

KYRA's gen z state of beauty report



2023 edition

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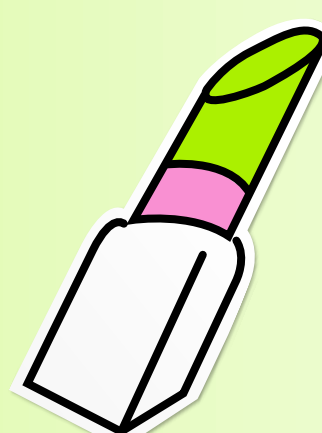
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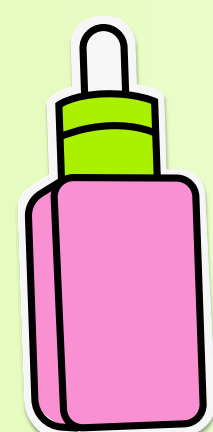
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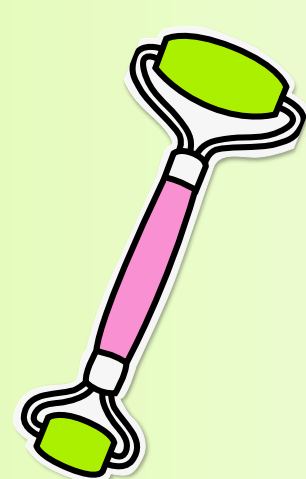
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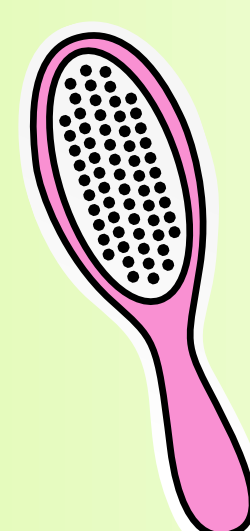
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to sum it up

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a word from the kyra team...

we're back, beauties!



Marina Mansour

Vice President, Beauty & Wellness @ Kyra

Keep your eye on Gen Z. They don't just know what they want; they know who to listen to, what to purchase and are unafraid to test, learn, and instigate informed change, when it comes to Beauty. Exploring Gen Z's dynamic relationship with skincare, their thirst for deeper makeup knowledge, the evolving exploration of hair care, and the assertive presence of fragrance in their considerations, this year's Kyra State of Beauty report reveals a generation that has unmistakably matured in their connection with Beauty & Wellness. They're no longer finding their feet, they've stepped into their power.

For Gen Z today, Beauty is a personal statement. A reflection of how they feel and how they want to be perceived in both physical and digital realms. They welcome influence, but demand it in their language and on their terms. Their brand loyalty might look different from generations before them, but their commitment to results is unwavering. We're witnessing the evolution of Gen Z from a new consumer with enticing influence and growing economic power, into the defining pulse of global Beauty popular culture.

Stay tuned; the heartbeat is getting louder.

Lauren Hector

Vice President, Marketing & Strategy @ Kyra



2023 was one for the books. A year where the beauty landscape was undoubtedly defined by icons like Barbie, Taylor Swift, and Beyoncé who left a lasting mark on the confidence of Gen Z. And as this generation was inspired to embrace their self-assurance in the last year, it sparked a new wave of how they interact with creators, social media and their beauty content. In short, they've taken control and are owning it — thank you icons!

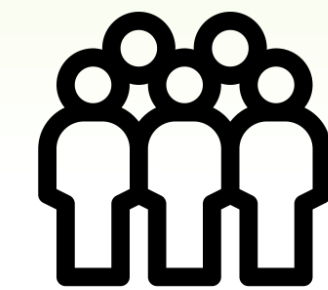
Our take? The world of traditional beauty is no more. We're ditching the formalities and diving headfirst into BFF territory because this generation knows what they want and is shouting it from the rooftops. Hint: deeper connections, authenticity, and shared experiences are high on the list. So pack your bags, bring along your favorite creators — they are the navigators of this landscape after all — and join us as we walk you through how to win with Gen Z in 2024. Forget trailing in the dust because this report will equip you with the tools to ride the wave of Gen Z beauty consumption successfully and win them over for years to come.

the how

our survey methodology



demographic



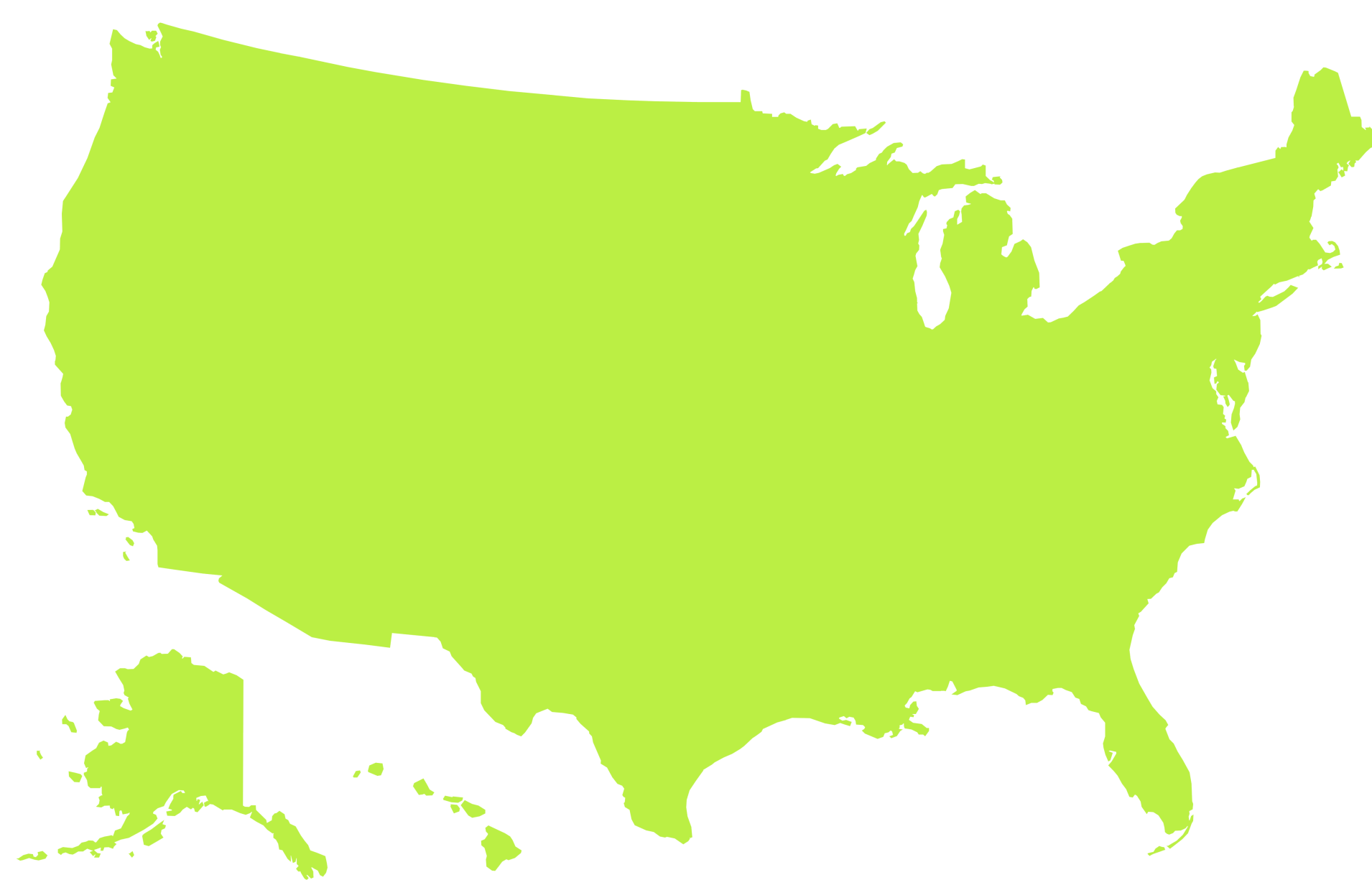
1000

total participants

18-25 y/o

gen z

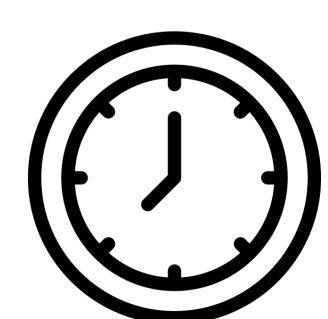
usa



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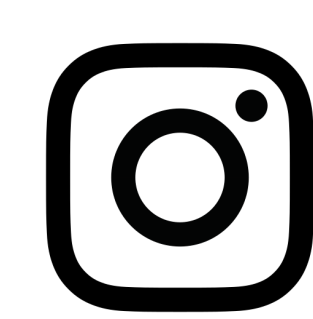


time of study



november 2023

format



instagram survey

additional data



5+ years historical data from Kyra's Platform

gen z is in its sophomore beauty era

YouTube laid their foundation, but now we must cater to Gen Z like the mature beauty mavens they are

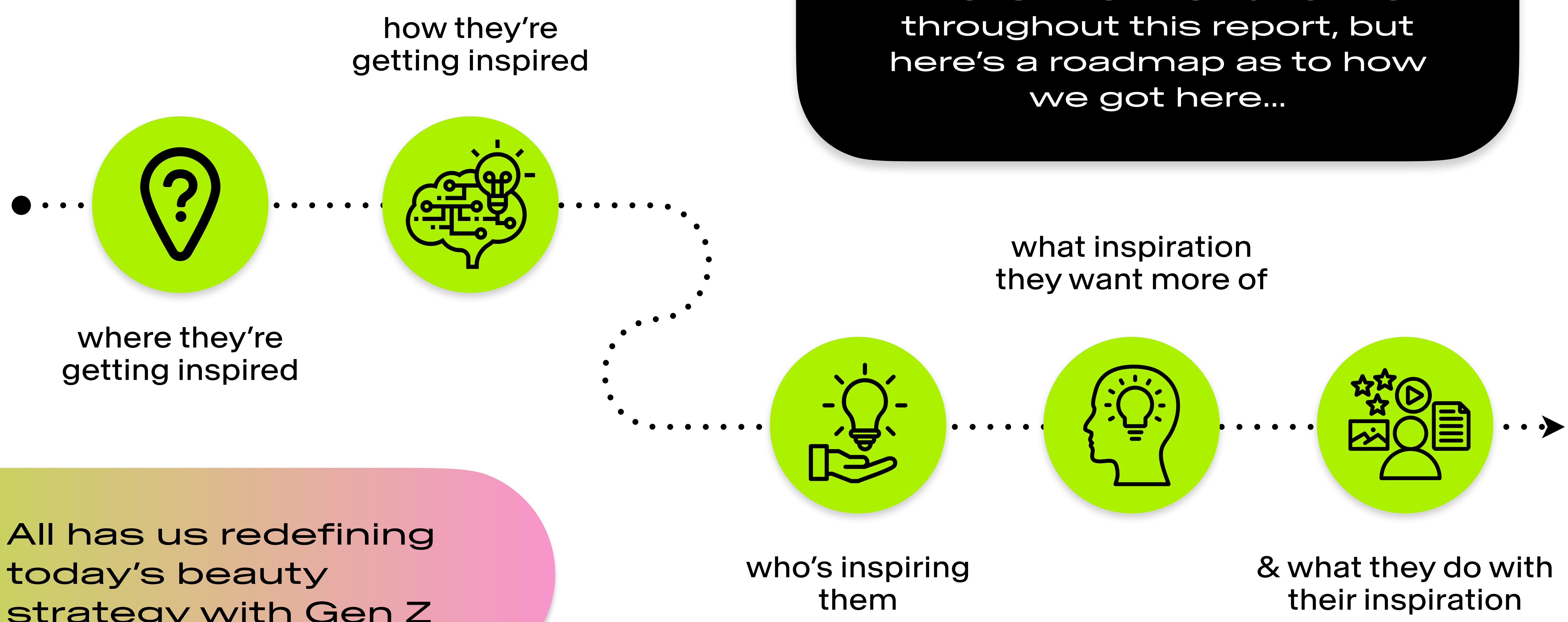


Three years of this report under our belts, and it's safe to say Kyra not only knows Gen Z like the back of our makeup pallets, but we've also been following their beauty journey and watching them 'glow' up before our very eyes.

As we unravel the data from this year's report, it's clear that Gen Z is taking a new lease on their beauty life. They're relying more on their experiences, they're more inquisitive, and they *will* challenge for the answer they're looking for when it comes to their beauty routines.

This isn't 'tween' beauty Gen Z anymore. They are in their Sophomore era — and we're here for it. Plus, we're here to break it down for you.

What learnings are giving us these Sophomoric vibes? That's what we'll dive into throughout this report, but here's a roadmap as to how we got here...



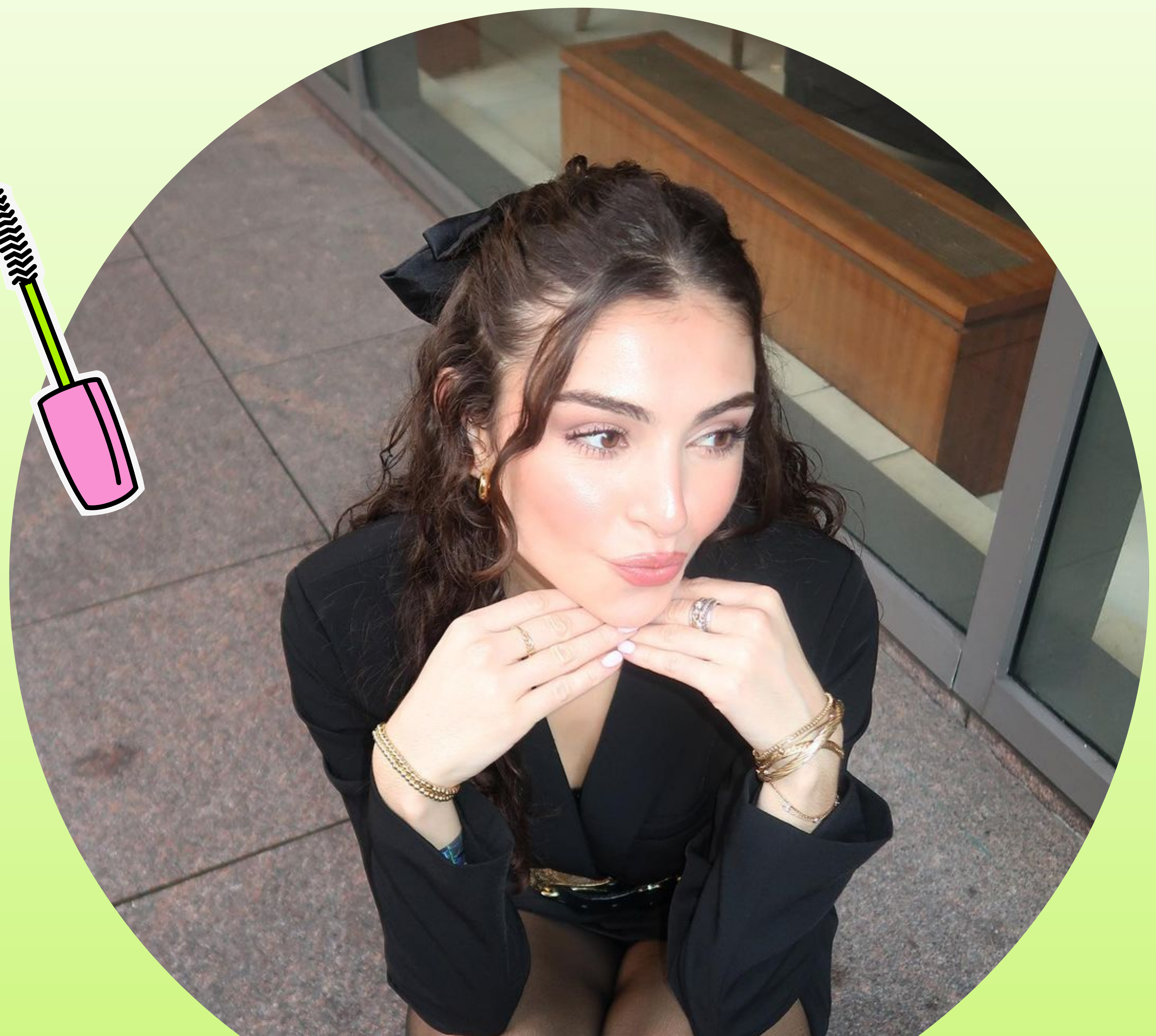
meet the creator

but first, say hi to our gen z beauty creator and resident report pundit...

Ashley's riding the beauty wave with us and giving her POV on all things state of gen z

why a creator?

In order to help brands succeed at marketing to the next generation, they need the help of both the consumer and the consumer's most trusted source: the creator. So we've enlisted Ashley to help us break down our findings to better arm brands for 2024. And to get the POV from a real-life, actual Gen Z'er.



@ashleylamarca

a little bit about Ashley...

Ashley is a 23 year old beauty and lifestyle content creator and MHA graduate student from New Jersey. She creates content focusing on haircare, makeup, and fashion while sharing her relatable personality with her millions of followers — all while building a strong relationship with her audience that values her online community.

 **299k**
followers

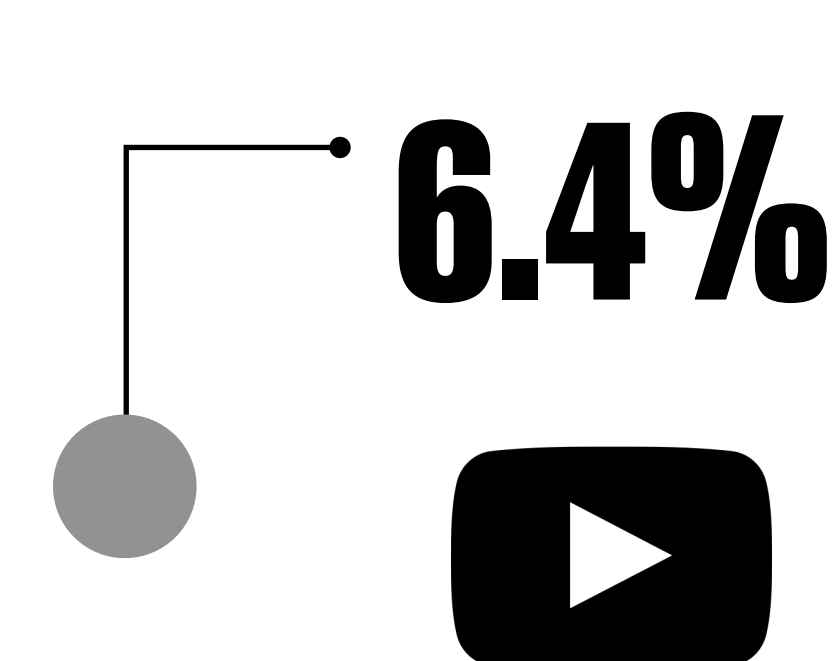
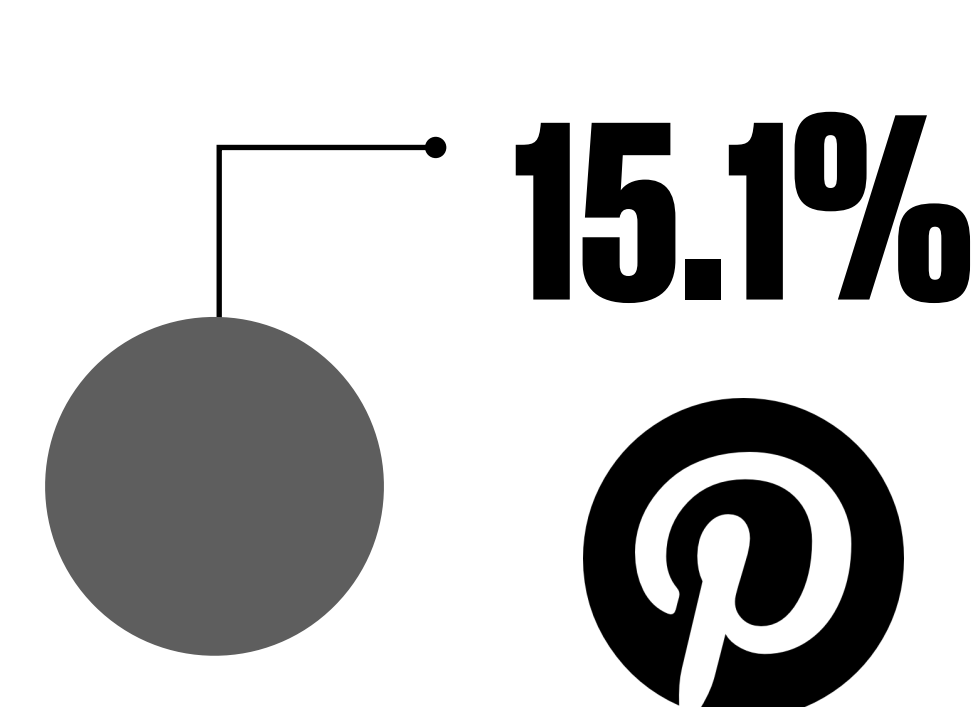
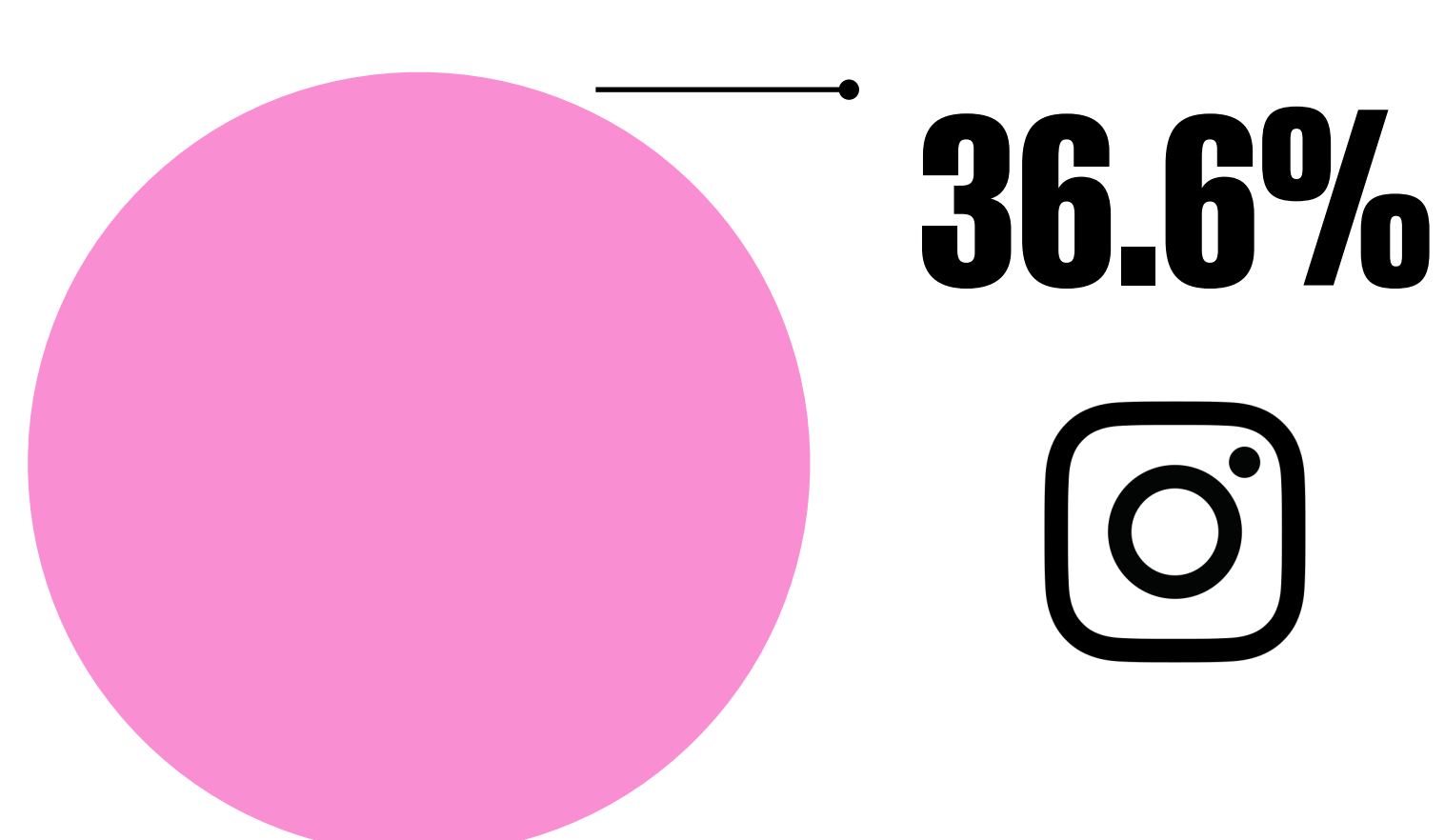
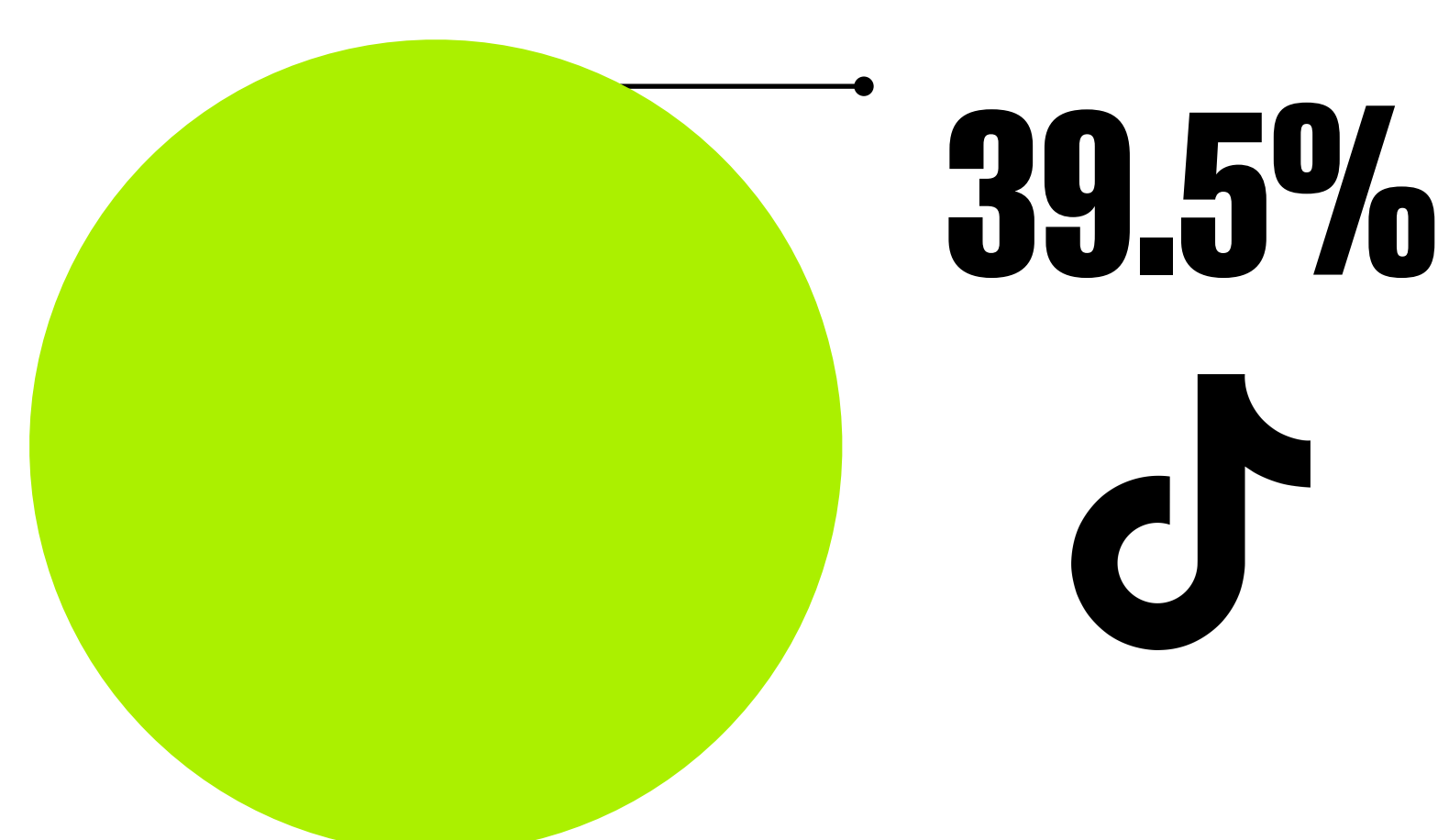
 **1.2m**
followers

now, onto the results 

where they're getting inspired

it's official, tiktok creators have fueled the confidence renaissance

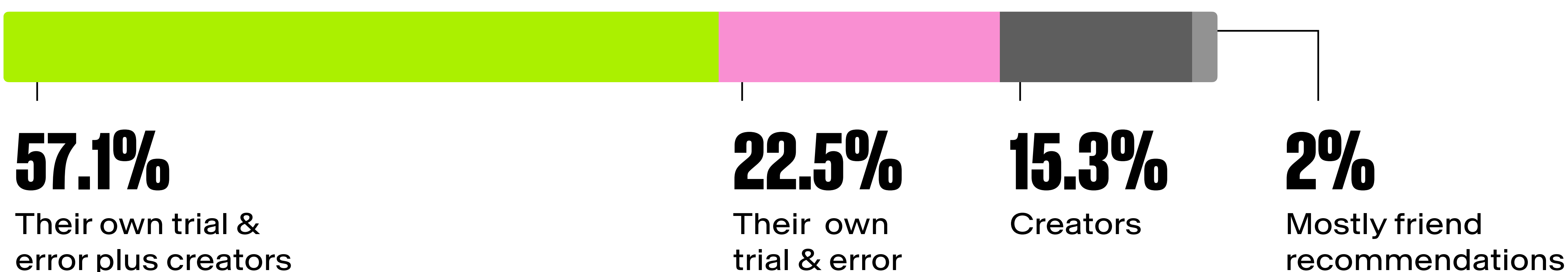
Gen Z's **go-to social media platform** for discovering beauty products and trends



who and what is inspiring Gen Z's **overall beauty routine**

FLASHBACK FACT

YouTube discovery is down year over year with 15% citing it as a resource in 2022



*
OUR 2
CENTS

meaning gen z beauty buffs got this. no more play-by-plays please.

Times have certainly shifted in the world of social and beauty. Platforms like YouTube which quite literally birthed the notion of the beauty creator, have now fallen to the backseat thanks to the meteoric rise of TikTok. Even a platform like Pinterest whose sole purpose is discoverability and inspiration has moved to the back of the line.

That coupled with Gen Z's confidence in trial and error tells us that this generation no longer needs the old-school method of influencing. They know how to apply their bronzer and don't need those application tutorials like they once did. In fact, now they want to be entertained and inspired so they can take the inspiration and run with it themselves. And platforms like TikTok (along with beauty creators who keep the platform kicking) literally serve this type of content up to them on a silver platter.

how they're getting inspired

brands and creators, it's time to drop the formalities

empowered Gen Z wants a creator bestie to entertain them with a side of education

the **social format inspiring Gen Z** most to purchase beauty products

FLASHBACK FACT

Tutorials ranked in the top 3 in our 2022 report



#1

ingredients
-focused



#2

GRWM



#3

when brands
& creators do
something
different



#4

trends

how likely is Gen Z to convert if a **brand engages in what's trending** on socials?

75%

Very Likely

25%

Not Likely

OUR 2 CENTS

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.

from Ashley



ASH'S 2
CENTS

ON TIKTOK'S RISE



This is so true. I too attribute a lot of my makeup and hair care skills to growing up watching YouTube tutorials.

Now, I find myself searching on TikTok as a search engine for beauty and fashion inspiration/information often times even more than Google. My two largest platforms are TikTok and Instagram where I personally spend most of my time on, aligning with the participant's responses 100%.



ASH'S 2
CENTS

ON BFF TERRITORY



Using social media for inspiration and purchasing is shifting from being solely about advertising to being more about building a relationship with the viewer.

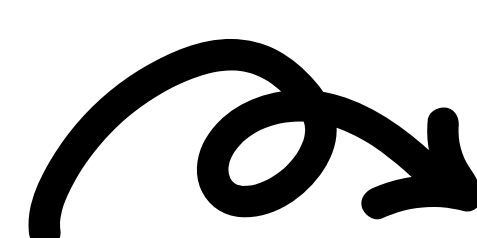
Consumers want to feel connected to who they are watching and if they can relate to them. Content creators owe it to their audience to be trustworthy and honest by promoting products they truly believe in.

what inspiration they want more of

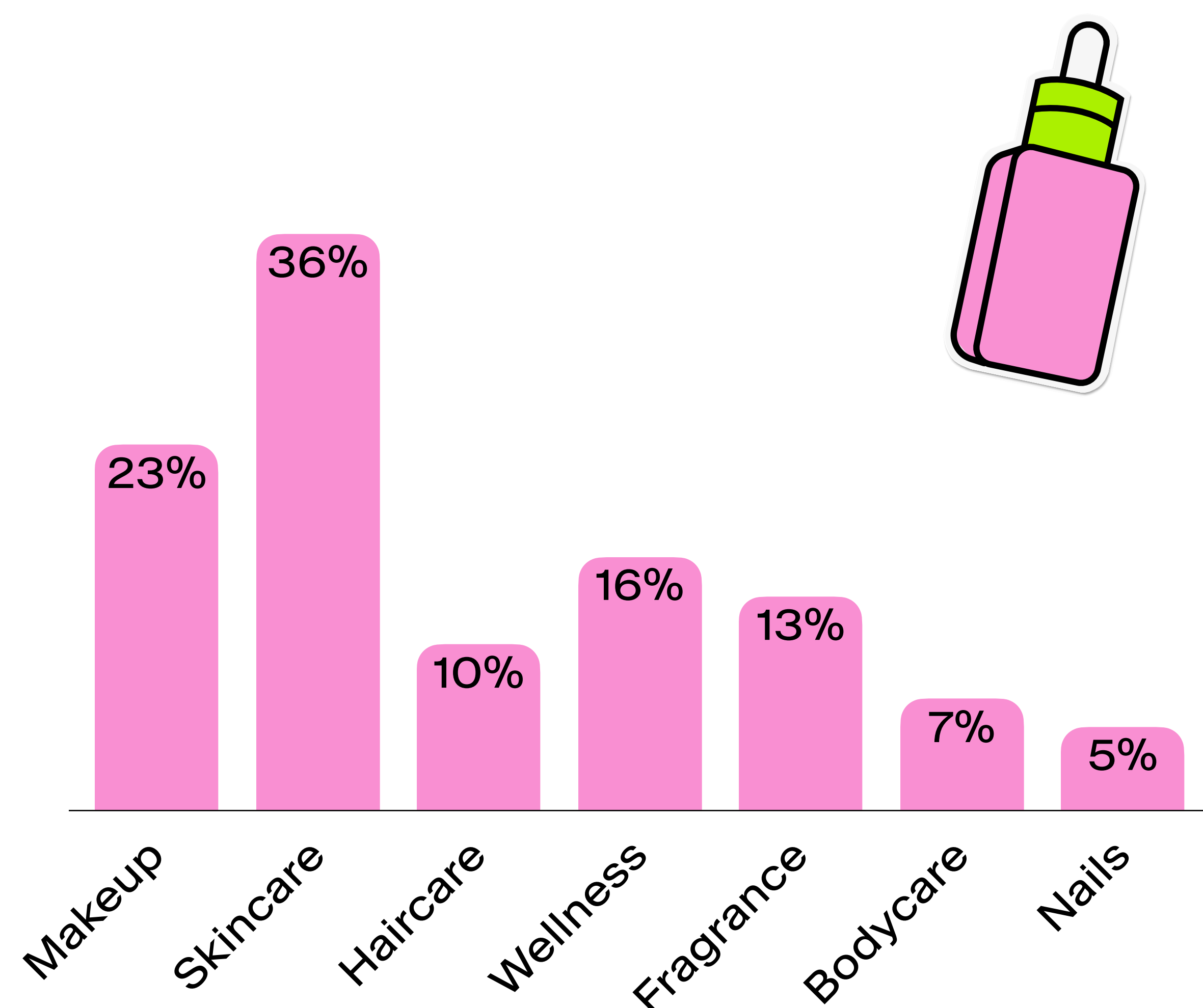
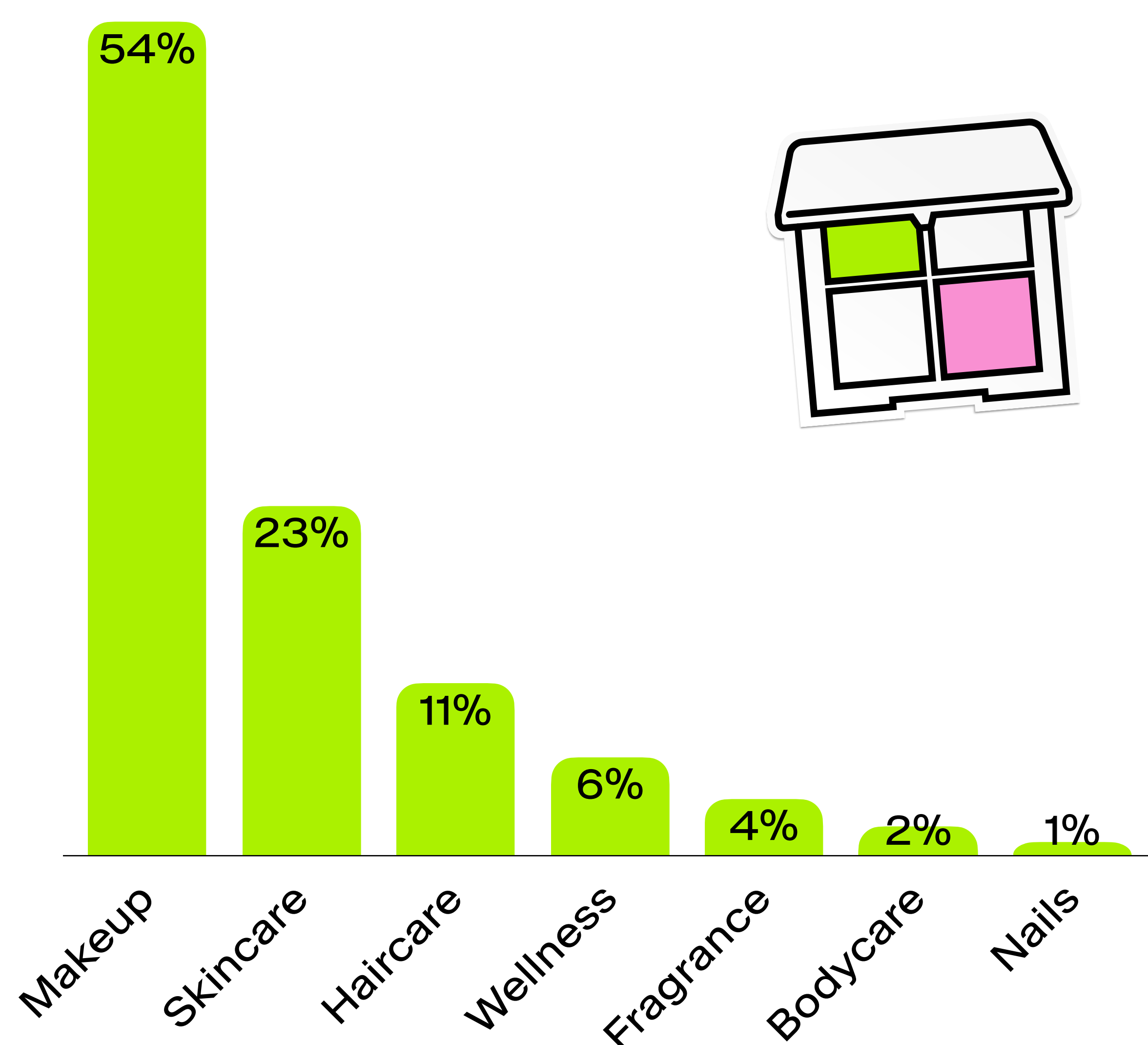
there's a new beauty trifecta in town, and makeup + skincare + wellness is the formula

what this generation knows now vs. what they want
to should have brands on the edge of their seats

where Gen Z feels **most**
knowledgeable today



vs. where Gen Z **wants** to
feel more knowledgeable



**the skills gap
is real, so are
brands ready
to step up to
the plate?**

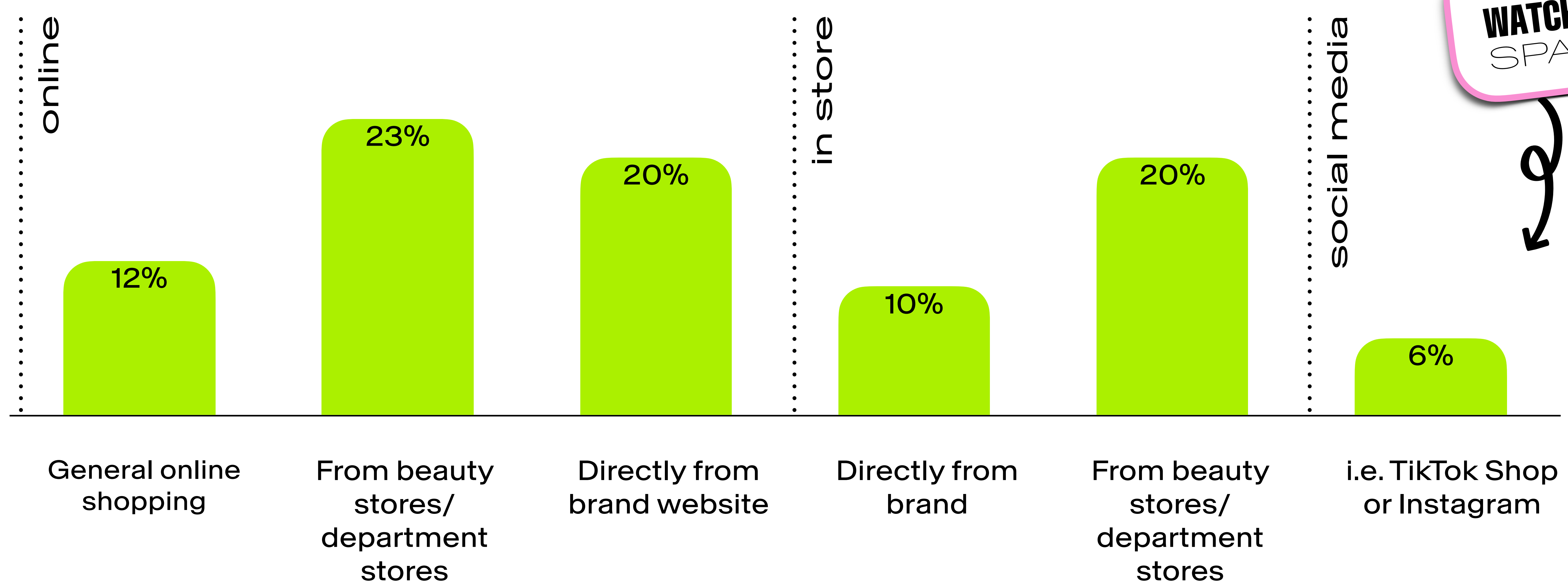
Makeup brands have had an immeasurable influence on social media, establishing a firm grip on Gen Z's attention, ranging from hooded eyeliner tutorials to the popular Euphoria-inspired makeup trends. So it's safe to say that Gen Z now knows the difference between foundation, a skin tint, and a CC cream and we couldn't be more proud.

But Gen Z is now yearning for more. It's clear that where they feel the least knowledgeable is where they want to build their skillset most — we're specifically eyeing the overall 'skincare' and 'wellness' and 'makeup' categories. So let's focus on quenching this thirst for skin and wellness knowledge in 2024 with the same time and attention that makeup has done over the years. Brands and creators that lean in, will reap the benefits of fans and consumers for years to come.

we know brands want results, but the sales journey's a winding road

understanding Gen Z's motivation and path to purchase can be your most powerful asset

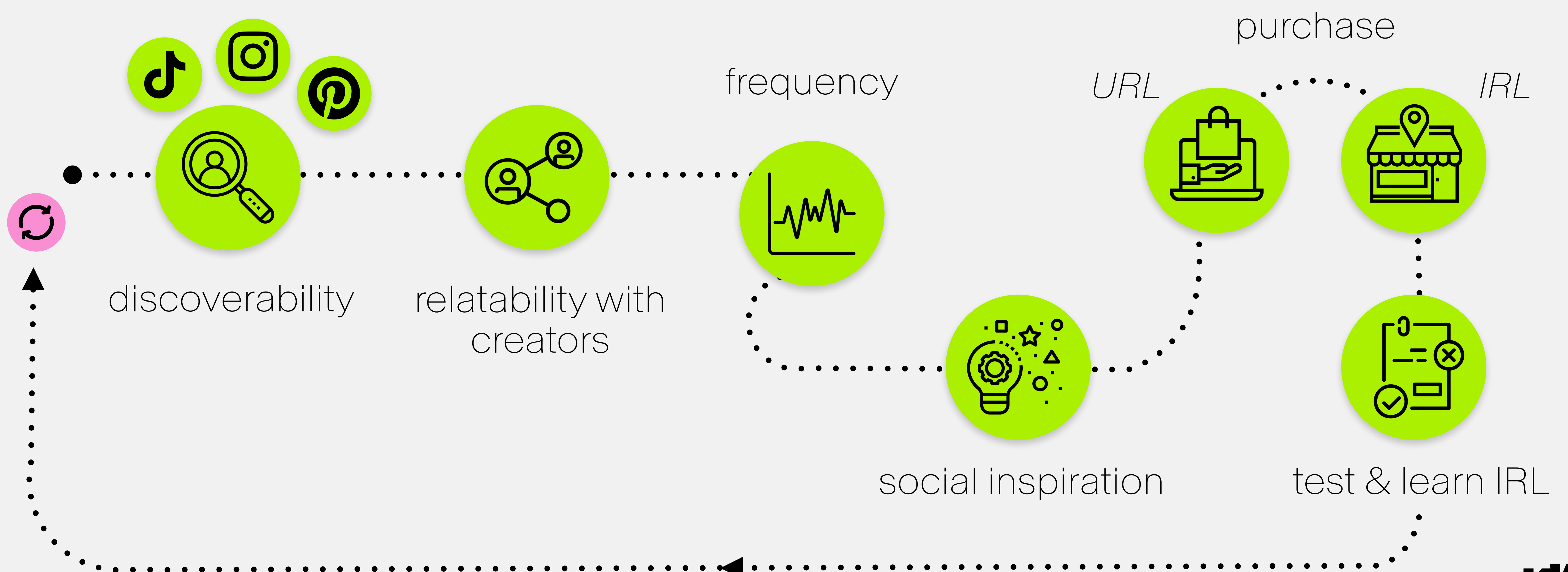
so where is Gen Z going to
purchase beauty products at the end of the day?



BRANDS
WATCH THIS
SPACE!

FLASHBACK FACT 40% were buying from in-store in our 2022 report

making your ROI funnel look a little more like a never-ending loop...



from Ashley



ASH'S **2**
CENTS

ON IRL vs. URL



As a Gen Z creator and consumer, I agree with the convenient instant gratification e-commerce has on both shopping and inspiration.

The average individual attention span is shortening after excessive exposure to short-form content on platforms like TikTok and Instagram, which in turn, has become the new standard for discovery and shopping.



ASH'S **2**
CENTS

ON CONVERTING

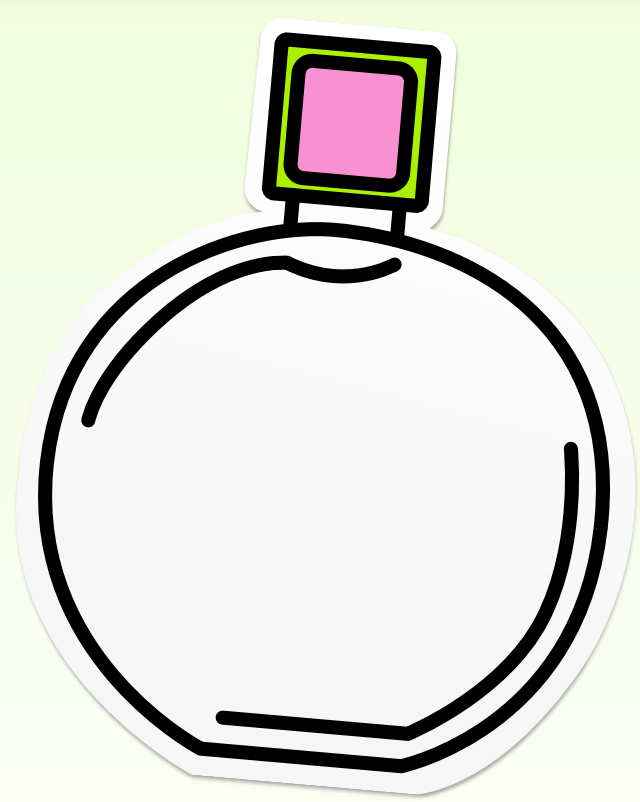
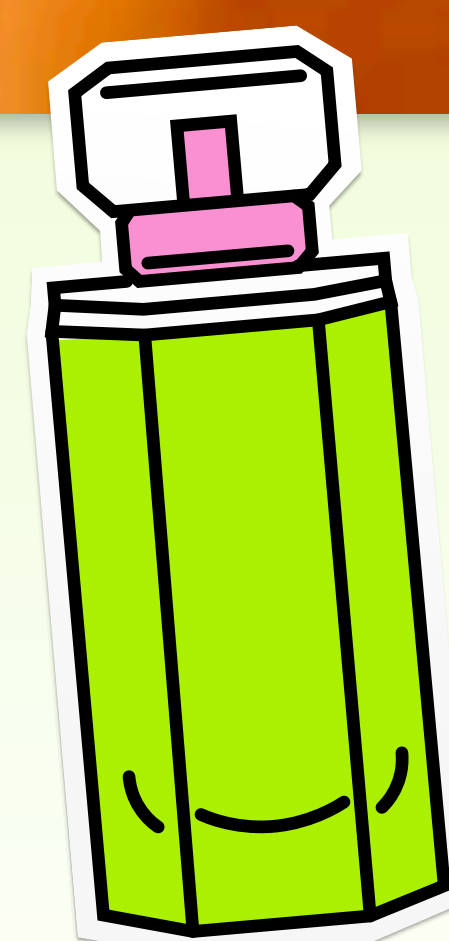


In fact, I find most of my audience often wants to buy a product straight off of my recommendation rather than doing external research on their own about products, resembling a quicker shopping experience.

Also, I find more sales are driven from "Get Ready With Me" style videos where my audience can physically see the product in use and decide whether or not it is worth the purchase.

let's dive into...

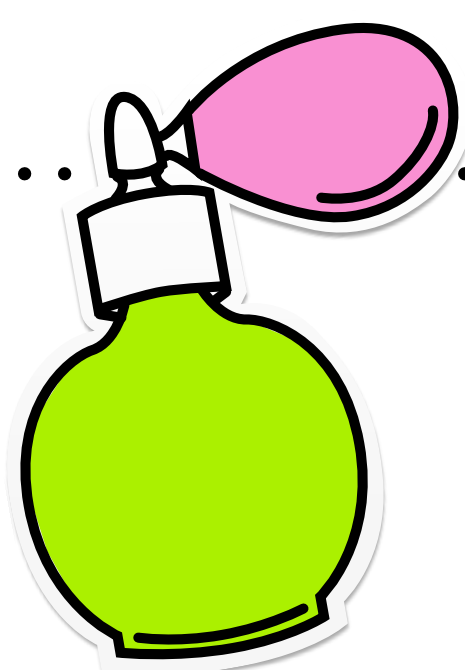
gen z & fragrance



45%

of Gen Z owns
1-3 fragrances

while 42% own 4-8 fragrances



63%

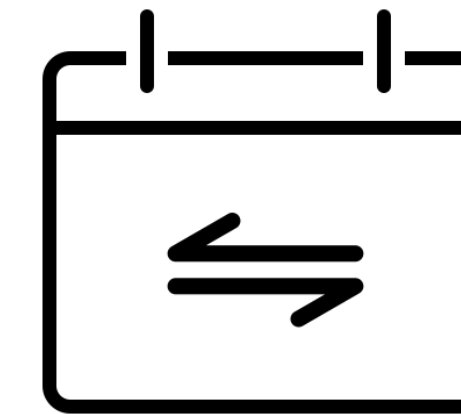
are buying a new fragrance
a few times a year

while 21% are buying
every 6 months



80%

are using their
fragrance
every day



FLASHBACK FACT

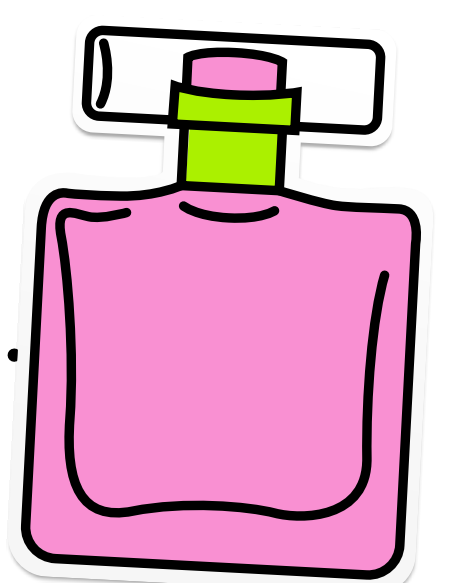
this is a big
uptick vs. 2022
when only 21%
were using daily

in the last 6 months ...

1/3



have bought a new fragrance
they never used before

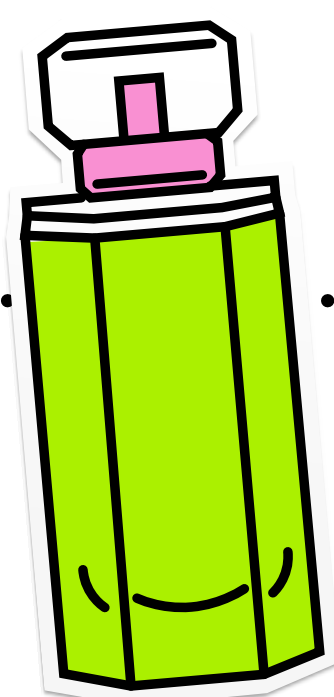


45%

are buying a new fragrance
because they want to try
something new



Whereas 21% are buying
for a change in season or
weather and 21% are being
influenced by a creator



1/2



have bought a
fragrance without
smelling it first

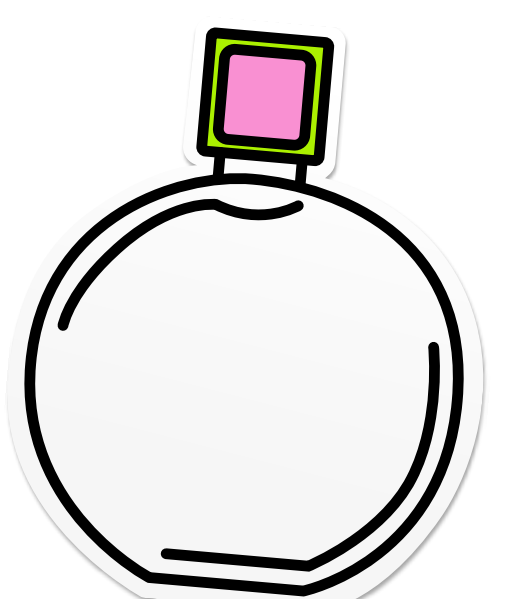
FLASHBACK FACT

In 2022, 36%
noted they
bought without
smelling first

75%

say scent is the biggest driver
for buying a fragrance

with the runner-up being
an affordable price



top 10 scents

- **#1** Vanilla 
- **#2** Rose 
- **#3** Fruity 
- ↗

#4 Lavender 
- ↗

#5 Jasmine 
- ↘

#6 Citrus 
- NEW

#7 Musk 
- NEW

#8 Orange Blossom 
- NEW

#9 Berries 
- NEW

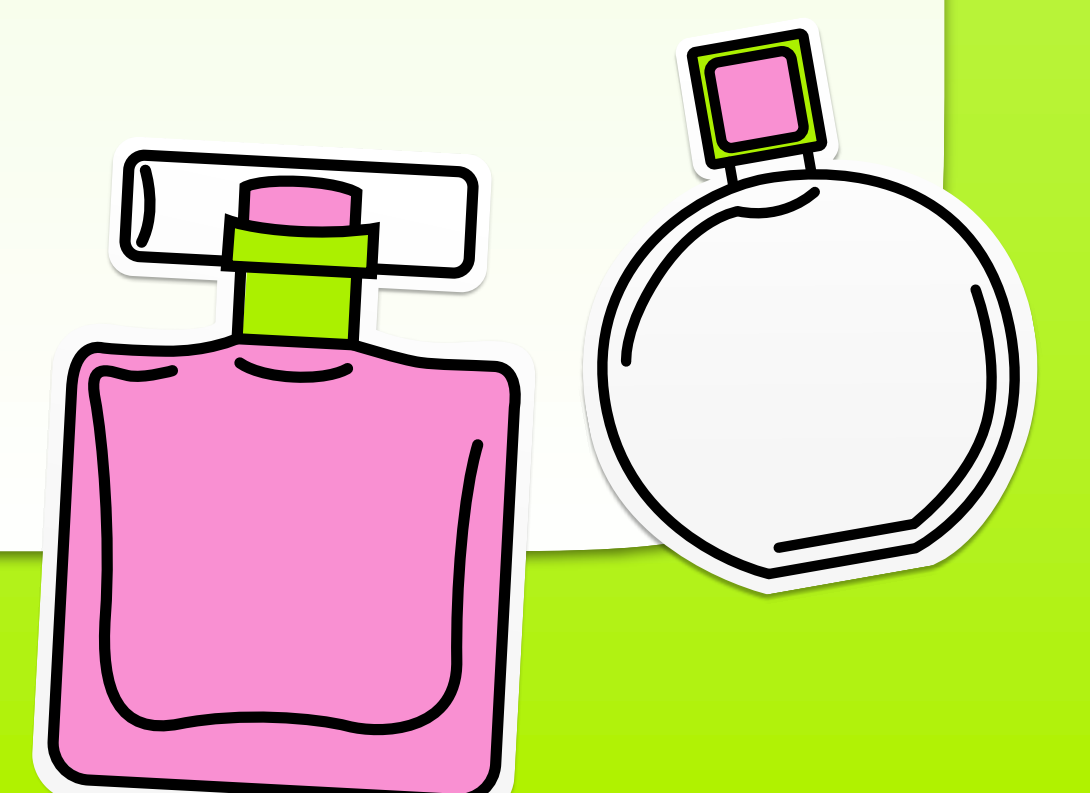
#10 Peach 

FLASHBACK FACT

Pineapple, Cinnamon
and Apple' fell off the
list from 2022

top 10 brands

- #1** DIOR
- #2** CHANEL
- #3** MARC JACOBS
FRAGRANCES
- #4** GUCCI
- #5** *Glossier.*
- #6** YVES SAINT LAURENT
- #7** BURBERRY
- #8** *SOL DE JANEIRO*
- #9** LANCÔME
PARIS
- #10** TOM FORD



witnessing the whiffs of change

Gen Z's fragrance game is a revolving door

BRANDS,
**TAKE
NOTE!**

RTS: return to spritzing

With Gen Z owning more scents in 2023 coupled with spraying more on the daily, it's clear we're on the fragrance up and up. Our take? With return to class/work playing a major role in their lives, brands should expect to market to this generation who now need a daily fragrance routine they didn't rely on 12 months ago.

hello, scent-sationalists

Gen Z are now frequently exploring and purchasing new fragrances more so than last year's report. Last year we said we were on the verge of the signature scent dying out. And we think our predictions were accurate?? So rather than Gen Z being known for single fragrances, maybe they're known as 'scent-sationalists'. Creating a world where pairing a scent with your mood and aesthetic - i.e. Scent Wardrobing - for the day becomes the norm.

the era of adventure seekers

With 40% of Gen Z buying new fragrances because they want to try something new, we're witnessing an adventure boom. That coupled with new aromas hitting their top list this year means they're not turning into a one-scent-wonder anytime soon. We're loving their discovery-first mentality.

fast-track purchases with creators

1/2 of Gen Z are buying a fragrance without even smelling it. Survey says? Creators are influencing them to hit 'checkout' before they even have a chance to sniff in person. Our recommendation? If you're looking to shorten the window of discovery to purchase, utilize the power of creators who can nudge your consumer to buy on your behalf.



modernizing their motivations

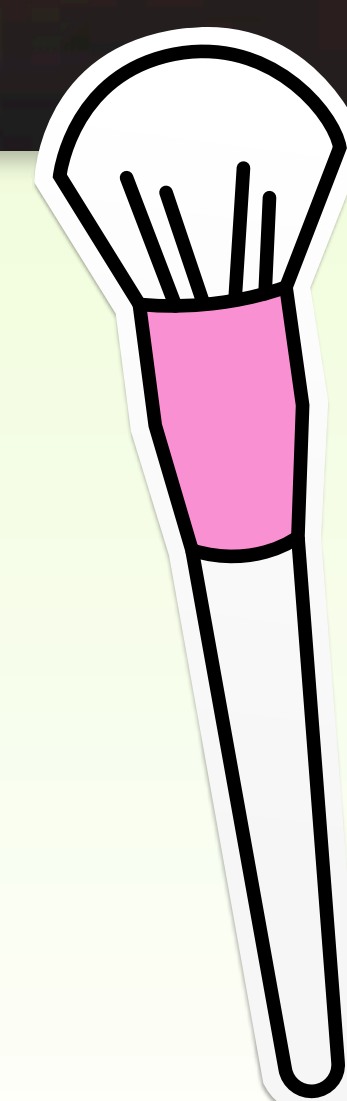
The top driver for buying a fragrance in 2023 is the scent (52.2%), with the uniqueness of smell as a close second (18.6%). Compared with 2022, where bottle design played a more significant role, this suggests that Gen Z is placing more emphasis on the olfactory experience rather than visual aesthetics. Is this yet another trend with Gen Z or do we think this pattern is here to stay?? Jury is out, but we know how to win their hearts as of today!

sophomore sophistication is here

We mentioned Gen Z being in their "Sophomore beauty era" and that is 100% true with fragrance as well. With their growing confidence, willingness to try and sophistication in the fragrance space all reflects this shift from freshman to sophomore in their beauty evolutions. We're excited to see what junior year brings!

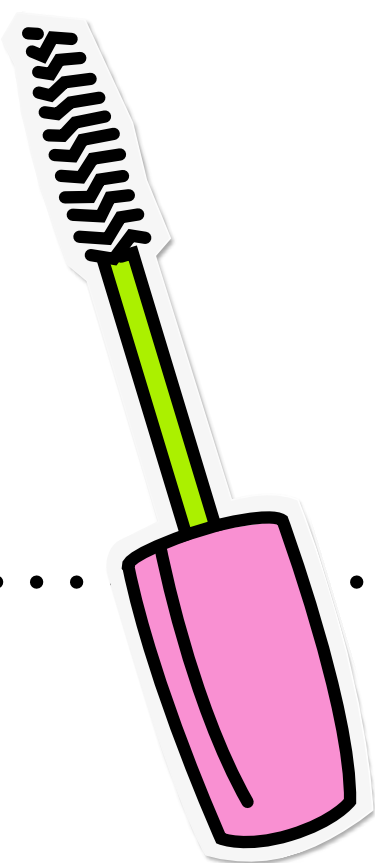
let's dive into...

gen z & makeup

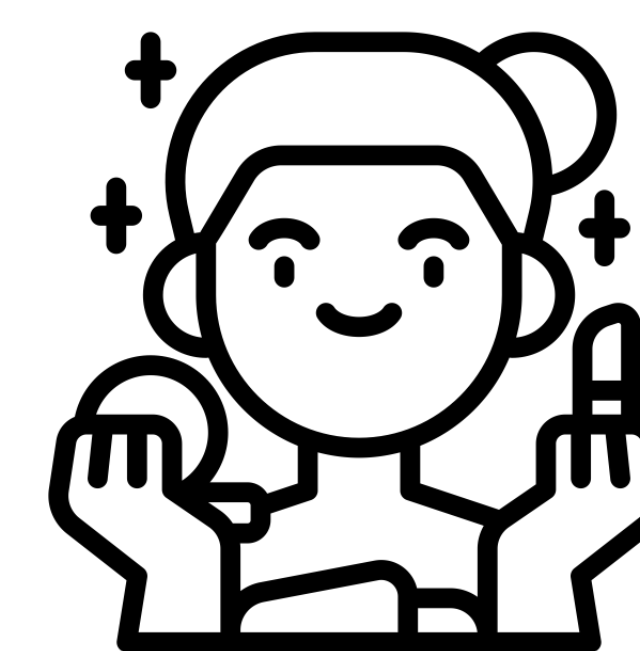


39%**of Gen Z are buying new makeup every month**

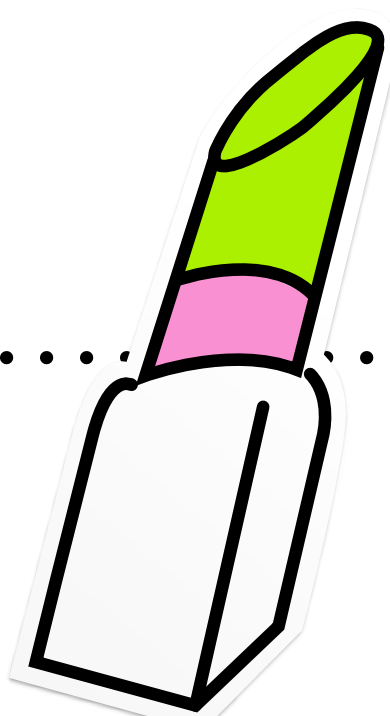
while 25% are buying every 2 months

**35%****say performance is what drives them to buy a makeup product**

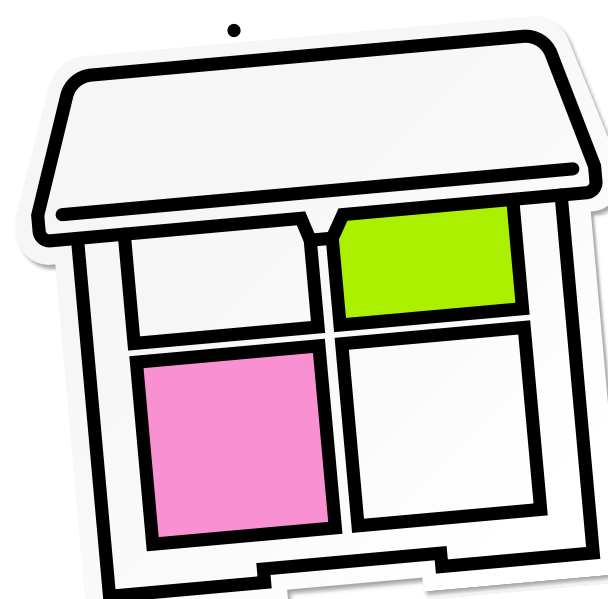

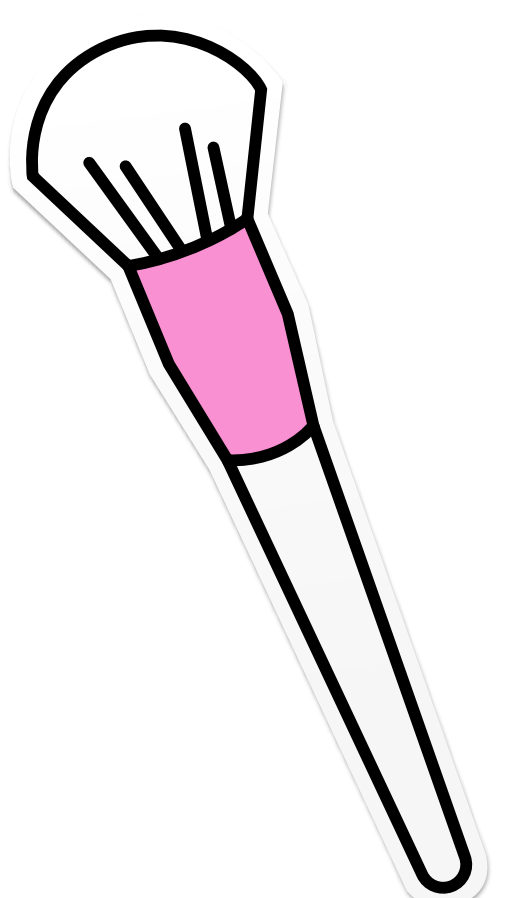
with Price and Quality tying as a runner up

**1/2****of Gen Z will add new products to their routine based on what their skin and body needs**

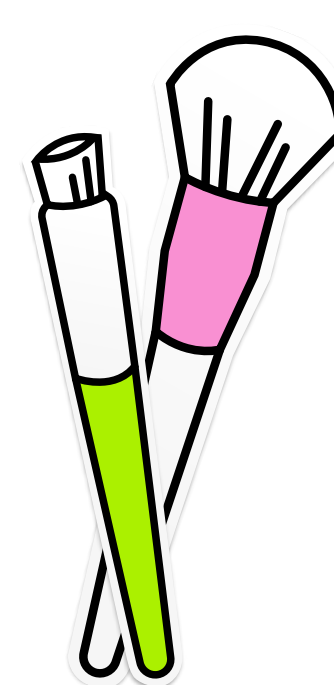
(let's not forget 14% are adding because an influencer told them to!)

**39%****Gen Z is opting for a medium coverage look for their most worn makeup look**

while 35% are opting for even lighter coverage

**77%** **say social trends play an important factor in their overall makeup looks**

top 10 gen z makeup brands



FLASHBACK FACT

MAC Cosmetics, NARS, Anastasia and Urban Decay fell off the list from 2022

#1

elf

↘
#6

NYX
PROFESSIONAL MAKEUP

↗
#2

DIOR

NEW

#7

Rare Beauty

↗
#3

Glossier.

NEW

#8

Charlotte Tilbury

↘
#4

MAYBELLINE
NEW YORK

NEW

#9

COLOURPOP

NEW

#5

FENTY BEAUTY
BY RIHANNA

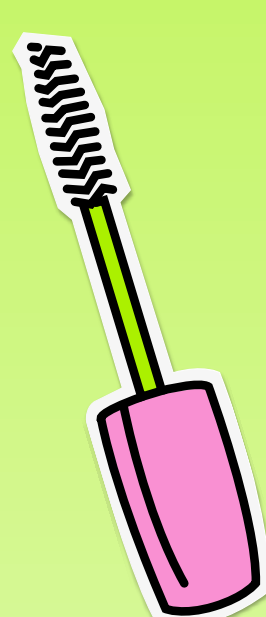
#10

Too Faced
COSMETICS

top 3 products gen z can't go without

—
#1

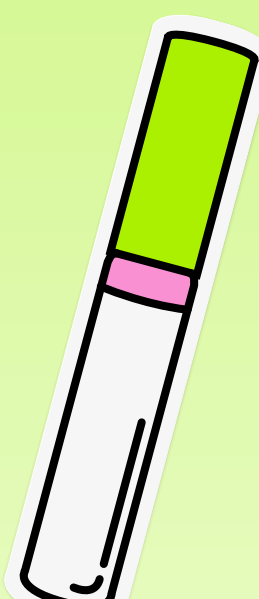
Mascara



NEW

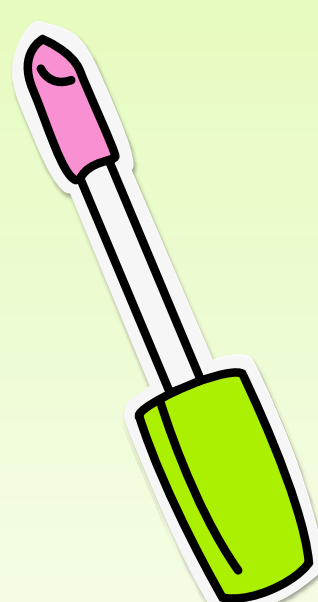
#2

Concealer



—
#3

Lip Gloss



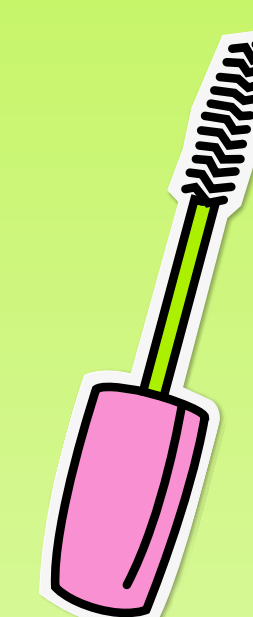
FLASHBACK FACT

Liquid Foundation fell off the list from 2022

top 3 products gen z purchases most often

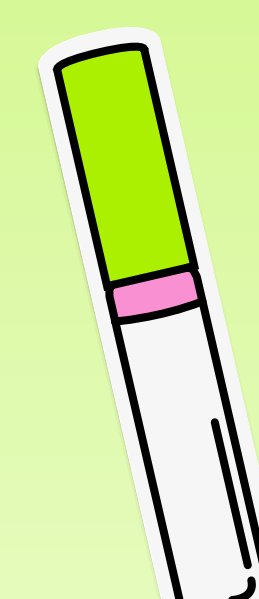
—
#1

Mascara



#2

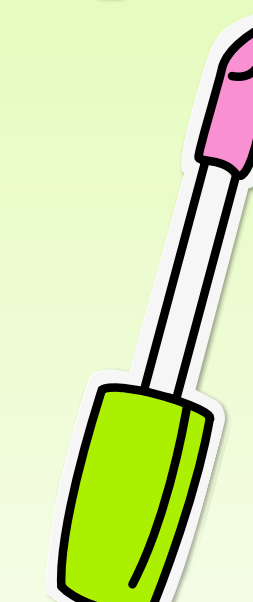
Concealer



NEW

#3

Lip Gloss



FLASHBACK FACT

Blush fell off the list from 2022

on the pulse will win the race

be in the know + move swiftly =
the winning strategy

BRANDS,
**TAKE
NOTE!**

frequency is the name of the game

Gen Z's high frequency of makeup purchases every month (38.8%) and every two months (24.3%) proves their dynamic and ever-evolving relationship with beauty products. That, along with the rapid turnover of purchases indicates their desire to stay on top of trends and experiment with new products regularly.

performance > price

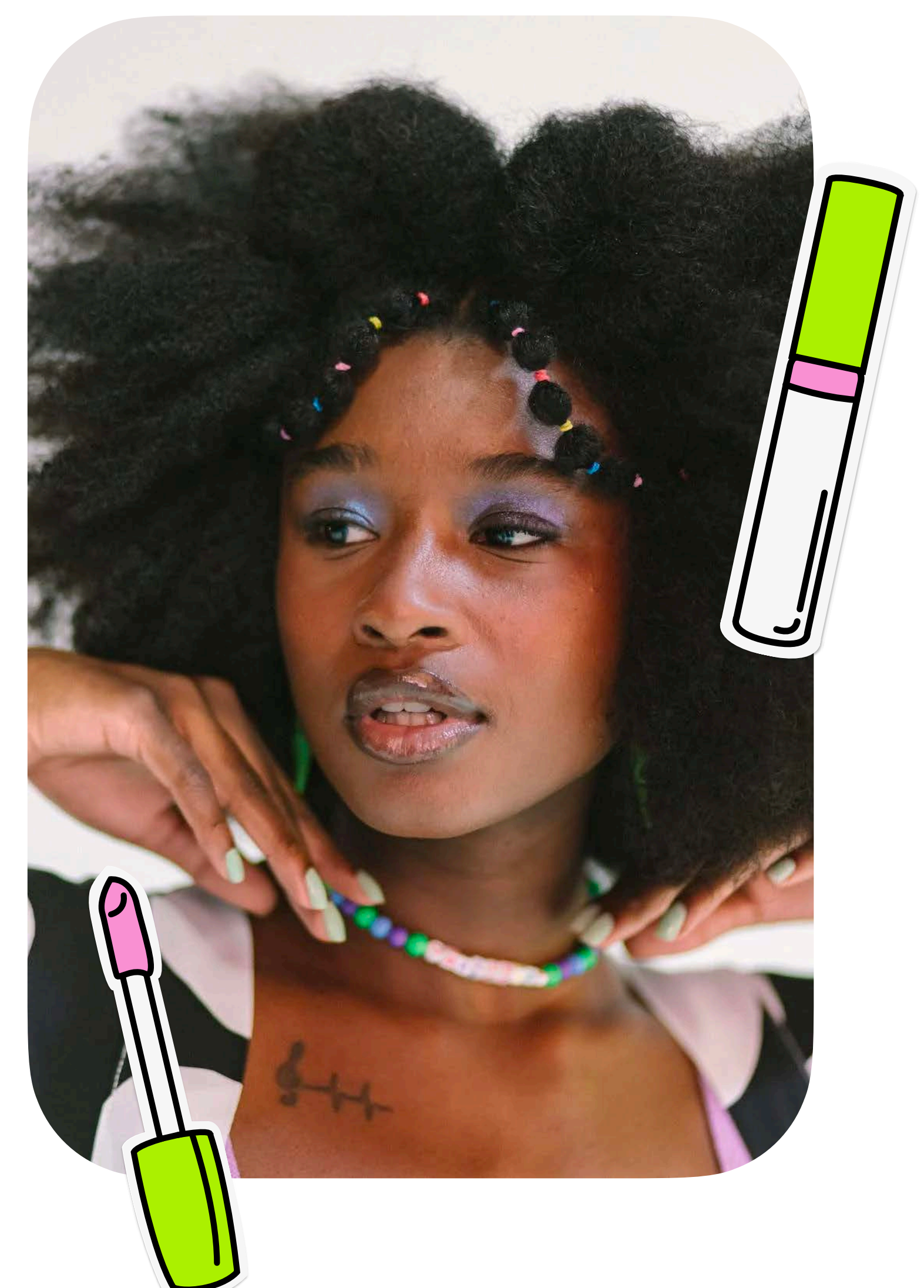
Gen Z's blossoming into an emphasis on performance (34.9%) as their primary factor driving makeup purchases — reflecting a generation that prioritizes the efficacy and quality of products over their price. And we're seeing it loud and clear in their top brands list (hellooooo Dior, Fenty, Rare Beauty and Charlotte Tilbury making the top 10!). Hinting at Gen Z's maturity and progression with makeup overall.

a balance of need & want

Gen Z puts a heavy emphasis on what their body and skin needs as a primary factor for driving their purchases, but with influencer recommendations coming in as a strong factor as well, proves the dual approach they take when considering a makeup purchase. Meaning they value both personal preferences and external influences, and brands have an opportunity to play in both spaces.

natural is the new normal

Gen Z is diving 'face' first into medium and light coverage territory. Which we expected in last year's report as classrooms and offices remained at home, but clearly the COVID coverage game has influenced their habits as they step back into the real world. Of course there is always a want and a need for a full beat, but when it comes to every day, they prefer an easy and natural aesthetic above all else.



trends, please!

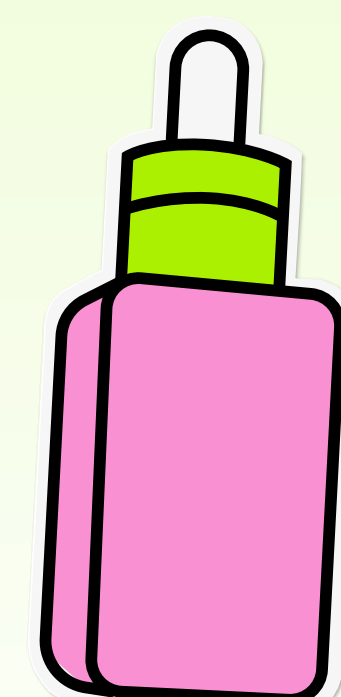
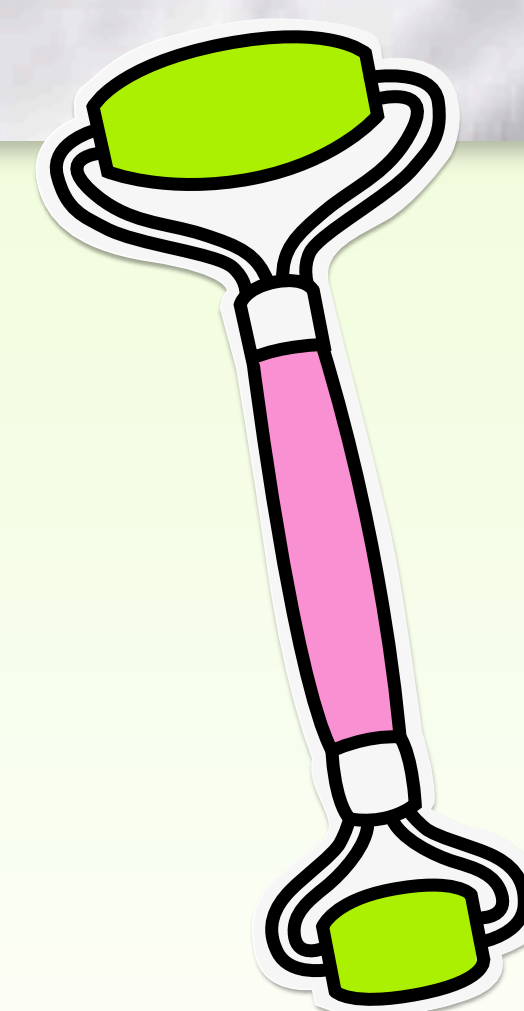
It's no surprise the significant role of social trends play in informing and inspiring Gen Z. And the 77% positive response when it comes to makeup trends purely underscores the powerful influence of platforms like TikTok and the beauty creators who keep it afloat. Gen Z's reliance on these platforms for beauty inspiration prove that old-school methods for marketing are a thing of the past, and we need to move toward a real-time, engaging content model for advertising and marketing to win with the next gen.

luxury 🤝 wallet-friendly

Long gone are the days when luxury and drug store cosmetic girlyies existed in two different universes. In fact, makeup provides a space where luxury can be attainable vs. a full luxury wardrobe, which is why we see such a strong balance of e.l.f. Cosmetics maintaining its top position while Dior Beauty, Glossier, and newcomers like Fenty Skin gain traction in Gen Z's favorite makeup brands. Proving while they have a diverse taste in makeup brands, they also value both affordable and luxury brands, and they're seeking a mix of accessibility and prestige.

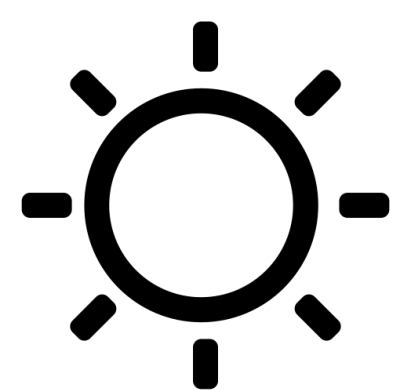
let's dive into...

gen z & skincare





85%
of Gen Z have a
regular facial
skincare routine



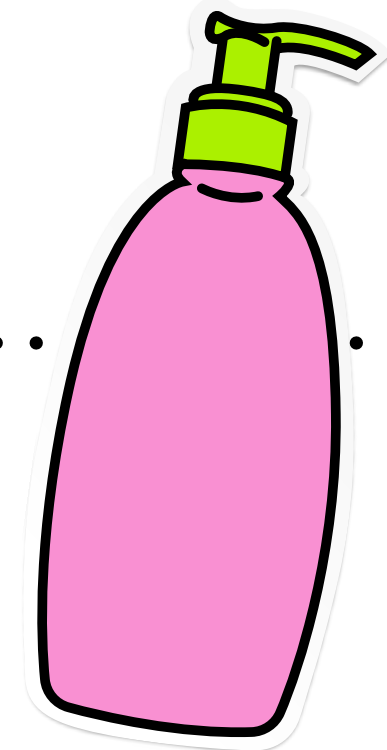
72%
understand the
importance of consistency

saying they have a
morning and night routine



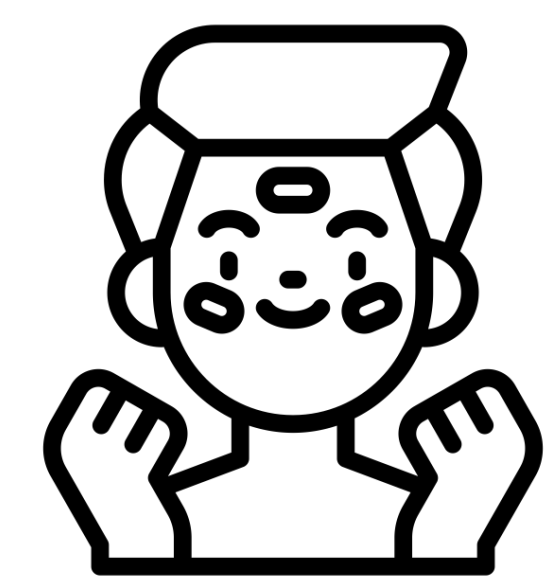
complementing this

57%
of Gen Z have a regular
body skincare routine

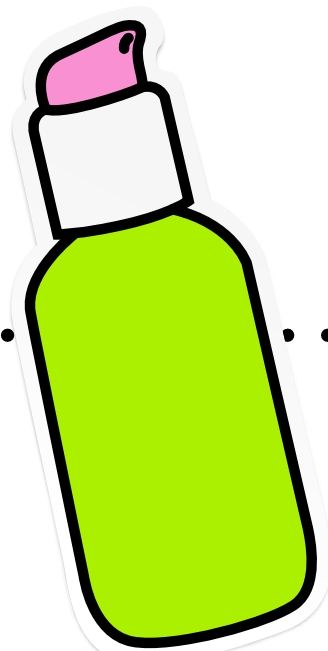


1/2
are buying a new skincare
product because their skin/
face/body needs it

with a good price tag
coming in as runner up
for reasons to buy



65% have in fact added a new step
to their body care routine

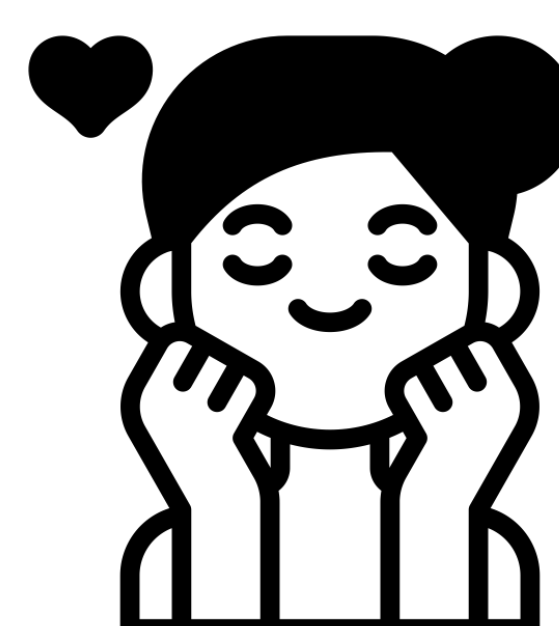


citing body lotion,
salt scrub and
toning mist as top
products added

3/4
believe skincare is
about more than
what's on the outside



75%



with most of Gen Z
saying their routines
are about looking *and*
feeling their best

top 10 skincare brands for face

#1

CeraVe

#2

Dove

NEW

#3

Aveeno

#4

Cetaphil

NEW

#5

Glossier.

NEW

#6

FENTY SKIN

NEW

#7

LA ROCHE-POSAY
LABORATOIRE PHARMACEUTIQUE

NEW

#8

ESTD 2012
DRUNK ELEPHANT™

NEW

#9

GLOW RECIPE

#10

CLINIQUE

FLASHBACK FACT

Simple, Olay, E45, The Ordinary, Nivea and Clean & Clear all made the 2022 list but not in 2023

top 10 skincare brands for body

#1

Dove

NEW

#2

THE BODY SHOP

#3

CeraVe

#4

NIVEA

NEW

#5

Simple

NEW

#6

OLAY

NEW

#7

PALMER'S®

NEW

#8

Vaseline

NEW

#9

Aveeno

#10

Avène

FLASHBACK FACT

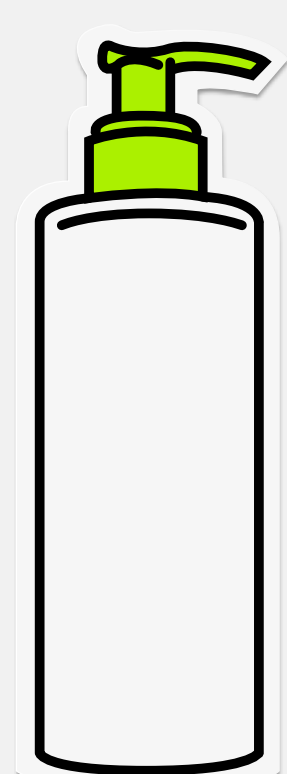
The Ordinary, Cetaphil, e45, dermatologica, Melaleuca, and Versed all made the 2022 list but not in 2023

top 3 facial skincare products Gen Z can't go without

NEW

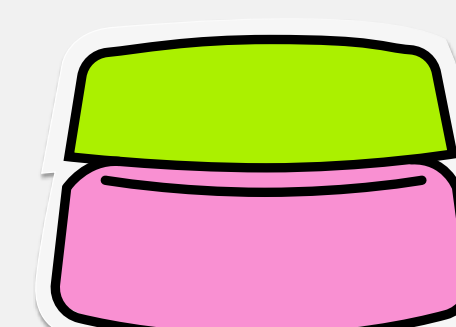
#1

Cleanser



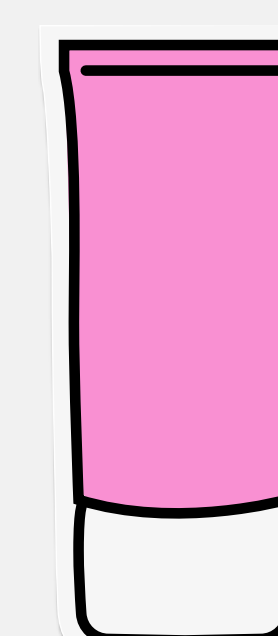
#2

Moisturizer



#3

SPF



FLASHBACK FACT

Face masks made the top 3 list in 2022 but not in 2023

on their skincare quest

learning, testing & personalizing —
they're in the thick of it and in it for the long haul

BRANDS,
**TAKE
NOTE!**

it's 'cool' to think about aging. for now.

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.

natural is the name of the game

While anti-aging is high on the list, this generation is looking toward natural ingredients first and foremost (or as long as possible). With products like Aloe Vera, Vitamin C and African exfoliating nets appearing throughout as common answers, it's clear that brands who highlight their clean ingredients will make big inroads with this generation.

in their test & learn era

As we saw early in the report, Gen Z is open and willing to learn more about skincare. And the massive disruption in their top favorite brands from 2022 to 2023 is a clear indicator of this. So what does it mean? Brands who can innovate and educate in the right way — be it with trends or creators — will see Gen Z convert as they're shipping around. And what's next after converting? The test and learn loop of course.

knowledgeable about their needs

While Gen Z is still learning about their skincare regimes, there is one thing for certain, they feel confident in their skincare concerns. Our respondents were able to pinpoint specifics such as acne or dark spots — meaning they know what they want to tackle, but need to learn how to tackle it in the best way. We saw ingredients focused and GRWM content are their favorite formats, so combine it into one for the best ROI.



show them results, baby!

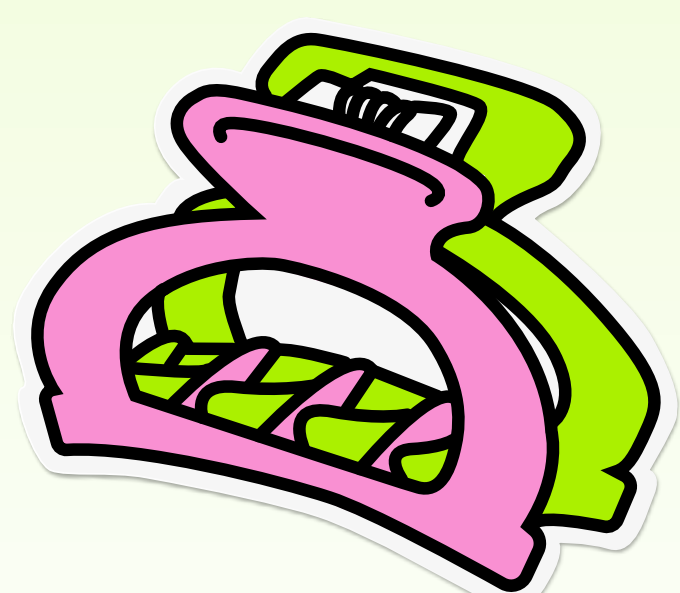
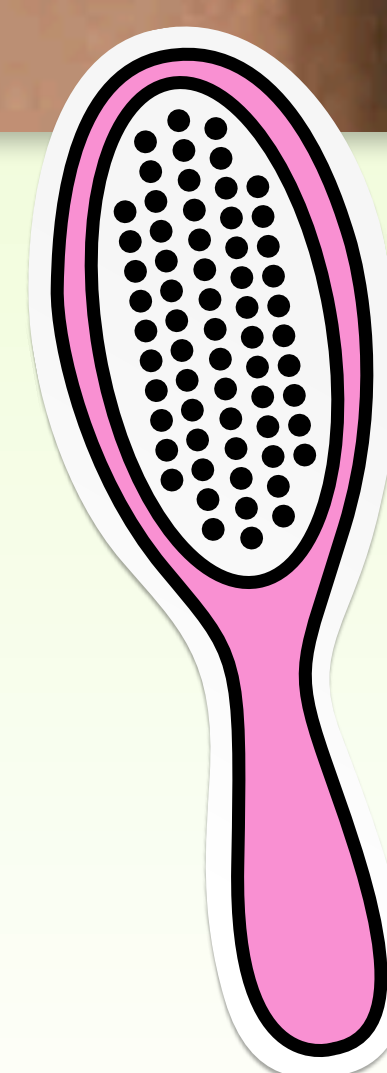
As we said, this is Sophomore year Gen Z. This generation is savvy and has been around the internet since the moment they could type on a keyboard. So they know how to see straight through an ad that's trying to 'sell' them. So if you're going straight to the source with a hard sell? Results are the way to win their hearts. This could be with creators as a relatable strategy, before & afters, or even testimonials. A number of formats will make this generation feel confident before hitting checkout.

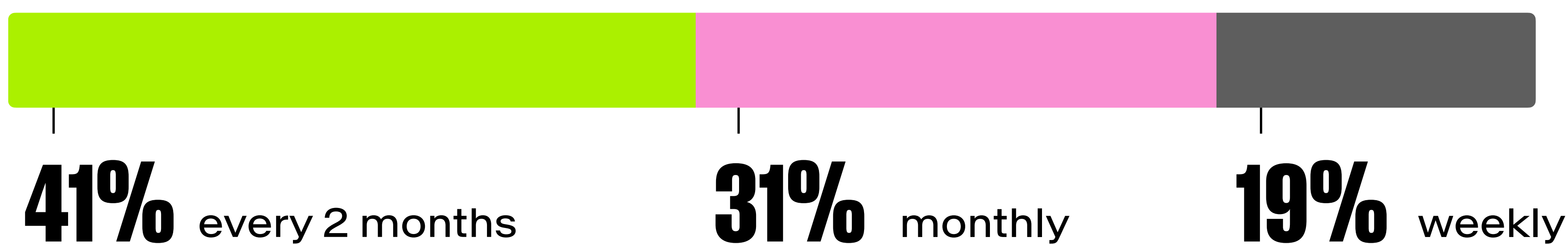
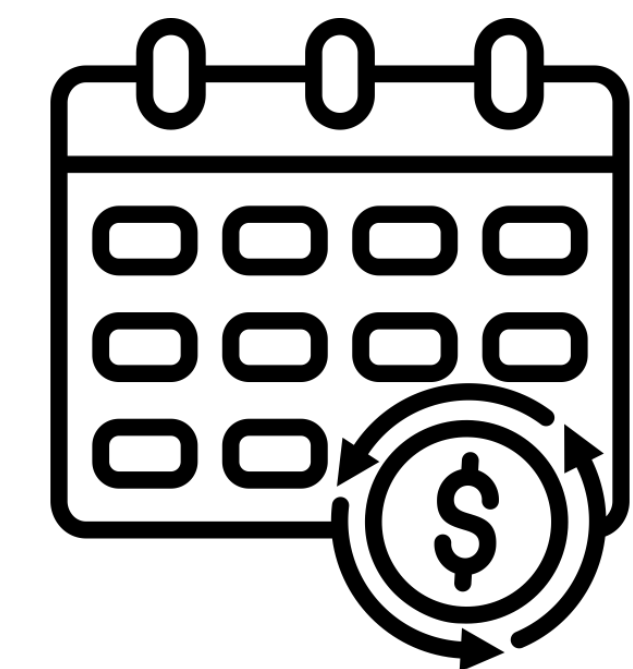
preference for personalization

We know there is no one-size-fits-all when it comes to skincare, and Gen Z is diving head-first into this mentality. After all, they're a generation that values individuality and expression above all else, so why would this not extend to their skincare?? So brands that can prove that their product speaks to niches and subsets of skincare needs — meaning you're not trying to blanket market to an entire generation — will win points. From hand-picked creator selections to a clear TOV to relatable content, Gen Z will value your attempts to provide a 1:1 marketing experience.

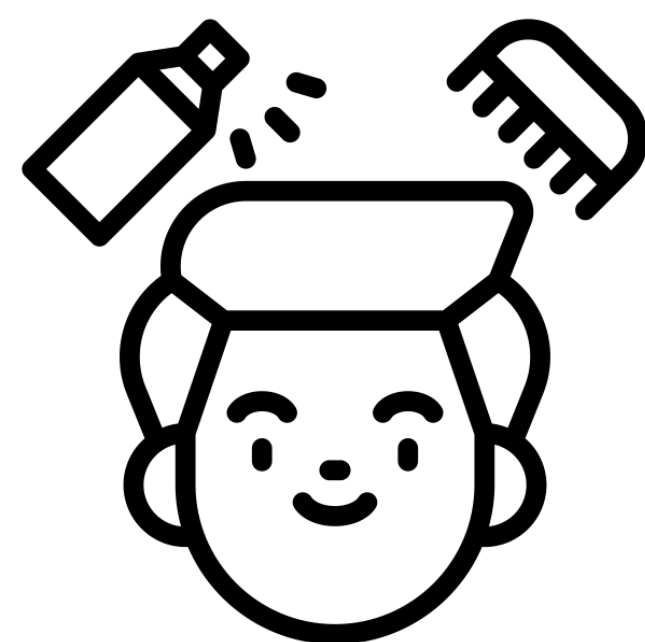
let's dive into...

gen z & haircare



41%**Of Gen Z are buying haircare products every 2 months****with 31% buying monthly**

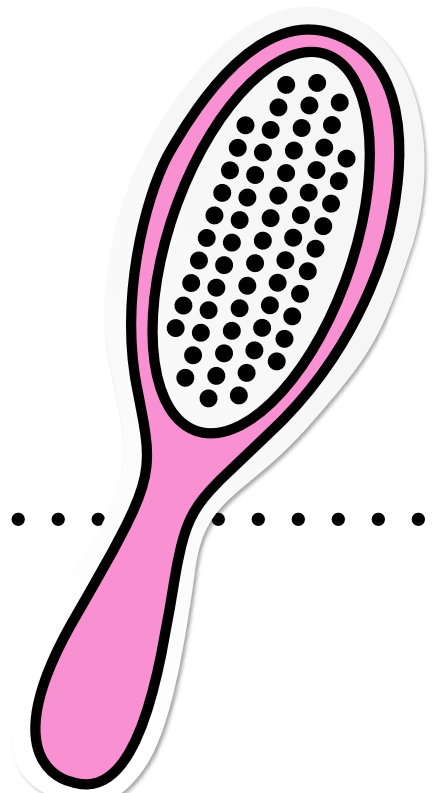
19% are actually buying new products every week!

54%**are buying new haircare products based on what their hair needs**

with 28% as a runner up are buying new products because of an influencer recommendation

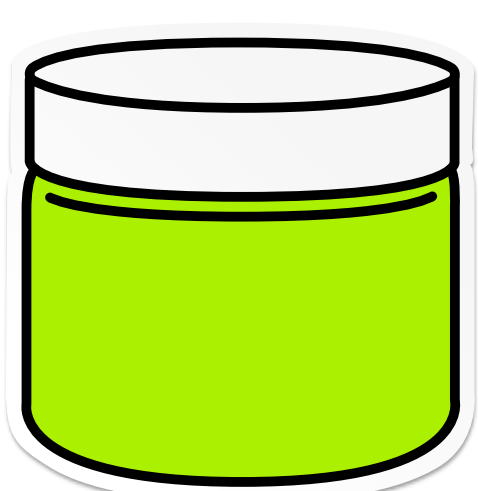
71% **noted that social trends play a massive role in the inspiration for their hair**

styling/cut/color etc

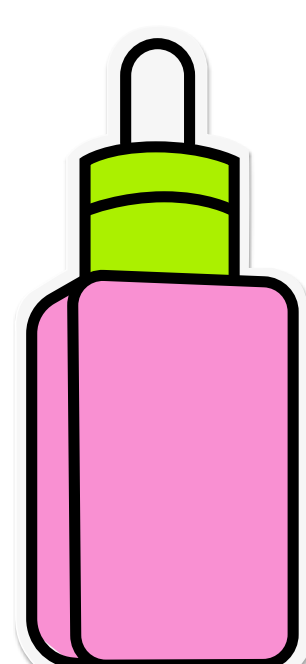
**41%****have added a new type of product to their haircare routine the last 6 months.**

The top 3 new products added?

Hair Masks

**21%**

Hair Oils

**14%**

Leave-in Conditioner

**7%**

the besties

top 10 haircare brands



FLASHBACK FACT

Alberto Balsam, Coco & Eve, Moroconoil and Dove made the list in 2022 but not in 2023

↑
#1

PANTENE

↓
#2

TRESemmé
USED BY PROFESSIONALS

↓
#3

aussie

NEW
#4

OLAPLEX

NEW
#5

SheaMoisture®

↓
#6



↓
#7

head & shoulders

NEW
#8

göt2b

NEW
#9

L'ORÉAL
PARIS
ELVIVE

NEW
#10

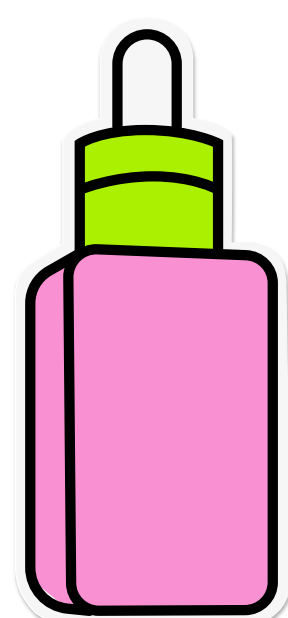
function — of beauty

outside of shampoo and conditioner,
the top 3 hair product winners
used by Gen Z are...



↑
#1

Hair
Oil



—
#2

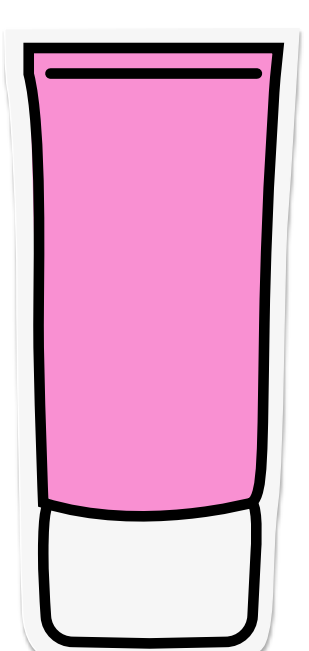
Leave-in
Conditioner



NEW

#3

Texture
Enhancing



FLASHBACK FACT

Hairspray made the top 3 list in 2022, but fell off in 2023

welcome to the long hair game

young adults used to use 2-in-1s, but today it's all about long-term hair health

BRANDS,
**TAKE
NOTE!**

down to test, and test often

A significant portion of Gen Z is open to trying new hair care products, with a 54% indicating that they have added a new step or product to their routine in the last 6 months. In fact, 41% of Gen Z is buying new products every 2 months leaving lots of open room for brands to step in as the new product to try in Gen Z's test and learn phase.

hair health is the new 'shiny'

It's not just about looking good when it comes to hair (we remember those shiny hair commercials from the early aughts!). It needs to feel good too. And that includes texture and overall hair health — which is now a major priority for Gen Z. Because these sophomore beauty lovers understand the long haul maintenance for beauty, and they're investing in hair masks, conditioners, and serums to ensure their hair health will last for years to come.

bonjour, au naturelle 🖐️

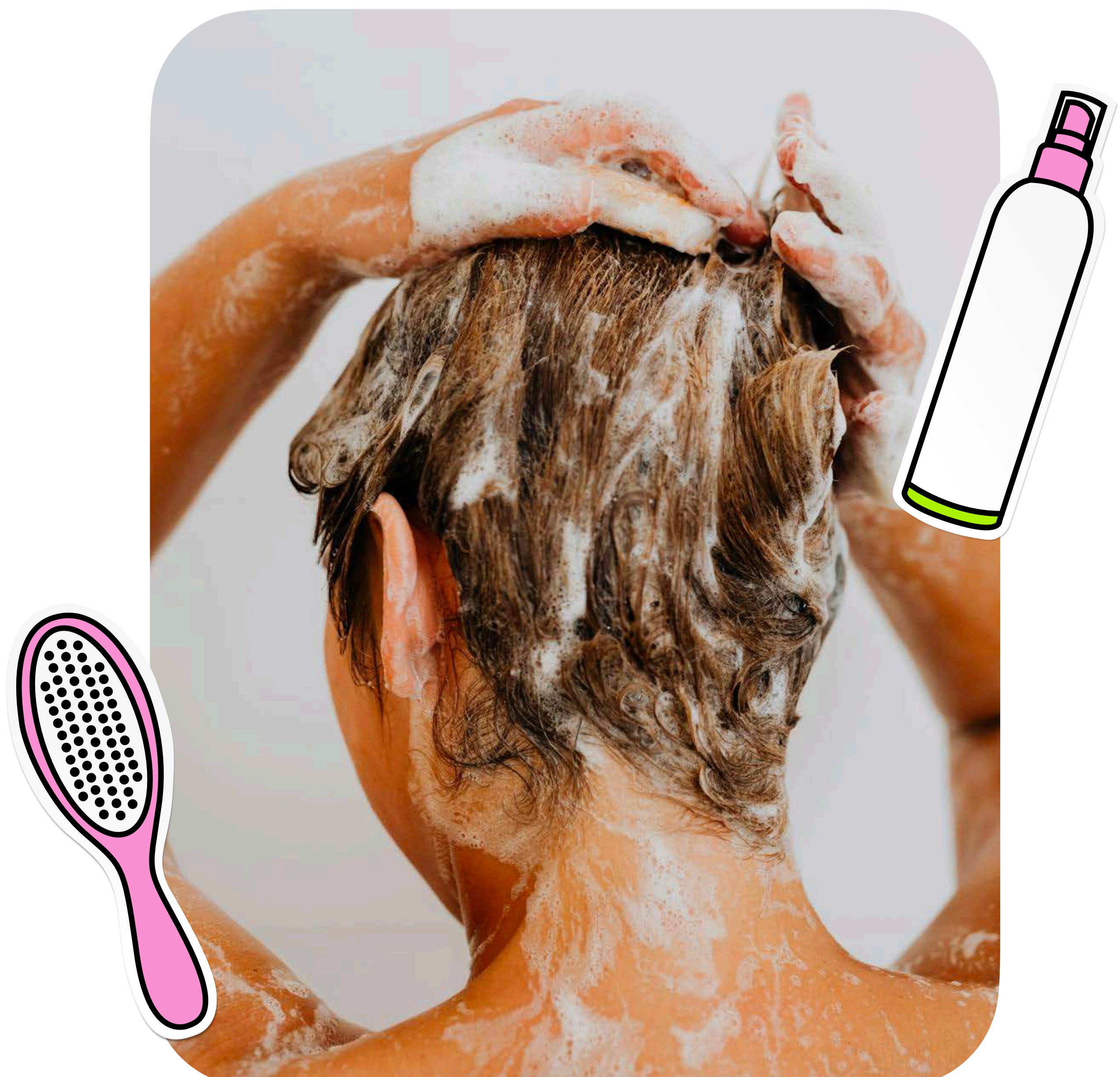
A common theme across all verticals? Gen Z cares about natural ingredients. And this was certainly evident in their haircare responses where our respondents often mentioned using aloe vera and flaxseed masks to keep their hair health strong. And let's not forget the mass trend around rosemary oil to improve strand health! So if your brand can provide an insight into the natural ingredients that make up your products and won't have a negative effect on Gen Z's hair health, you'll be sure to win with this generation.

the skinification of hair is here to stay

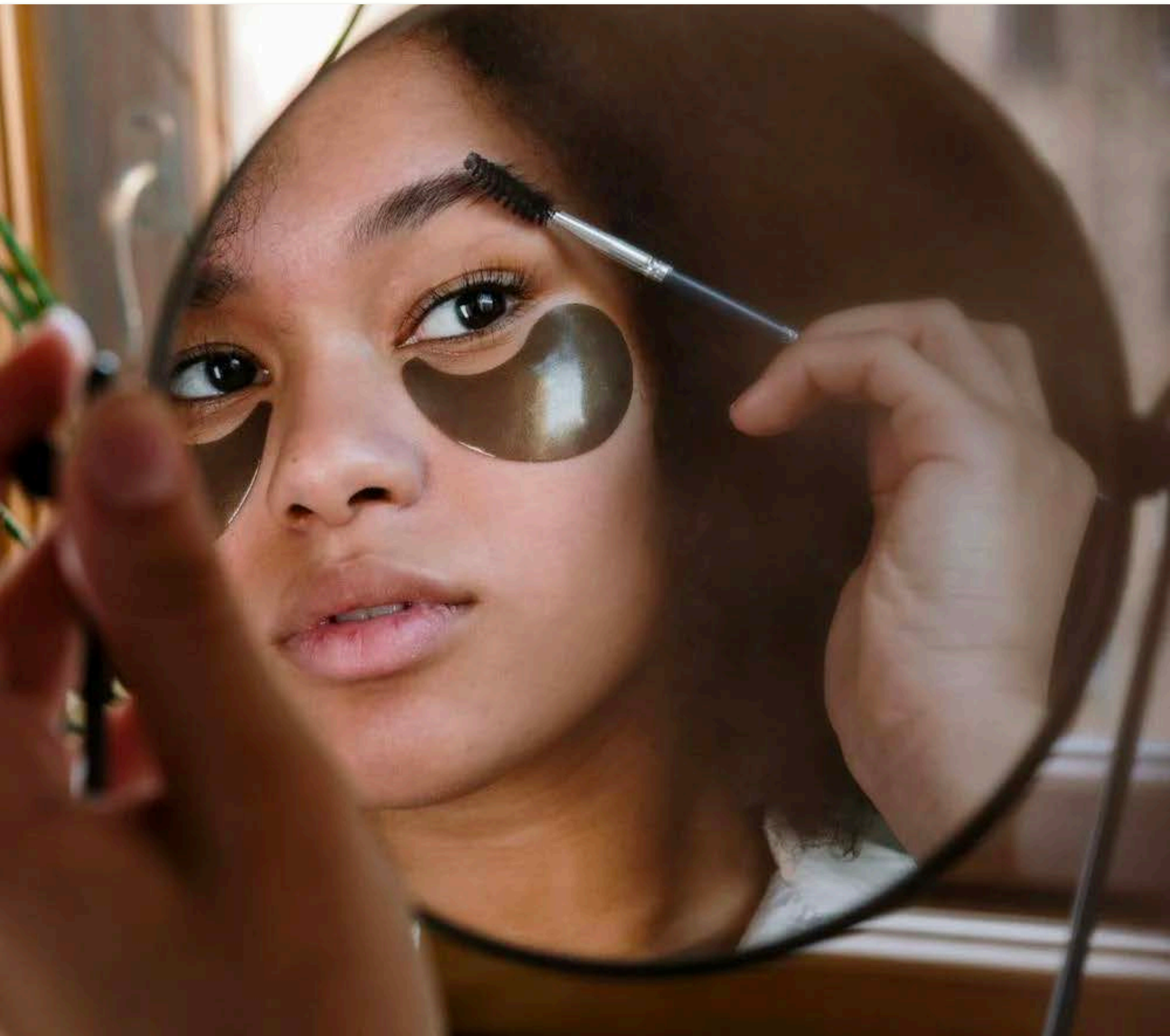
We noticed a wide variety of products mentioned with our respondents, including hair masks, oils, serums, curling products, and more. Meaning Gen Z isn't held to just shampoo or conditioner anymore. They are multi-step baddies when it comes to their hair, just like their skin, and they're well on their way to building their hair knowledge and build their overall beauty mastery. Skinification of hair isn't anything new mind you, it's just in its sophomore era.

a styled coif is a must

While natural skincare and makeup is very much in, when it comes to hair care, we're finding that a good styling moment is 'the now'. Gen Z is using curling irons, heating products, texture spray, and powders and even experimenting with colors quite regularly. And 71% of them are looking to trends to inform their next styling inspiration!



summing it up



investing in creators shifts gen z perception

We noticed lots of brand disruptions in the top 10 skincare and haircare categories from 2022 to 2023, so we decided to dig and understand what drove this disruption. What did we find?? Well, the data shows the top brands in each category in 2023 were also the top spenders with TikTok creators against their competitive set. What does this mean for brands? The next steps are clear. If you're looking to rise in the ranks, **partnering with creators is your solution to winning over young audiences that you're after.**

2022 Kyra rank

creator \$ rank

2023 Kyra rank

skincare face

CeraVe

#1

#1

#1

Dove

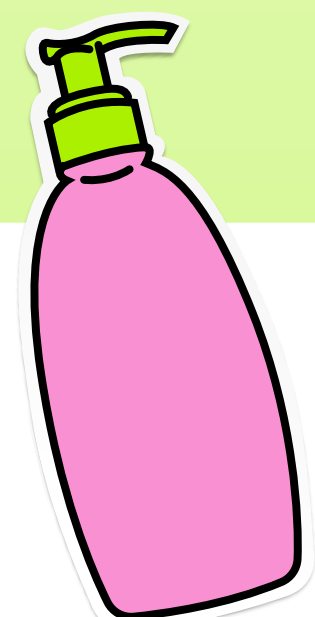
#6

#2

#2



skincare body



Dove

#1

#2

#1

CeraVe

#3

#1

#3

haircare

PANTENE

#10

#3

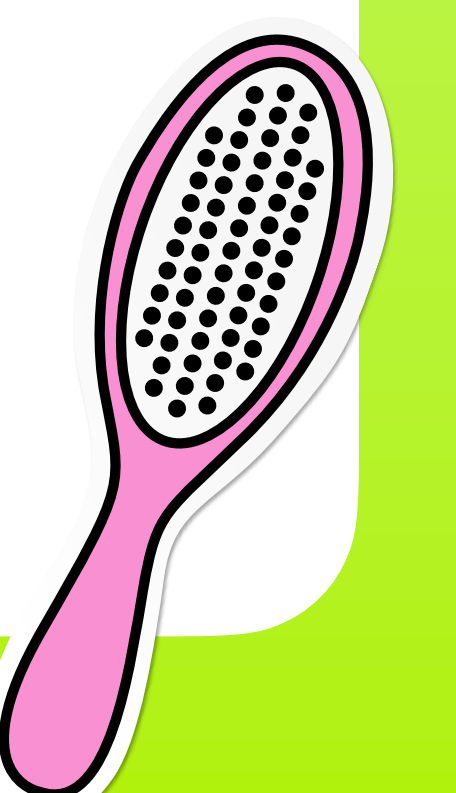
#1

TRESemmé
USED BY PROFESSIONALS

#1

#2

#2



goodbyes are tough, but here's our scoop to slay in 2024

stay ahead of the sophomore revolution

Our data underscores a significant cultural shift in how Gen Z approaches beauty education. Unlike previous generations, they are not solely reliant on formal tutorials or established platforms. Instead, they embrace a more intuitive, experimental approach, fueled by the engaging and dynamic content offered by TikTok creators.

influencers are your gateway

The ascendancy of TikTok signifies a redefinition of influencer dynamics. Traditional platforms like YouTube, which once held sway in the beauty realm, are now overshadowed by the more spontaneous and bite-sized content found on TikTok. This shift emphasizes the need for brands to adapt to the evolving landscape and collaborate with influencers who resonate with Gen Z's desire for authenticity and relatability.

relevance is your social currency

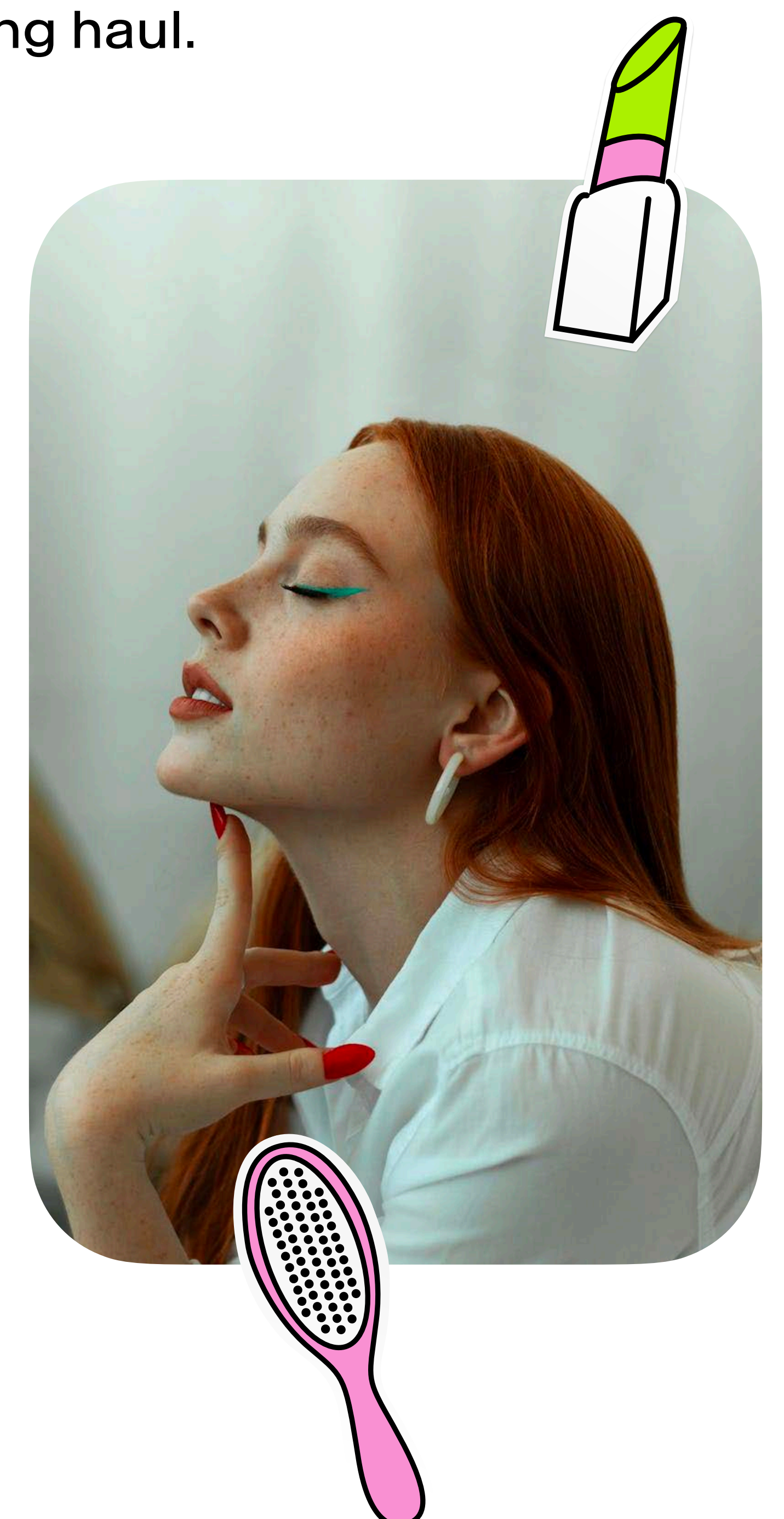
The call for authenticity and relevance is not just a preference but a currency in the Gen Z beauty economy. Brands and creators need to go beyond marketing formalities, establishing connections that mimic the intimacy of a conversation with a close friend. When embodied by both brands and influencers, this connection will be the cornerstone of a successful campaign or not.

wellness is a conversation focus

Wellness is becoming a deeper part of today's beauty conversation with Gen Z. In fact wellness is no longer considered 'separate' from makeup and skincare, it's closer to the fold and now all inter-relatable. In the past, Gen Z may have seen wellness as unattainable, but today's social media has made it feel within reach. Brands that can present wellness as attainable and dimensional will create fans and customers for the wellness long haul.

standout by being in-the-know

The pace at which trends emerge and evolve requires brands to be agile in their strategies. Gen Z's appetite for quick adaptations necessitates partnerships with creators and agencies who not only understand the pulse of social trends but can also activate campaigns swiftly and at scale. Flexibility becomes a key factor in staying relevant and resonating with the ever-changing preferences of Gen Z.



don't forget the power of IRL shopping

While Gen Z is deeply immersed in the digital realm, the preference for in-person purchases highlights a nuanced aspect of their consumer behavior. The sales journey is not a linear path from advertisement to online checkout; brands must acknowledge the importance of offline touch points in the overall consumer experience. This duality underscores the complexity of Gen Z's shopping behavior, urging brands to embrace a holistic approach to sales strategies.

from Ashley



ASH'S **2**
CENTS

ON KEY TAKEAWAYS

My key takeaway is visually seeing the speed society is moving at. The responses resemble society's desire for convenience, saving time, and innovation.

The world moving towards shorter-form content, ecommerce, and recommendations highlights how social media and the power of instant influence will continue to grow and become the future. Consumers want to see someone try a product they like and know if they should buy it or not in under a few minutes or even a few seconds.



ASH'S **2**
CENTS

ON WHAT'S NEXT

I also predict longer-form content, like YouTube, falling off for a while in the near future as the world consumes more and more of TikTok, Instagram, and Snapchat.

That being said, I firmly believe the major social media applications will always go through cycles, with what is currently "out" eventually making a comeback and the cycle continuing.

'till next year! 🖐️



KYRA