "I look after my health to improve my appearance"
i115 Gen Z

Strive for perfect

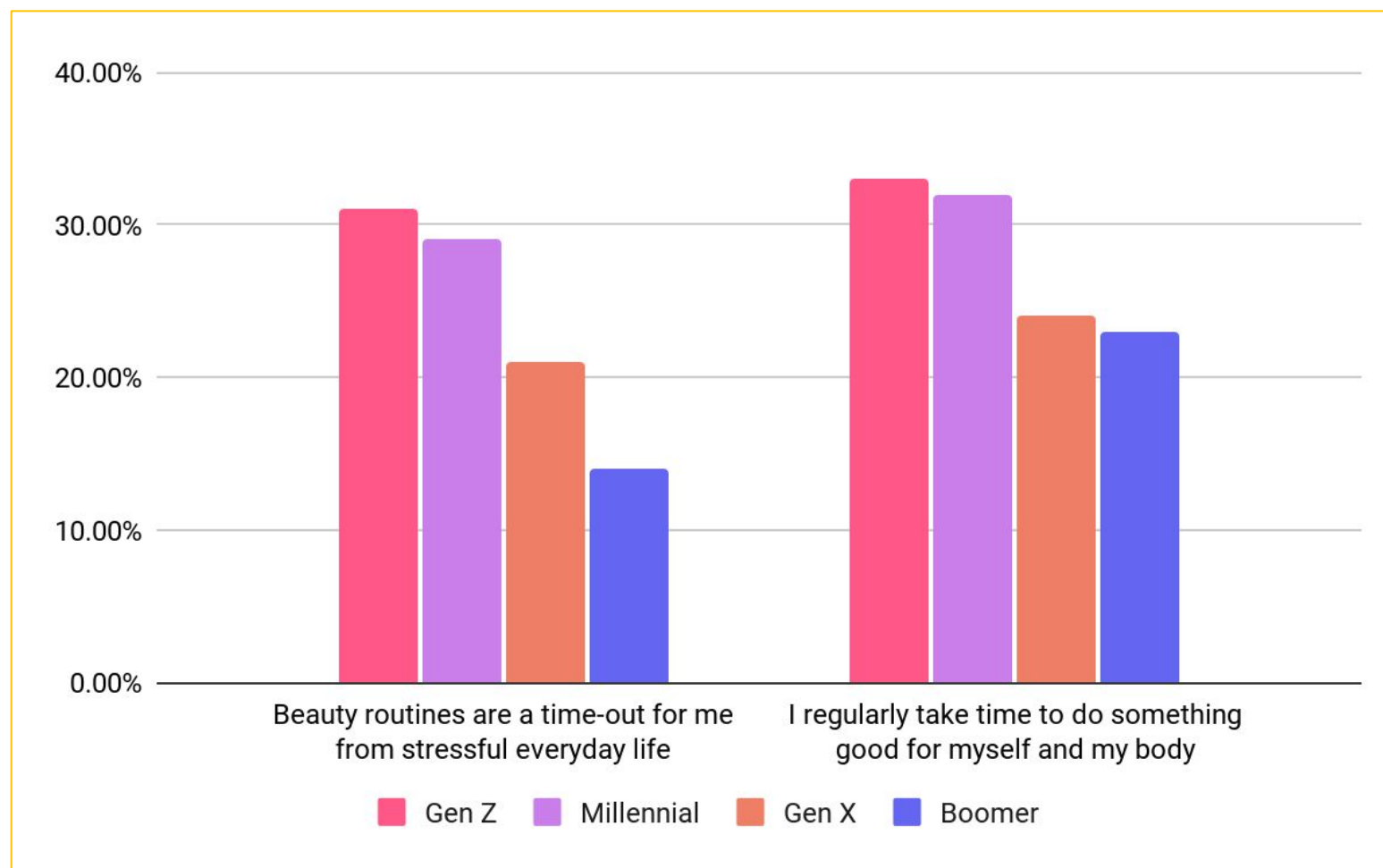
- "I am a perfectionist"
i127 Gen Z



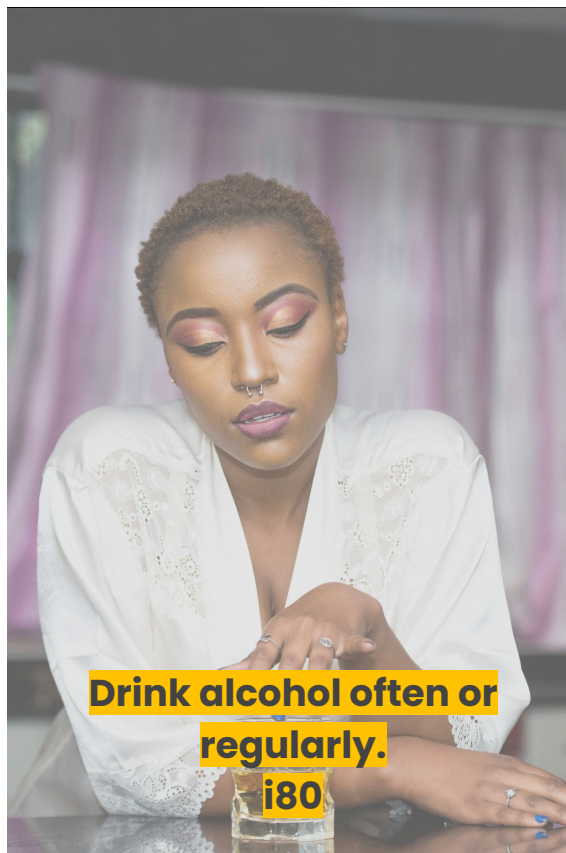
Regularly spending vast amounts more time on their beauty routines



And using their beauty routines as escapes for themselves



This holds true in the USA as well



Lowest of all generations



Highest of all generations



This beauty regime helps them achieve their perfect skin, so they're less reliant on make-up

In 2016, Gen Z over-indexed for the statement **I can't leave home without makeup on at i127.**

In 2024 this has dropped to i94.

**We're seeing a similar pattern for Millennials as well (i114 in 2016 vs. i97 in 2024)*



These routines also help them prevent the effects of aging

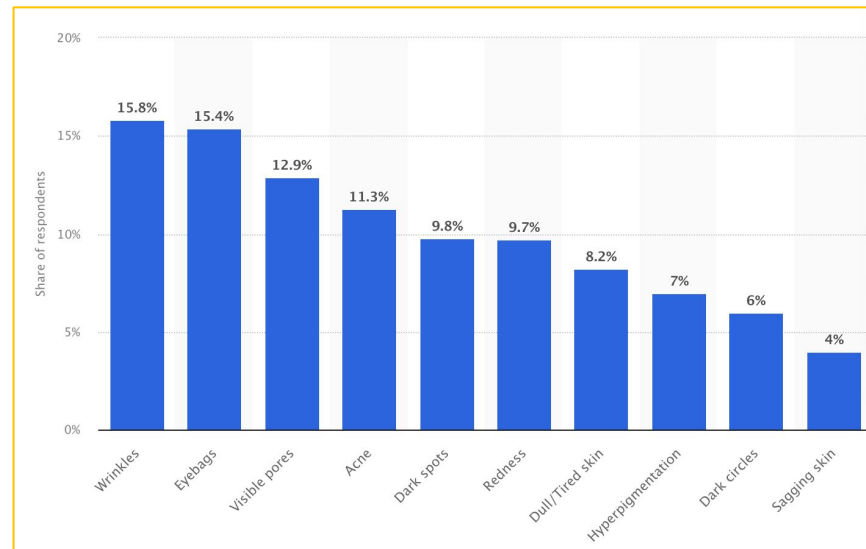
Feel it's important to stay looking youthful



It is important to keep young looking i135

There's no point worrying about getting older i77 – underindex

Most common skin concerns among Gen Z is wrinkles



In the US, more regularly getting "tweakments"

"75% of US facial plastic surgeons reported more clients under 30 requesting botox and filler"

Business Insider "Gen Z's new status symbol"

“Gen Z is proving they’re putting a strong emphasis on their skin health, specifically focusing on keeping up their youthful appearance for as long as possible. With many respondents mentioning steps like toners, serums, and eye creams, it suggests that they are not only focused on immediate concerns but also on long-term skin health and maintenance”

Kyra State of Beauty Report 2023



**What impact is this having
on their relationship with
beauty?**

Through these regular routines, beauty has become a hobby for them.

UK

"Beauty/Styling products help me feel good about myself" **i122**

"I like to be pampered" **i115**

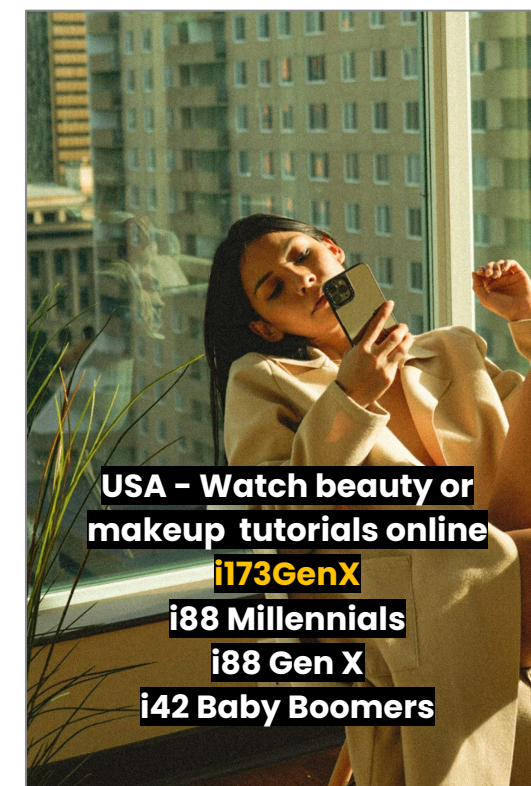
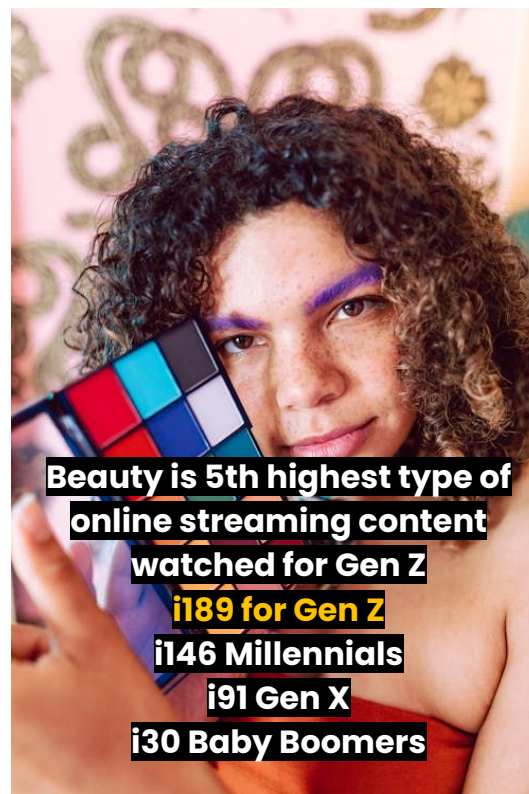
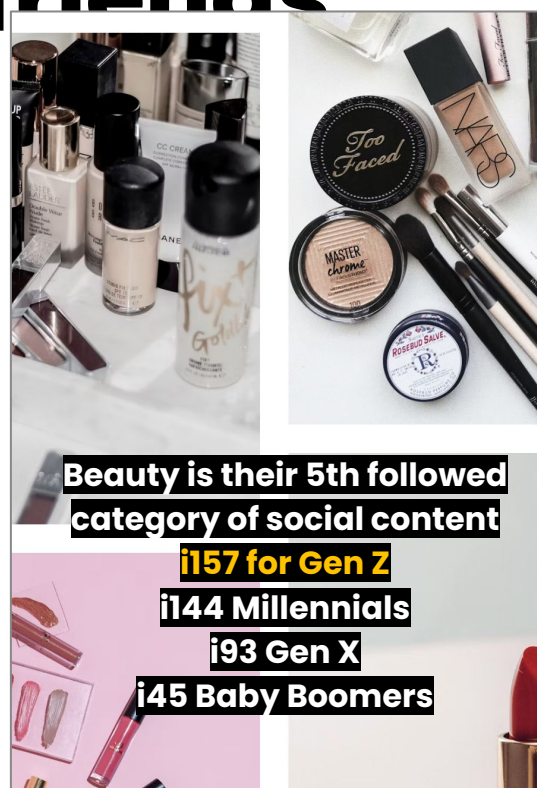
USA

"I often take time to pamper myself" **i136**

Consider "beauty/cosmetics" a lifestyle interest **i132**

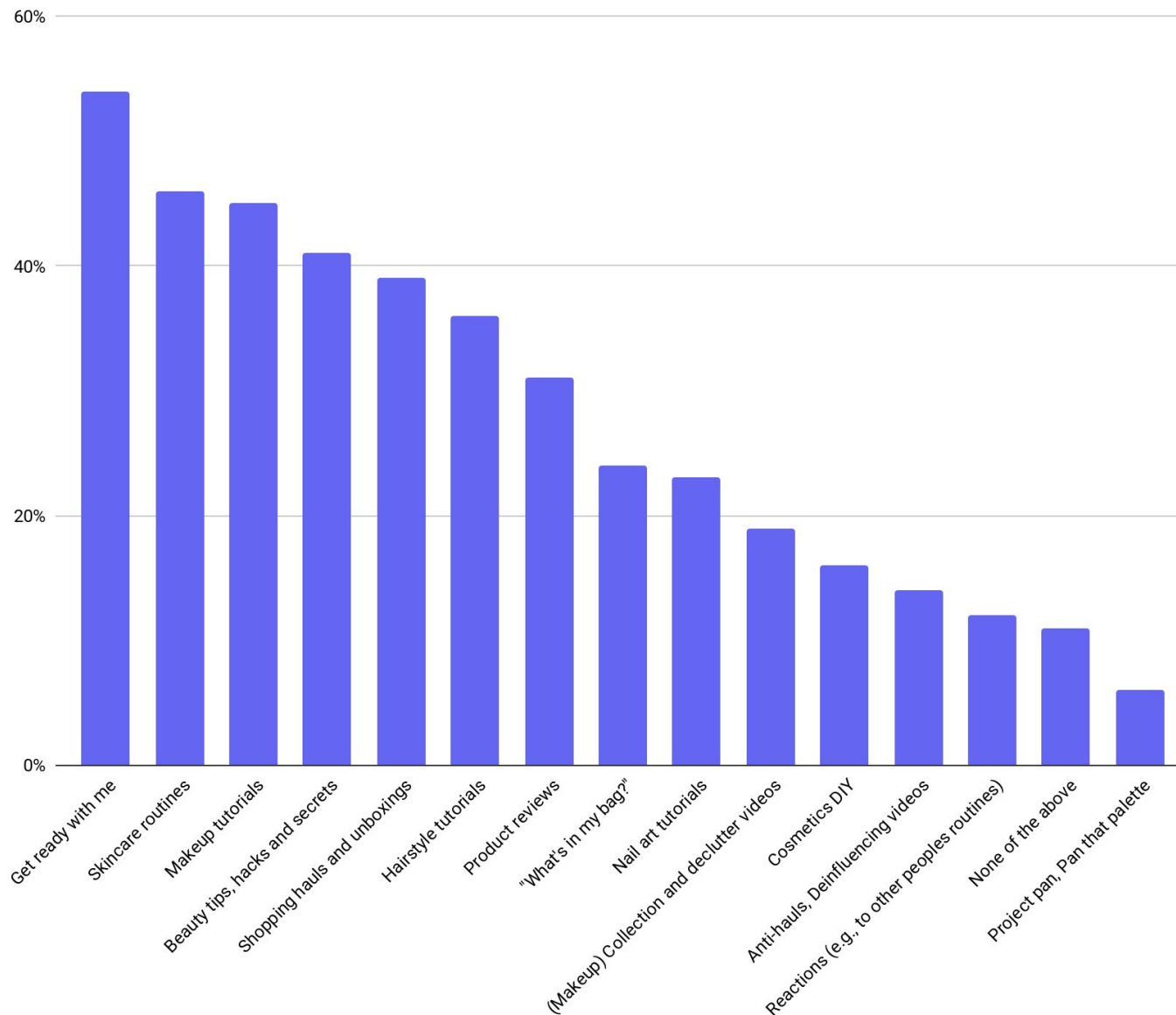


As they build their routines Gen Z are looking to absorb more knowledge online and regularly discussing with friends



**And they become
obsessed with
finding the best
routine for
themselves**

Gen Z Most Watched Beauty Social Media Content

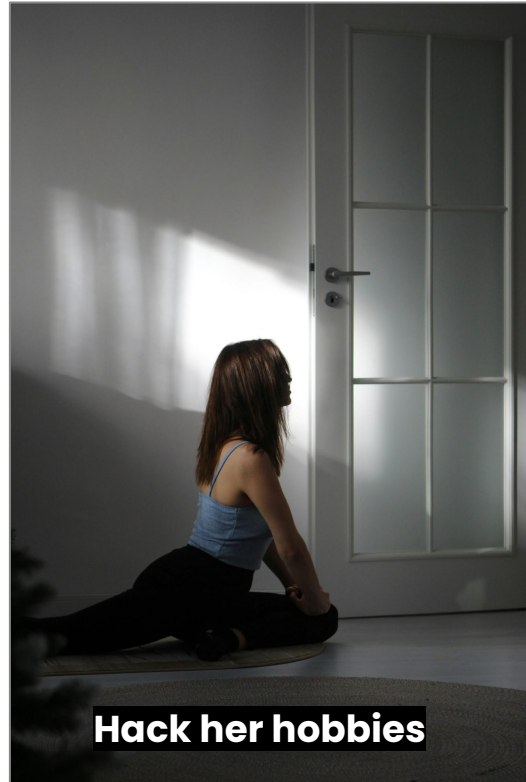


A close-up photograph of a person's hand holding a smartphone. The screen displays various social media app icons, including Twitter (with a red notification badge showing '21'), Instagram, LinkedIn, and TikTok. The background is blurred, showing what appears to be a desk or table. The text 'Social Media' is visible in a large, white, sans-serif font on the right side of the screen.

**Which means brands end up in a sea of
sameness...**

**...delivering the same or extremely
similar content as everyone else**

For brands to stand out they need to hack Gen Z's routines and hobbies at high frequency.



Increased Purchase Intentions

10+ Ad Exposures

Psychological Process

Ad's ability to evoke emotion motivates consumer to ACTION

in High Frequency



**Beauty brands are hacking
their way into
Gen Z's beauty routines**

Routine is Paramount: Implications for comms

1

Hack her routine

Show up around the content she is already watching or add to the routine.

2

Hack her hobbies

Get into new spaces through partnerships outside of beauty.

3

Use frequency to build routine associations

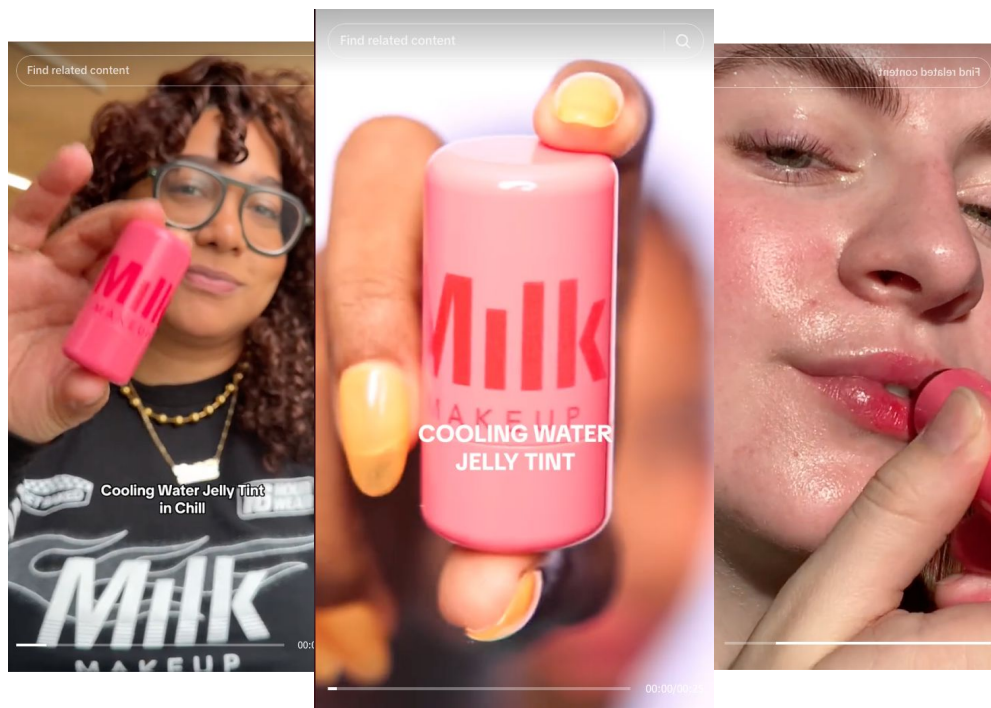
Routines are ingrained over time. In order to “hack them” high frequency of messaging across multiple touchpoints is necessary

**1. Hack her
routine ; show up
around the
content she is
already watching
or add to the
routine**



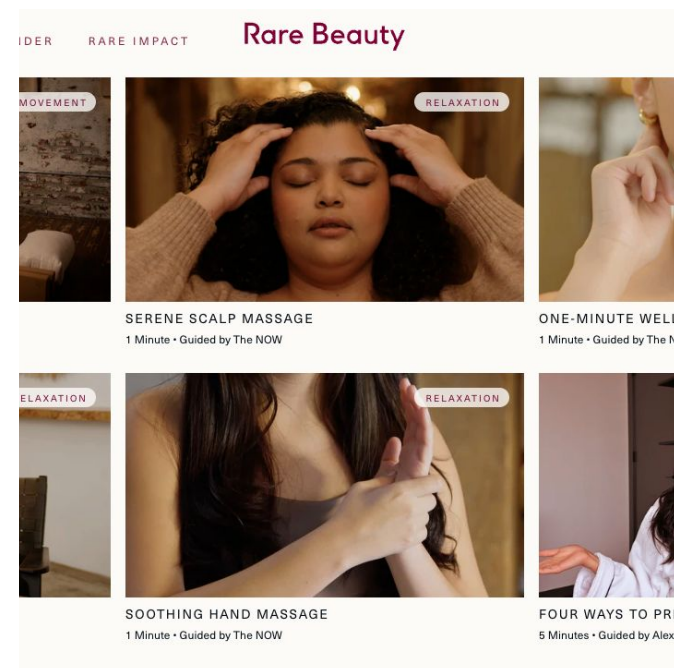
Hack her routine

Show up around the content she's already watching or add to her routine



Milk Makeup Cooling Water Jelly Tints

Hacked Gen Z's routine by showing up on TikTok with their owned socials along with a myriad of influencers all showcasing the new product that does 2 for 1.



Rare Beauty Comfort Club

Creating a space for the women to add other forms of self care into their beauty routines through massage, yoga, and meditation.



2. Hack her hobbies; get into new spaces through partnerships outside of beauty



Hacking her hobbies

Get into new spaces through partnerships that surround her interests outside of beauty



Charlotte Tilbury x F1 Academy

Helping female drivers build their careers and shining a light on their achievements so wider audiences can learn about the opportunities the sport has for women.

The Charlotte Tilbury car is driven by Lola Lovinfosse from France who's been racing since 2018.



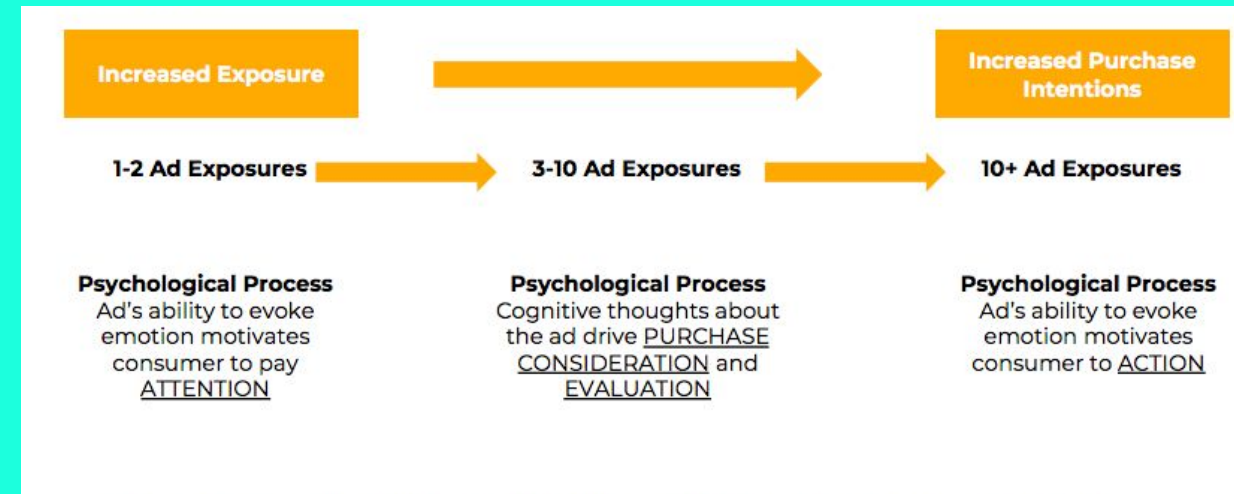
OPI x Xbox

Collaboration that created 12 unique nail colours with gaming names such as *Heart & Con-soul*, *You Had Me at Halo*, *Can't CTRL Me*, *Achievement Unlocked*, and *N00berry*.

Fans could unlock hue-matched in-game content for Forza Horizon 5 and Halo Infinite Games.



3. Use frequency to build routine associations



Routines are ingrained over time
In order to “hack them” **high frequency of messaging across multiple touchpoints is necessary.**



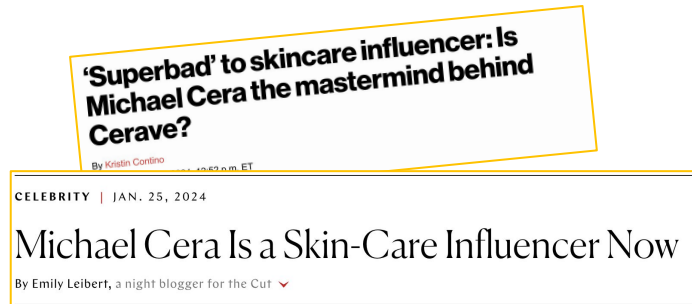
Cerave's Michael Cera Campaign ensured their campaign was unmissable through multiple touchpoints



TikTok Stars alleged seeing CeraVe across and many other posted about the "controversy"



Podcast interviews with talent



News worthy Earned Media idea



Supercharged with Super Bowl Spot that also played worldwide on YouTube

Estimated UK Ad Spend £400k



3. Standing out ...in order to fit in

How Gen Z use beauty to flex their style and fit in



Gen Z pride themselves on being **different**

'To me, being beautiful means asserting my personality, my difference'

55% i149



They have a desire to stand out

'I like to stand out in a crowd'

29% i201

'I like it when my nails attract attention'

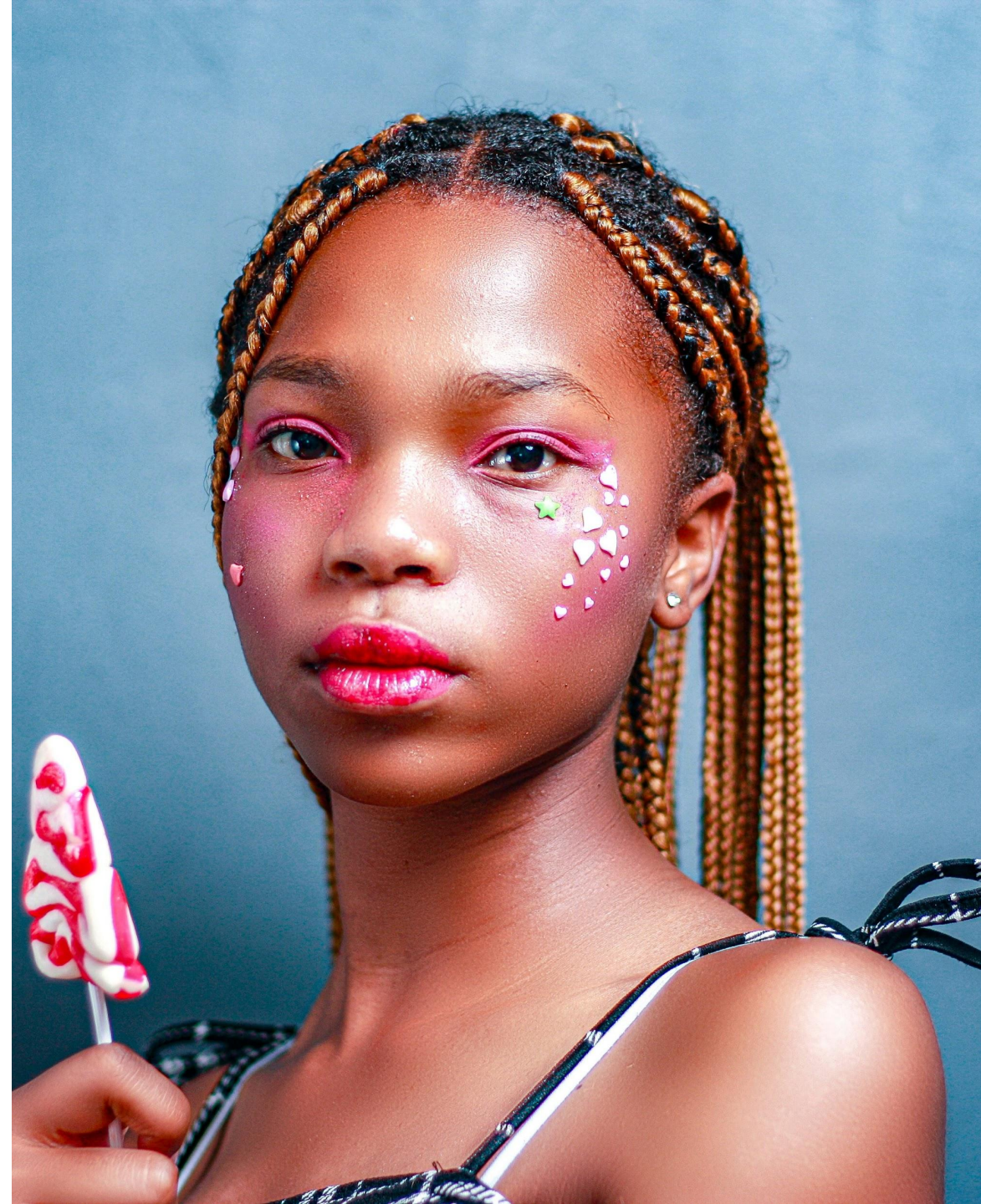
41% i153



And makeup is a great tool to help them do this!

'I enjoy experimenting with makeup to change my appearance'

51% i192



However, there's a discrepancy between their perception of being different, and their desire to fit in

More likely to keep up with the latest fashion trends **(i183)** than Millennials **(i128)**

They describe their style as the "latest fashion" **(17%, i208)** over having a "rebellious" style **(8%, i189)**



Providing an interesting tension between their confident exterior and insecure interior

UK

"I use social media for fashion inspiration (E.g. Instagram, TikTok, Pinterest)"

i189

UK

"I ask people for advice before buying new things"

i152

US

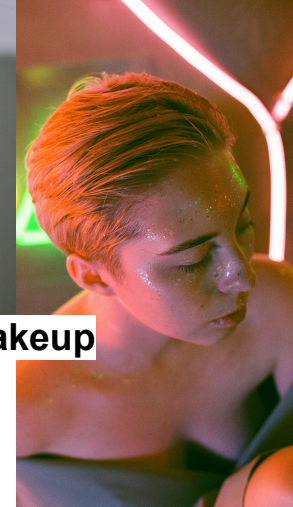
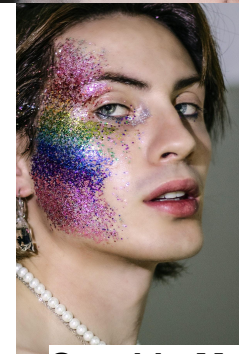
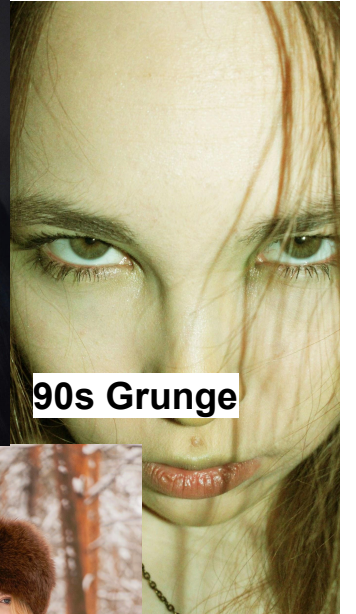
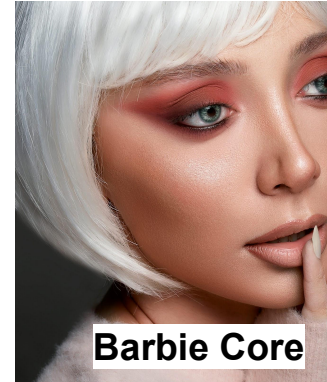
"I use social media for finding inspiration"

i123



**What impact is this having
on their relationship with
beauty?**

**They are buying
products that
allow them to
signal belonging
to a tribe**



But this doesn't mean they're monogamous – they're tribe fluid

Makeup is a great tool to help them easily update their looks and stay tribe fluid

This means they buy new products regularly to signal belonging

US Gen Z **99%**
More likely to
say they're
influenced by
what's cool and
trendy

UK Gen Zs are **2x**
more likely to say
their *style reflects*
the latest trends,
rather than have
a *specific*
aesthetic



They are a lot more reliant on validation from authoritative sources than any other cohort

58% of Gen-Z
feel reassured using
products
recommended by an
expert (i149)

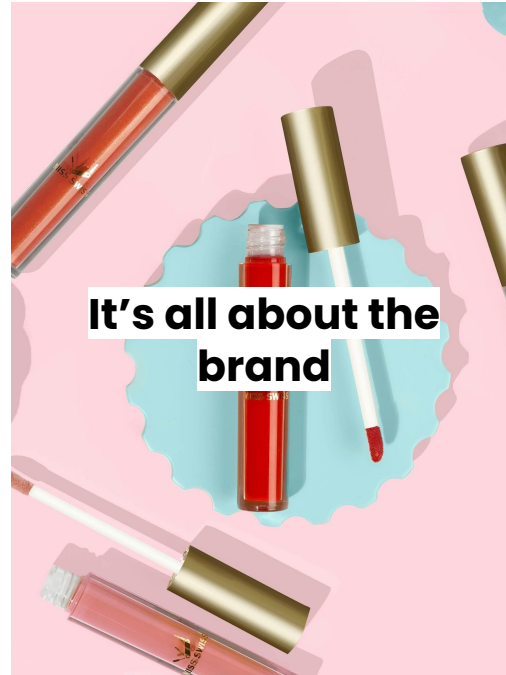
This validation can come in many forms, from people to brands



Reviews from trusted sources

UK: 'Product reviews have a major influence on my purchasing decisions'
55% i129

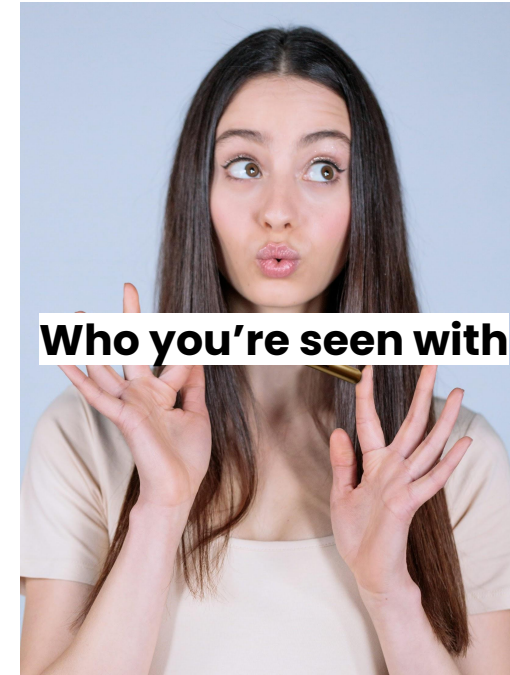
US: 'I trust what reviews say about products'
30%, i125



It's all about the brand

UK: 'On the whole I think well known brands are better than a shop's own brand'
29% i124

US: 'Brand names are important to me'
10% i128



Who you're seen with

UK: 'Celebrities influence my purchase decisions'
21% i251

US: 'I notice celebrity endorsements'
10%, i176



**They are more
influenced by
people like them
vs. the
“aspirational”
influencer**



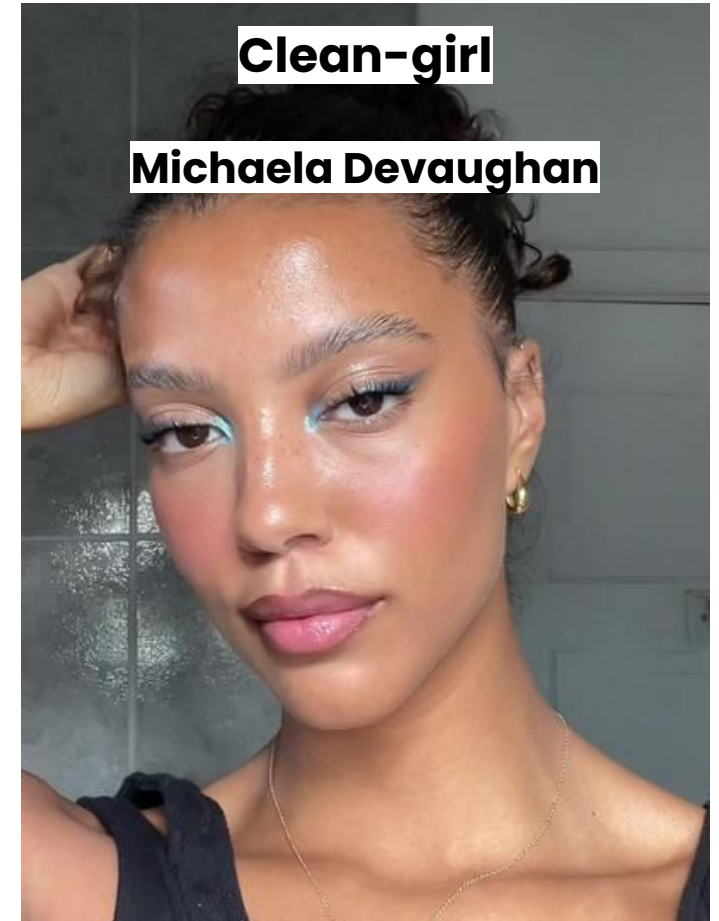
**tldr: if you know, you know,
then you'll win with gen z**

This generation wants brands and creators that 'just get it.' But don't be cringe, please! In today's social and beauty world, scrollers want to feel like they just left a FaceTime with their bestie. And the way to do that is to walk the social walk and talk the social talk.

Brand's best bet is to partner with creators who can bring this dialogue to life in a way that feels most relatable and authentic to Gen Z. Trends come quickly too! So you need a partner who can help you activate quickly and at scale.

They're rejecting perfection and connecting with influencers that just 'get them'

STAND OUT TO FIT IN



**Beauty brands with a clear
identity that Gen-Z can
adopt, whether it's
expertise, inclusivity or fun,
have the best chance of
winning**

Stand out to Fit In: Implications for comms

1

Use confident comms to help stay relevant as trends change

Plan for notice to gain cultural traction.

Building a strong brand gives you license to adapt

2

Work with talent to produce authentic content that nurtures a community

Working with the right influencers to create content that signals belonging and authenticity.

Focus on highlighting expertise, inclusivity, and reliability.

3

Doubling down on a unique selling point can make you an authoritative voice

Because 'brand' is important to them, they also turn to authoritative brands as a source of truth

Become THE expert in one thing.

1. Build a strong brand through confident comms choices to help stay relevant as trends change



Confident comms choices help signal to consumers what a brand stands for



Plan for notice to gain cultural traction

To generate buzz around the e.l.f. cosmetics x Liquid Death collaboration, they enlisted the help of Julia Fox to show off Corpse-Core make up range. This bold comms play helped the collaboration sell out in 45 minutes



Having a strong brand gives you license to adapt

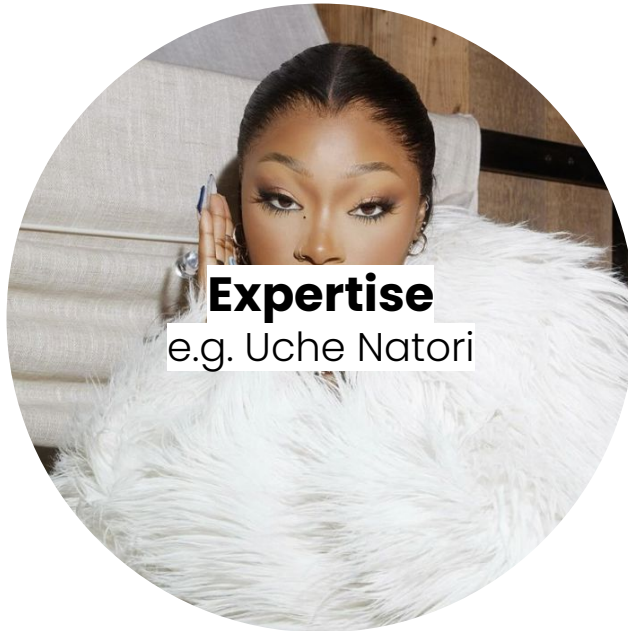
McKinsey's survey shows that close to 40 percent of Gen-Z consumers — compared with about 30 percent of older generations — prefer gender-neutral beauty products. YSL adjusted their playbook to keep pace by launching Nu Collection, a genderless skin care and makeup line



2. Work with talent to produce authentic content that nurtures a community



Working with the right influencers to create content that signals belonging and authenticity



Content focused on education to empower Gen-Z



Content that speaks to minority groups from a trusted source



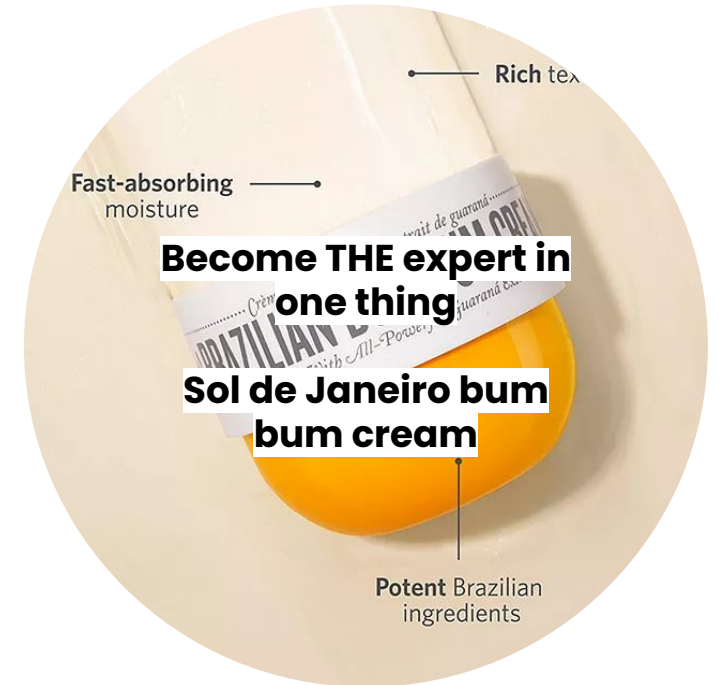
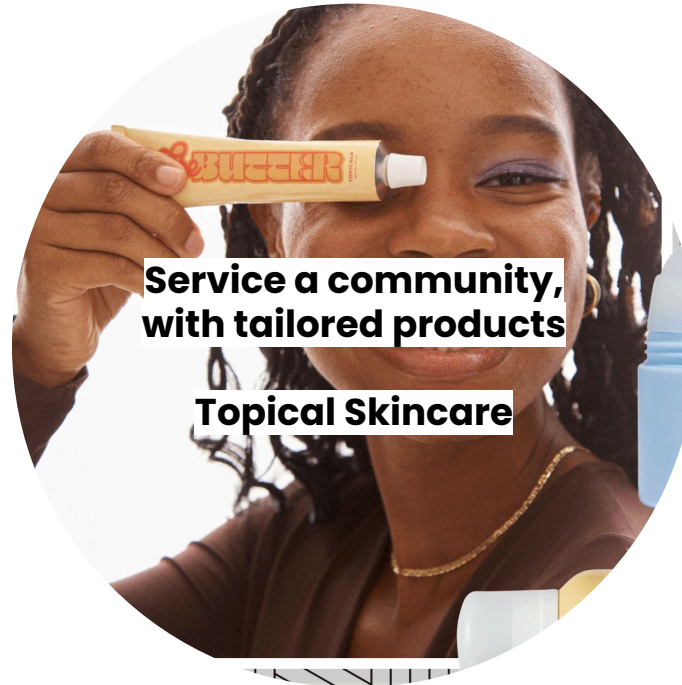
Content that is down to earth and realistic, rejecting perfection



3. Be a brand that earns an authoritative voice by doubling down on a unique selling point



Because 'brand' is important to them, they also turn to authoritative brands as a source of truth



4. Love / Hate Relationship with Social

**The importance of 360 planning to engage
Gen Z across every available touchpoint**



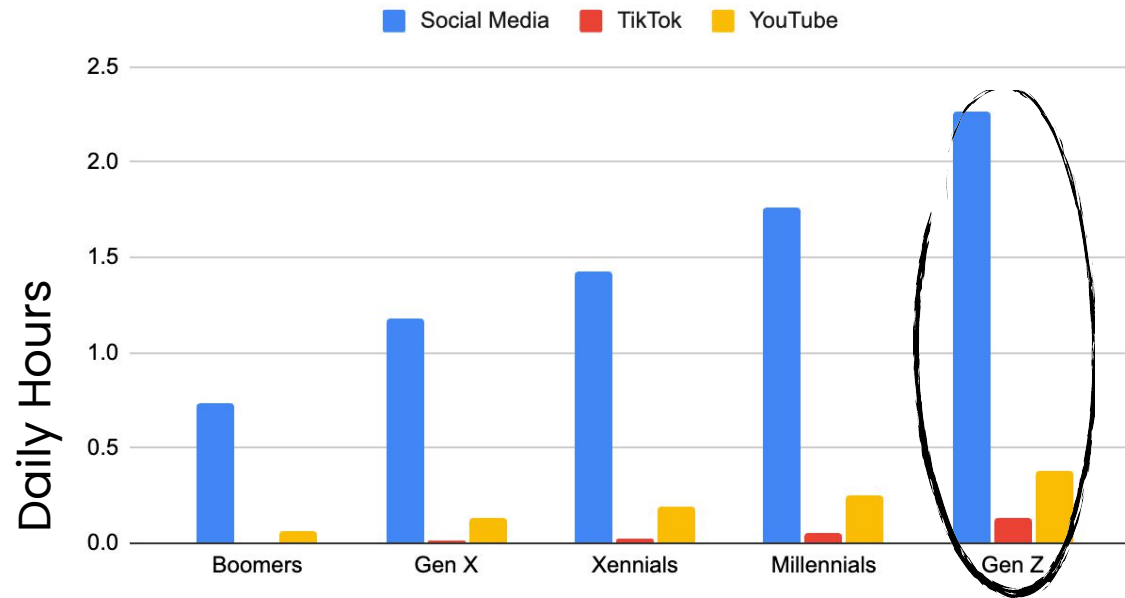
Gen Z are categorised as:

- “Digital Natives”
- “Social Dependent”
- “Social First”

The rise of Gen Z: Embrace the digital generation

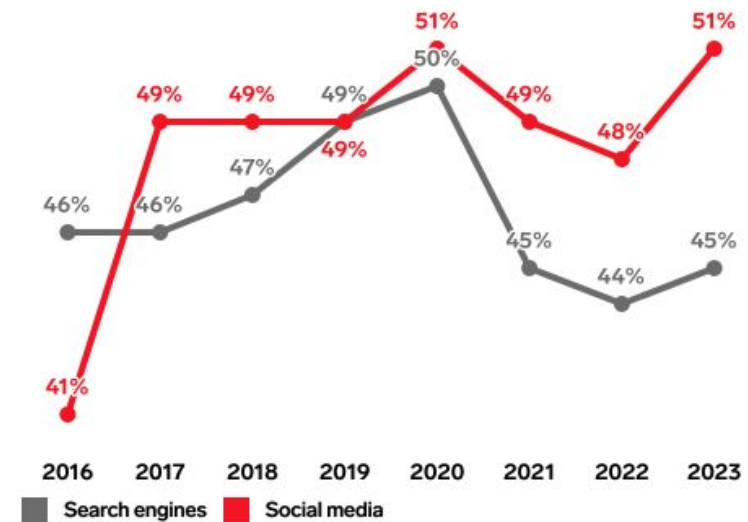


The data tells us this is true; they spend longer online than any other generation



Spending more daily hours on all social apps than other generations

% of Gen Zers worldwide who use search engines vs. social media, 2016-2023



Note: n=967,381; Gen Z=1998-2008; Q: "Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services?"

Source: GWI, Feb 6, 2024

Using social > search engines to discover brands

Social is still the go-to for discovering new beauty products...



64% agree social media is the best place to search for beauty product inspiration



77% say social trends play an important factor in their make-up look



37% say TikTok is the platform where they learn the most about skin maintenance



But their relationship with staying connected online is becoming more complex

They *claim* they are less dependent on their phones than millennials...



But it's a necessary evil; they are still reliant on their phones to stay connected



As they are feeling the negative effects of social media more so than any generation

"Social media has a negative impact on people's self esteem"

i95



Boomer

i103



Gen X

i104



Millennials

i107

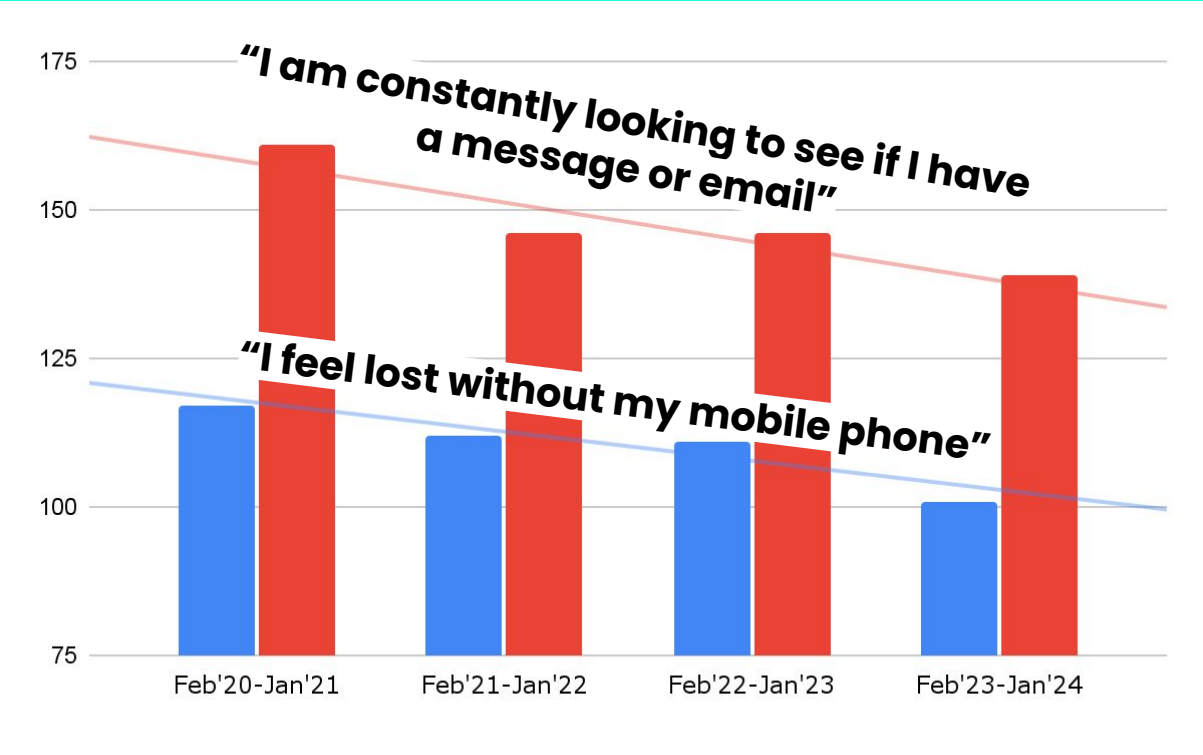


Gen Z



Digital fatigue is settling in. They are trying to limit their dependency on their phones & staying connected

The ‘boring phone’: stressed-out gen Z ditch smartphones for dumbphones



This is even more pronounced with Gen Z in the US

I am using social media less than I used to



Gen Z W UK: 25% **i119**
Gen Z W USA: 28% **i132**

I feel using social media causes me anxiety



Gen Z W UK: 28% **i179**
Gen Z W USA: 29% **i184**

I worry I spend too much time on social media



Gen Z W UK: 46% **i157**
Gen Z W USA: 44% **i149**

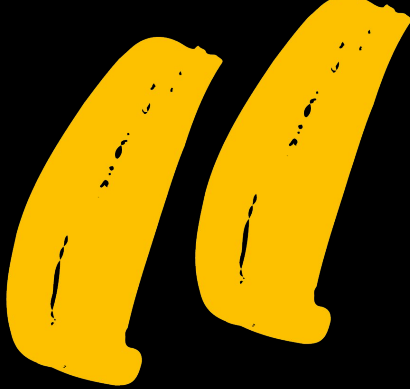
**What impact is this having
on their relationship with
beauty?**

**Their waning
attention spans
mean they often
choose on
impulse**

**52% Gen Z (i112) agree
*I tend to make
decisions quickly,
based on "gut
feeling"***

(vs. millennials i104)



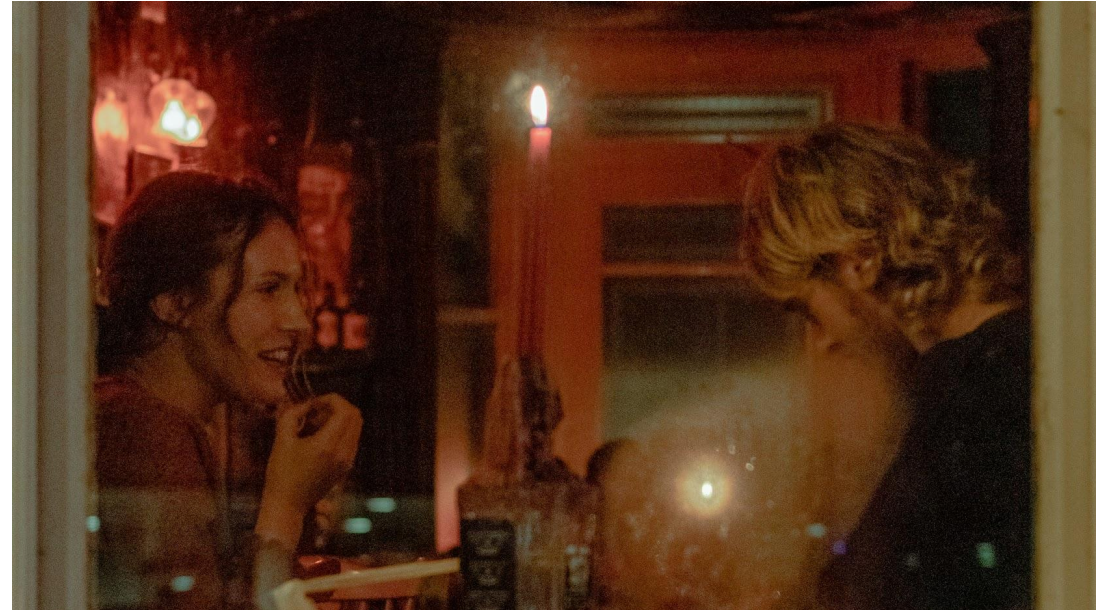


**I find most of my audience
often wants to buy a product
straight off of my
recommendation rather than
doing external research on
their own about products,
resembling a quicker shopping
experience**

Ashley, Kyra



They are finding opportunities to trade their digital lives with physical experiences

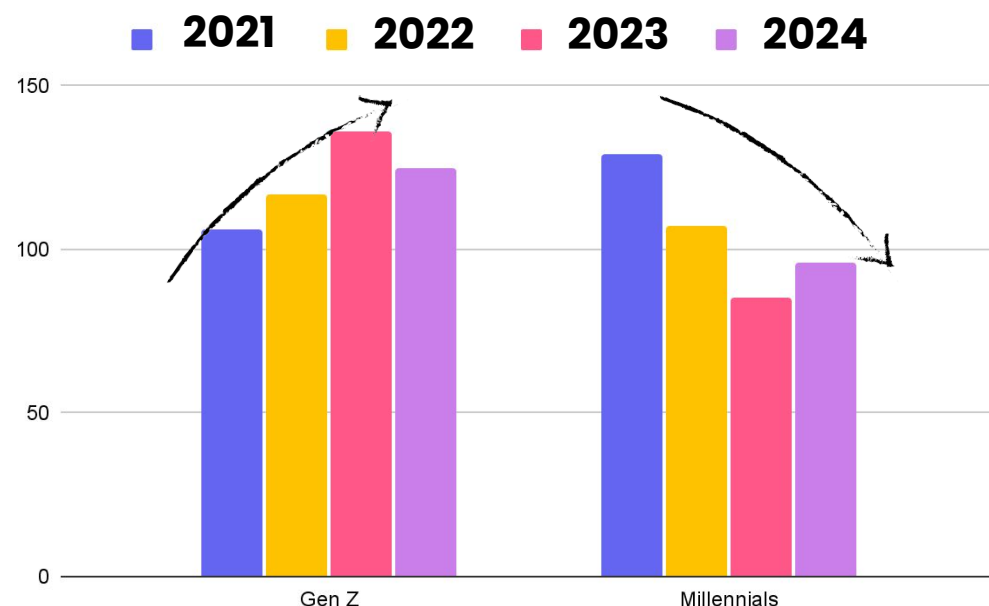


‘Nostalgia for a Dating Experience They’ve Never Had’

Young people are tired of swiping. Now they want serendipity.

So they're more influenced by in-store touchpoints than you think

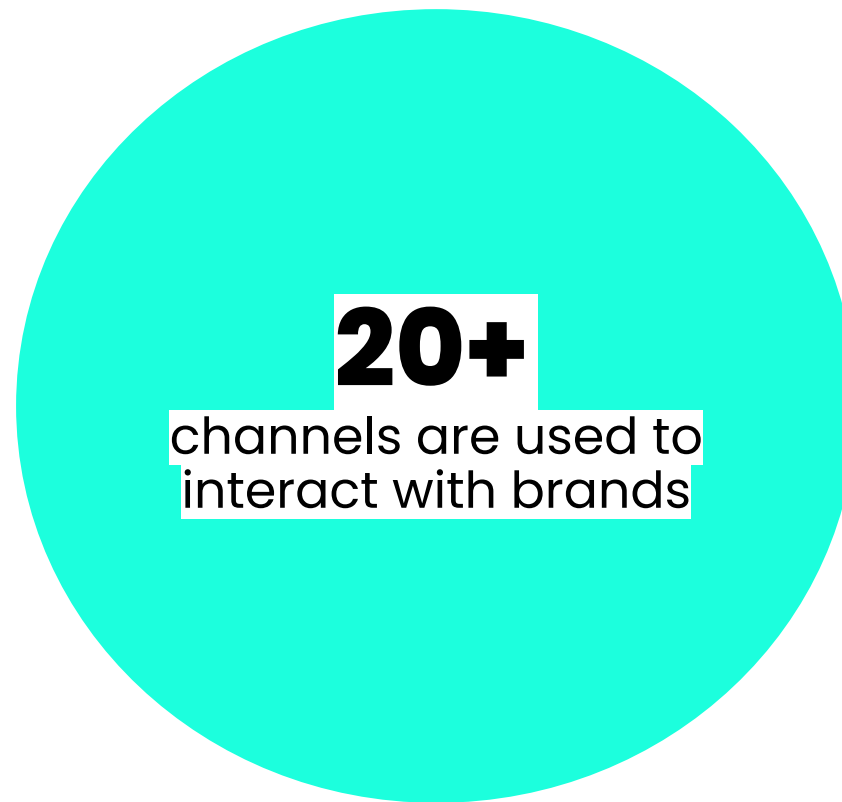
"If I were to make a purchase on the internet I wouldn't do so until I saw the product in real life" (UK)



Discover brands
via in-store
product displays
or promotions:

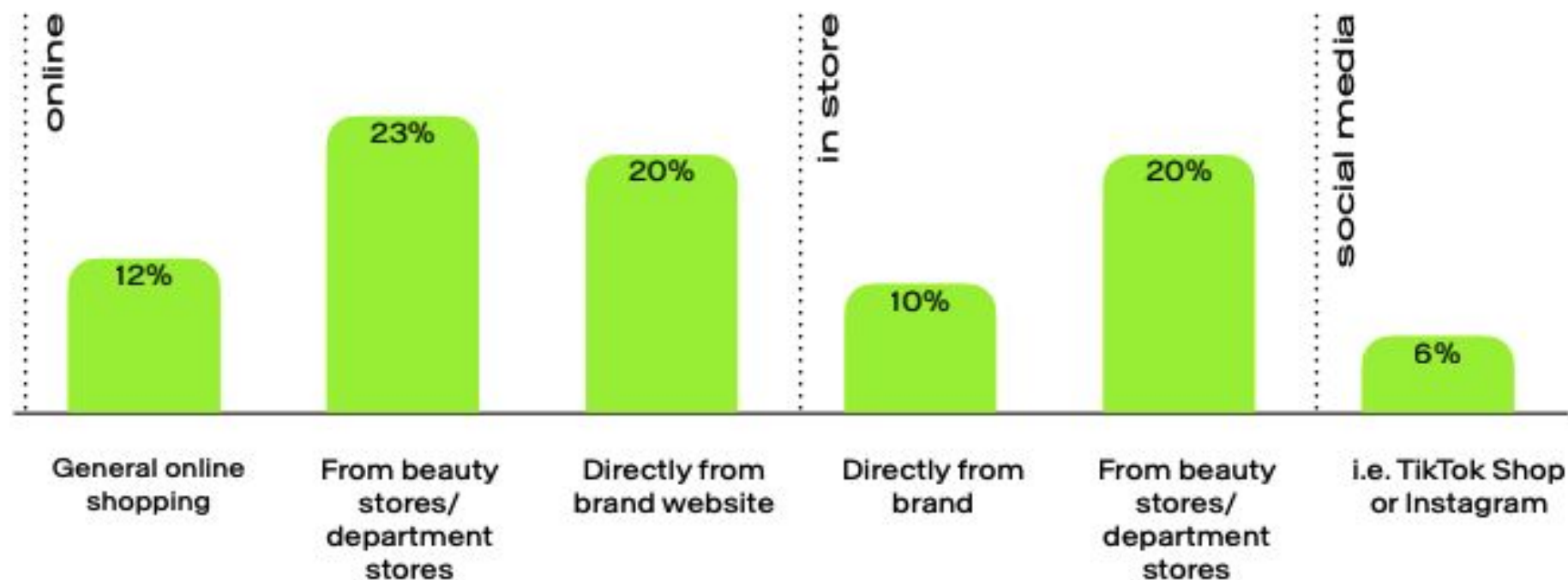
28% of Gen Z USA

**The path to
purchase is more
complex; and not
linear**



Where every brand's touchpoint has influence

Where are Gen Z going to purchase beauty products?



**Beauty brands that adapt
to Gen Z's changing
relationship with social &
technology are the ones
that are winning**

Love/Hate Relationship with Social: Implications for comms

1

Use tech advancements as a help not a hindrance

Help to make the product experience, shopping discovery & purchase journey as seamless as possible

2

Have an eye on the end-to-end experience

Consider all channel touch points as a chance to engage this audience

3

Provide a shopping experience

Provide a 360 shopping experience around moments that connects audiences

4

Using social platforms to foster connection, not anxiety

Brands that create online beauty tribes are the ones listening to what this audience really wants

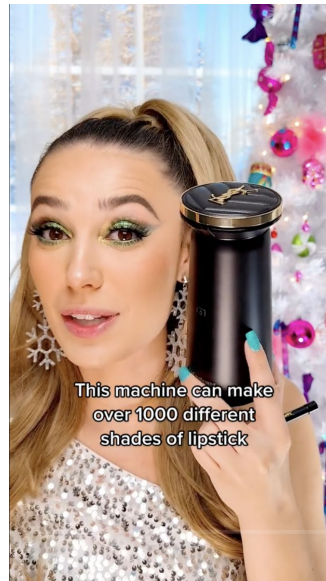
1. Use tech advancements as a **help** not a hindrance

Help to make the product experience, shopping discovery & purchase journey as seamless as possible



Brands that use tech to optimise & complement the shopping experience


YSL lipstick maker: a Snapchat filter to try, then create a lipstick shade bespoke for you



Kosas: a filter to find your shade; order sample kits online; try & buy in Sephora

Shade Finder Quiz

LET'S GET STARTED



Help me find my shade matches

I know one of my Kosas complexion shades

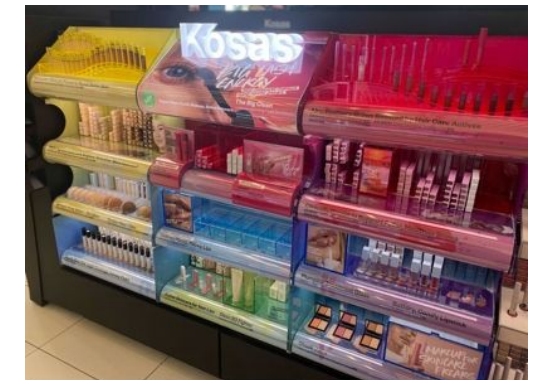
Look up my concealer shade in another brand

Kosas TRY OUTS

At-home try on that's quick, easy, and risk-free. Go ahead, sample the merchandise.

HOW IT WORKS

- 1 Buy samples, get site credit for every \$ you spend
- 2 Test them out at home
- 3 Use your credit for any future purchase - easy



2. Have an eye on the end-to-end experience

Consider all channel touch points as a chance to engage this audience.



All touchpoints are a chance to engage audiences

A brand's packaging is an important choice criteria for Gen Z when choosing toiletries & cosmetics

12% i151



BeautyPie encouraging customer follow-up



Pat McGrath sequins in packaging to stand out



Glossier reusable bags as a distinctive asset



3. Provide a 360 shopping experience around moments that connects audiences



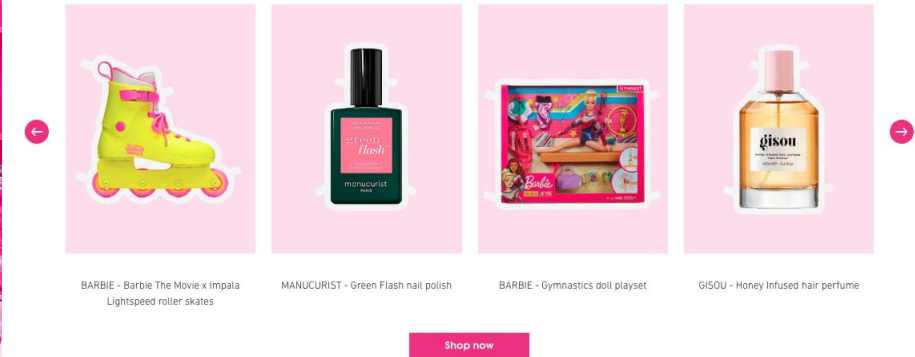
Brands offering a 360 experience: Selfridges x Barbie



Pop-up Barbie salon to drive traffic to Selfridges' beauty hall



Enticing audiences into store to rent the look



Products available to buy on Selfridges site

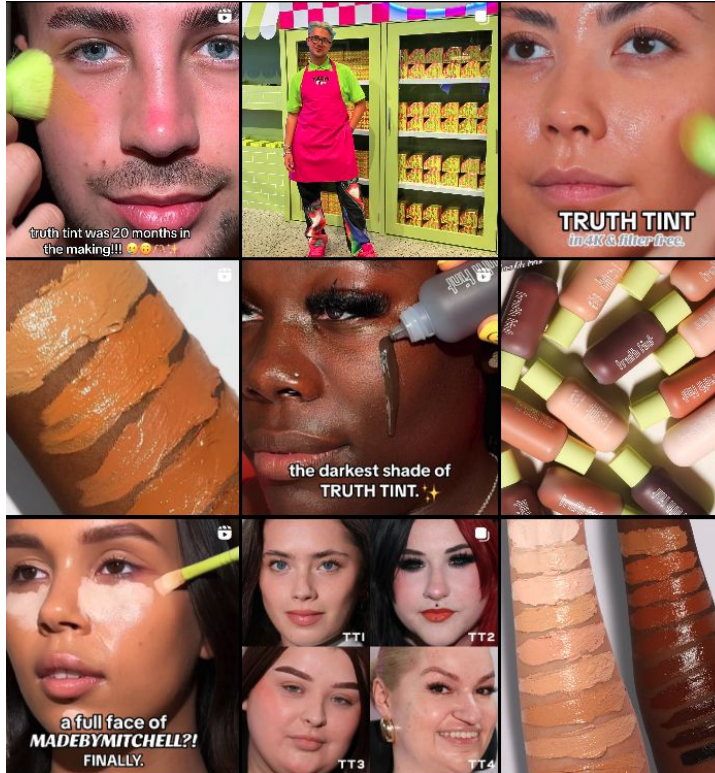


4. Using social platforms to foster connection, not anxiety

Brands that create online beauty tribes are the ones listening to what this audience really wants



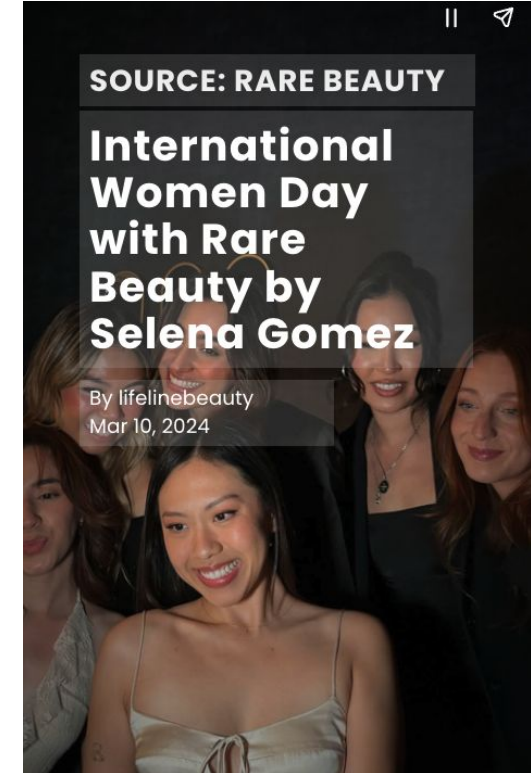
Use owned social as a way to prioritise communities / connection



Made by Mitchell use organic social to communicate their focus on all skin tones



Convié consult their community to develop product concepts through to packaging design



Rare Beauty: Selena Gomez regularly engages her fanbase personally



5. Not so sustainable

**How to engage Gen Z through their
“sustainable” behaviours**



Gen Z say they're willing to make changes for the environment

- Gen Z **i138**

VS.

- Millennials **i111**

VS.

- Gen X **i87**

VS

- Baby Boomers **i82**



... but costs hold them back from being sustainable

i66



Boomer

i93



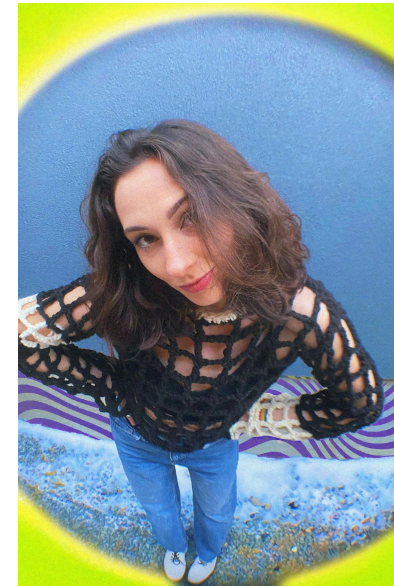
Gen X

i105



Millennials

i134



Gen Z

“It’s only worth doing environmentally -friendly things if they save you money”

Which has resulted in a laissez faire attitude towards the environment



I make a conscious effort to recycle

i78 for Gen Z

i93 Millennials

i104 Gen X

i113 Baby Boomers



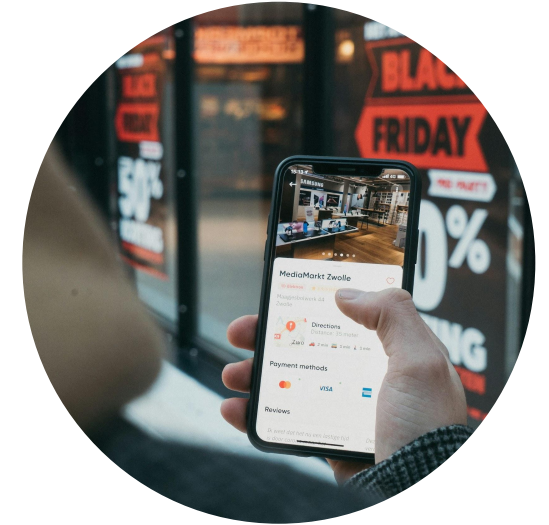
I take positive steps to reduce my energy use

i76 Gen Z

i87 Millennials

i107 Gen X

i117 Baby Boomers



If a company offers competitive prices, I will use them regardless of their reputation

i140 for Gen Z

i127 Millennials

i91 Gen X

i55 Baby Boomers



Leading to a lot of nihilism

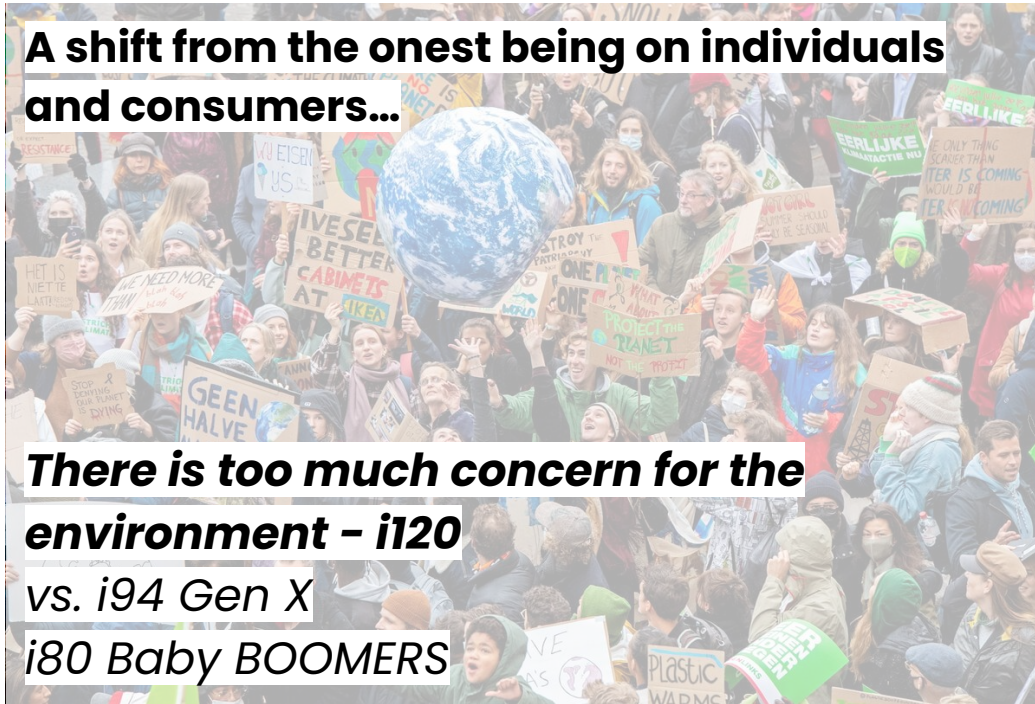


1.34x

more likely to agree with the statement:
**"It's not worth me doing things to help
the environment if others don't do the
same"**

Compared to i105 Millennials, i91 Gen X, i87 Baby Boomers

They don't see it as their problem to address, rather a the responsibility of those in power



In the US, Gen Z are likely to be less apathetic to the environment but have “bigger” priorities



They actively support Environmental Causes

i118 for Gen Z

i105 Millennials

i188 Gen X

i95 Baby Boomers



Price is still the number one factor in if they're willing to make a sustainable choice

i112 for Gen Z

i98 Millennials

i198 Gen X

i98 Baby Boomers



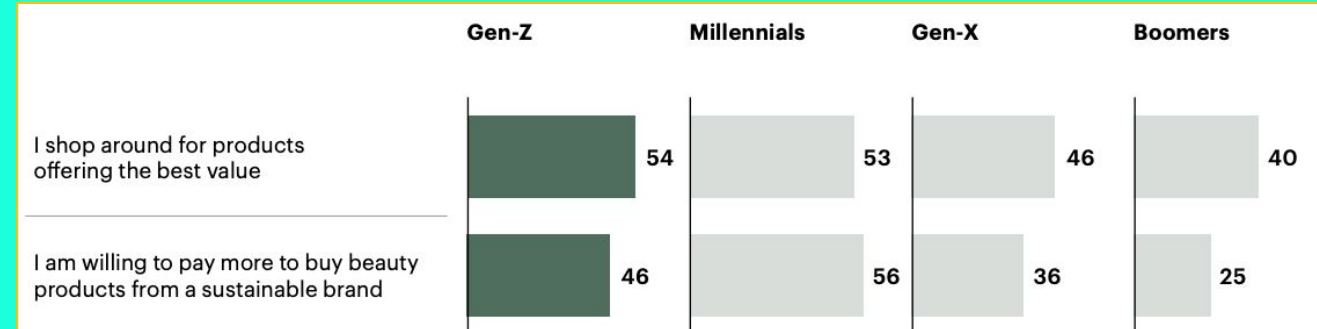
They over index for prioritising helping the environment (i110) but it's 10th on their list.

1. Clothing / Fashion **i150**
2. Making Money **i132**
3. Exploring the world. **i124**



**What impact is this having
on their relationship with
beauty?**

**They shop brands
that can offer
eco-friendly
products **without
breaking the bank****



And want to see sustainability in action, as transparency is shrouded

16–34s are twice as likely as average to visit a store due to refill stations or recycling points.



Beauty brands that make sustainability a quiet but structural part of their business are winning

Not so Sustainable: Implications for comms

1

Don't lead with the eco-message

Brands that make their whole identity being eco-friendly miss out on the ability to talk other product benefits

2

Incentivise sustainable choices

Gen Z want to do the right thing, but costs make it harder for them to make the sustainable purchase, help them through financial incentives.

1. Don't lead with the eco-message in comms

Brands that make their whole identity being eco-friendly miss out on the ability to talk other product benefits




Don't lead with the eco-message

Paula's Choice

NOT SO SUSTAINABLE

How to add **Vitamin C** into your routine



Booster
Fades brown spots & promotes radiance

Serum
Targets sun damage & improves uneven tone and discoloration

Moisturiser
Strengthens skin's barrier & promotes radiance

Eye Care
Brightens skin & visibly reduces fine lines

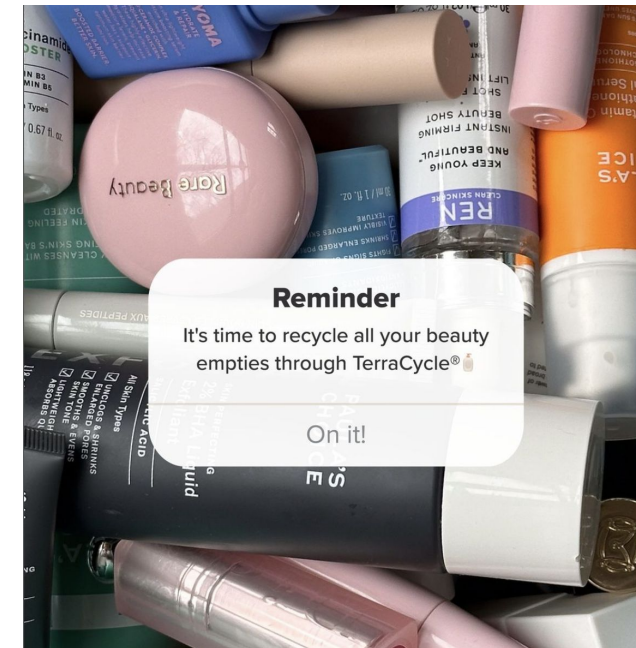
Serum
Reduces signs of ageing & leaves skin hydrated

"How do I layer my morning skin care?"



cleanser **toner** **exfoliant** **sunscreen**

Lead with product comms and entertainment on owned socials



And remind of sustainability credentials/measures on a lighter cadence



2. Incentivise sustainable choices

Gen Z want to do the right thing, but costs make it harder for them to make the sustainable purchase, help them through financial incentives.



Incentivise sustainable choices

Charlotte Tilbury & Boots



Offers 20% off repeat purchases of their beauty creams.



500 Advantage Card points (worth £5) for 5 empty containers



Summary



	Gen Z's contradictory behaviour traits	How this impacts Gen Z's relationship with beauty	How beauty brands can win with Gen Z in comms
1 Beauty is External	Outwardly accepting, but inwardly insecure; Gen Z are highly literate in beauty to feed their fixation with achieving external perfection	Gen Z are highly beauty literate; researching the next new ingredient, entering brands product-first, and experimenting with new methods to achieve their beauty ideal	<ul style="list-style-type: none"> Spotlight ingredients; make them front & centre Double down on your best bet to cut through Inject a bit of drama
2 Routine is Paramount	Today's Gen Z aren't rebelling; they're busy building their daily wellbeing & beauty routines to achieve perfection	Beauty has become their hobby; they are obsessed with building their unique routines, and consume a vast number of sources to get the perfect blend of products	Use comms to: <ul style="list-style-type: none"> Hack her routine Hack her hobbies Use frequency to build routine associations
3 Standing Out to Fit In	Today's Gen Z pride themselves on being bold and creative with their looks; but in an increasingly fragmented world, fitting in with the latest fashions is important to them	Makeup is a key tool to signal belonging to a particular tribe; which changes depending on what's happening in culture. So authentic influencers win over aspirational to appeal to this audience.	<ul style="list-style-type: none"> Use confident comms to stay relevant as trends change Work with talent to produce authentic content; Double down on a USP to be an authoritative voice
4 Love / Hate Relationship with Social	Gen Z are social media savvy; but their relationship is more complex than it appears, as they actively start looking for opportunities to disconnect and	Alongside social, other, more physical touchpoints play a strong role in their purchase journey; where the journey from discovery through to purchase isn't linear	<ul style="list-style-type: none"> Use tech advancements as a help not a hindrance Have an eye on the end-to-end experience Use social platforms to foster connection
5 Not So Sustainable	Gen Z are sustainably conscious, but have bigger priorities; sustainability isn't the core driver when choosing beauty products	They shop brands that provide value, influencing shopping at refill stations; sustainable credentials are a secondary driver	<ul style="list-style-type: none"> Don't lead with the eco message; use it as a secondary message Incentivise sustainable choices



Authors of this report



Jenny
Co Founder

Jen, co-founder of Craft, has over 25 years of experience in media agencies like Mindshare, PHD, Maxus, and Wavemaker. She has won various Media Week and Campaign awards and has been named one of Campaign's Top 10 Planners in the UK for the past five years.

A regular speaker at industry events, Jen is known for her insights on communications. She frequently judges at major industry events, including Cannes Media Lions, Campaign & Media Week awards, D&AD, APG, and YouTube Effectiveness.



Yewande
Managing Partner

Yewande, a Managing Partner at Craft, joined after 13 years at WPP agencies, most recently as a Planner at Essence. She has worked internationally in roles across Business Development, Strategy, and Consumer Insights before focusing on Media. At Craft, Yewande has led client relationships across a range of sectors including Beauty, Luxury, Retail & Professional Services

In 2021, she was honored in Campaign's Female Frontier Awards and received WACL's Future Leaders' Award. Yewande is a regular MEFA mentor.



Hannah
Strategist

10+ years experience in media planning and strategy roles.

Hannah has experience in defining successful comms for the retail and D2C sector, and writing strategies to help new brands to market navigate the right approach to launch their brands.

Hannah is a mentor for the NABS Fast Forward training programme, and has been a regular facilitator of Craft's training courses for over three years.



Nat
Planning Director

Natalie is a Planning Director at Craft Media with 6 years experience. She's worked across multiple sectors including but not limited to: Beauty, Wellness, Entertainment, D2C, Food & Drink, and FMCG.

Nat began her media career at Essence, where she won their business development programme for her work on L'Oreal annual planning.



Thank you

