Age Diversity in Beauty: Why the 50+ Consumer is Still Busy Living

MAKE YOUR MARK.

LONDON I LOS ANGELES I SAN FRANCISCO I SINGAPORE

Methodology

2CV ran a proprietary online survey in Feb 2021 with a sample of 1041 women 50+ based in the UK. To compare and contrast the findings, we also included a representative sample of 518 women aged 16-49

The data for this study was collected using Cint, a global leader in digital insights gathering that operates the world's largest consumer network for digital survey-based research

www.2cv.com
www.cint.com

Scene setting & exploring the broad opportunity

50+ women are a growing opportunity

By 2038 they will make up an even bigger proportion of the female population in the UK

Current & projected number of women aged 50+ in the UK

	2020	2030	2040
Population of Women 50+	13.1m	14.2m	15.3m
Population of Women 16-49	13.4m	13.6m	13.5m

Source: ONS

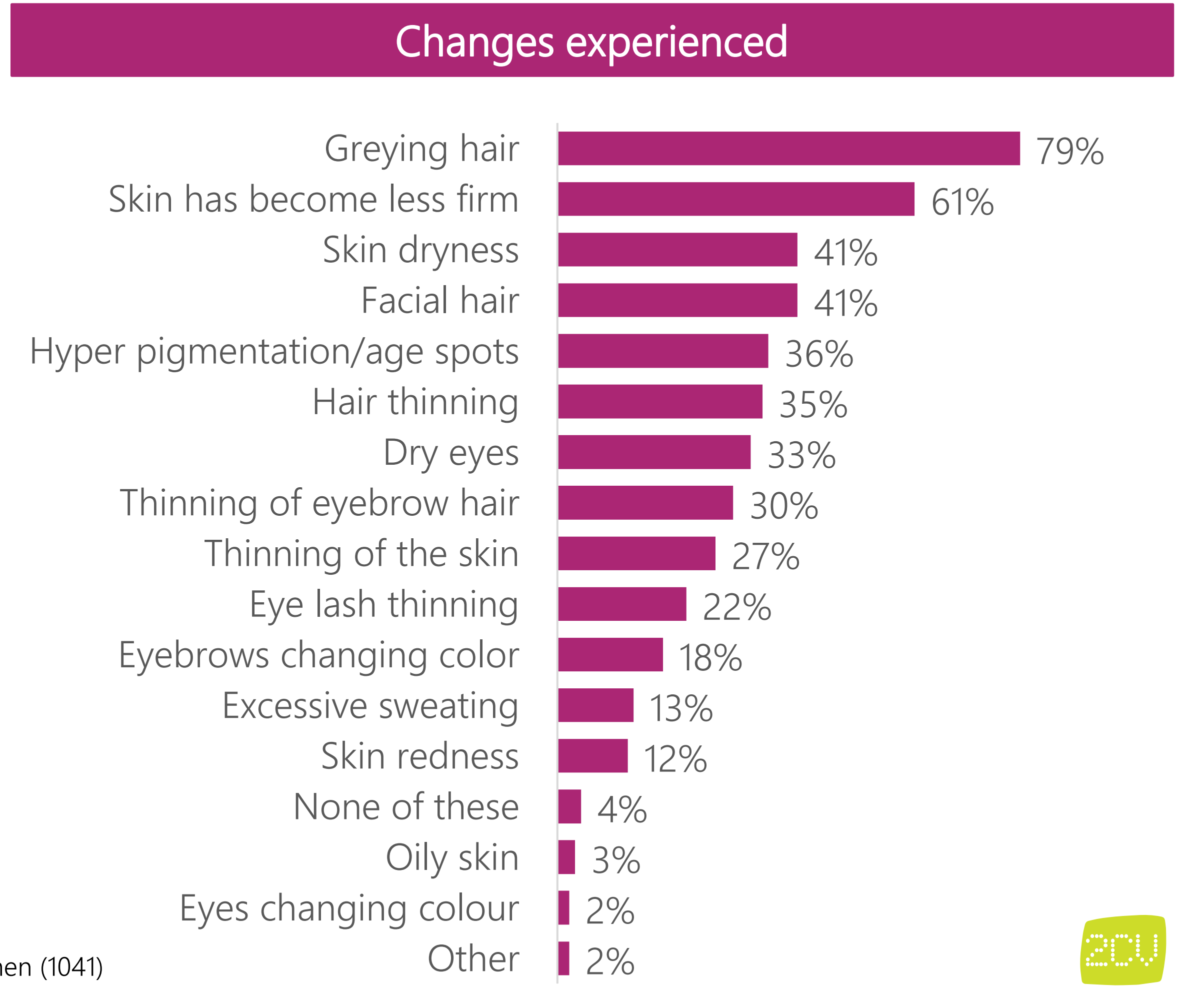
I think as you get into mid-life, age becomes irrelevant. If anyone had said to me when I was 30 that 58 looked like this and I'd still be working in the beauty industry I would have thought, they were mad. As it happens, age is just a number. We're not irrelevant. We're a growing society of 50+ and we've got the disposable income. We just need to be spoken to with a little bit of respect

Hitting 50 does represent a time of change

Women report a variety of different changes in this time; there's a real opportunity for beauty brands to support these women through the transition

96% Of women 50+ report at least one change to their skin and hair in recent years…

4.5 Number of changes experienced during this time (on average)



S3. Have you experienced any of the following changes to you skin and hair in recent years? Base: 50+ women (1041)

Ageing is something they feel positive about

It means looking & feeling good; wellbeing sits at the heart of their needs

FEELING CONFIDENT

"Experience and **being comfortable** with yourself"
- 50-year-old

"Feel **confident and comfortable** in your own skin"
- 65-year-old

"To feel **confident** and **not be afraid** to try new experiences"
- 54-year-old

"It is important to **feel comfortable** in your own skin."
- 70-year-old

LOOKING GOOD

"To **look the best I can** and not have any major flaws in the way I look due to my age. To be the real me but the best version I can be."
- 51-year-old

"To age well means to **look good** even though you are no longer young."
- 67-year-old

"Look after yourself and **your appearance**"
- 78-year-old

"**Looking good** for my age."
- 72-year-old

BEING ACTIVE

"To still be **young at heart and active**"
- 64-year-old

"**Keep well, eat well exercise within your capabilities** and have a good social life"
- 78-year-old

"Remain as **fit and healthy as possible**"
- 71-year-old

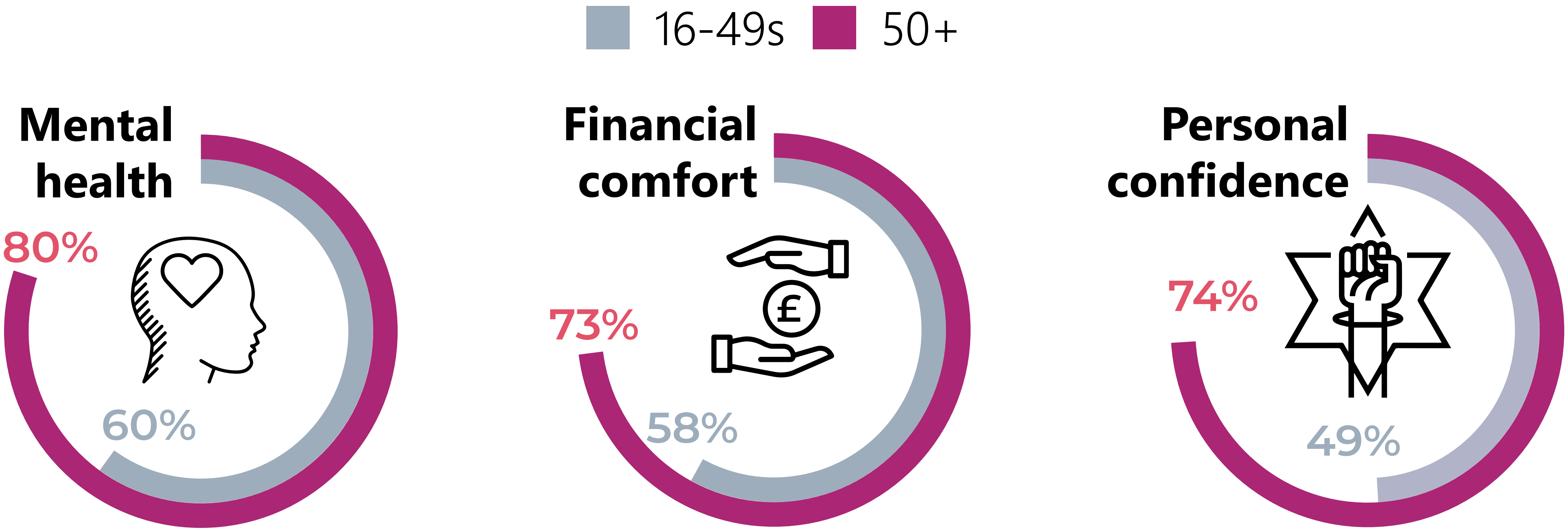
"To **be active physically and mentally** and to engage socially, volunteer and be a member of organisations"
- 60-year-old

B0. What does it mean to you to age well? Base: 50+ women (1041)

Women 50+ are strong, with a lot to offer

This challenges the stereotype and highlights the need for brands to rethink representation of this audience

% rating themselves as good in terms of....



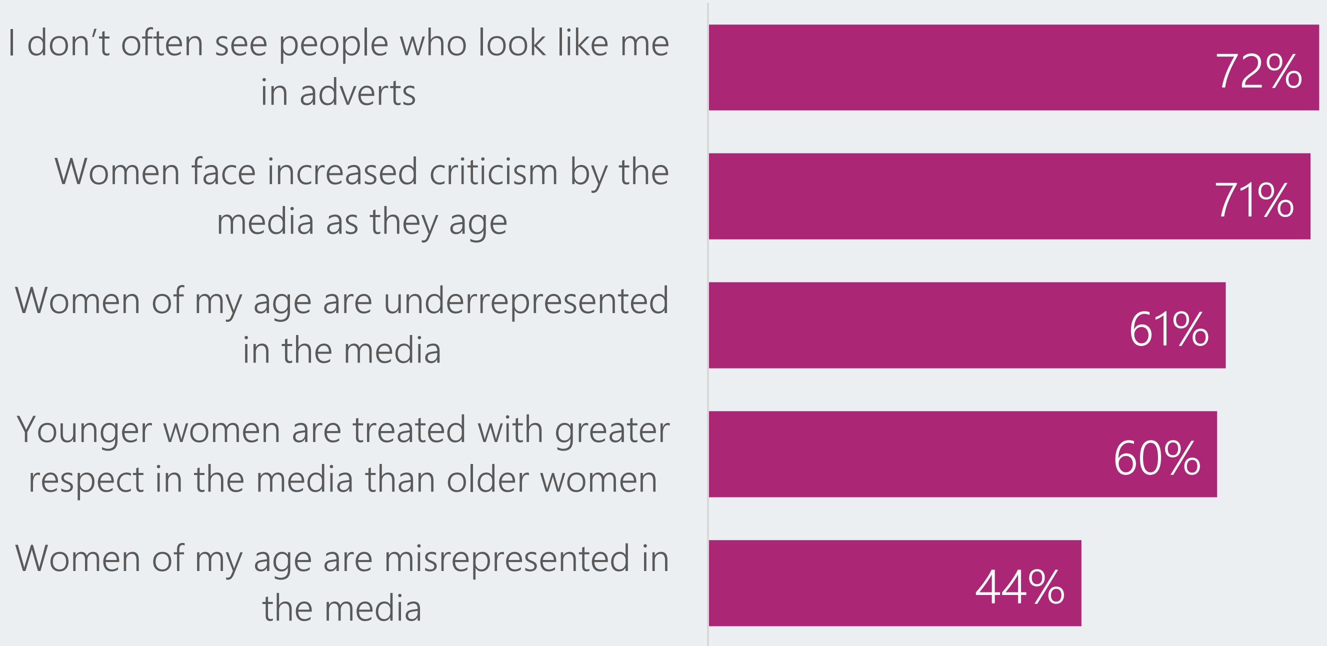
A1. Thinking about yourself currently, how would you rate yourself in the following areas. Showing Top 2 Box on a 4pt scale: Quite good/Very good.
Base: 16-49 (518), 50+ women (1041)

However, they're either ignored/scrutinized

Empower women with more positivity & representation as they age

agree "women my age are represented positively in the media"

The majority of 50+ women agree that older women are not positively portrayed in the media generally…



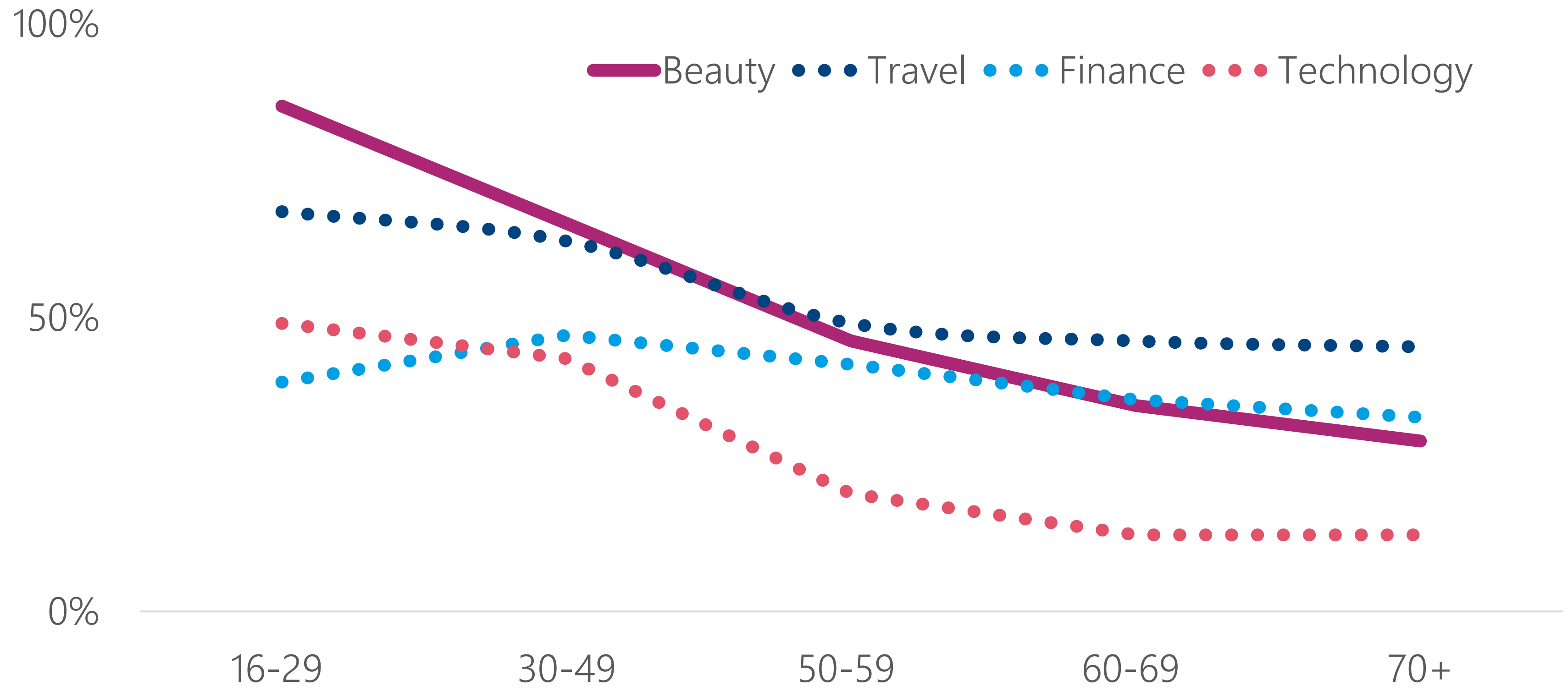
Agreement is significantly higher for those over 50 vs. those under 50. However, all women agree women face more media criticism as they get older.

A2. We'd now like to show you some statements relating to how different groups are portrayed in the media. How much do you agree or disagree with each? (T2B) Base: 50+ women (1041)

Beauty as a category is particularly ageist

Whilst this audience represent a lucrative opportunity – this opportunity is being missed.

How well represented do women feel within beauty media/ advertising



- Underrepresentation for all categories
- Beauty decline is most marked
- Each age group feeling more ignored than their younger counterparts

A3. How well do you feel women of your age are represented in advertising/the media within each of the following sectors… 16-29 (198), 30-49 (320) 50-59 (377) 60-60 (348) 70+ (316)

Women 50+ feel that beauty only values youth

A narrow target which risks isolating a large proportion of the female population

84% of women 50+

believe spokesmodels are always **younger** than them

78% of women 50+

believe that beauty focusses on **fighting** rather than **embracing** ageing

65% of women 50+

believe beauty advertising isn't **relevant** to my needs

80% of women 50+

believe beauty brands are **obsessed** with youth

Source: 2CV survey of 1559 women.

They feel that beauty brands have failed them

Women have been increasingly isolated by the beauty industry as they've aged – leaving them to cope with changes alone

45%

Feel like the beauty industry has not supported them as they have got older

Just

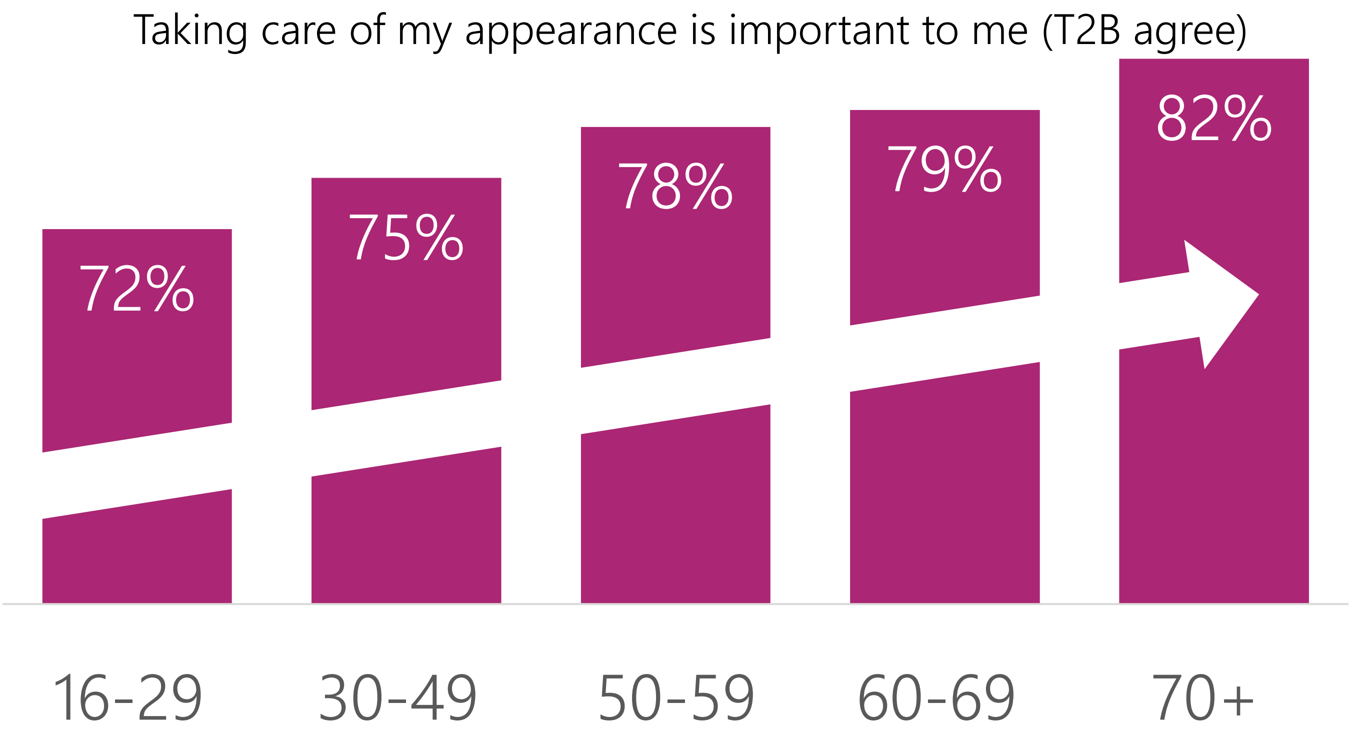
14%

Feel like the target consumer for beauty brands

S1. Do you think the beauty industry supported you as you've got older? B4. Do you feel like a target customer for beauty brands? Base: 50+ women (1041)

Their appearance remains important to them

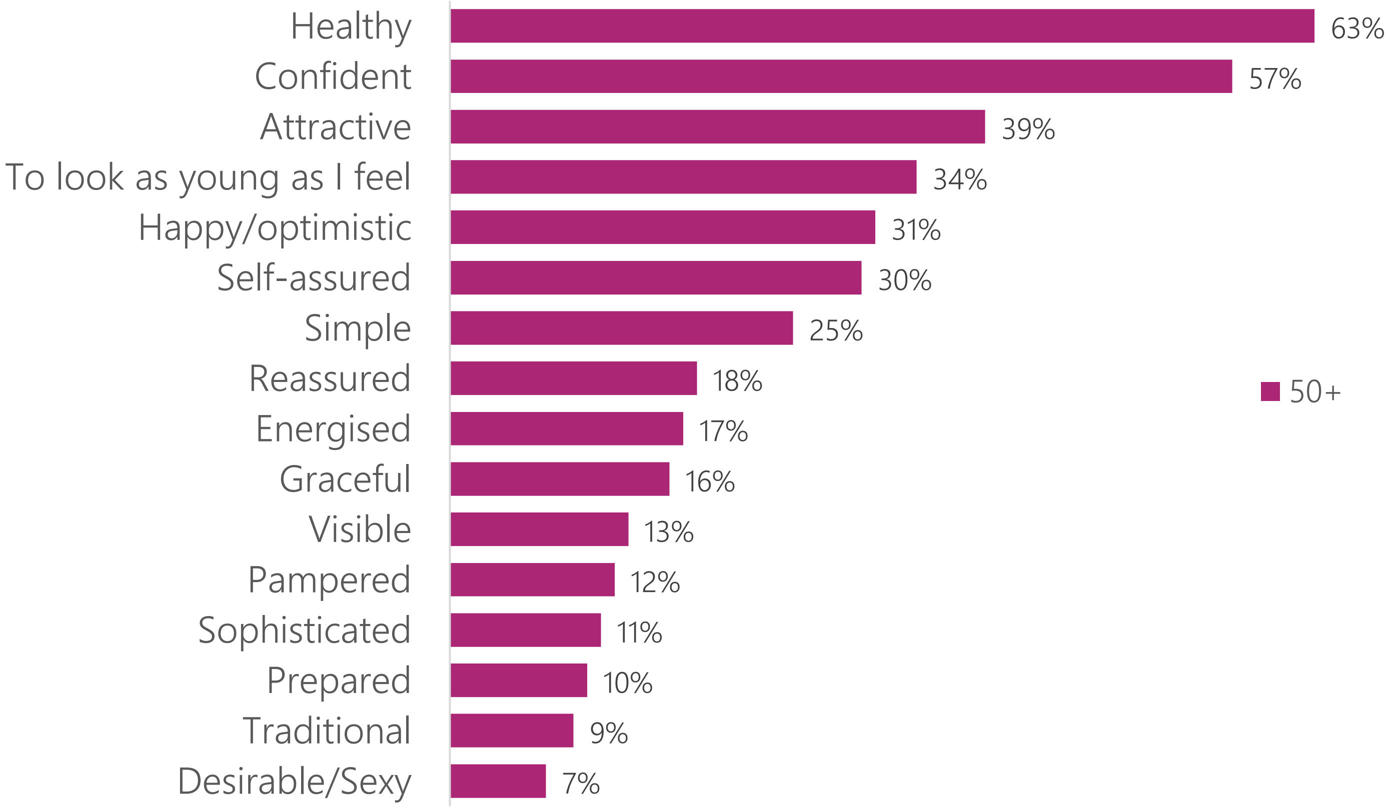
There is an increasing, rather than decreasing role for beauty as women age. An opportunity for brands to tap into this engagement



B2. Taking care of my appearance is important to me. Agreement on 5pt scale. Base: 16-29 (198), 30-49 (320), 50-59 (377), 60-69 (348), 70+ (316). Showing Top 2 Box agree (Agree somewhat/Agree strongly)

Tailoring language to their priorities will resonate

Using the right language can help create a more emotional connection with these women

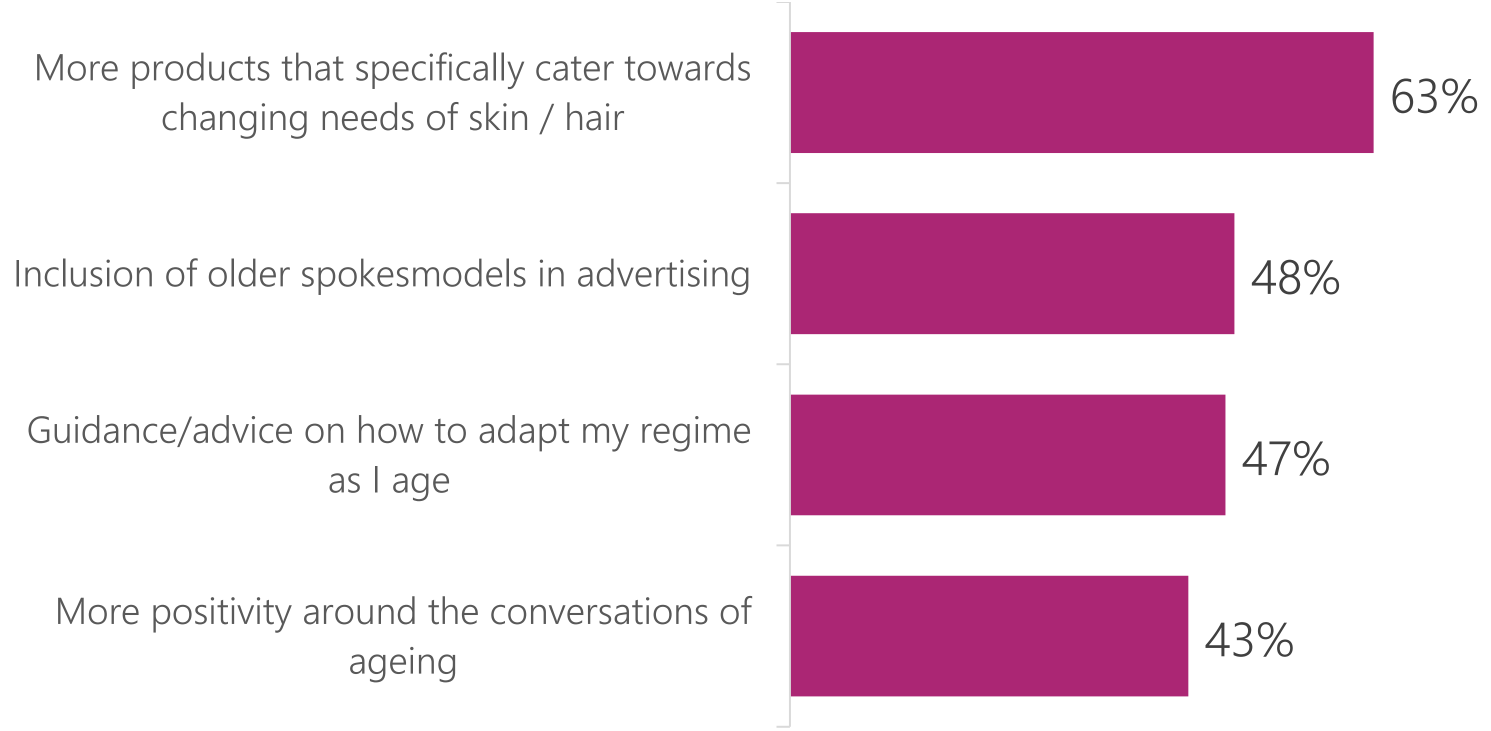


B3. Thinking about when you're using beauty products, which of the following best describes how you want to feel?
Base: 50+ women (1041)

There's an open goal for brands to aim for

Brands can play a role in breaking down stigma and changing the narrative around age

Support that appeals to 50+ women

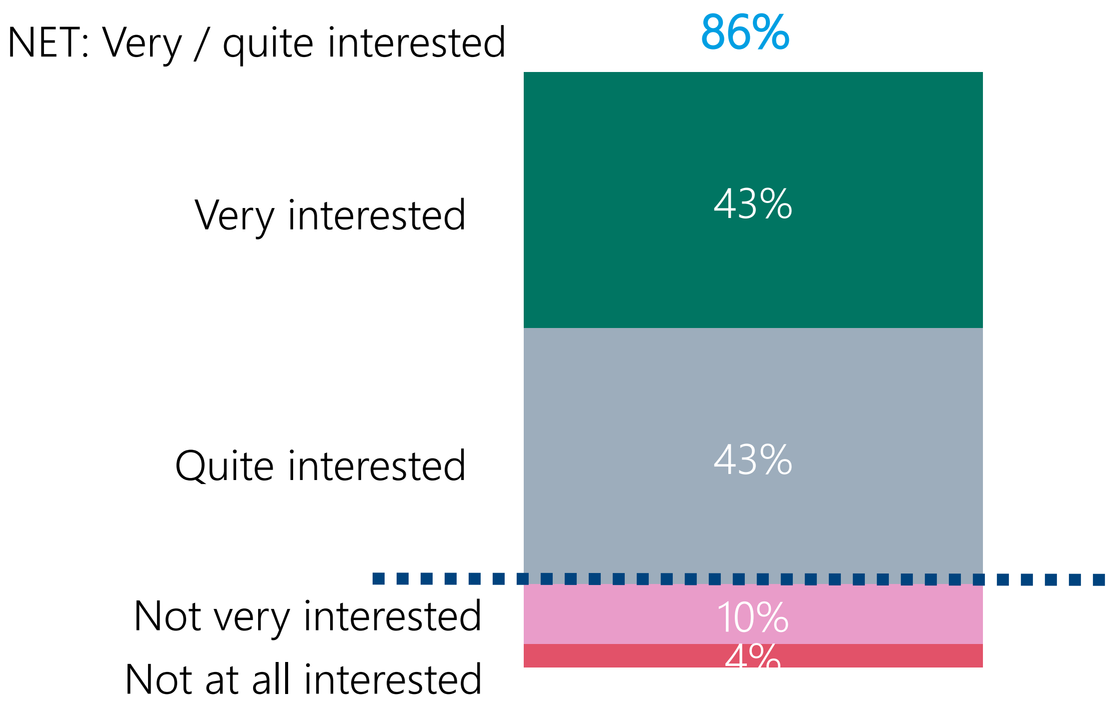


S5. Thinking about what beauty brands could do to support older women, which of the following, if any, appeal to you? S7. Would you like the beauty industry to talk more openly about menopause? Base: 50+ women (1041)

Big product potential for brands to engage with 50+

An opportunity for beauty brands to develop NPD specifically designed to their needs

Interest in products tailored to your age

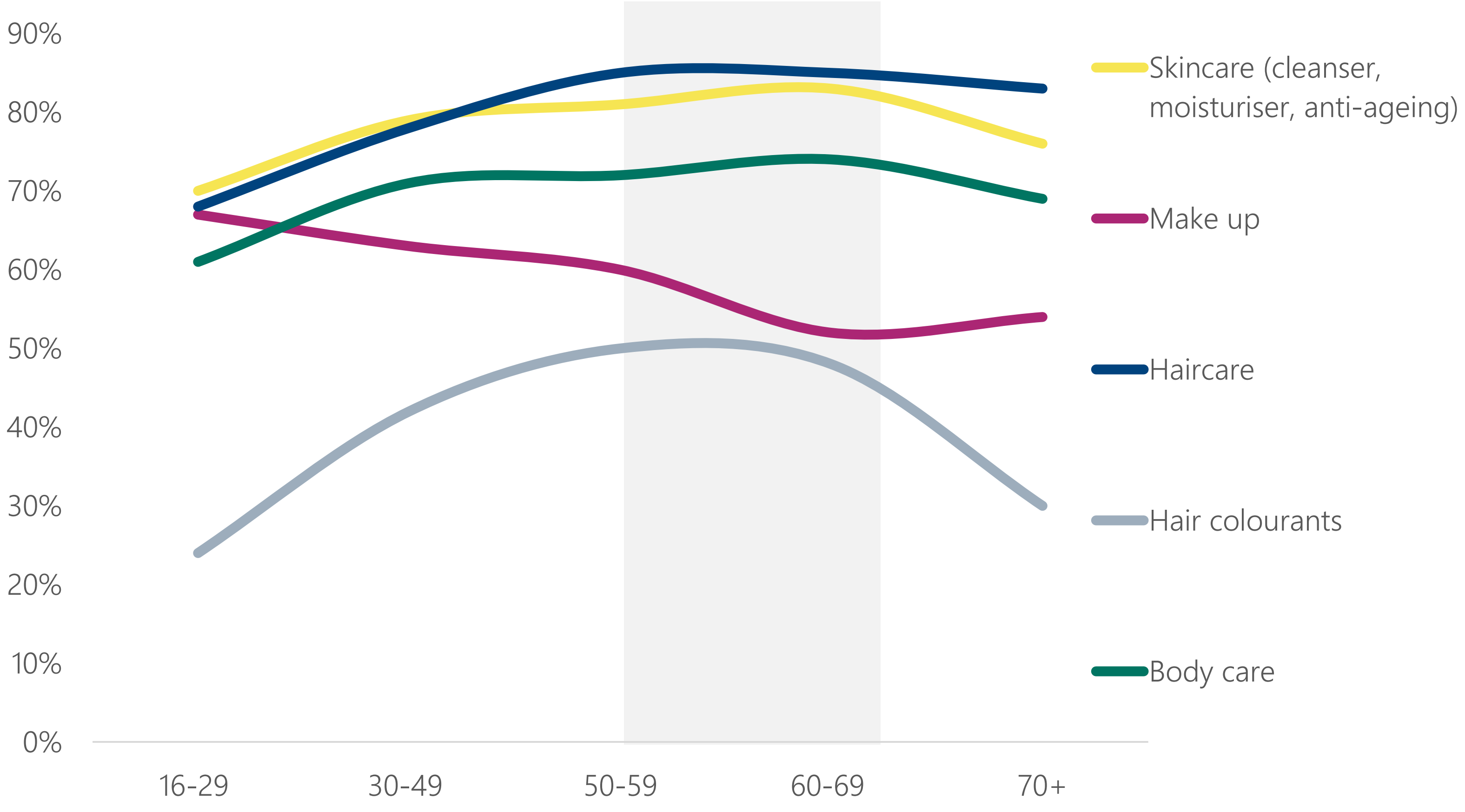


S4. How interested are you to trying new products that are tailored to women of your age group? Base: 50+ women (1041)

Beauty categories exploration in more detail

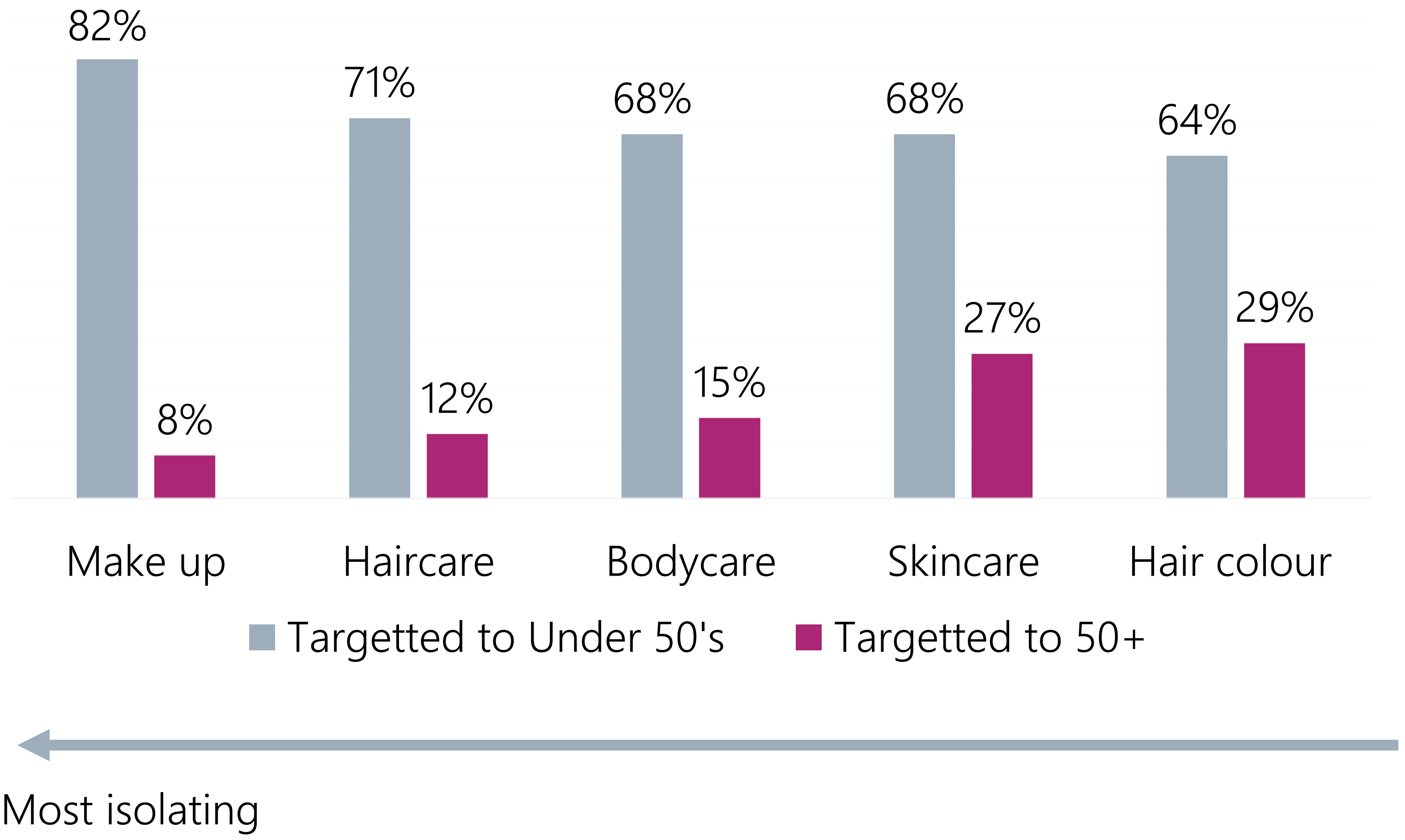
50+ women are prominent users of beauty categories

The most engaged are typically those aged 50-70



B8. Which of the following beauty products do you use regularly? Base: 16-29 (198), 30-49 (320), 50-59 (377), 60-69 (348), 70+ (316)

No category is targeting them effectively; a huge opportunity

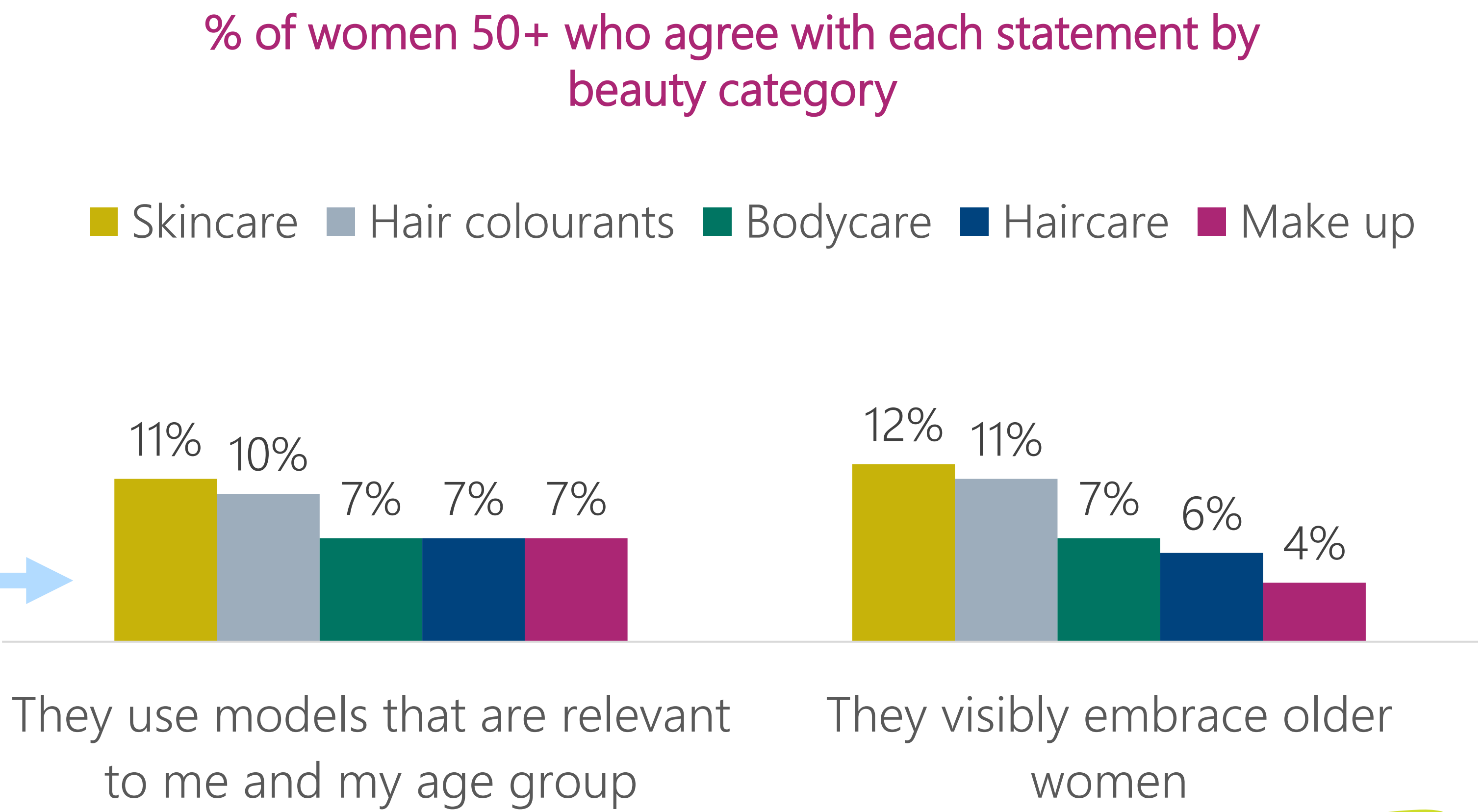


B5. What age group(s) do you think the majority of "CATEGORY" products are aimed at?
Base: 50+ women (1041)

Inclusivity is weak across all categories

Most work is needed within the make up category where only 1 in 20 claim it embraces older women

The majority of 50+ women do not see any visual representation of brands embracing women of their age

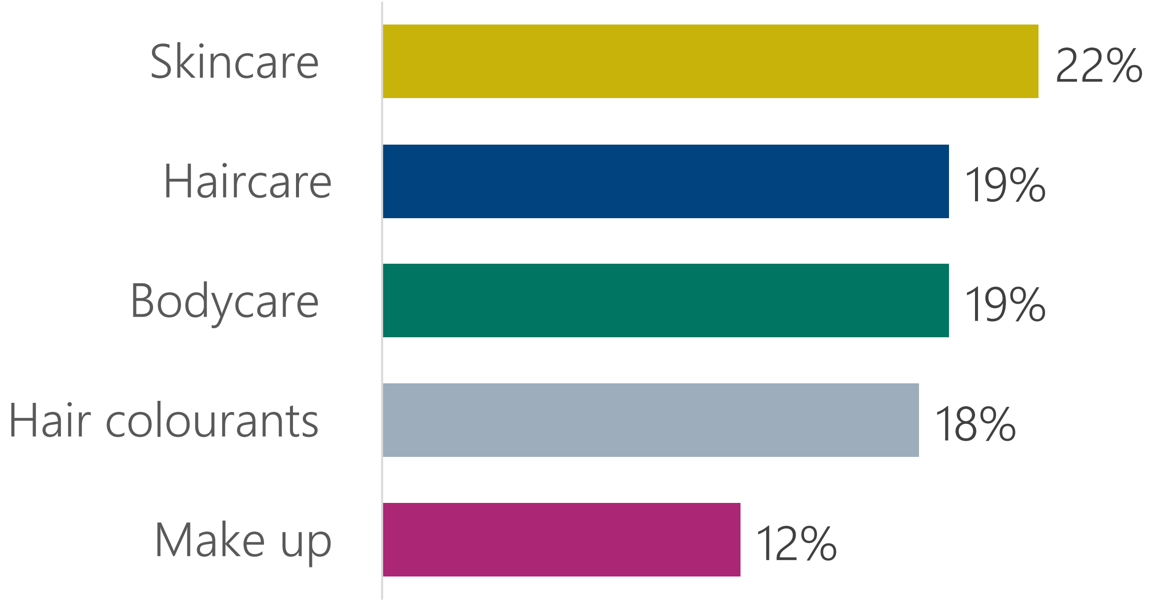


B7. And which of these statements do you think apply to the 'CATEGORY' statement. Base: 50+ women (1041)

Better categorisation could help these women

This is needed across all categories, but in particular for make up

"They categorise products in a way that allows me to identify which are the right products for me" (agree)



B7 . And which of these statements do you think apply to the 'CATEGORY' products available? Showing % who selected statement. Base: 50+ women (1041)

Relevant benefits need to be communicated

Whilst skincare and colorants have the strongest product offer for this audience neither are strong at communicating relevant benefits

	Skincare	Hair colour	Haircare	Body care	Make up
Relevant products	33%	28%	20%	21%	18%
Relevant benefits	20%	15%	20%	19%	14%

B7. And which of these statements do you think apply to the 'CATEGORY' products available? Showing % who selected 'They have relevant product types for my age group' and 'They talk about the benefits that are relevant to my hair/ skin type' statement. Base: 50+ women (1041)

When brands don't deliver – they look elsewhere

Making this audience a ripe opportunity for brands delivering new products tailored to their needs

% Open to new products

Body care	Make up	Haircare	Skincare	Hair colour
85%	85%	81%	78%	78%

To encourage trial, more representation, relevancy and support is needed for 50+ women

B9. How satisfied with the products that you use from the following beauty categories. Net: "I am actively looking for better products" or "I like them, but I am always open to something better". Base: 50+ women who are regular users of the category, Body care n=748, Make up n=580, Haircare n=878, Skincare n=834 Hair colour n=878

The challenge faced by brands can be broadly bucketed into 3 areas

Most prominent in….

Lack of tailoring, education & support →	**Make up**
Oversimplification of women's needs →	**Hair categories**
Use of conflicting/ isolating language →	**Skincare**

More support is needed within Make-up

Education, navigation and support is required to make 50+ women feel catered to by make-up brands

Skin changes

- ✓ Less firm
- ✓ Dryer
- ✓ Age spots
- ✓ Thinning

Feature changes

- ✓ Facial hair
- ✓ Dry eyes
- ✓ Thinning eyebrows
- ✓ Thinning lashes

- ❖ Opportunities to create tailored advice of how to change their products/ routine to adapt to changing skin & facial features
- ❖ Increased categorization online/ instore could help support navigation

Skincare needs to empower rather than shame

Whilst the category broadly recognizes these women, more can certainly be done to support and celebrate them

Celebrate differentiation

Look beyond standard skincare vs. anti ageing → They are a large audience with differing needs within this

Change the narrative

Historically has focused on fighting ageing and something to cover/avoid → Empower women and help them feel proud of their bodies through use of effective and relevant spokesmodels

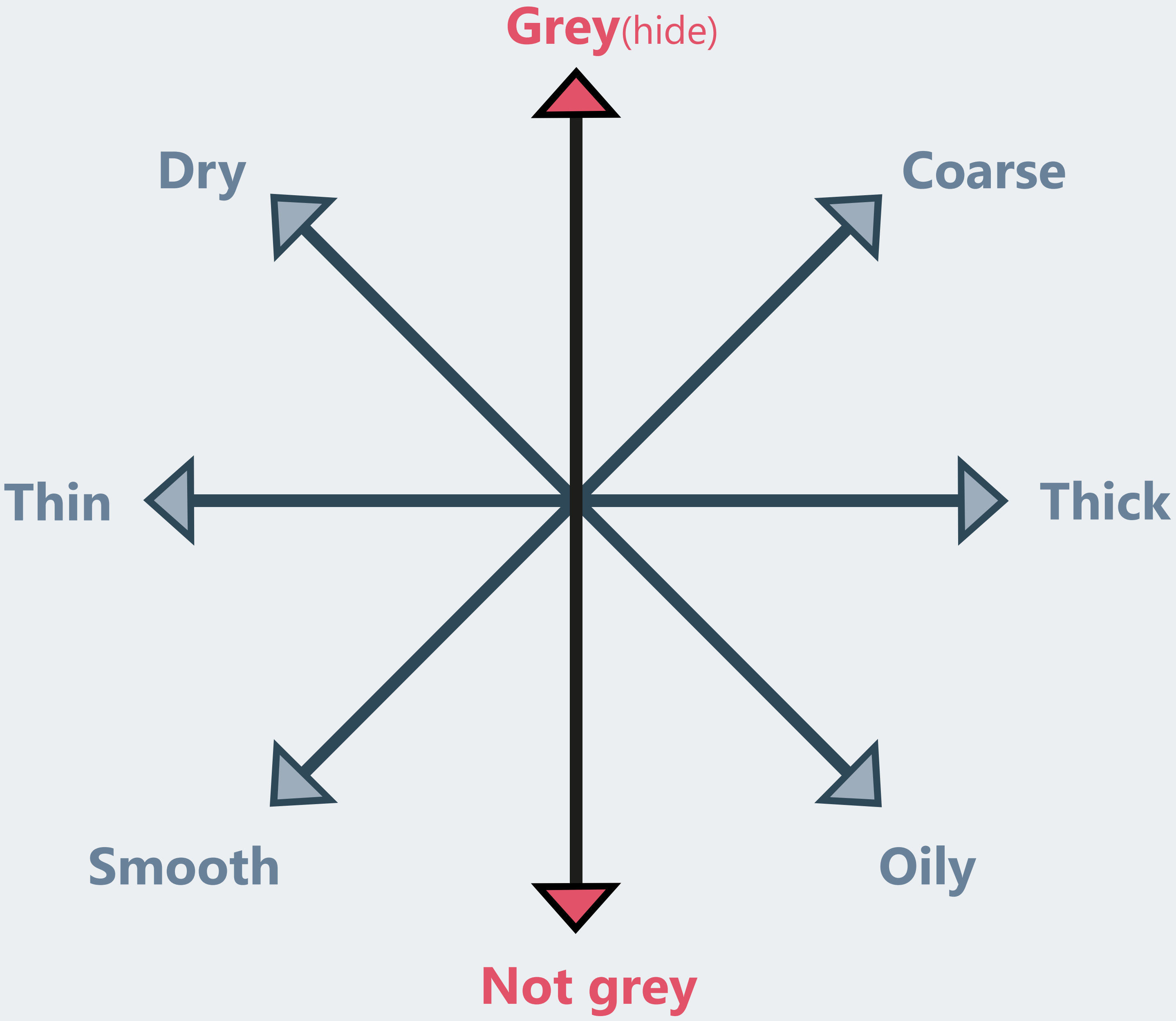
Inspire with positive language

Language is often so negative (turkey neck, saggy skin etc) → Need to rewrite the language + focus on benefits & positivity

Hair brands have oversimplified these women

We need to better support women as their hair texture changes; it's not always about hiding greys

The primary message has traditionally focused on greys. It's a problem-solution message. This misses the diversity that exists beyond this, which has implications for hair care and hair colorants



How to best target women 50+

Contrary to belief, this audience are tech savvy

This isn't just limited to mainstream tech, they engage across a range of different technologies

Almost all..

Use the internet
98% vs. 98% of 16-49

Watch Free TV
88% vs. 82% of 16-49

Listen to radio
77% vs. 72% of 16-49

Browse social media
74% vs. 96% of 16-49

Around half...

Stream TV/ Movies
56% vs. 94% of 16-49

Watch Cable
52% vs. 75% of 16-49

Watch UGC (e.g. YouTube)
50% vs. 80% of 16-49

1 in 3 ...

Post own content on social media
36% vs. 73% of 16-49

Stream music
34% vs. 81% of 16-49

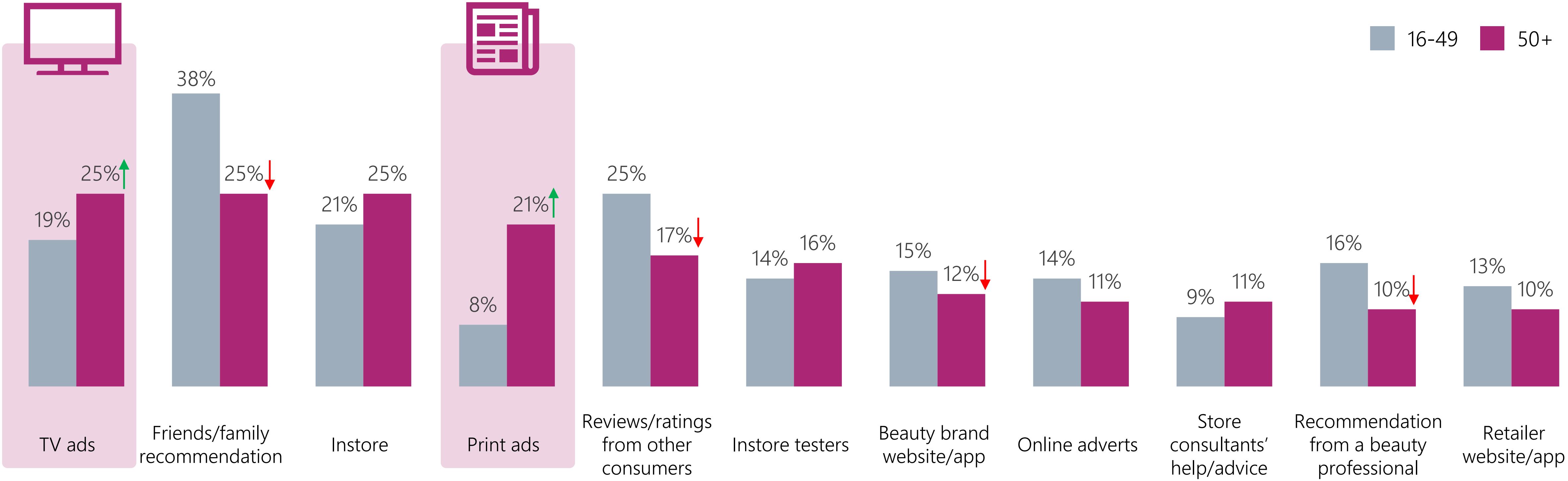
Play video games
27% vs. 61% of 16-49

CL1. How many hours do you spend doing the following activities in a typical week? Base: 16-49 women (518), 50+ women (1041)

Multiple touchpoints represent potential

Traditional media has the highest reach, however don't assume they aren't looking to other channels… they are

Top sources of beauty inspiration amongst 50+ women



They engage in traditional media channel, but online is still important. It's vital to deliver advertising that is relevant to this audience.

Significantly higher/lower than 16-49 year olds

P2. Where, if at all, do you look for ideas and inspiration within beauty? Base: 16-49 women (518), 50+ women (1041)

Online presence is of increasing importance

Placement needs to be on the relevant sites/ apps which won't be the same as younger counterparts

Online purchase of beauty

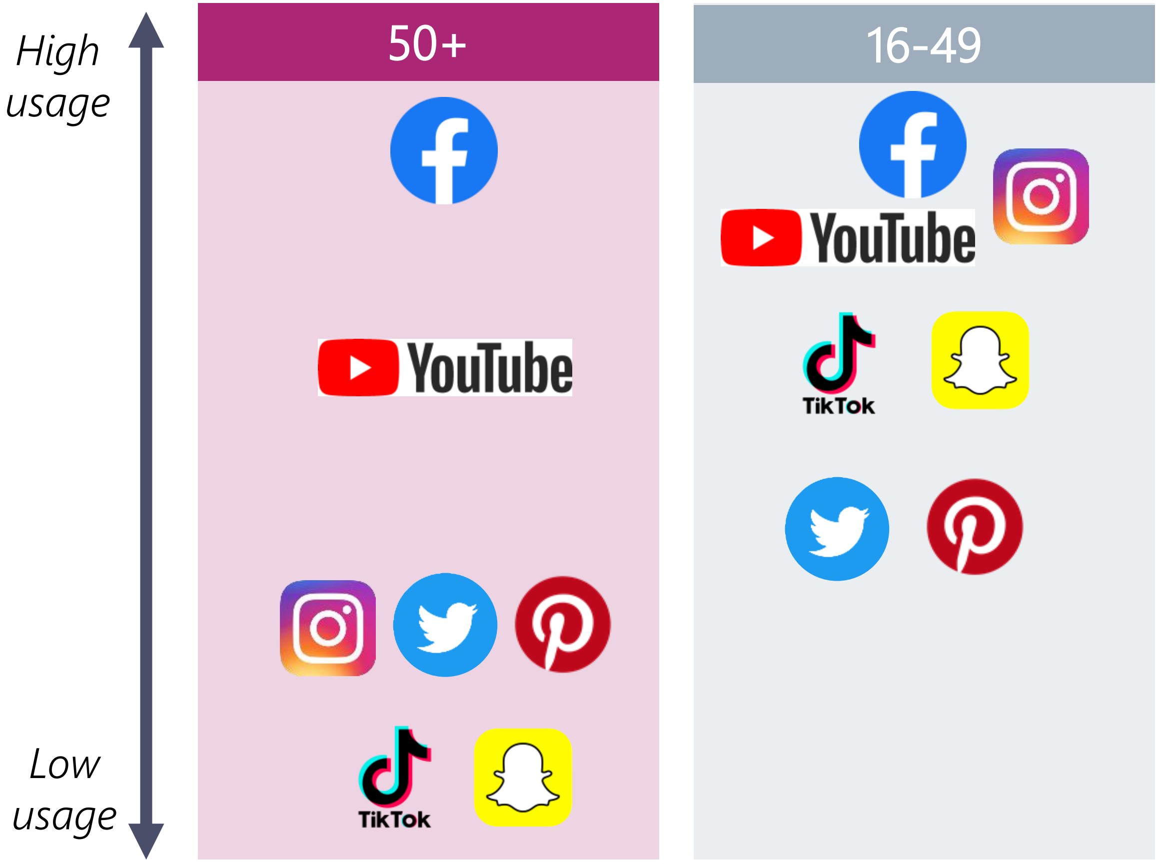
39% buy beauty products online

COVID has also increased their use & comfort of online channels

24% Say they are buying skincare online more than they used to

16% Say they are buying make up online more than they used to

Social media usage



P1. Where do you typically buy beauty products? V1. Has COVID-19 affected your shopping behaviour for skincare and makeup products in any of the following ways? CL2. And specifically, which social media sites do you use? Base: 16-49 women (518), 50+ women (1041)

Our 3 key actions we recommend taking from this study are…..

ACKNOWLEDGING

- Your perception may not be their reality: get to know them for who they are
- Challenge the stereotype and recognise them as a viable and valuable target
- Represent them fully – a diverse audience, defined by more than a number

ASSISTING

- Support & educate them through the time of transition (and beyond)
- Understand changing needs to develop relevant products and a benefit led focus
- Position as an ally: actively challenge the misrepresentation of this audience

ACHIEVING

- Celebrate what aging brings: wisdom, strength, experience
- Foster open and positive narratives around aging to empower not shame
- Consider imagery, language and tone

It’s time to rewrite the narrative…

Introduction to 2CV

2CV

Global consumer insights

1989

ESTABLISHED IN

For more than 3 decades, we've worked with some of the biggest brands across the globe to make their mark with our award-winning insight solutions.

60+

MARKETS

Turning insights into successful strategies for brands in the tech, entertainment, lifestyle and finance sectors, and driving positive change through our social practice team.

4

GLOBAL OFFICES

Our local teams in London, Los Angeles, San Francisco and Singapore offer clients the world's best research thinking, practice and application.

100+

MEMBERS OF STAFF

Specialists in research disciplines, powered by digital innovations, built on a behavioural science foundation, amplified with advanced analytics and creatively brought to life by our information design team and film makers.

Helping businesses thrive

Understanding people to unlock opportunities

Creating simplicity from complexity

2CV | Our Practice Specialisms

Our Tech & Ent practice is fueled by researchers dedicated to understanding disruptive technologies, and with experts in London, LA, San Francisco and Singapore, we're close to the heart of innovation in media, technology and video gaming

The Life and Style practice provides deep, unique perspectives on consumers lives an around global brands that make us look and feel good; from beauty to fashion, food to wellness and culture

2CV's Social practice was formed with a clear mission in mind; to give people a voice to drive positive social change, using innovative, immersive methodologies and sensitivity enabling our clients to make their mark

Our B2B practice has experience in speaking to this specialized audiences and the expertise in delivering insightful results to our clients

A selection of our clients

All of them a partnership

TESCO
hp
CANCER RESEARCH UK
amazon.com
DIAGEO
PELOTON

BBC
Transport for London
sky
Nestlé Good Food, Good Life
THE BODY SHOP

vodafone
Kellogg's
RALPH LAUREN
MARKS & SPENCER
Heineken
Three.co.uk

Disney
UNIVERSAL
UNIVERSAL MUSIC GROUP
co op
COSTA COFFEE
macy's
VIACOM

Virgin media
facebook
EA
SONY
L'ORÉAL
Singtel

2CV

A true partnership

Like our clients, we're selective over who we work with because we know it'll be the start of a long-term partnership

We pick our clients carefully; and we do it for one simple reason: we've been working with some of them for over 10 years. And we mean it when we say we work with our clients, not for them.

That's why all our client relationships are built on three simple principles

1. Trust

It's at the heart of everything we do. Knowing that we'll be there when you need us, that we'll deliver every time, on-time and that no matter what, we want your brand to excel

2. Understanding

Our clients stay with us not just because we're friendly people but because we get them. We understand what they need and what they want, and we understand what's going on in their market. We bring that sector expertise into everything we do

3. Excellence

Ultimately, we're able to have such long relationships because we deliver commercially impactful work consistently. It's why they recommend us and that's how we've built our business

2CV
Areas we work in

We help clients in three core areas; getting to know their audience, creating products and services to meet consumer needs and building effective brand and communication strategies

Audience intelligence

Getting under the skin of your current or potential audience and walking in their shoes. Deep audience empathy to uncover their needs, pains and gains across journeys.

Cultural analysis I Social listening I Sales and Behavioural data analysis I Passive data monitoring I Video observation I Eye tracking I 2CV:Momento | Ethnography | Path to Purchase I Depth Interviews I Diary studies I Focus Groups I Decision making analytics; max-diff and Key drivers analysis I Market Sizing | Segmentation | Choice drivers

Product & innovation

Ideating to fill gaps in the market, developing concepts into launchable products and fine-tuning positioning. Aligning your offer to audience needs in the right way, at the right time and place.

Semiotics I Desk research I Trends I ethnography & immersion I Stakeholder & expert interviews I Leading edge and consumer workshops I Ideation sessions I 2CV:Accelerator; iterative development in focus groups or online pop up communities I Idea screening I Concept testing I Conjoint I Sizing take up I Product testing I Launch evaluation

Brand and communications

Shaping brand and marcoms strategy, optimising messaging and creative for maximum cut through. Tracking the success of your brand, comms and behaviour change.

Accelerator; iterative development in focus groups I Online pop up communities I Sensorium; refinement in context I immersive consumer experiences I Quantitative pre testing, heat mapping and evaluation I Touchpoint intercepts I Accompanied consumer safaris I Social listening I Passive data monitoring I Pre-post evaluations I Vox pop interviews I Behaviour science techniques; IAT, IRT

2CV Toolkits

We have a range of approaches to tackle any client brief, from tried and tested techniques to cutting edge innovative options

Qual and Digital

Getting up close with consumers, delving deep into their lifestyles through ethnography, group discussions, one to one interviews and diaries. Leveraging proprietary techniques and digital innovations to get closer to real life experiences, thoughts and feelings.

Quant and Analytics

From tracking to concept testing, segmentation to conjoint, we have a tool to help you develop, optimise and evaluate. Working with complex datasets to find the insight that is not always obvious at face value.

Underpinned by Behaviour science

All our work uses a range of tools and thinking designed to get closer to the truth and look "behind the scenes" to unlock the hidden factors that can have a powerful effect on behaviour.

Brought to life Creatively

Presenting key insights in engaging, digestible, sharable content to socialise internally and inspire action through film making, motion graphics and information design.

Let’s talk.

london@2cv.com

Sabine.Cronick@2cv.com
Hannah.Davies@2cv.com

MAKE YOUR MARK.

LONDON I LOS ANGELES I SAN FRANCISCO I SINGAPORE