



## BEAUTY INSIGHT REPORT

It's obvious to all that Covid 19 has changed how we live our lives. Day-to-day activities such as shopping have been altered, perhaps forever, by the pandemic. This has created dramatic shifts across all industries including the British beauty sector - an industry estimated to be worth up to £1.74 billion. Research and insight agency, Perspectus Global, conducted new research of 1,000 British women to investigate exactly how their attitudes - and spending - have changed.

This report provides a snapshot of how beauty shopping habits have evolved and adapted to the pandemic within the last year. This covers the expedited existing trends as well as the repositioning of spend and altering purchasing methods. We also gaze into the future to discover where new beauty trends may emerge as restrictions are lifted.



**perspectus  
global**

# HOW BEAUTY SPEND IS CHANGING

---

There has been a seismic shift in the products that beauty consumers have purchased in the last year.

The importance of good hand hygiene was stressed throughout the pandemic so the increase in shopping for hand care products, including sanitiser and lotion, was anticipated and arrived with 39 percent of British females spending more money and buying more of these items during the last year.

However, this was just the beginning. With restaurants, pubs and clubs being forced to close, and restrictions limiting social events, our lifestyles were curtailed. With less reason to wear makeup, the report found that almost HALF (45 percent) of British women were spending less on cosmetic products than during pre-pandemic life.

This is down to a variety of factors, and one crucial reason revealed by the research is that trends have moved sharper and faster.

Take one trend that was beginning to emerge pre-pandemic - a decreasing interest in using multiple makeup products and layering them to dramatic effect - lockdown has sped this up, according to the Guardian:

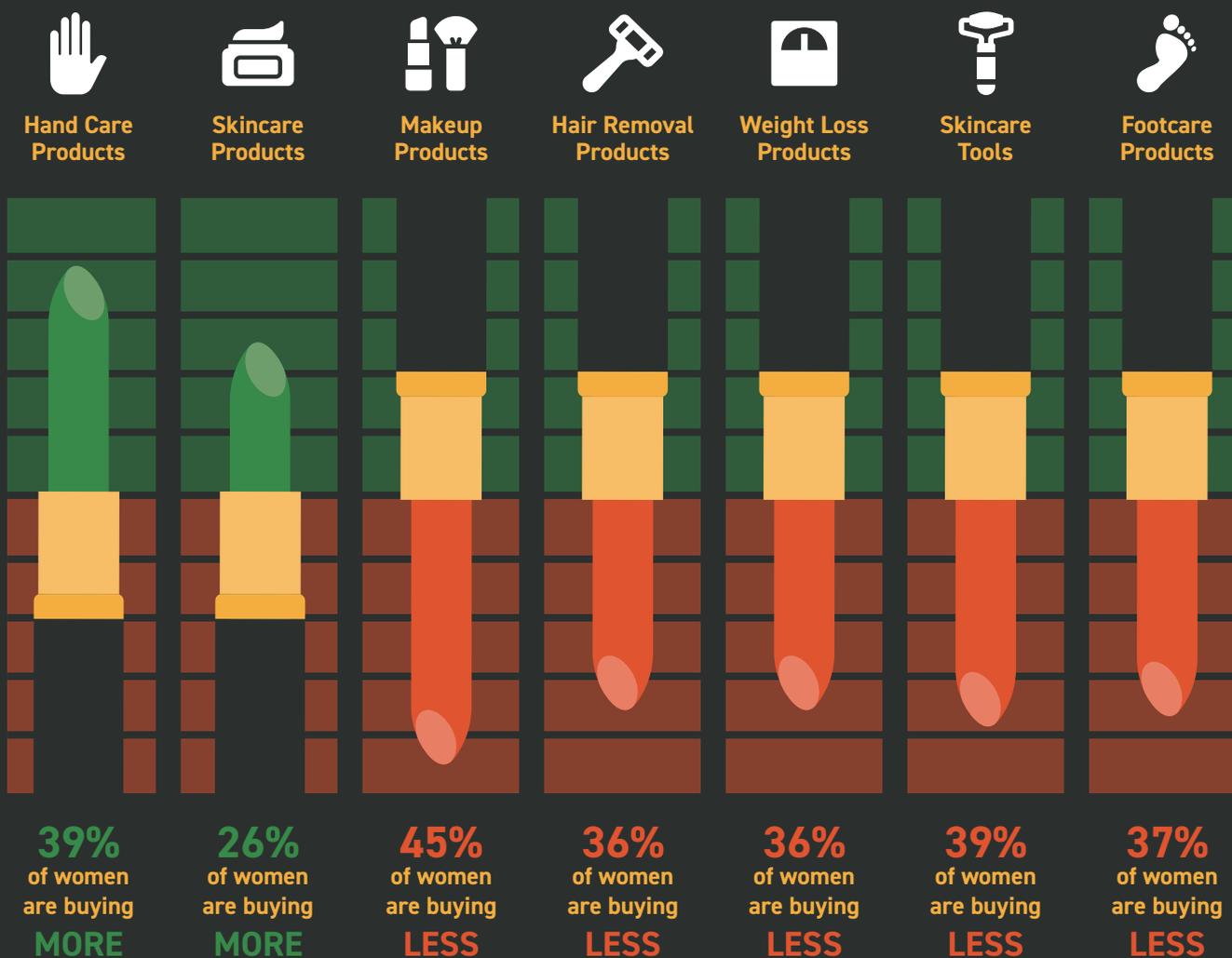
“

*The lockdown expedited trends that were already happening. People were already starting to take a different approach to makeup from the Insta-glam layer-upon-layer [look].*

**Alexia Inge, co-founder of  
Cult Beauty, speaking to the  
Guardian, December 2020.**



## CHANGING BEAUTY SPENDING HABITS:



Body grooming products have also become less important to UK females, seen by a 36 percent decrease in body hair removal items such as razors and wax strips.

And as the nation settled into lockdown, diet and weight loss also became less of a priority, with 36 percent of women spending less on this than pre-pandemic.

Although sales of premium skincare tools, like jade rollers and electronic cleansing devices, have dropped - by 39 percent, according to our research - women appear to be investing more in general facial skincare including cleansers, serums and moisturisers, with 26 percent spending more on these items.

An increased interest in skincare products can be seen primarily in trend-setting younger women aged 18 to 24, with 46 percent of this age group spending more than before the pandemic, a larger number than than any other section of British females. This age group has also spent more on hair care products - 43 percent are buying more, compared to one third of women aged 25-34 who are actually buying less of these items.

And as restrictions on movement have remained in place, 37 percent of women polled admit they have spent less on foot care in the last year, including lotions and exfoliating scrubs.



## NEW MAKEUP OCCASIONS

---

Our research indicated less spending generally on makeup products, but Perspectus Global delved deeper into this new trend. We wanted to explore if there were any surprising changes in women's beauty routines throughout lockdown.

A key factor is the rise of video calls. A consequence of this new way of working, has been a surge in people feeling anxious or worried about their appearance whilst at home. 22 percent of women across the UK reported feeling self-conscious about their appearance during Zoom calls, which could explain why 14 percent are still choosing to apply makeup ahead of virtual video meetings throughout the pandemic. This rises to 22 percent of young women aged 18-24.

The research also revealed that interest has grown in skincare and less emphasis is placed on heavy makeup looks, 18 percent of British females are making their skin the main priority of their beauty routines, hoping for a natural "glow" by paying for more skincare.

This can be seen in simple money terms, while purse strings have tightened throughout the pandemic, some areas have seen an increased investment in skincare. 15 percent of women based in the North said they have invested more in these products since March 2020, as have the trend-setting younger females aged 18-24, at 27 percent.

Across the UK, up to 26 percent of women can't even remember the last time they wore makeup. And for women who are still opting to wear cosmetics, they are generally embracing a more natural look, with up to a quarter of females adopting a "less is more" approach to beauty.

In fact 13 percent have adapted their look from glamorous to natural since the start of the pandemic.

Less emphasis on a polished hair style is apparent across the UK too, with 17 percent of women no longer straightening their hair and instead embracing their natural waves and curls. Interestingly, females based in the South of England are most likely to have put down the hair straighteners, at 19 percent overall, with 20 percent of women aged 25-34 the most likely age group to relax their hair styling routine.

“

*Women have realized they don't need as much makeup during the pandemic. They are really simplifying their routines and learning less is more — makeup no longer has to be "perfect" with a full face, but rather effortless and natural... Less is more! It's all about enhancing one's natural beauty."*

**Monika Blunder, Celebrity Makeup Artist and  
Founder of Monika Blunder Beauty**

# THE FUTURE

---

Hopefully, the rollout of vaccines means the end of the pandemic is in sight. But with uncertainty as to how daily life will evolve as the threat of Covid fades, how can we expect the beauty industry to adapt and move forward, both later in 2021 and beyond?

The industry should prepare for a return to grooming and large increase in spending post pandemic, as 27 percent of UK women admit they are feeling unglamorous. 42 percent of British females surveyed strongly believe that the end of the pandemic will see a surge in women making more effort with their appearance.

From buying more makeup to spending on body care products and indulging in more trips to the hair salon, research shows that beauty items will become more important to women as they adapt to post pandemic lifestyle changes.

While 28 percent of women across the UK admit they are anticipating the enjoyment of getting ready for a night out post pandemic, this thrill increases for younger women. Almost a third of females aged 25-34 admit they "can't wait" to get glammed up for a night out (32 percent), while 44 percent of young women aged 18-24 are already fantasising about getting ready for a night on the town.

And as restrictions are lifted, 19 percent of British females forecast that their purchasing of makeup products will increase - and this escalates for younger women, with almost a quarter (24 percent) predicting a rise in their makeup spend. An interest in haircare is also to be predicted for young women, with 21 percent of 25-34 year olds and 20 percent of 18-24 year olds expressing a return to the glossy blow dry, as inspired by icons including Kate Middleton and Elizabeth Hurley, post pandemic.



Many beauty industry experts are anticipating the increased interest in skincare products during the last year to continue post pandemic, especially as 22 percent of women generally - and one third of the 18-24 year old age group - have become more focused on skincare instead of cosmetics.

Although a surge in more dramatic looks is inevitable as restrictions ease, research shows that a more natural look could be here to stay for many women.

In fact, the younger women who are likely to set the fashion are moving in that direction already with 21 percent of 18-24 year olds admitting they have actively changed their makeup look since lockdown began to a softer, easier approach.

“

*There's definitely been a huge shift within the industry over the last six months. I really hope it's here to stay and grow and not just because it's a trend right now, but it's definitely the first time I've been online and seen influencers stating 'without a filter' or at least acknowledging them more. It means we're heading towards a much more transparent place online and the benefits of that for women and young girls' mental health will be prolific.*

**Sasha Louise Pallari, make-up artist and figurehead for the fight against social media's homogenised beauty standards**





Northerners will be the first to throw out their tracksuit bottoms and are sick of feeling unglamorous during lockdown - 30%.

**26%**

of Scottish women think the natural look is here to stay.



WHERE WILL WOMEN BE "GLAMMING UP" THE MOST FOR A NIGHT OUT POST-PANDEMIC\*?

**SCOTLAND: 44%**

**THE NORTH: 45%**

**THE MIDLANDS: 40%**

**WALES: 47%**

**LONDON: 40%**

**THE SOUTH: 38%**



**44%**

of 18-24 year olds can't wait to get glammed up again.



**23%**

of 25-34 year olds have been buying more beauty products online since March 2020.

\*Based on results for the question:

*Do you think that the end of the pandemic will see a surge in women making an effort with their appearance again?*

# LONG TERM CHANGES TO SHOPPING HABITS

---

As a result of wearing masks - and uncertainty about their continued use, 13 percent of women say that they will be spending more time and money on makeup for their eyebrows and eyes rather than lips and cheeks - and this increases to 24 percent of 18-24 year olds.

Experts also predict less emphasis on facial make up generally, as 26 percent of British females admit that throughout the pandemic they have been wearing less makeup since they cover most of their face with a mask.

An important area of interest across the beauty industry is the subject of the bricks-and-mortar shopping experience. With more consumers moving to the online space to purchase products, the pandemic accelerated the closure of department stores including Debenhams, which offered the traditional in-person beauty shopping experience.

Can we expect this trend in consumer behaviour to continue? The future may not be so bleak for traditional department stores and their beauty halls. 22 percent of British female consumers admit that they have missed the original in-store customer experience, including the social interaction between counter assistants and shoppers and ability to see and physically touch products.

And perhaps surprisingly, 29 percent of 18-24 year olds - an age group traditionally associated with favouring online shopping - say they are missing shopping in-store for beauty products.

Yet 17 percent of female consumers overall reported that they have bought more products online since lockdown began in March 2020. And 31 percent of younger women, age 18-24, will often buy cosmetic items after seeing social media content covering these products across platforms including Instagram.

This indicates that there is plenty of room for both the bricks-and-mortar experience as restrictions lift, as well as the continuation of online shopping.

“

*I believe that bricks and mortar will go back to being important. People will want to meet up with friends, try things, have a coffee. Debenhams is an important player in the world of beauty but when a retailer closes customers shift to similar retailers where they feel at home.*

**June Jensen-Mills, Head of UK beauty at market researchers NPD, speaking to the Guardian, December 2020**



“

*In an inter-Covid era – and its aftermath – solutions that make us feel better may well trump the ones that only make us look better.”*

**Elle Turner, deputy  
beauty editor at Glamour**



## CONCLUSION

---

Our investigation into the beauty industry, combined with expert opinion, indicates that this booming sector has changed dramatically. While we can anticipate a resumed interest in glamorous and heavier makeup looks post pandemic, it is probable that women will continue to embrace a more natural look during their day-to-day life, as well as continuing to invest and grow their knowledge around skin products and the importance of a good skincare routine.

**If you would like take a deeper look into a sector or subject, please get in touch:**

[info@perspectusglobal.com](mailto:info@perspectusglobal.com)  
**+44 (0)203 976 2212**



+44 (0)203 976 2212  
info@perspectusglobal.com  
perspectusglobal.com