



# little black book



...of Beauty





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# Methodology



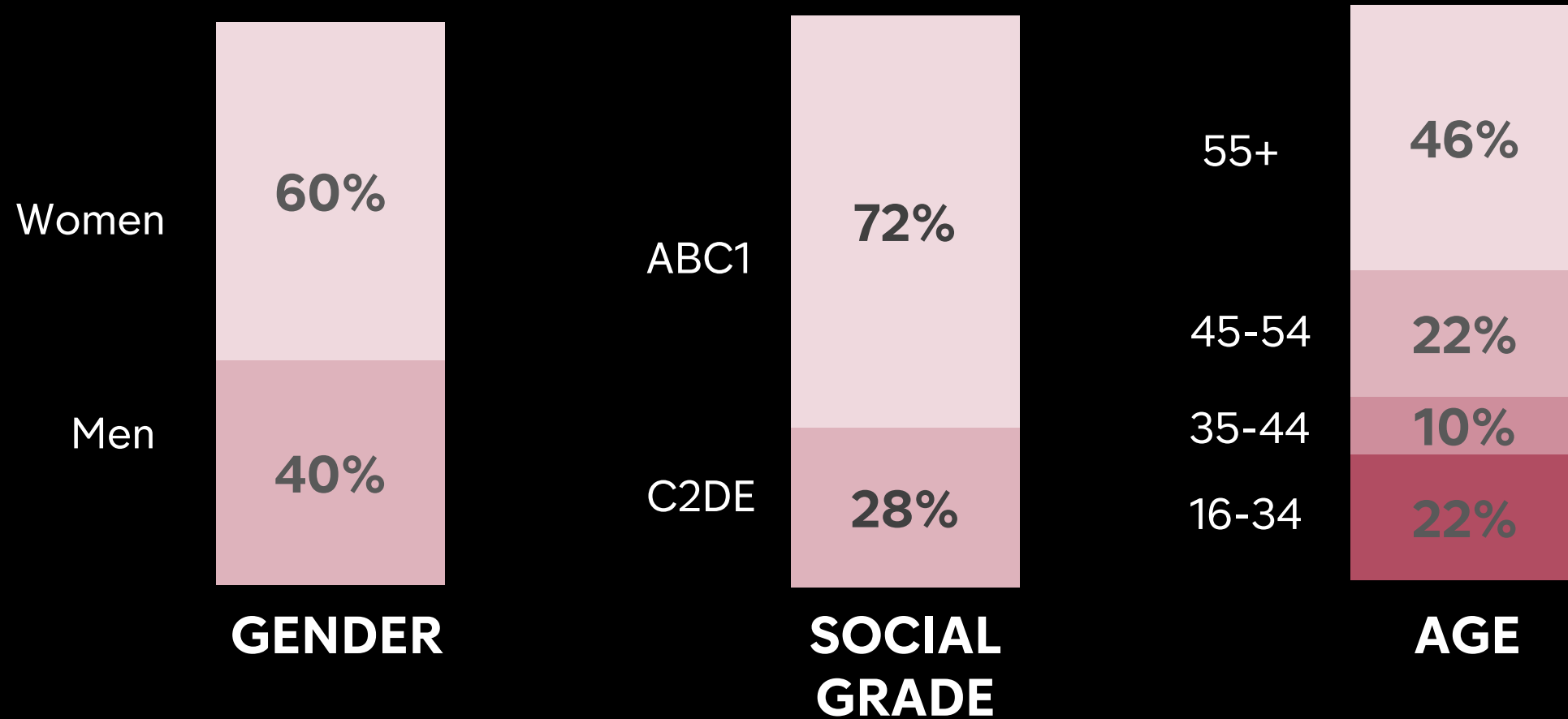
# Methodology – what we did!

We sent a survey to our **Core4** community, which is made up of a subset of our All 4 registered viewers and **4Youth**, our community of 16-24s. In total **we collected 590 responses.**

Respondents were asked questions about their beauty product **purchasing habits**, the impact of **media** on their purchase decisions and **emerging trends** within the beauty industry.



# Our sample skews slightly older, more upmarket and more female





02

# Purchase Habits



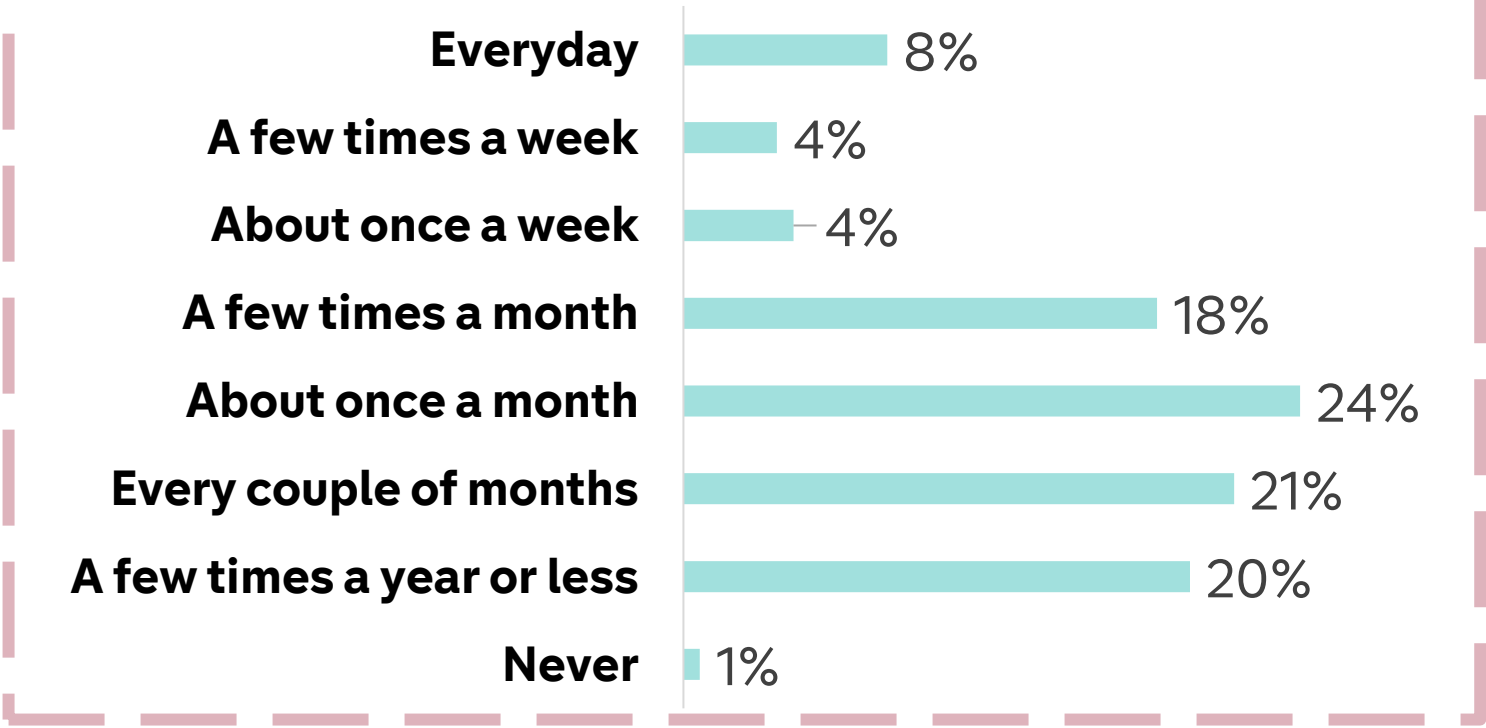
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# 79% of respondents said they use beauty and/or grooming products

Do you use any beauty and/or grooming products?

58% buy beauty/grooming products at least one a month



100% of our 16-24 sample said that they use beauty/grooming products

73% of women sampled said they use a variety of beauty/grooming products vs. just 16% of men

Beauty products are important to UK adults, 55% agree "Beauty products make me feel better about myself"



Source: Core4/4Youth Survey, October 2021, n=590, Q='Firstly, do you use any beauty and/or grooming products?'

# Moisturiser is the most frequently purchased beauty product amongst all adults

Which beauty/grooming products do you buy the most frequently?

## Most frequently purchased beauty/grooming products amongst Men:

1. Shaving products **80%**
2. Moisturiser **52%**
3. Lip balm **21%**
4. Cleanser **17%**
5. Facemasks **9%**
6. Exfoliator **8%**
7. Eye cream **7%**
8. Serums **3%**
9. Tinted moisturiser **3%**
10. Eye shadow **3%**

## Most frequently purchased beauty/grooming products amongst Women:

1. Moisturiser **76%**
2. Cleanser **46%**
3. Mascara **41%**
4. Lip balm **33%**
5. Foundation **25%**
6. Lipstick/ Lip gloss **24%**
7. Serums **20%**
8. Eye cream **17%**
9. Eyeliner **17%**
10. Shaving products **17%**

## Holy Grail Products!

What is your 'holy grail' beauty/grooming product that you couldn't live without?

*"I could not live without shaving products and moisturisers as I usually have sensitive skin and need to use them to avoid irritation and dryness."*

*"Lip balm is my holy grail. I used to have a really bad habit of biting my lips and lip balm was a must to help me feel better and also eventually stop."*



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# Many are opting to purchase their beauty/grooming products in store

## Most beauty product shopping is done Instore



46% mainly buy their beauty/grooming products **instore**



30% mainly buy their beauty/grooming products **online**



25% evenly buy their beauty/grooming products **instore/online**

### ONLINE

- Greater range of products available
- Able to compare prices across products/sites
- Convenient and easy

VS

### INSTORE

- See products and test in real life
- Instore experience
- Buy whilst doing supermarket shop



Source: Core4/4Youth Survey, October 2021, n=590, Q='Where does most of your beauty/grooming shopping take place? Please detail why that is your preference in the box provided'

# The most popular places to buy beauty/grooming products are high street health and beauty retailers - Boots was the most commonly mentioned



## Top 5 Beauty Retailers:

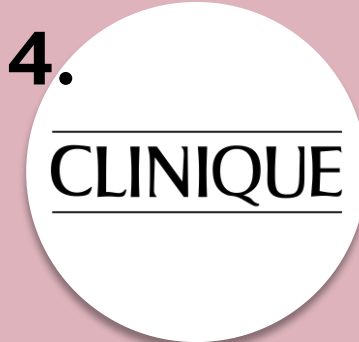
- 1 Boots
- 2 Superdrug
- 3 TESCO
- 4 amazon
- 5 ASDA



Source: Core4/4Youth Survey, October 2021, n=590, Q='Where do you buy most of your beauty/grooming products from? This includes both online and in-store.'

# Respondents' favourite brands were generally affordable and found regularly in high street health and beauty retailers

What is your favourite brand and why?



CeraVe was the most commonly mentioned brand amongst **16-24s**



*"My favourite brand is CeraVe; their face washes and moisturisers are soft and lightweight, and just really nice to use. You also get a lot of product for what you pay for."*

**Brand Loyalty** - 59% of respondents said that they tend to stick to buying the same brand



Source: Core4/4Youth Survey, October 2021, n=590, Q='What is your favourite brand and why?'

# Price and quality are the most important factors for our respondents when looking to buy beauty products

When buying beauty/grooming products, which of the following criteria do you look out for?

## Top Criteria of Choice:

66% Price



62% Quality

41% Not tested on animals



41% Brand

35% Promotions/discounts



33% Ingredients

26% Eco friendly/sustainable



24% Reviews

## 16-24s are particularly interested in sustainable and ethical brands

43% of 16-24s look out for products that are not tested on animals vs 41% of all adults 16+

33% look out for products that are environmentally friendly/ sustainable vs 26% of all adults 16+

29% look out for products that are organic/natural vs 21% of all adults 16+

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03

# Beauty and the Media



# 1 in 5 adults rated TV adverts as an important source of beauty/grooming product inspiration

19% of respondents rated TV adverts as an important source of inspiration

13% rated TV programmes as important

## Why TV inspires Beauty/Grooming purchases:



### LATEST PRODUCTS

Helps viewers keep up with new product releases



### VISUAL

Showcases how products work and what they look like



### PEOPLE/ ASSOCIATION

Talent used in ad and perception of quality

## Stand Out Beauty/Grooming Ads



Source: Core4/4Youth Survey, October 2021, n=590, Q='Thinking about how you get inspiration for beauty/grooming products, how important would you rate the following sources?', 'TV adverts and/or TV programmes are an important source of inspiration, why is that the case for you?'



# Many of the most memorable beauty TV adverts have distinctive music and slogans

48% agree "I notice beauty products in TV adverts"



"**L'Oréal** - the 'because you're worth it' adverts always stick in the mind, even though the strap line is years old!"



"The **Olay** Regenerist whip with SPF featuring Lady Leshurr is an advert that sticks in my mind because it's catchy but is also educating people of colour on the importance of using an SPF."



"**Rimmel** - 'The London look'"



Source: Core4/4Youth Survey, October 2021, n=590, Q='Can you recall any beauty/grooming related TV adverts you've seen? If yes please specify which ad(s)'

# 52% of respondents agree that beauty advertising in general needs to be more inclusive

## What would you like to see beauty brands do more of in their advertising?

*"I like seeing diverse adverts, **both genders** enjoying makeup - why should it just be for women?"*

*"Better **representations of ethnic minorities**, different **sexual orientations** etc. The more varied, the more inclusive."*

*"Showing more diverse models, especially in terms of **race, gender/gender presentation, age, and ability/disability**. In particular, some disabilities can make beauty/grooming - and using beauty/grooming products - quite a challenge and **it would be really cool to see this represented** in mainstream advertising."*



*"**Diversity**, showing people with **skin conditions** being able to use their products."*

Respondents want to see better representation of different **age, gender, ethnicities** and **disabilities** within beauty advertising. They want ads to **"celebrate ordinary people"**.

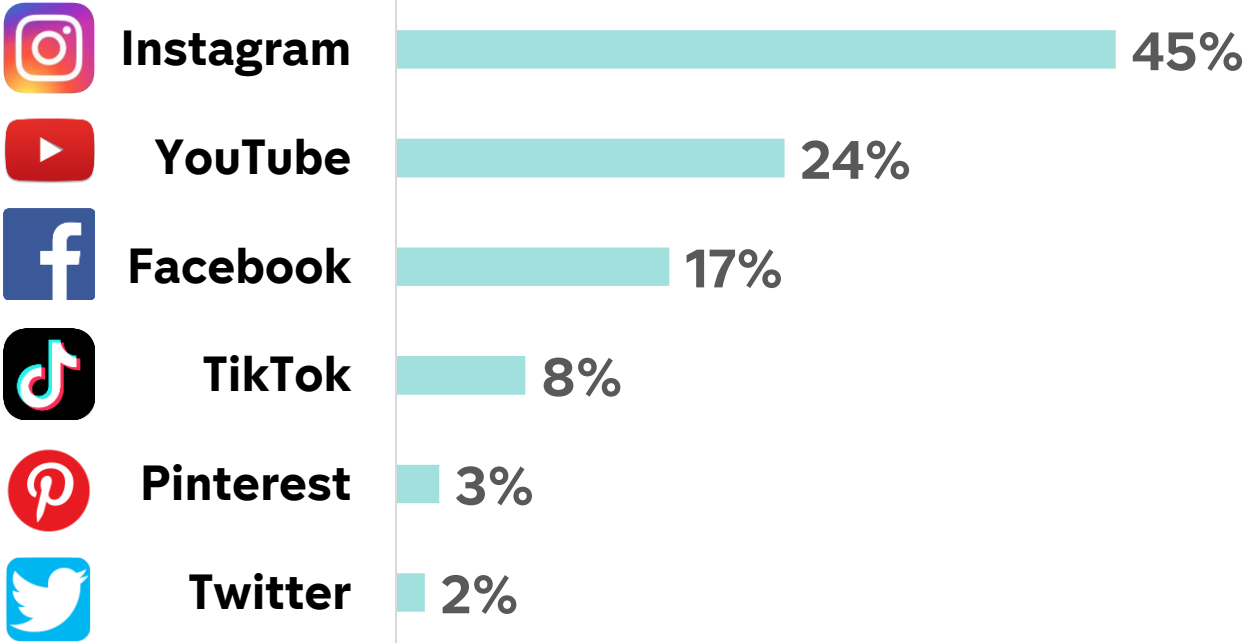
**49%** agree "Beauty advertising needs to be more **inclusive of all ethnicities**"

**63%** agree "Beauty advertising needs to be more **gender inclusive**"



# 24% of respondents rated social media as an important source of beauty product inspiration

Which social media platform do you get the most beauty/grooming product inspiration from?



61% of 16-24s rated social media as an important source of inspiration



Source: Core4/4Youth Survey, October 2021, n=590, Q='Which social media platform do you get the most beauty/grooming product inspiration from?'

# Celebrity owned beauty and grooming brands are becoming increasingly common – over 20% of 16-24s have bought from them

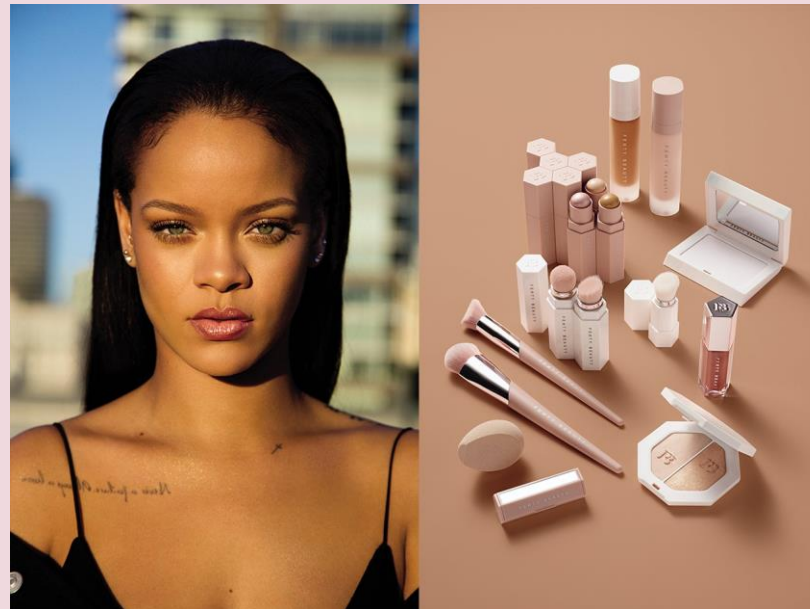
**25%** of 16-24s rated celebrities as an important source of beauty/grooming inspiration **vs. 8%** of all adults 16+.

The most commonly mentioned brand amongst respondents was Fenty Beauty by Rihanna.

Both David and Victoria Beckham were also mentioned for their successful beauty/grooming products.



"I have used/continue to use Fenty products and really like them. I have the Fenty concealer and highlighters."



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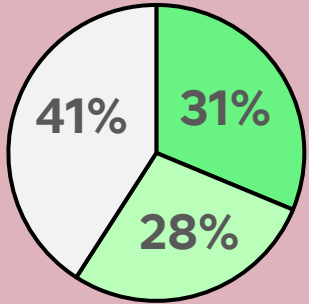
# Sustainable Beauty





# Over 60% of respondents think it is important for beauty/grooming brands to be sustainable

Do you use any eco-friendly beauty/grooming products already?



- Yes I do
- Not yet but I plan to
- No I do not

How important is it to you that a beauty/grooming brand is sustainable?



Not at all important

Very important

When you hear 'sustainable beauty/grooming' which brands come to mind?



Lush and The Body Shop are the most commonly mentioned brands.



Source: Core4/4Youth Survey, October 2021, n=590, Q='When you hear the phrase 'sustainable beauty' or 'sustainable grooming' which brands come to mind?'



# Respondents are actively taking a more sustainable approach to their beauty routines

*In terms of having a more sustainable approach to beauty/grooming, which of the following have you done, if any?*

**65% agree "I'm more likely to buy beauty products from companies with good ethics"**

**% of respondents that have...**

**43%**



**Bought cruelty free/vegan products**

**40%**



**Bought jumbo sized products to reduce consumption**

**37%**



**Bought beauty products with little to no packaging**

**34%**




**Looked out for the ingredients used in product**

**23%**



**Bought refillable packs e.g. shampoo, self-tan**

**23%**



**Used reusable cotton pads/wipes**

**21%**



**Used all in one/multipurpose products**

**19%**



**Researched what brands are doing to be more eco friendly**



Source: Core4/4Youth Survey, October 2021, n=590, Q='In terms of having a more sustainable approach to beauty/grooming, which of the following have you done, if any? Please select all that apply'

# The future is green! 75% of 16-24s think it is important for beauty/grooming brands to be sustainable

For those respondents that don't already use sustainable products, **85%** said they would consider using them in the future

- **38%** of 16-24s already use sustainable beauty products, and **47%** intend to.
- Of those that don't already use or intend to use, **87%** would in the future.

How much more would you be willing to pay for more sustainably produced beauty/grooming products?

- ↑ A little more **59%**
- ↑ A lot more **5%**
- No more **36%**

**80%** of 16-24s are willing to pay more

Thinking of beauty/grooming brands, what would you like to see them doing more of in their advertising?

"Promoting **genuine sustainability**, **cruelty free** and **vegan** and not just **greenwashing**"

"I would love to see **more organic products** on the market and definitely **NOT** tested on animals"

"I guess it's less advertising and more product but just having like **cardboard and recycled materials**, and not being harmful to the environment or animals! I would be 10000x more likely to buy something that in an advert demonstrates this"



Source: Core4/4Youth Survey, October 2021, n=590, Q='How important is it to you that a beauty/grooming brand is sustainable?'

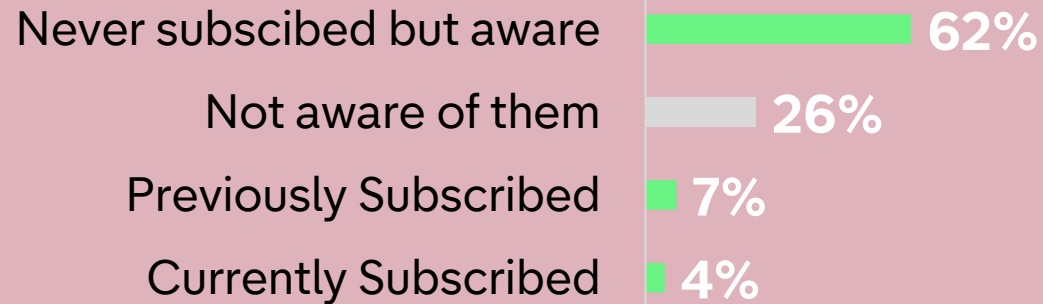
04

# Subscription Services



# Around 10% of respondents are currently or have previously subscribed to a beauty subscription service

Which of the following best applies to you when it comes to beauty/grooming subscriptions?



Why are you no longer subscribed?

The main reasons for ending a beauty/grooming subscription were related to **price** and **wastage**. Some felt their experience would be improved if they could select the products themselves.



**1 in 4** respondents would be willing to pay up to **£10** a month for a beauty subscription, and **17%** would pay between **£11-£20**



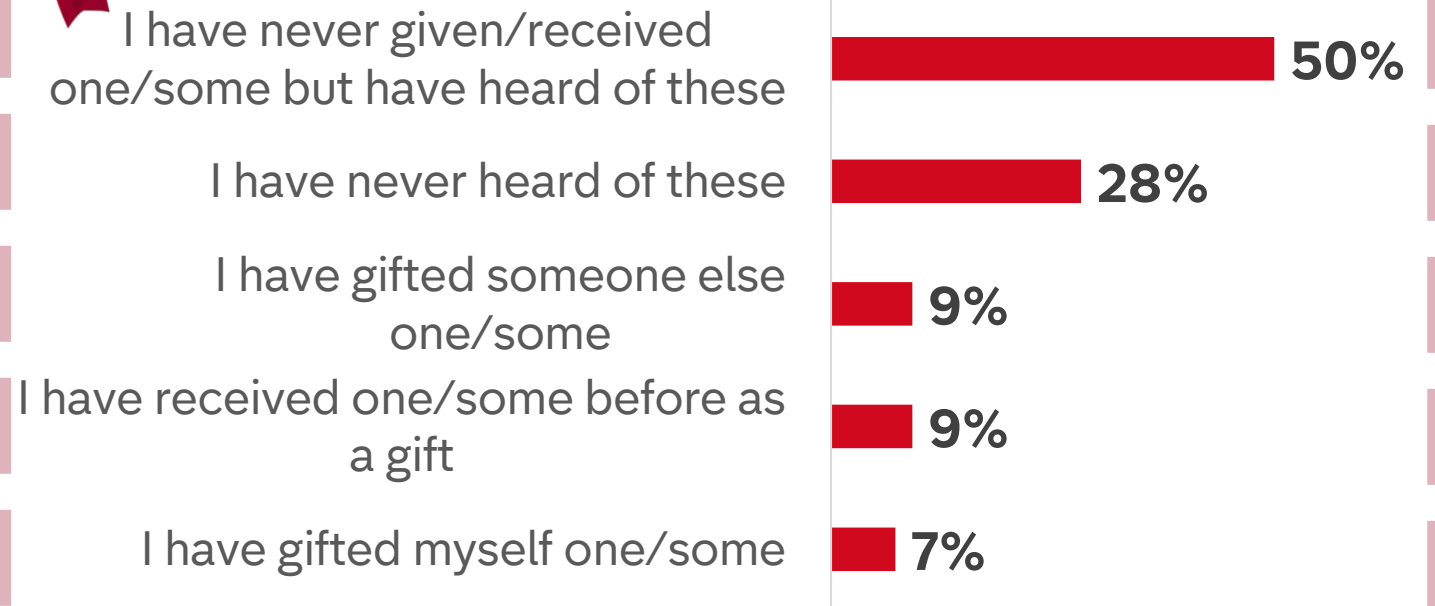
*"The price mostly but also I wasn't using all of the products so it was a bit of a waste. Not all the products will suit everyone and I don't think it was worth the money."*



# Beauty/Grooming advent calendars are increasingly popular, with 1 in 4 having gifted or received one



## Which applies to you when it comes to beauty or grooming advent calendars?



**38% of respondents would consider buying a beauty/grooming advent calendar in the future - 57% for 35-44s!**

The most commonly mentioned advent calendar amongst our respondents was by **Marks & Spencer Beauty**.

In general, there were **mixed reviews** towards beauty/ grooming calendars. Respondents enjoyed trying new products, however some felt they didn't like enough of the products to deem it to be good value.



*"I found some gems which I would never have considered buying/come across otherwise!"*

*"The products are small and it's a lot of waste if I don't enjoy one product."*



Source: Core4/4Youth Survey, October 2021, n=590, Q='Which applies to you when it comes to beauty or grooming advent calendars?', 'Would you consider buying a beauty/grooming advent calendar in the future?'

04

# Our Channels





# Channel 4



## PURCHASING HABITS

30%



Mostly buy  
online

47%



Mostly buy  
instore

## SOURCES OF INSPIRATION

18%



TV adverts are  
important

15%



Social media  
is important

## SUSTAINABILITY

61%



Sustainability  
is important

59%



Pay more if  
eco-friendly

62%

I'm more likely to  
buy beauty  
products from  
companies with  
good ethics

51%

Beauty products  
make me feel  
better about myself

45%

Beauty advertising  
needs to be more  
inclusive

40%

I notice beauty  
products in TV  
adverts

37%

I enjoy looking for  
new beauty  
products

21%

I notice the beauty  
products used in TV  
programmes

16%

I keep up with  
trends within the  
beauty industry

little  
black  
book





## PURCHASING HABITS

31%



Mostly buy  
online

45%



Mostly buy  
instore

## SOURCES OF INSPIRATION

15%



TV adverts are  
important

15%



Social media  
is important

## SUSTAINABILITY

61%



Sustainability  
is important

59%



Pay more if  
eco-friendly

63%

I'm more likely to  
buy beauty  
products from  
companies with  
good ethics

50%

Beauty products  
make me feel  
better about  
myself

48%

Beauty advertising  
needs to be more  
inclusive

38%

I notice beauty  
products in TV  
adverts

36%

I enjoy looking for  
new beauty  
products

21%

I notice the beauty  
products used in  
TV programmes

16%

I keep up with  
trends within the  
beauty industry

little  
black  
book



## PURCHASING HABITS

28%



Mostly buy  
online

47%



Mostly buy  
instore

## SOURCES OF INSPIRATION

19%



TV adverts are  
important

13%



Social media  
is important

## SUSTAINABILITY

63%



Sustainability  
is important

62%



Pay more if  
eco-friendly

64%

I'm more likely to  
buy beauty  
products from  
companies with  
good ethics

53%

Beauty products  
make me feel  
better about  
myself

44%

Beauty advertising  
needs to be more  
inclusive

40%

I notice beauty  
products in TV  
adverts

38%

I enjoy looking for  
new beauty  
products

22%

I notice the beauty  
products used in TV  
programmes

15%

I keep up with  
trends within the  
beauty industry

## PURCHASING HABITS

27%



Mostly buy  
online

48%



Mostly buy  
instore

## SOURCES OF INSPIRATION

17%



TV adverts are  
important

12%



Social media  
is important

## SUSTAINABILITY

63%



Sustainability  
is important

62%



Pay more if  
eco-friendly

66%

65%

53%

46%

39%

23%

17%

I enjoy looking for  
new beauty  
products

I'm more likely to  
buy beauty  
products from  
companies with  
good ethics

Beauty products  
make me feel  
better about myself

Beauty advertising  
needs to be more  
inclusive

I notice beauty  
products in TV  
adverts

I notice the beauty  
products used in TV  
programmes

I keep up with  
trends within the  
beauty industry

little  
black  
book



# ABC1 Adults

## PURCHASING HABITS

31%



Mostly buy  
online

44%



Mostly buy  
instore

## SOURCES OF INSPIRATION

21%



TV adverts are  
important

27%



Social media  
is important

## SUSTAINABILITY

64%



Sustainability  
is important

66%



Pay more if  
eco-friendly

69%

I'm more likely to  
buy beauty  
products from  
companies with  
good ethics

55%

Beauty products  
make me feel  
better about  
myself

53%

Beauty advertising  
needs to be more  
inclusive

48%

I notice beauty  
products in TV  
adverts

33%

I enjoy looking for  
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27%

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