# THE BEAUTY RIPPLE™

# Gen Z State of Beauty 2024/25

4TH EDITION

Powered by the Kyra Platform

# Contents



# The Beauty Ripple™

## If Beauty culture is a lake, Gen Z is the stone that hits the water.

Their influence is the initial impact that sends ripples outward; influencing up, influencing down and directing the Beauty current. Gone are the days when this generation was introducing themselves to Beauty, exploring entry-level products and merely sharing their reviews with their community. Today, their digital-first approach to Beauty discovery, demand for inclusivity, focus on trust, and ability to ignite trends, all have the potential to turn ripples into tidal waves. Whether it's a viral skincare trend, a makeup aesthetic, or a shift in Beauty standards; their current touches the entire Beautysphere.

What's crucial in understanding how to action some of the insights we'll uncover in this report, is moving beyond the tired conversation of Gen Z's influence as mere 'tReNd'. Over the past few years, they've cemented their role as industry architects, actively shaping beauty's future by driving new product innovation, demanding revised marketing strategies and triggering new ways of consumption. At Kyra, we witness this impact unfold daily, which is why this year's report goes deeper and broader than ever before. Our industry, at large, is still playing catch-up with what actually works for this audience. With the creator economy projected to hit $470BN by 2027, and Beauty's continued 'recession-proof' resilience, we're committed to delivering insights that matter and contribute to lifting the tide - and all the boats with it. By combining first-party research, proprietary tech and practical insights, our goal with this report is simple: to create something valuable, shareable and truly useful in decoding this space.

In the coming pages, we'll cover familiar verticals, along with this audience's attitude and consumption habits relating to **Makeup, Skincare, Bodycare,** and **Fragrance**. And for the first time we'll take a closer look at **Luxury Beauty, Retailers, Hygiene and Wellness**. We'll uncover some of Gen Z's motivations, what makes them spend, where they are most influenced and the crucial metric for success when building your advocacy strategy. We have the pleasure our **industry experts and friends of Kyra** enriching our report this year, leaving you with an insightful understanding of the ins & outs.

> Enjoy it! And if you find it valuable, share it with someone who would love it too.
> Thanks for reading 💚

*Love,* **Marina & Team Kyra**

President, Beauty & Wellness

# INSIGHTS

# Trend Discovery

## Where Gen Z Finds Their Next Beauty Obsession

Gen Z's path to discovering Beauty has always been deeply digital, but the 'How' is shifting. While TikTok remains the dominant force, we're seeing movement in the platforms capturing Beauty fans' attention.

### Where is Gen Z discovering **new** Beauty trends & products?

**TikTok**

**39%**

*(#1 last year, increasing)*

**Instagram**

**35%**

*(#2 last year, decreasing slightly)*

**YouTube**

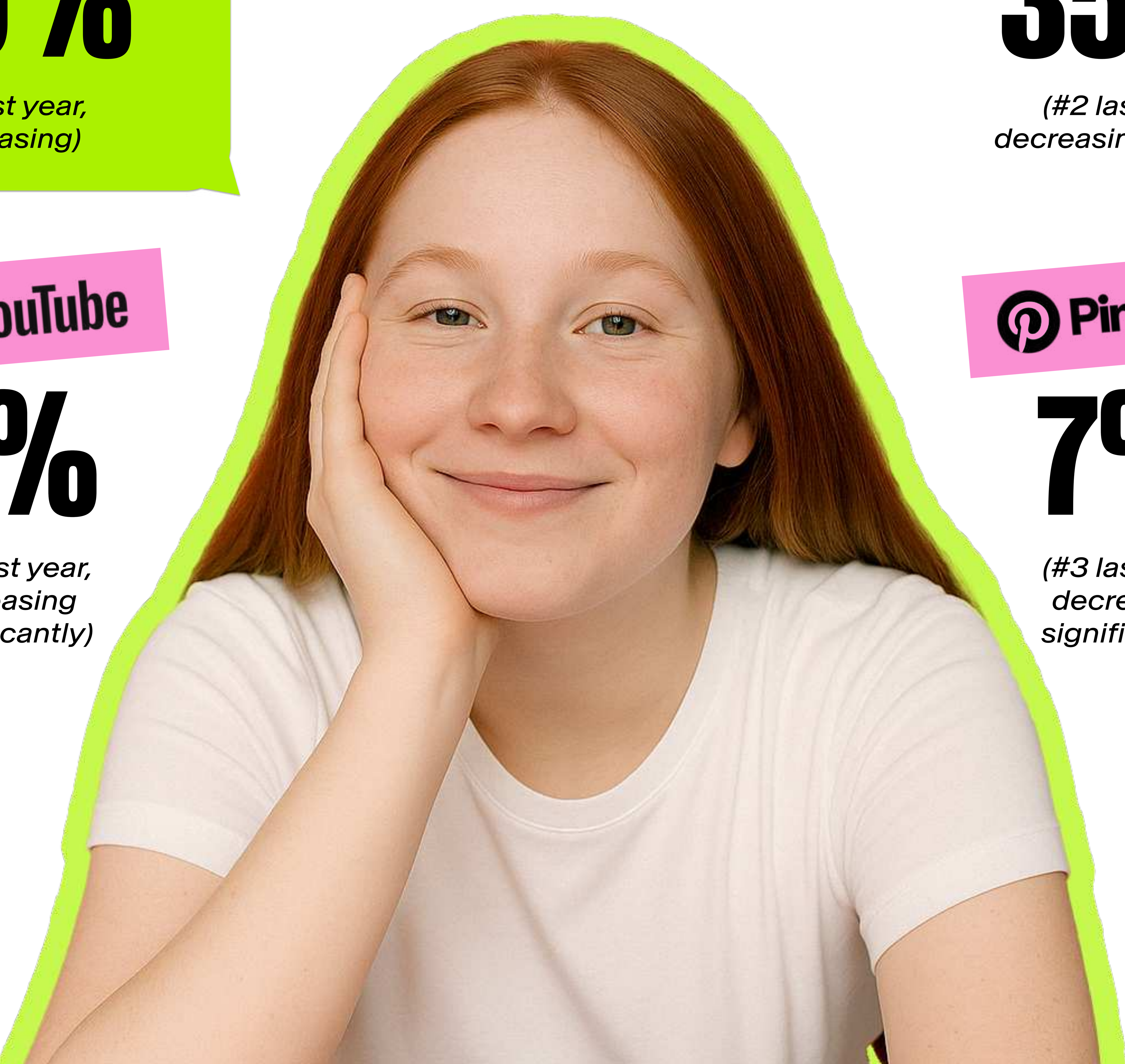
**9%**

*(#4 last year, increasing significantly)*

**Pinterest**

**7%**

*(#3 last year, decreasing significantly)*



# What does this mean?

## TikTok Continues to Lead

TikTok is not **going anywhere** as far as the go-to Beauty platform, with content now up to 10 minutes long, the platform is doing what it can to keep mid-form watching within its walls.

## Instagram's slight decline doesn't mean it's losing relevance - but its role is evolving

IG continues to show up as a staple, to make the most of it consider the use of the platform's full breadth, not just posts and stories.

## But YouTube is rising

Beauty fans are leaning back into YouTube - the original Beauty platform. To be clear, **YouTube never lost its relevance** with this audience but it wasn't where they *discovered* Beauty trends and products. A growth of longer-form video content for trend discovery suggests Beauty fans are looking for more in-depth insights, storytelling and exploration than ever before.

## Pinterest's dip signals a shift in visual discovery habits

Does this show Gen Z favoring platforms with more dynamic, personality-driven content? We'd say so.

KEY TAKEAWAYS FOR BRANDS

## Plainly, TikTok needs to be a priority in your plans,

there is no debate on that at this stage. TikTok - and short-form video - need to be a meaningful part of your strategy and with the growth of long-form for trend and product discovery, trial long-form content and/or YouTube to see how this works for your KPIs.

# Shopping Habits

Purchase remains a hybrid experience for Gen Z, balancing social discovery and digital convenience with the need to touch, test and experience in-store.

## Where is Gen Z Buying Beauty in 2025?

### Online


(-2% YoY)

### In-Store


(+15% YoY)

### Social Commerce


(2x growth YoY!)


*"Gen Z values the sensory experience of products just like previous generations, but with one key difference—they're more likely to try products they discover through the content they consume. The surge in popularity of our Almond Shower Oil and Shea Butter Hand Cream is proof of this, driving in-store trials. For Gen Z, it's not about blind purchases — it's about the feeling a product gives them and the quality it delivers during the trial.*

Leslie Caswell

# What does this mean?

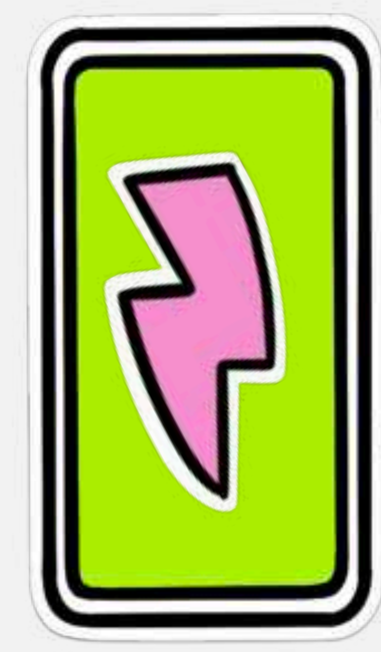
## **Online & in-store** remains balanced

The balance in this split reinforces the need for an omnichannel strategy.

## **Physical retail** is far from dead

Gen Z's savvyness extends to offline. Get comfortable with a consumer funnel and route to purchase that jumps from digital to IRL and back again.

## **Social commerce** is gaining traction



While still small, the **12% figure represents double last year's rate**, signaling a growing interest towards frictionless purchasing.


> *Social selling continues to grow because people trust their favorite creators' recommendations. Expect to see more collectives like Glow House pushing content that drives sales; more social sampling programs like Haut Drops; and more exclusive drops for social platforms like TikTokShop. And it's only a matter of time before Twitch and other streaming platforms become more shoppable and lead to even more social commerce.*
>
> Jenn Sulivan

## KEY TAKEAWAYS FOR BRANDS

Brands should ensure their online and in-store strategies feel interconnected, offering Gen Z the best of both worlds and understanding that **online & offline work together** to increase awareness, consideration and sales. Be prepared for the traditional funnel to be further challenged and **manage your expectations accordingly**. Success requires consistency and a holistic approach.

# True Influence

We know Gen Z trust influencers, but not all influencers hold the same weight when it comes to swaying Gen Z's Beauty choices.

## Who Holds the Most Sway Over Gen Z?

This year's data reveals a **clear hierarchy of influence.**

**36%**
**Experts**

**30%**
**Celebrities**

**21%**
**Influencers** *who feel like friends*

**13%**
*Aspirational* **Influencers**


*"For M·A·C, the influence of M·A·C's expert artists is undeniable—when they share their techniques, the world listens. From social to real life, their visionary artistry continues to shape beauty trends and inspire generations.*

Aïda Moudachirou-Rébois

# What does this mean?

## **Expert** voices lead the way

Whether it's dermatologists, makeup artists or aestheticians Gen Z are most influenced by expert, knowledge-backed recommendations.

## **Celebrities** still hold power, but they're no longer the default

Gen Z values knowledge and authenticity over A-list status.

## **Relatability** matters

Influencers who feel like trusted friends carry more sway than traditional aspirational figures, marking a continued shift away from the era of perfectly curated Beauty personas.

*(brands) should have a relatable person who is advertising their product. Someone that could be seen as a friend.*

GEN Z POV!

## **Aspirational influencers** rank the lowest

The old-school influencer model of unattainable perfection isn't driving decisions like it used to.

KEY TAKEAWAYS FOR BRANDS

## Authority + Trust is the magic combination.

Who holds the most sway over Gen Z?Whether it's an education-backed expert or a creator with a highly engaged, 'besties'-type audience, working with creators who hold real credibility will drive the most impact for success when it comes to your influencer marketing strategy.

# The Branded Content That Feels most Authentic

Branded content has evolved and Gen Z's preferences are crystal clear: **trust wins.**

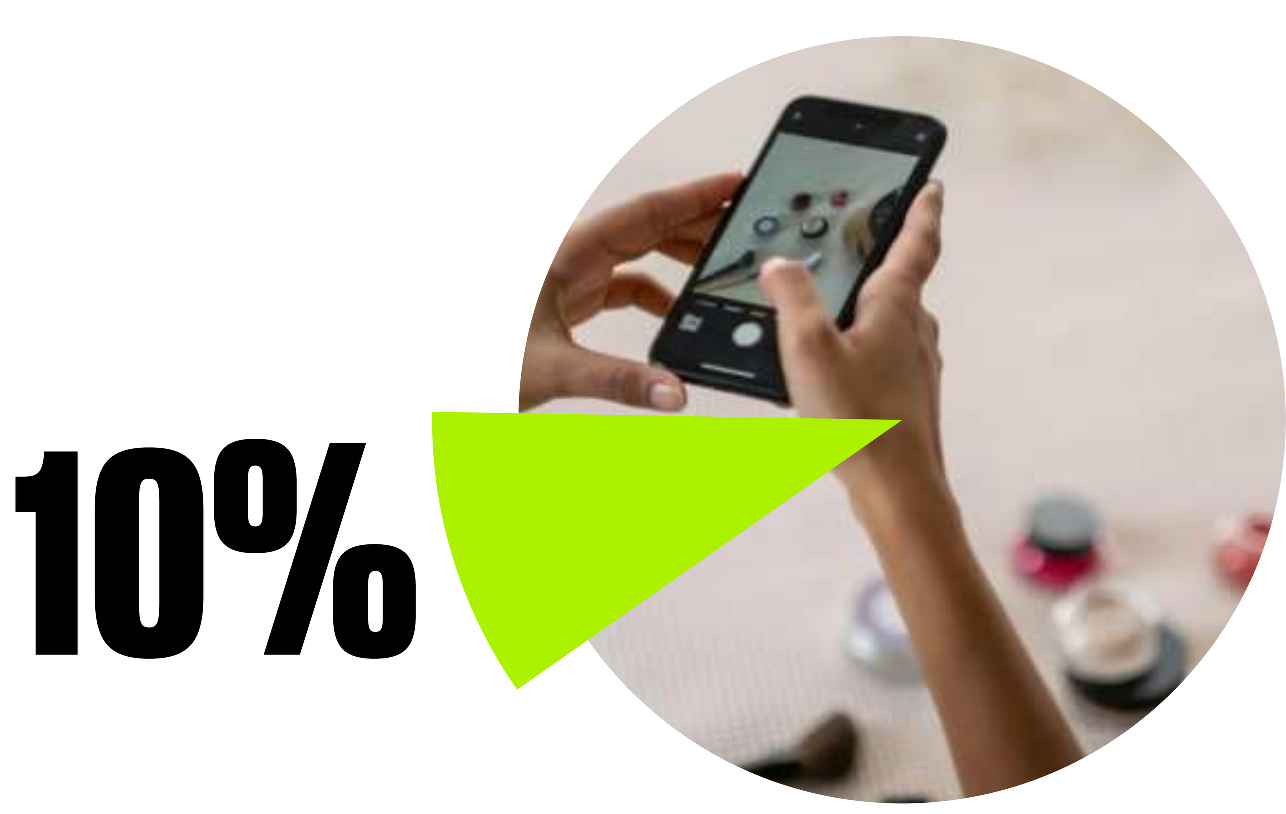
## Most authentic branded content formats for Gen Z:

Reviews


GRWM


Tutorials


Unboxing




Challenges

# What does this mean?

## Reviews dominate

Gen Z want real, unfiltered opinions, not scripted brand messaging.

## GRWM & Tutorials still work

But they work best when paired with honest, real creator narratives.

## Unboxings aren't dead, but they're not top of mind

Surprise-and-delight still holds some appeal, but with gifting increasing in the space, fans want more than just a reveal, they want a reason to care.

## 'Challenges' are officially OUT!

We can all breathe a sigh of relief... Here's to puting the creator front and centre.

KEY TAKEAWAYS FOR BRANDS

## Trust >

Lean into content that feels genuine, unscripted and opinion-led. Prioritise creators with engaged audiences and let them craft narratives that resonate - this means simple briefs, minimal (or better yet, no) feedback and empowering creators to lead this. In 2025, authenticity beats virality.

# The Knowledge-Spend Connection

## How Gen Z's Beauty Education Drives Their Purchases

Gen Z isn't just *consuming* Beauty; they're actively *learning*.
But where they're most knowledgeable is shifting.

### Gen Z's self-reported Beauty expertise:

**36%** Skincare
*Up from 23% last year*

**15%** Haircare
*Up from 11% last year*

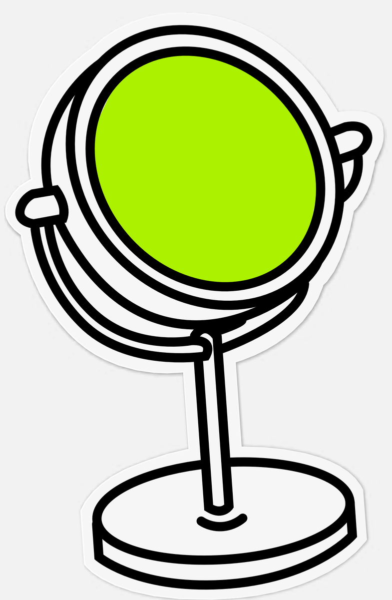
**15%** Wellness
*Up from 6%*

**12%** Fragrance
*Up from 4%*

**11%** Makeup
*Down from 54%* 😮

# What does this mean?

## **Skincare** remains a focus

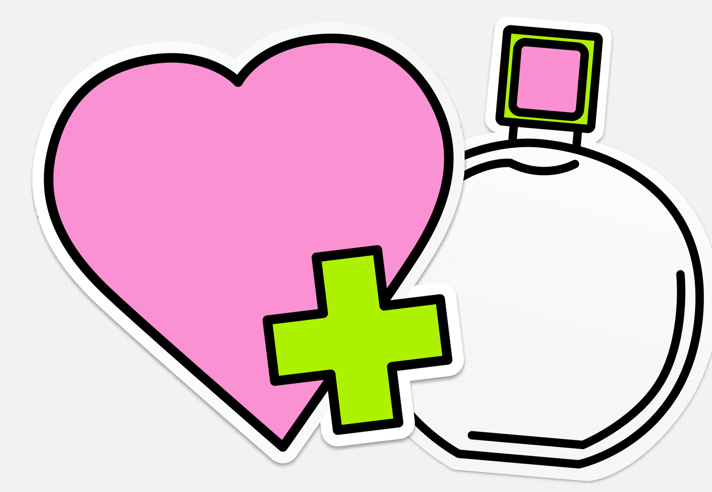


Gen Z continues to level up their skincare knowledge and we predict they'll be the earliest generation to adopt treatments like facials and at-home devices (e.g. LED masks, micro-current toning devices) as part of their consistent routines.

## Their attitude to **Makeup** has changed

Just **11%** feel educated about makeup, down a remarkable **43%** compared to last year. However, over half (54%) want to improve their Makeup skills. This is a major whitespace for the right makeup brand.

## **Wellness & Fragrance** are rising; fast



With **2x growth in Wellness and 3x growth in Fragrance**, these categories are clearly gaining traction (more on this later 👀).

KEY TAKEAWAYS FOR BRANDS

## Build your campaigns with this awareness.

Skincare knowledge is at its height and building, Wellness & Fragrance are in acute growth and Makeup is primed for disruption. There is nothing that will make this audience scroll past your content faster than it feeling like something they already know or they don't value. Beware of falling into this.

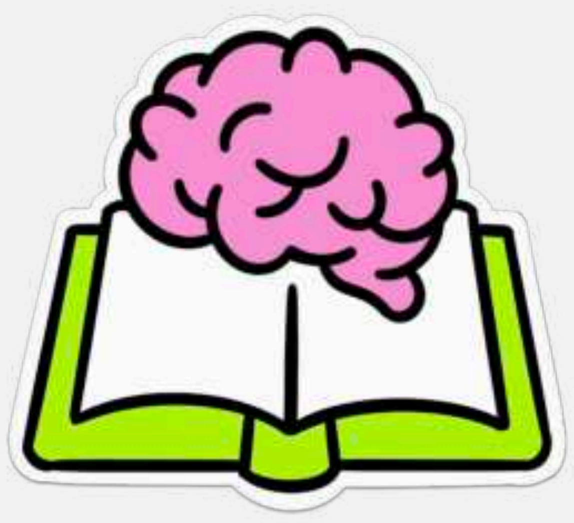
# Add to Cart

## With this Knowledge, Where Does Gen Z *Spend the Most?*

| Beauty categories where Gen Z is willing to **spend the most on** | | Beauty products Gen Z **purchases most often** |
|---|---|---|
| 30% | SKINCARE | 52% |
| 15% | HAIRCARE | 21% |
| 13% | MAKEUP | 14% |
| 13% | FRAGRANCE | 7% |
| 12% | WELLNESS | 6% |

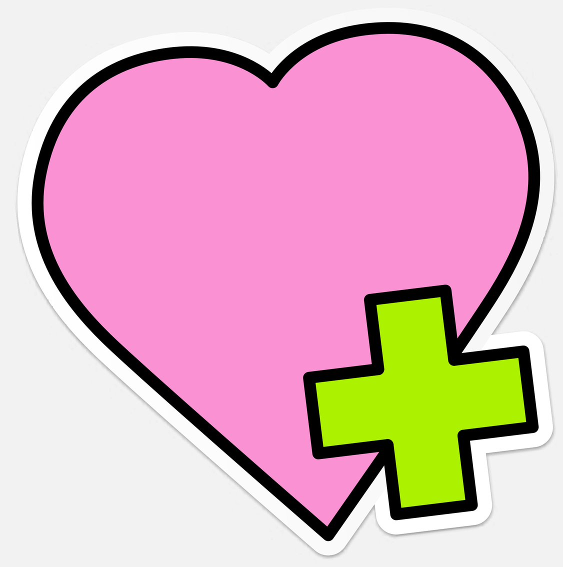
# What does this mean?

## Knowledge = Investment



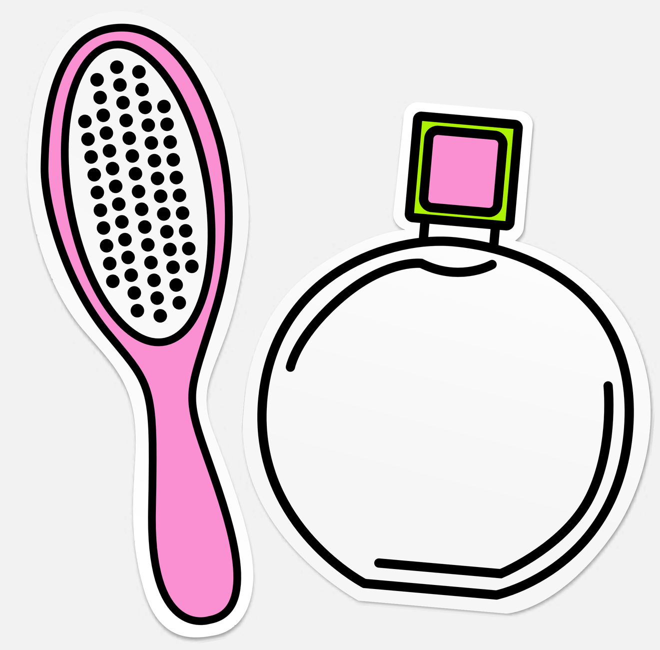
Gen Z spends the most on Skincare, likely because it's the category they believe they understand the most. All categories' level of spend **is directly correlated** to how often they purchase within the vertical.

## **Wellness** is making moves



For the first time, facials and massages were mentioned as regular purchases, signaling a continued shift towards **Beauty as self-care**.

## **Haircare & Fragrance** are solidifying their status



As Gen Z's education on these categories grows, **so does their spend.**

KEY TAKEAWAYS FOR BRANDS

## Gen Z's spending habits follow their education curve.

The more Gen Z knows, the more they are willing to buy, it's that simple. The brands that win will be those that offer **value-led content**, consistently utilising the people and voices this audience **trusts**.

# Retailers

Affordability & Convenience
Win Every Time

## Gen Z's top Beauty Retailers

**Amazon and Ulta lead the way.**
Gen Z's top shopping destinations reflect their priorities:

**#1**

**23%**

amazon

*Convenience + competitive pricing*

**#2**

**18%**

ULTA BEAUTY

*Strong mix of affordability, promotions & variety*

**#3**

**16%**

target

*Mass-market staples*

**#4**

**14%**

SEPHORA

*Higher-end options, but not the dominant choice*


"*No shock here—beauty stores are the new hangout spots for Gen Alpha and Gen Z.*

*In the U.S., if you go to a Sephora on the weekend or after school lets out, you'll see groups of friends swiping, sampling, and, inevitably, buying. We recently did a call-in episode of our podcast, Fat Mascara, and listeners told us that beauty retailers are also popular places for birthday parties, with hosts giving their attendees gift cards to shop and/or associates leading them through mini treatments or teaching them about ingredients.*

Jenn Sulivan

# What does this mean?

## **Price** is Queen

The #1 reason Gen Z picks a retailer? **Affordability (64%)**, outweighing the second consideration of product selection (**20%**) and completely eclipsing in-store experience or customer service (**both <5%**).

## **Loyalty programs** doesn't drive behavior

Only **24% feel very loyal**, while a large chunk (**24%**) is indifferent.

## They'll switch for a better **deal**

The #1 reason Gen Z leaves a retailer? **Better prices (71%).**

*I dont like being sold to, if its too obvious a sales pitch it turns me off buying the product.*

GEN Z POV!

FOR RETAILERS

## Convenience and affordability are non-negotiable.

**If it's not easy and budget-friendly, they'll shop elsewhere** with Affordability (64%) and Product Selection (20%) keeping this audience engaged more than Customer Service (5%) or In-Store Activations (2%). If your brand isn't already in some of these retailers, it's time to consider incorporating them into your strategy.

| 64% | 20% | 5% | 2% |
| --- | --- | --- | --- |
| Affordability | Product Selection | Customer Service | In-Store Activations |

# What Matters Most

## Values That Drive Gen Z's Beauty Choices

### Inclusivity, Sustainability, or Personalization?

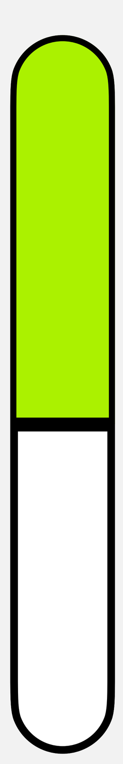
When asked to rank the importance of these three factors, only **one** was a clear priority:

**43%** Say **inclusivity** is very important 👑

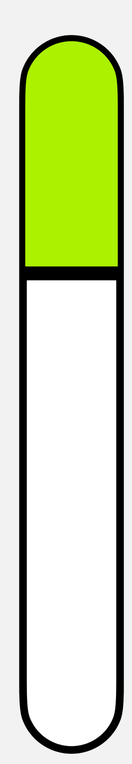
**19%** Say **sustainability** is very important

**15%** Say **personalization** is very important

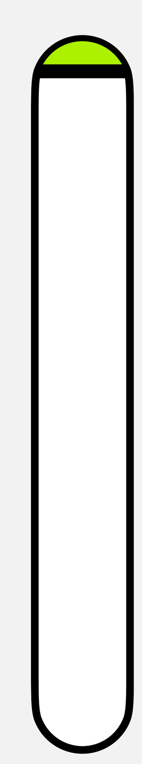
### Where Does Sustainability Stand?



**54%** Say it's between very and quite important



**33%** Are neutral



**5%** Say there are more important factors when shopping

# What does this mean?

## **Inclusivity** is non-negotiable

Nearly half of Gen Z expects Beauty brands to cater to everyone - from shade ranges to gender inclusivity. Anything less? Not good enough for them (and we love them for it).

## **Sustainability** is important, but not a dealbreaker

**54%** say it's somewhat to very important, but **33% remain neutral**. Sustainability matters, but it's not the primary reason they purchase.

## **Personalization** is still a 'nice-to-have'

With only **15% ranking it as 'very important,'** brands need to prove its value before it becomes a major purchase driver.

*If beauty brands want to connect with me, one important thing they should understand is the value of authenticity and inclusivity. It's also crucial for brands to engage with their audience in an honest and meaningful way, whether it's through customer feedback or community-building initiatives.*

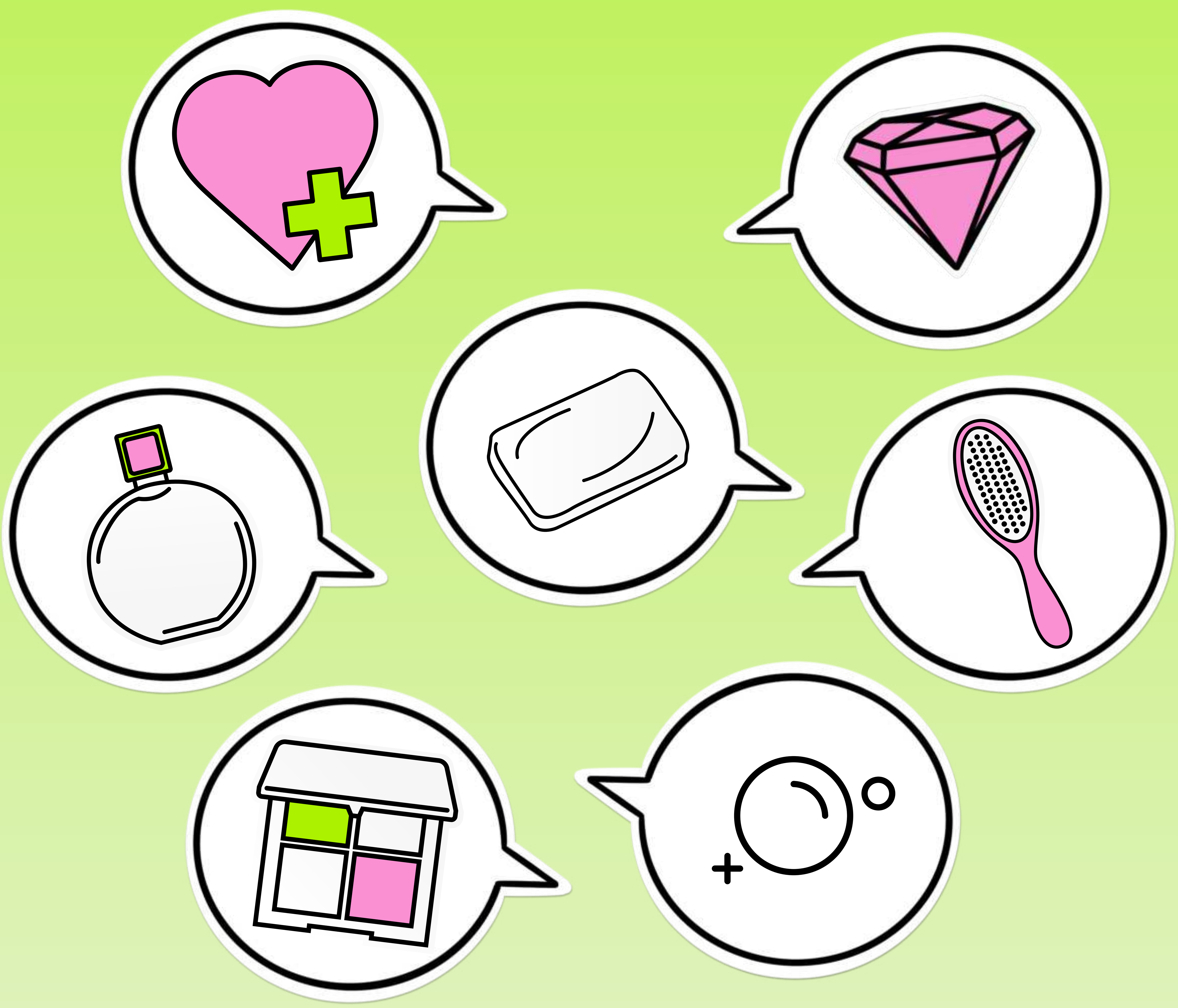
**GEN Z** POV!

KEY **INSIGHTS** FOR BRANDS

## This is a conscientious generation.

They care about the impact of their purchases and **will put their money where their values are.** However, brands shouldn't assume sustainability alone will drive sales. The real challenge? Making conscientious Beauty part of your brand ethos; effortless, accessible and exciting.

# VERTICALS



# Wellness

## A Daily Habit, Influenced by Social Discovery

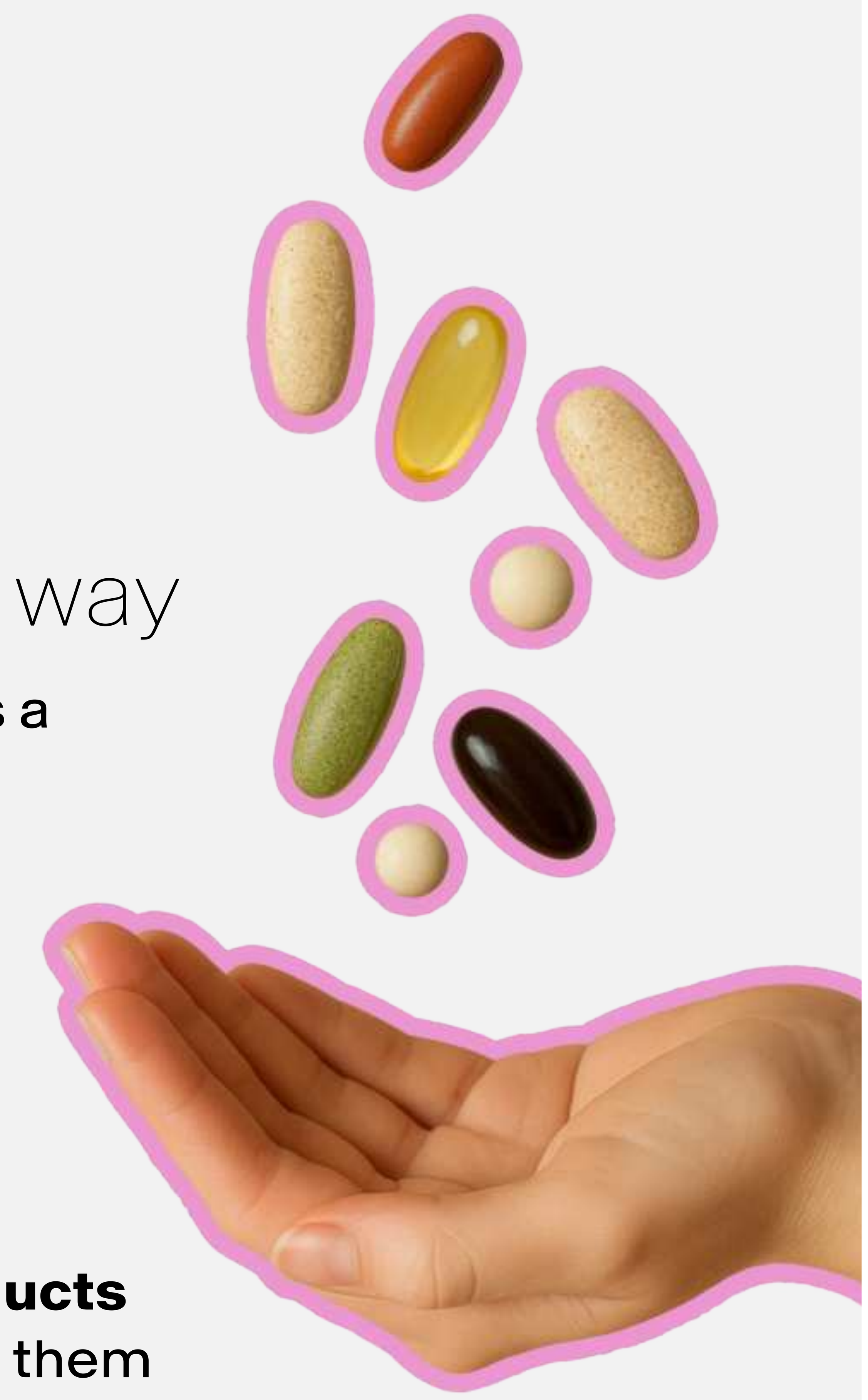
**Our first dip into Gen Z and Wellness and we see a healthy vertical developing for this cohort**

### Supplements are non-negotiable

A powerful **80% of Gen Z** take **1-6 supplements daily**, with **15% committed to supplement subscriptions.**

### Multivitamins lead the way

The first supplement for most was a **multivitamin (41%)**, followed by **Vitamin D (24%)**



### Creators influence purchasing

**36% have bought wellness products more than once** after discovering them through influencers, while **20% have done so at least once.** A dedicated **5% say they purchase from influencers 'all the time'.**

**FOR WELLNESS BRANDS**

**There are (literal) gateway drugs for this audience,** explore how these fit with your product offering. Subscription models are working well for Gen Z, and influencer marketing - especially with an educational angle - it drives acute discovery. Positioning products as part of a **long-term wellness routine** will resonate.

**What was the first supplement Gen Z started taking?**

#1 **41%** Multi-vitamins

#2 **24%** Vitamin D

#3 **7%** Omega-3 (Fish Oil)

#4 **6%** Probiotics

#5 **6%** Protein Powder

#6 **6%** Magnesium


# Top WELLNESS Brands

1. headspace
2. Bloom
3. MYPROTEIN
4. OLLY
5. lemme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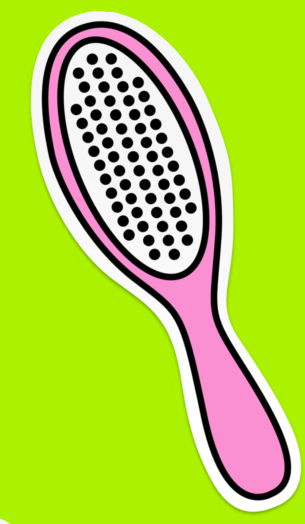
6. Calm
7. VITABIOTICS
8. Nature Made
9. wellman wellwoman
10. GNC

# Haircare

## A Category Defined by Health & Protection



**For Gen Z, Haircare isn't just about styling -**

it's about **nourishment, protection and long-term health**. They're not just looking for products; they're looking for **solutions** tailored to their unique concerns.

### Gen Z makes hair health a priority

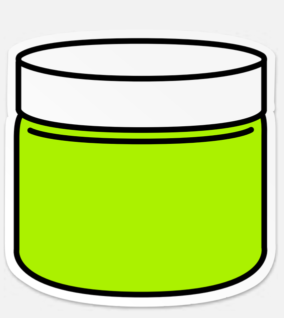
The **biggest driver** of hair care purchases is **individual hair needs (67%)**, signaling that education around areas like **hair types, porosity and ingredients** resonates.

### Leave-in care is essential

**Not only is it the product Gen Z can't live without, 22% of Gen Z** have added **leave-in conditioner** to their routine in the past six months.

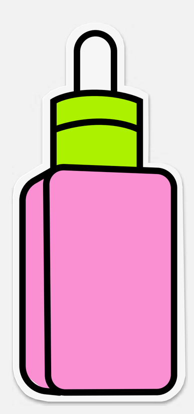
**Top 5 hair products Gen Z can't live without:** *(ex. shampoo & conditioner)*

**#1 Leave-In Conditioner**



*No.3 last year, now the No.1 must-have*

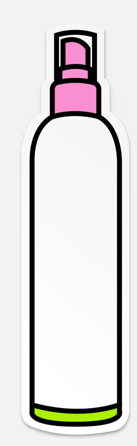
**#2 Hair Oil**



*Consistent in Gen Z's routine*

*NEW!*

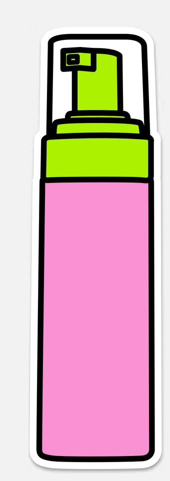
**#3 Heat Protectant**



*NEW entry. Reflecting more awareness of damage prevention*

*NEW!*

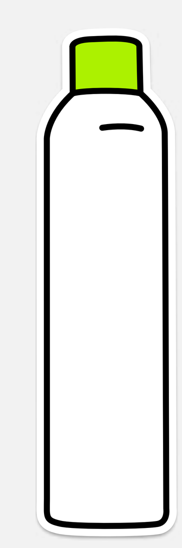
**#4 Hair Mousse**



*Styling & volume remain a focus*

*NEW!*

**#5 Hair Spray**



*Styling & longevity also key*

**FOR HAIRCARE BRANDS**

**Protection and nourishment are at the core of Gen Z's hair priorities.** Heat protectants entering the top 3 highlights an increased understanding of hair damage prevention, while leave-in conditioners and oils reinforce the shift towards long-term hair health. For brands, this is an opportunity to **lean into education and efficacy**. Scalp health, bond repair and damage prevention are prime areas to explore, while styling remains relevant. Gen Z is telling us exactly what they want from their haircare, and the brands that listen will be the ones that win their loyalty.

# Top HAIRCARE Brands



1. head & shoulders
2. L'ORÉAL PARIS ELVIVE — NEW!
3. GARNIER — NEW!
4. SheaMoisture
5. Dove — NEW!

6. PANTENE
7. TRESemmé USED BY PROFESSIONALS
8. OLAPLEX
9. aussie
10. cantu SHEA BUTTER
11. REDKEN 5TH AVENUE NYC
12. KÉRASTASE PARIS
13. amika:
14. OGX
15. Herbal Essences
16. MIELLE

# Hygiene

## Low Switching, High Standards

*Another first for this report,* we look at Gen Z and Hygiene, identifying an **uncharacteristically loyal consumer** for this vertical.

### 1. Brand loyalty is strong

**36% of Gen Z 'rarely' switch** between hygiene brands. When you have them, they're there for the long haul

### 2. Effectiveness is the dealbreaker

The top reason they will switch? **Enhanced effectiveness (48%)** - better performance matters more than scent, packaging or marketing

### 3. Innovation & Design isn't high on their list

Interestingly, for Hygiene only **New Technology (6%)** and **New Design (7%)** are the least compelling in getting them to switch brands

**FOR HYGIENE BRANDS**

**Here, performance is everything.** Brands need to focus on their products' benefits, championed through real-user results to win over Gen Z. And the best part? This audience is loyal to Hygiene brands. If you can win their attention hearts by capturing their attention and gaining their trust, **this consumer is with you for the long haul.**

# Top HYGIENE Brands



1. Dove
2. Colgate
3. Vaseline
4. NIVEA
5. Dettol

# Bodycare

## The Skinification Movement in Full Swing

***Building on last year,* we see Gen Z's growing dedication to Bodycare.**

### A routine, not an afterthought

A staggering **74% of Gen Z** have a dedicated **bodycare routine**, with nearly **half (47%)** adding **new steps** in the past year.

### Needs-based purchasing

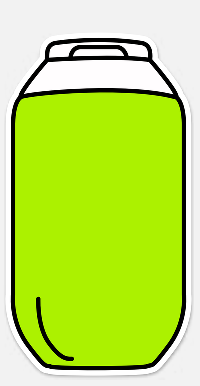
The biggest driver of body care purchases? **Personal skin needs (57%)**, making education especially key for this vertical.

Cleansing and hydration reign supreme.

**The top 5 must-have body care products are:**

**#1**

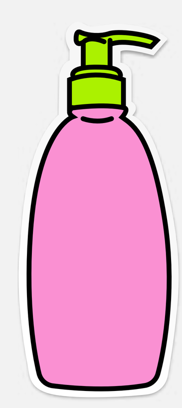
### Body Wash



*No.1 - potentially reflecting the rise & availability of 'active' body cleansers?*

**#2**

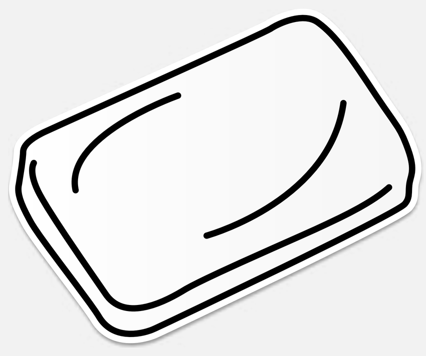
### Body Lotion or Butter



*Moisturization is key*

**#3**

### Soap



*Is this a sign that soaps are making a modern comeback?*

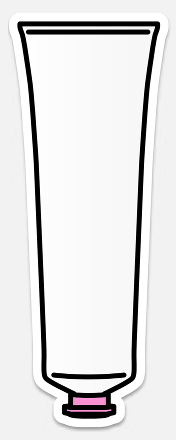
**#4**

### Scrub

*Often used alongside a chemical exfoliant by Gen Z*

**#5**

### Hand Cream



*Bodycare on the go*

**FOR BODYCARE BRANDS**

The 'skinification' of bodycare i.e. the application of principles traditionally associated with skincare to bodycare products, is here to stay. Cleansers and moisturizers **are the gateway to capturing Gen Z's loyalty.** Product innovation will see success focusing on hydration, exfoliation and targeted treatments like keratosis pilaris smoothing or brightening solutions.


# Top BODYCARE Brands

1. Dove
2. NIVEA
3. CeraVe — DEVELOPED WITH DERMATOLOGISTS
4. Aveeno®
5. Vaseline

6. eos evolution of smooth
7. Bath & Body Works®
8. SOL DE JANEIRO
9. PALMER'S®
10. NATIVE
11. LUSH
12. OLAY
13. NATURIUM
14. Simple®
15. GARNIER
16. Neutrogena
17. Cetaphil®
18. LYNX
19. JERGENS
20. E45

# Skincare

## A Deeply Personal Ritual That's About Feeling Good First

Gen Z's allegiance to skincare is more than just skin deep, **their duo-daily rituals are focused on Self; Self-love, Self-care and feeling their best selves.**

### A dedicated part of daily life

**74%** have a morning Skincare routine, and **75%** have to an evening routine

### It's about more than just looks

**94%** say Skincare is about feeling their best

### Routine expansion is ongoing

**49%** have added a new Skincare product in the last 3 months

### Influence is balanced

Friends and creators **hold equal power** in Skincare purchasing decisions - the **only category** where this happens. Whereas, **Celebrities? Barely register (1%)**

*I connect most with brands that are transparent about ingredients and don't overhype their products.*

**GEN Z** POV!

# Top 5 Skincare products Gen Z can't live without

#1
## Moisturizer
*No.2 last year, now No.1*

#2
## Cleanser
*No.1 last year, now No.2*

#3
## SPF
*Remains a staple*

*NEW!*
#4
## Exfoliant
*Chemical exfoliation new in at no.4*

#5
## Face Mask
*Dropping slightly, but Face Masks stay in our top 5*

FOR SKINCARE BRANDS

For Gen Z, first and foremost, Skincare is an emotional category - Skincare (and healthy skin) is a means of feeling their best. The consistency in Gen Z's top Skincare products over the last three years **indicates a deep commitment to building a sustained routine,** over fleeting trends. Brands should emphasize self-care messaging, hybrid formulas and proven results to unlock deeper potential, especially when introducing new products to market.

# Top SKINCARE Brands


**1** CeraVe — DEVELOPED WITH DERMATOLOGISTS

NEW! **2** The Ordinary.

NEW! **3** NIVEA

**4** LA ROCHE POSAY — LABORATOIRE DERMATOLOGIQUE

NEW! **5** Simple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6 Neutrogena
7 Cetaphil
8 Dove
9 Aveeno
10 GARNIER
11 COSRX
12 CLINIQUE
13 OLAY
14 BULL DOG — NATURE X SCIENCE
15 BYOMA
16 조선미녀 — BEAUTY OF JOSEON
17 L'ORÉAL PARIS
18 PAULA'S CHOICE SKINCARE
19 dermalogica
20 ELEMIS LONDON

# Luxury Beauty

## Trust Over Exclusivity

*I think (brands) need to know that pretty packaging will always win me over if it's paired with an amazing product.*

**GEN Z** POV!

Gen Z don't buy luxury beauty to signal status; they buy it for **what it does**. This generation expects their luxury purchases to **deliver tangible benefits** rather than just a status symbol.

### 1. Quality is the #1 priority

Over half **(56%)** of Gen Z associates luxury Beauty with **high quality**, while prestige and superior ingredients lag behind **(both 11%)**

### 2. Proven results drive investment

The top reason Gen Z spends on luxury Beauty is **proven efficacy (45%)**, followed by **word-of-mouth recommendations (30%)** and **influencer endorsements (15%)**.

### 3. Exclusivity doesn't matter

Only **3%** of Gen Z link luxury Beauty to exclusivity - cost and access is no longer a gatekeeper; performance is.

*"This generation not only cares about ingredients and performance, they know about ingredients and performance, which, as someone who was once 13-28 myself, I can say is a new development as things like hypochlorous acid and peptides simply were not a part of my vocabulary until more recently.*

Celia Ellenberg

**FOR LUXURY BRANDS**

By shifting the focus from **luxury as exclusivity to luxury as proven performance**, brands can align with Gen Z's values. Product claims, user testimonials and passionate advocacy will be the most effective selling tools. Combine this with a compelling in-store experience and you'll see cut through.

# Top LUXURY Brands



1. DIOR
2. CHANEL
3. MAC (**top** beauty-forward luxury brand)
4. YVES SAINT LAURENT
5. GUCCI

6. TOM FORD
7. VERSACE
8. Calvin Klein
9. Charlotte Tilbury
10. NARS
11. CLINIQUE
12. MARC JACOBS FRAGRANCES
13. PRADA
14. HUGO BOSS
15. LANCÔME PARIS
16. JO MALONE LONDON

**(speaking on MAC as the top makeup-first Luxury beauty brand)**

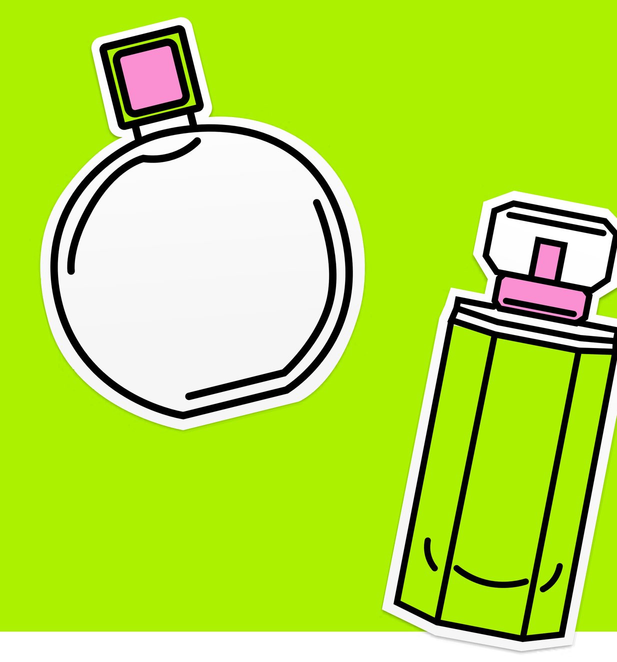
*"MAC's recent 90s Nudes campaign was a win across the board for the brand. It felt timely and nimble and like what consumers want, which is hard for such a big brand to execute on. It was also nice to see them regain some ownership over a narrative they started thirty years ago, with a smart lineup of products that engaged new and existing consumers—another extremely difficult task for a legacy brand.*

Celia Ellenberg

KYRA

# Fragrance

## Educated, Digital-First and Ready to Spend



**Gen Z are *three times* more educated on Fragrance YoY. This is how that understanding manifests more widely:**

### Gen Z buys fragrance without testing

Almost **half (49%) have purchased a fragrance without smelling it first**, thanks to detailed online education and influencer content.

### Influencer discovery matters

**49%** have purchased a fragrance after discovering it through an influencer.

### They invest in Fragrance

**49%** spend between **$50-$200+ per fragrance.**

### They own multiple fragrances

A massive **97% own more than one**, with **53% owning between 3-9.**

### Longevity is key

Beyond scent preference, **22% say longevity is the biggest driver** in deciding to buy a fragrance.

### Floral & Gourmand win

**Floral (25%)** and **Gourmand (21%)** are the top scent preferences, while **Earthy & Herbal** are the least liked.

Firmenich

*"Gourmand fragrances continue to go strong but have evolved beyond being just sugary sweet. I like to call them the 'Neo Gourmands'. Woody notes have become well accepted and in a world where gender specific fragrances play less of a role, they create the perfect note to be genderful.*

Frank Voelkl

NEW! **25%** Floral

NEW! **21%** Gourmand

NEW! **17%** Woody

**11%** Fruity

**9%** Citrus

**FOR FRAGRANCE BRANDS**

Long gone are the days of the signature scent and a 'smell-before-you-buy' approach. **Gen Z is confident buying online**, so considered digital storytelling (notes breakdowns, longevity claims and influencer-driven descriptions) is essential. Longevity is a major selling point, with price sensitivity lower than in other categories. Take advantage of Gen Z's preference to 'wardrobe' fragrances and explore how one strategy could feature multiple scents.

KYRA

# Top FRAGRANCE Brands



1 DIOR

NEW!
2 Bath & Body Works®

3 YVES SAINT LAURENT

4 CHANEL

5 GUCCI

6 VERSACE
7 TOM FORD
8 Calvin Klein
9 SOL DE JANEIRO
10 rabanne
11 VICTORIA'S SECRET
12 PRADA
13 HUGO BOSS
14 MARC JACOBS FRAGRANCES
15 Ariana Grande FRAGRANCES
16 Glossier.
17 JO MALONE LONDON
18 LYNX
19 LUSH
20 KAYALI

# Makeup

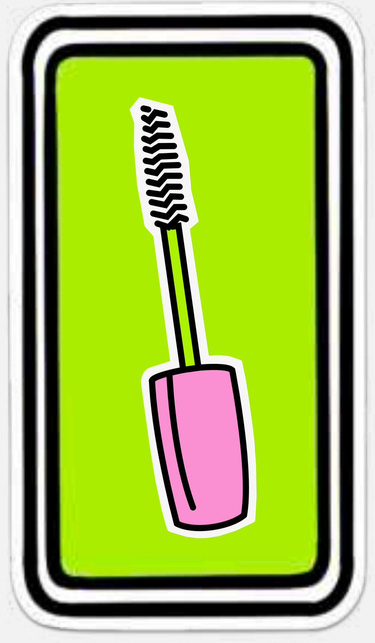
## A Story of Trend & Performance

For Gen Z, **Makeup is about transformation, creativity and self-expression.** Unlike skincare, which is rooted in routine and self-care, Makeup is dynamic - **trends shape purchasing decisions** as Gen Z leans into inspiration-driven beauty

### **Inspiration** fuels purchases

The **biggest driver** of Makeup purchases? **The desire to create a trending Makeup look (37%),** proving that visual storytelling is key and unlike Skincare, trend is a crucial tactic to lean into.

### **Creators** hold more sway than friends



**14% are influenced by creators,** a testament to the power of social media tutorials and how impactful they can be for this audience.

### **Performance** matters most

For the **second year in a row, Performance (38%)** is the top driver of purchases, followed by **Price (33%)** and **Value (18%).**

**GEN Z** POV!

*I LOVE Makeup and beauty products and I'm always willing to try something new.*

**Since 2021, we've been seeing coverage preference shift YoY**

**34%** Of Gen Z rely only on Skincare only

**25%** Opt for **light coverage**

**14%** Prefer **medium coverage**

**13%** Use **concealer only**

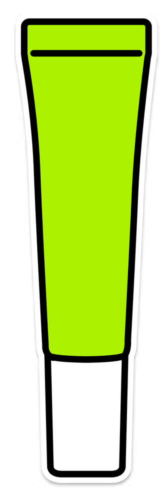
**10%** Change their coverage **depending on the day**

# Top 5 Makeup products Gen Z can't live without

NEW!

**#1**

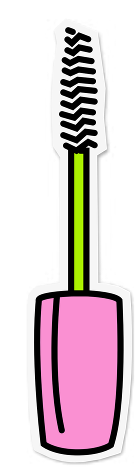
## Lip Balm



*NEW entry - beating all other lip products!*

**#2**

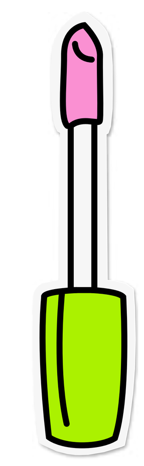
## Mascara



*Previously No.1, still an essential*

**#3**

## Lip Gloss

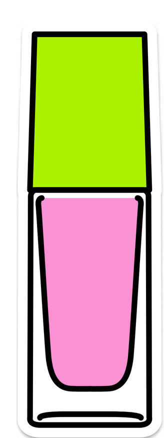


*Previously No.2, still an essential*

NEW!

**#4**

## Foundation



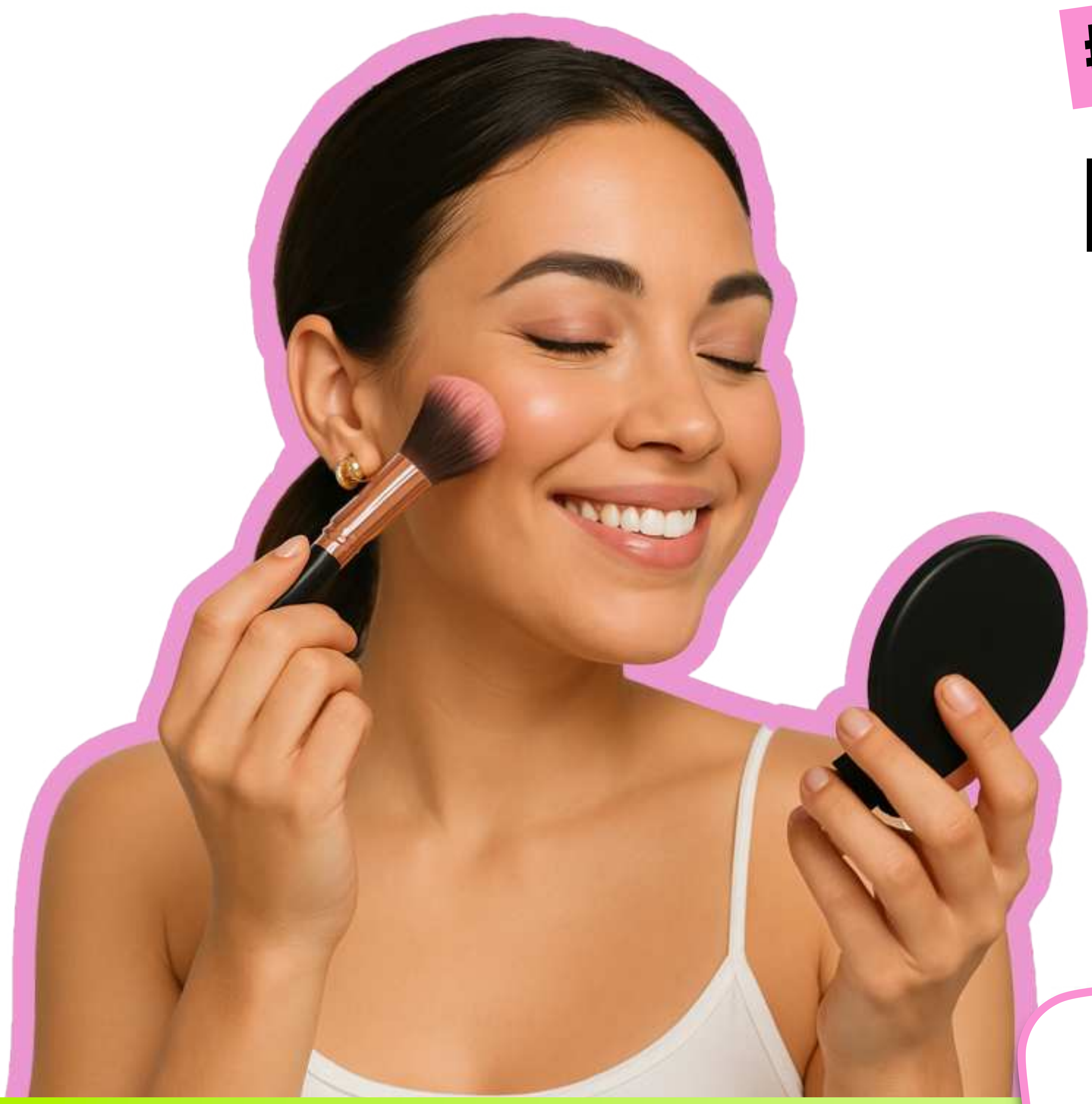
*Back from the 'naughty corner' after two years of what seemed like routine exile...*

NEW!

**#5**

## Skin Tint

*NEW entry - and our second coverage product in the top 5!*



FOR MAKEUP BRANDS

For brands, the **winning formula is clear**: performance-first products, strategic creator partnerships and staying on top of relevant trends. Combining this with what we saw on knowledge earlier in the report (with 54% of Gen Z wanting to upskill their Makeup skills) brands who master this balance and deploy it consistently, won't just capture Gen Z's attention; they'll build real love and loyalty with this audience.


# Top MAKEUP Brands

1. e.l.f.
2. MAYBELLINE NEW YORK
3. NYX PROFESSIONAL MAKEUP
4. FENTY BEAUTY
5. *NEW!* L'ORÉAL PARIS

6 MAC
7 Charlotte Tilbury
8 NARS
9 Rare Beauty
10 DIOR
11 hudabeauty
12 tarte
13 RIMMEL LONDON
14 Too Faced
15 No7
16 Glossier.
17 benefit
18 REVOLUTION BEAUTY LONDON
19 CLINIQUE
20 COVERGIRL

# FINAL NOTE

# Firstly, a big thank you to the State of Beauty contributors!

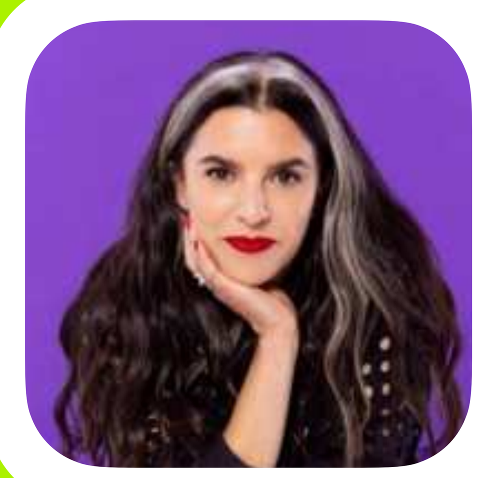
Your expertise and insight has been invaluable in connecting the dots across our first-party insights and Kyra platform data.
**You are the best!**

## OUR EXPERTS

Aïda Moudachirou-Rébois
GLOBAL GM

Leslie Caswell
MARKETING DIRECTOR

Celia Ellenberg
EDITORIAL STRATEGIST

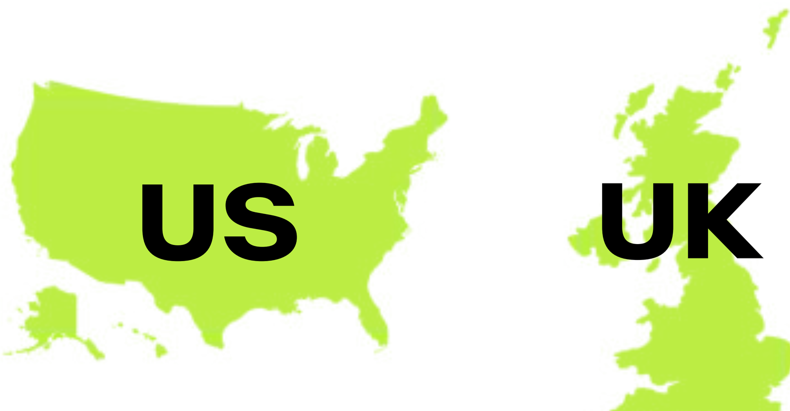


Jenn Sulivan
BEAUTY JOURNALIST

Frank Voelkl
PRINCIPLE PERFUMER

## GEN Z PARTICIPANTS

**2,000** Total Respondents




**18-24** Age Range

We're honoured to keep representing Gen Z's voice when it comes to Beauty! Thank you for continuing to help us do so 🫶

# Secondly,

# how to harness the Beauty Ripple™?

Gen Z have evolved from curious into powerful industry shapers, setting new standards for trust, transparency and innovation. Their influence flows in every direction, informing luxury, mass and neighboring generations' Beauty experiences.

## Here's how to harness it:

### **Creators** are today's Power Players

Gen Z's Beauty journey starts on social, partner with the right voices and **give them the freedom** to craft content that resonates, (add in comma) appreciating that different creators yield different levels of influence.

### **Education** converts to sales

Knowledge is Power - and in Beauty, it's a purchase driver. **Clinically-backed claims, ingredient transparency and honest reviews** are key to turning interest into investment.

### **Trust** is a Currency, not a Buzzword

This audience doesn't buy products; they buy into brands who align with their values. **Authenticity, community engagement and real results** are non-negotiables.

### **Consistency** is the Only Way To Win

A viral moment is great, but longevity wins in the long run game. Show up where they are (TikTok, Instagram and, more than before, YouTube), what they want (consistent dialogue, not sporadic moments), and how they want to see you (relatable, entertaining, sticky and valuable content)

## Online & In-Store:

### Adjust Gen Z have just built the new marketing funnel.

Are Gen Z buying online? 100%. Are they buying in-store? For sure. Do they test in-store and then buy online? Yes. Do they discover online and then go in and trial in-store? Definitely. Do they need an influencer video to remind them of what's in their cart? All the time. **Gen Z are just building the new marketing funnel.** The best advice? Build a powerful conversation between in-store and digital teams and collaborate to find success.

# The Beauty Ripple™ is growing into a tidal wave.

The brands that harness this momentum will make **the biggest splash.**

Lastly.

# Beauty is moving fast. But the opportunities move faster.

Kyra help brands stay ahead by collaborating with the most powerful and relevant creators, shaping what's next.

**From first like to sell-out, our creator-led strategies build brands people care about.**

## Insights-Driven Strategy

Trend forecasting, audience segmentation, cultural POVs

## Creator Programs

Always-on, product launches, brand-building moments

## Performance Obsessed

Real-time optimization, ER benchmarking, brand lifts

## Streamlined execution

Kyra platform - from creator sourcing to content delivery - everything happens in one place.


***Hit us up*** *to plan your next creator program; marina@kyra.com* 💚

# THANKS

for reading

KYRA