FUTURE OF
BEAUTY

GEN/X

THE INVISIBLE GENERATION

CAN YOUR BRAND AFFORD TO IGNORE THEM?

THE PULL AGENCY

FOREWORD

THIS RESEARCH AND REPORT WAS PRODUCED BY THE PULL AGENCY. THE PULL AGENCY IS A CREATIVE AGENCY AND CONSULTANCY, DELIVERING TRANSFORMATION THROUGH BRAND STRATEGY, DESIGN AND TECHNOLOGY, AND SPECIALISING IN HEALTH AND BEAUTY.

Pull believes that inside every brand there is a better story waiting to be told. Pull's research aim is to provide unique consumer insights that provide inspiration to marketers to make their brands more relevant and appealing to consumers.

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GEN/X

IN THIS EDITION OF FUTURE OF BEAUTY, WE HAVE EXPLORED WHAT DEFINES GEN X AND HOW BRANDS CAN ENGAGE WITH THIS GROUP OF HEALTH AND BEAUTY HEAVYWEIGHT SPENDERS.

Often invisible or misrepresented by society and the media, there is a lot more to be understood about women in their 40s and 50s than you might think. Whilst they share some common characteristics, there is a huge divergence in views, attitudes and habits among this group that is often treated as just a generation of 'mums'.

We wanted to know where real Gen X women stand in all this.

GEN/X

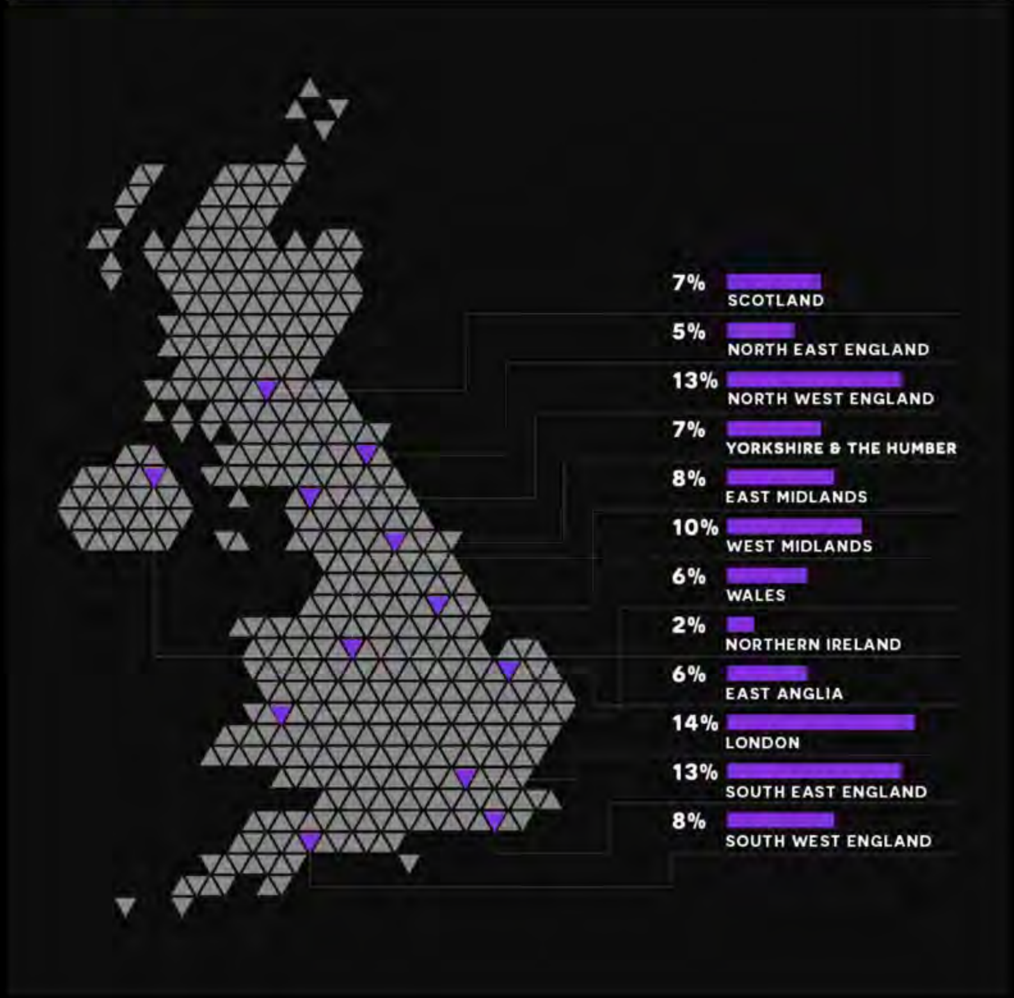
METHODOLOGY

2019 SURVEY

The Pull Agency surveyed over 2,000 UK consumers representative of the 2019 UK population. In 2023 we updated this survey with 840 women to focus in on Gen X women.

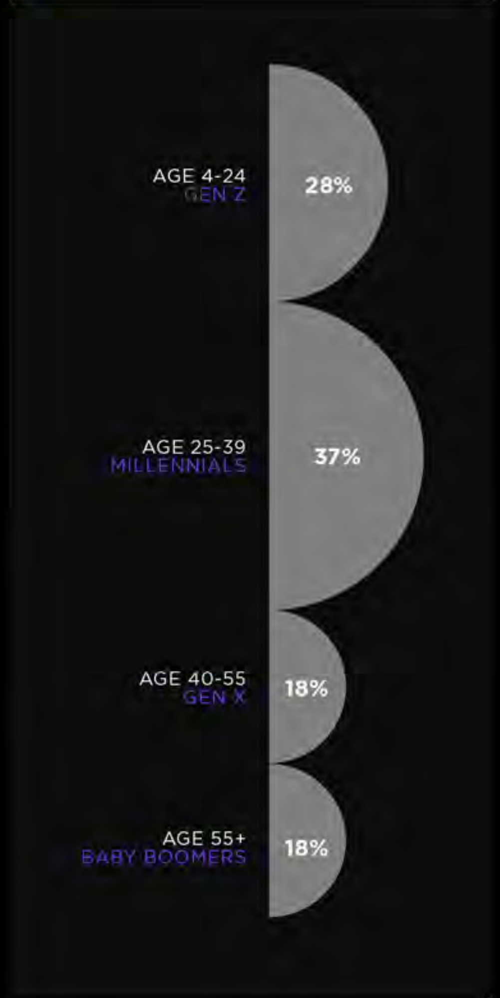
We aimed to better understand what Gen X women really think and aspire to when it comes to health and beauty products, their attitudes towards beauty, health and aging, how this should ideally translate into brands offering the right product/routines, and how to most effectively communicate with them.

LOCATION



SEX

AGE



Source: FOB 2019 Survey

METHODOLOGY

2023 SURVEY – SPOTLIGHT ON GEN X

56%
43-49 years old

44%
50-59 years old

ANSWER CHOICES	RESPONSES
EMPLOYED, WORKING FULL-TIME	41%
EMPLOYED, WORKING PART-TIME	25%
SELF-EMPLOYED	14%
NOT CURRENTLY WORKING	11%
IN FULL-TIME EDUCATION	3%
RETIRED	7%

HOUSEHOLD INCOME
FIG. 4

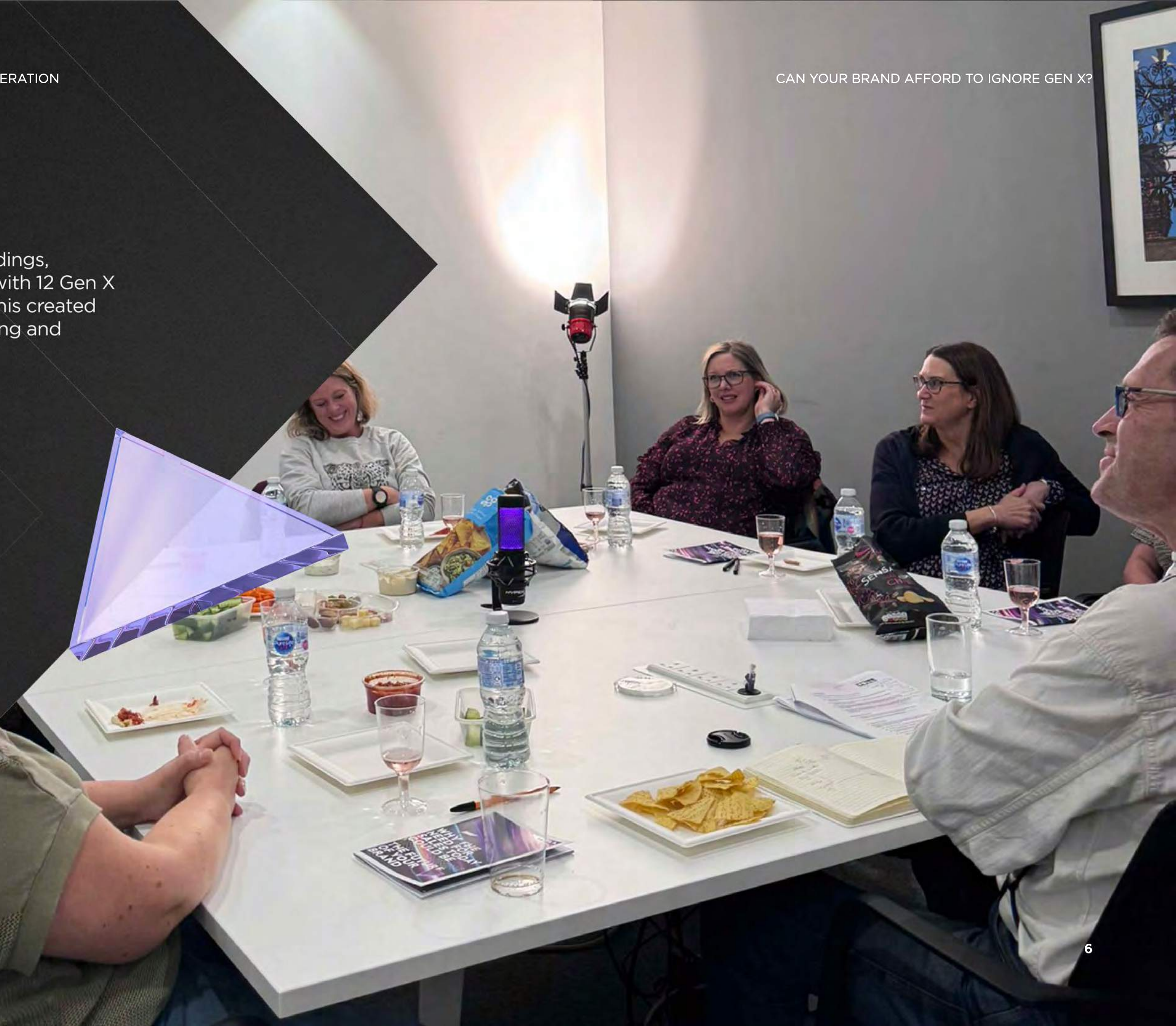
CHILDREN IN HOUSEHOLD
FIG. 5

ANSWER CHOICES	RESPONSES
YES – YOUNG CHILDREN UP TO 12 YEARS OLD	31%
YES – TEENAGE CHILDREN 13-18	24%
YES – GROWN UP CHILDREN	24%
NO – I DON'T HAVE CHILDREN	19%

Source: FOB Quantitative Survey 2023

METHODOLOGY

To provide richness to the quantitative findings, additionally we conducted focus groups with 12 Gen X women aged between 43 and 56 years. This created some deeper understanding of the meaning and motivations behind our survey findings.



GEN/X

Source: FOB 2023 Qualitative Study

ARE GENERATIONAL COHORTS EVEN RELEVANT?

FOR SOME HABITS, YES – BUT DON'T STICK TO SUPERFICIAL STEREOTYPES

There is a growing realisation within the marketing industry that individuals from one generation – for instance Millennials – are no more like each other than they are to Gen X or Gen Z. Demographics have always been a superficial approach to segmentation at best, and at the Pull Agency we encourage clients to spend time and effort on true attitudinal and emotional insights when defining their brand target personas.

So why and how can generational cohort insight still add value? Because in the here and now, they are representative of life stages and ages. Unlike perspectives on other subjects, attitudes to health and beauty evolve with changing needs at different ages which makes a generational study valid for the health and beauty category.

This report will move beyond a simplistic 'chronological age' description and instead share insights into Gen X women's attitudes towards ageing or staying healthy.

We will elevate the nuances of perceptions and habits amongst this age group overall and will debunk a few myths about how different or not their path to purchase really is from other generations.

Finally, these insights are also valid about how Millennials and even Gen Z will see things in the future. We all move through life and reach the 40s and 50s. One thing is for sure; 40s to 50s is the age when disposable income is at its peak and 94% have disposable income left after paying bills. That's some serious spending power your brand does not want to miss out on.

Check out **THE PULL BLOG** on how insights are just as important for smaller brands and well achievable even with smaller budgets

£

94%

of **Gen X** have disposable income after bills

Source: 2019 Experian Spending Power Index Report

WHO ARE GEN X?

IF YOU BELIEVE TV AND CINEMA, GEN X WOMEN ARE ALL FRAIL, FRUMPY AND FRAGILE. THINK AGAIN...

Nielsen reported in 2020 that only 8% of women in TV roles are over 50 (often portrayed as mums). If they do feature, a 2020 study by the Geena Davis Institute on Gender in Media concluded that women over 50 were often portrayed negatively, being depicted as senile or physically frail, and more likely to wear unfashionable clothing.

So, it hardly comes as a surprise that less than 5% of (US) marketing strategies target women over 50, despite Gen X spending significantly more than any other generation on health and beauty: about 44% more than Baby Boomers and 18% more than Gen Z.

GEN/X

Source: 2023 - Pmynts.com
Image credit: Willowberry Natural Skin Care https://www.willowberry.co.uk/pages/agewithoutapology

WHO ARE GEN X?

IS THE HEALTH AND BEAUTY INDUSTRY TOO FIXATED ON YOUTH?

In 2021, Generation X accounted for approximately 14 million UK consumers. This is a sizeable 20% of the overall UK population, nearly at par with 22% Millennials.

Gen X were born between 1965 and 1980 and are currently aged between 43-58. They are often **described as the 'Middle Child' of generations**, sandwiched between Millennials and Baby Boomers. Whilst not born into a digital world, Gen X are digital adopters who easily navigate between traditional and digital media. They saw the birth and rise of technology innovations such as personal computers, mobile phones and the internet, and are far from technophobic: **95% own a smartphone and 41% state online as their preferred shopping route**.

They **spend an estimated £8 billion annually on health and beauty** and are **more frequent users of skin care, hair care and makeup products than both Millennials and Gen Z**. 92% of them are working. A quarter do not have children. **75% browse Instagram for new trends and products**. They are a no-nonsense, pragmatist generation. Many look to social media and influencers for beauty inspiration, but Gen X have a savvy, independent mind with high expectations of brands to deliver results. They value information and authenticity.

Source: FOB 2023 Survey and ONS Statistics

GEN/X

14M

UK consumers were **Generation X**, a massive 20% of the overall population

SHIFTING TRENDS IN ROLE AND STAGE OF MOTHERHOOD

NO SLOWING DOWN IN THE 40S OR 50S: LATER MOTHERHOOD IS KEEPING GEN X 'YOUNGER' FOR LONGER

Whilst the number of childless women has stayed fairly static at 20% since the 1950s*, there is a clear trend of women delaying starting a family. In 2021 the average age when giving birth in England and Wales rose to almost 31 years old compared to 22 for the previous generation*.

The most common key factors are cost of living/childcare on the one side, and women having more economic and educational options than to get married and have children on the other**. The trend of starting families later has led to larger age diversity within friendship groups, and mid-life is a busy balance of juggling families, careers and older relatives at the same time. Gen X women perceive themselves to act younger than their parents when they were in their 40s/50s.

TOP REASONS FROM UCL STUDY FOR HAVING CHILDREN LATER IN LIFE**

46%
I am developing my career

37%
I am not financially ready

28%
I have fertility issues

25%
I am not ready to have children

Source: * Office of National Statistics
** UCL London 2022 Online Survey

ATTITUDES TO AGEING ARE FLUID AND COMPLEX

AGE REMAINS SOCIETY'S LAST TABOO

There is consensus amongst women that perceptions of women ageing have not much improved and whilst some progress has been made within the health and beauty industry, societal pressures and beauty expectations still have a long way to go.

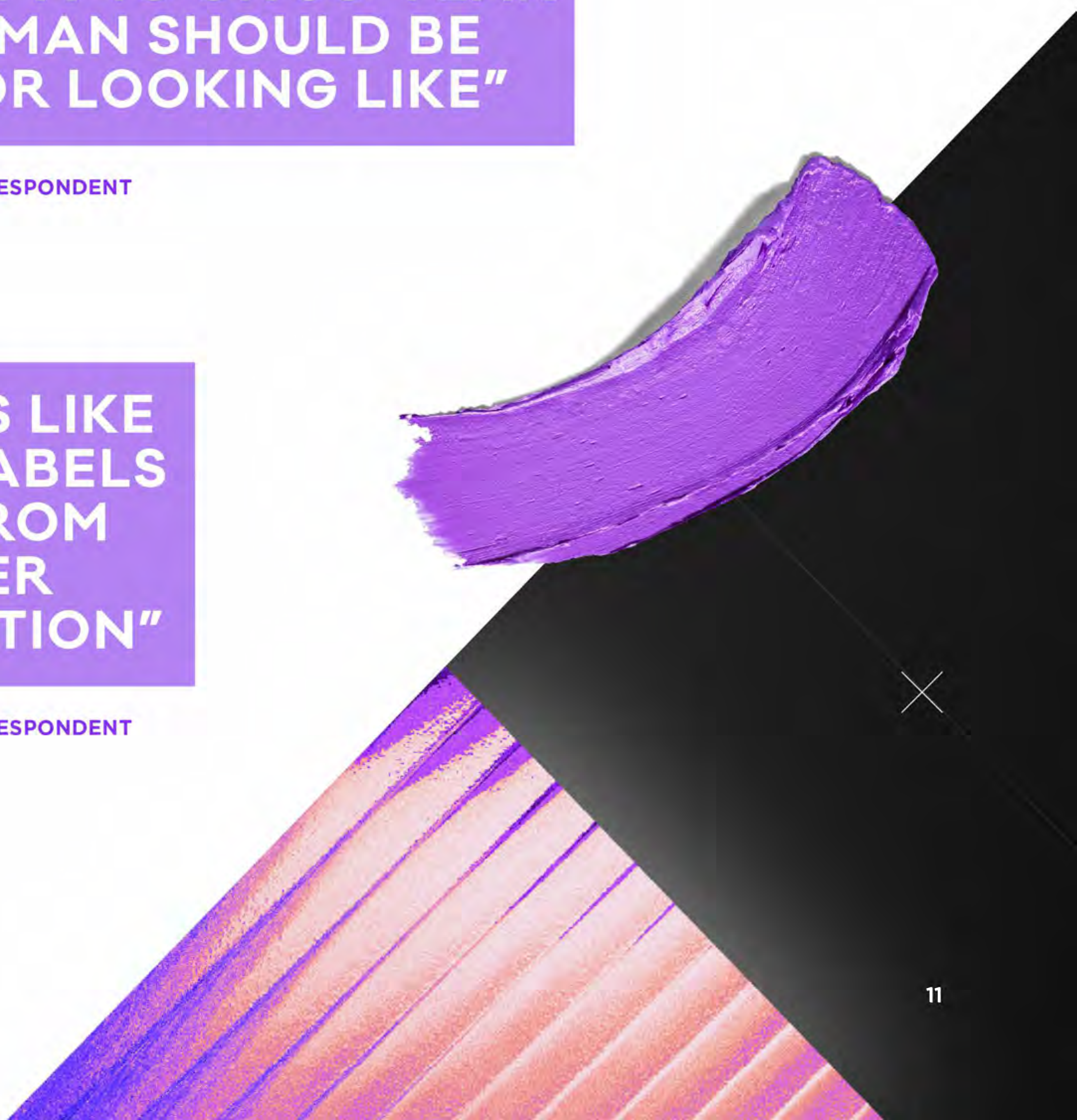
Most old and newer labels used in the industry – from anti-ageing or age defying to ageing gracefully – are generally received with much reservation and rejection by Gen X women. They just want to age of their own accord and without the feeling that women are "past their best" once they hit a certain age (usually in their 40s).

> "WE ALL WANT TO AGE APPROPRIATE TO OUR OWN SORTS. WE SHOULDN'T LIVE UP TO SOME SORT OF SOCIETAL EXPECTATION OF WHAT A 40 OR 50-YEAR OLD WOMAN SHOULD BE DOING OR LOOKING LIKE"

FUTURE OF BEAUTY RESPONDENT

> "IT SEEMS LIKE THESE LABELS COME FROM AN OLDER GENERATION"

FUTURE OF BEAUTY RESPONDENT



Source: FOB 2023 Quant and Qual Survey

GEN GEN GEN GEN GEN GEN

XXXXXX

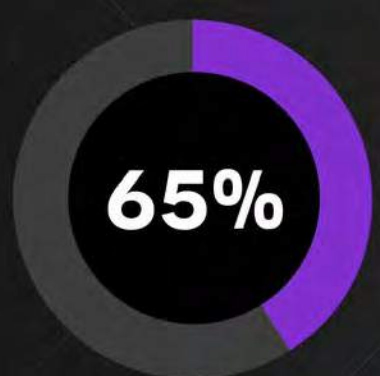
"I THINK A LOT HAS CHANGED BECAUSE I THINK IT'S MORE ACCEPTED NOW THAT PEOPLE ARE BUILDING CAREERS, YOU ARE MEETING PARTNERS LATER IN LIFE AND THEREFORE YOU START YOUR FAMILIES LATER. IT'S ALMOST THE LIFESPANS HAVE BECOME STRETCHED. NOW BEAUTY WISE I THINK THAT'S A TOTALLY DIFFERENT STORY. PERSONALLY, I THINK YOU'RE BOMBARDED FROM ALL ANGLES TO BE YOUNGER."

FUTURE OF BEAUTY RESPONDENT

ATTITUDES TO AGEING ARE FLUID AND COMPLEX

The 2023 survey revealed that as women grow older, their focus shifts from looking to feeling good. 65% of Gen X said it was more important to feel good than to look good.

Our group discussions and open survey comments very quickly caveated that both go hand-in-hand and that it is really about looking your best for the age you are at.



of Gen X women said it was more important to feel good than look good.

GEN/X

Source: 2023 FOB Survey

> **"LOOKING WELL MAKES YOU FEEL GOOD"**
>
> FUTURE OF BEAUTY RESPONDENT

> **"THEY GO HAND-IN-HAND"**
>
> FUTURE OF BEAUTY RESPONDENT

> **"I LIKE TO LOOK NICE, BUT WOULD BE HAPPIER WITH FEELING GOOD THAN LOOKING GOOD"**
>
> FUTURE OF BEAUTY RESPONDENT

> **"FEELING GOOD MAKES YOU LOOK GOOD"**
>
> FUTURE OF BEAUTY RESPONDENT

ATTITUDES TO AGEING ARE FLUID AND COMPLEX

When we segmented our sample by respondent based on how important it was to them to either fight signs of ageing or to let ageing take its course naturally, it became clear that 40% of Gen X remain very self-conscious about ageing and would rather do their best to prevent, fight or cover up signs of ageing.

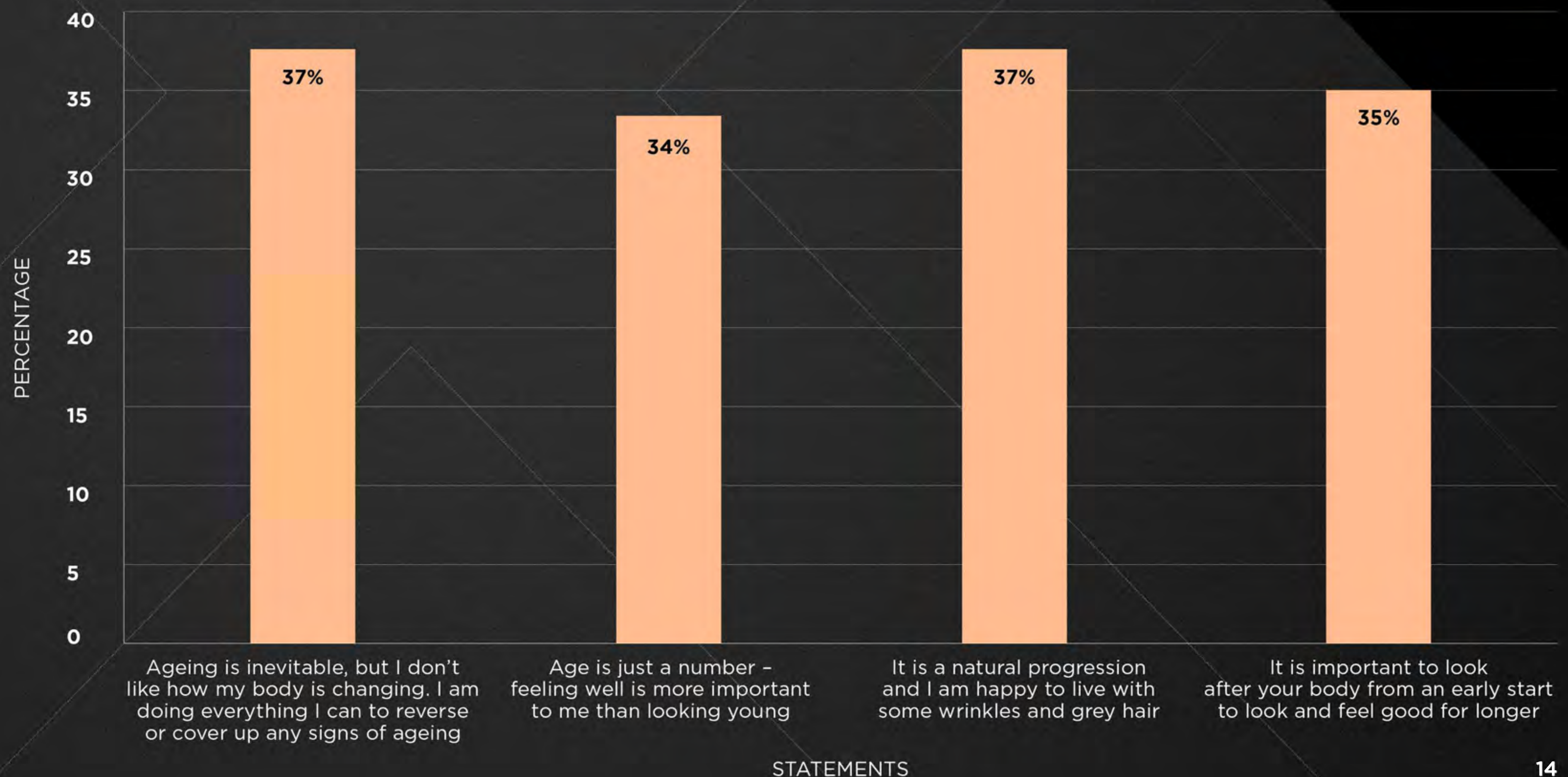
The data also shows that as much as most women agree that ageing for women should be normalised, it appears that for now women cannot entirely escape the pressures from society and media. To look beautiful still means looking younger than your age for many. Mintel (2021) reported that more than half of UK female consumers are 'stressed' about ageing skin and greying hair despite a rising momentum for the concept of body positivity.

Amongst 'age-defying' Gen Xers, looking good was most important to nearly half (48%) versus 33 % amongst those who are happy to embrace the signs of ageing. This demonstrates how important it is to know who your core audience is. For some a claim like anti-wrinkle/anti-ageing will be highly motivational, whereas others reject it as unrealistic and somewhat patronising.

A route that looks to work best for most Gen X women is to stay clear of age messaging altogether and just focus on the symptoms and conditions products are designed to improve, from toning or creating a glow (34%) to reducing lines and wrinkles (28%) or specific conditions such as adult acne, blemishes, or dark spots (12%).

WHAT DOES AGEING MEAN TO YOU? PICK 1-2 STATEMENTS THAT BEST DESCRIBE YOUR PERSPECTIVE

FIG. 7



Source: 2023 FOB Survey

IGNORE BIOLOGY – AGE IS NOT THAT EASILY DEFINED

SELF-PERCEIVED AGE OF GEN X WOMEN IS FLUID AND DEPENDENT ON CONTEXT AND PERSONAL EXPERIENCES

A 2023 study by the University of Nottingham Trent discovered that how Gen X women in the UK deal with and define their age is as fluid as it is complex. They found that Gen X women are especially resistant to demographic age-identity expectations. Biological age is of secondary importance. Women are far more likely to operate according to a perceived age defined by self-identity and psychographics. Simply positioning brands or products by age brackets (e.g. over 50s) often does not work.

The study identified seven age frames that define how Gen X women view and deal with age. They also found that women move between these mindsets depending on context and recent experiences. This makes Gen X a moving target that can make communications challenging but also make it crucial to really understand your brand's consumers well. Generalised Gen X stereotypes will only get you so far. Understanding the attitudes that define the seven mindsets and knowing where your brand's core audience fits in is more likely to lead to motivating and engaging communications.

AFFECTIVE

PROTEST

ACCEPTANCE

CAMOUFLAGE

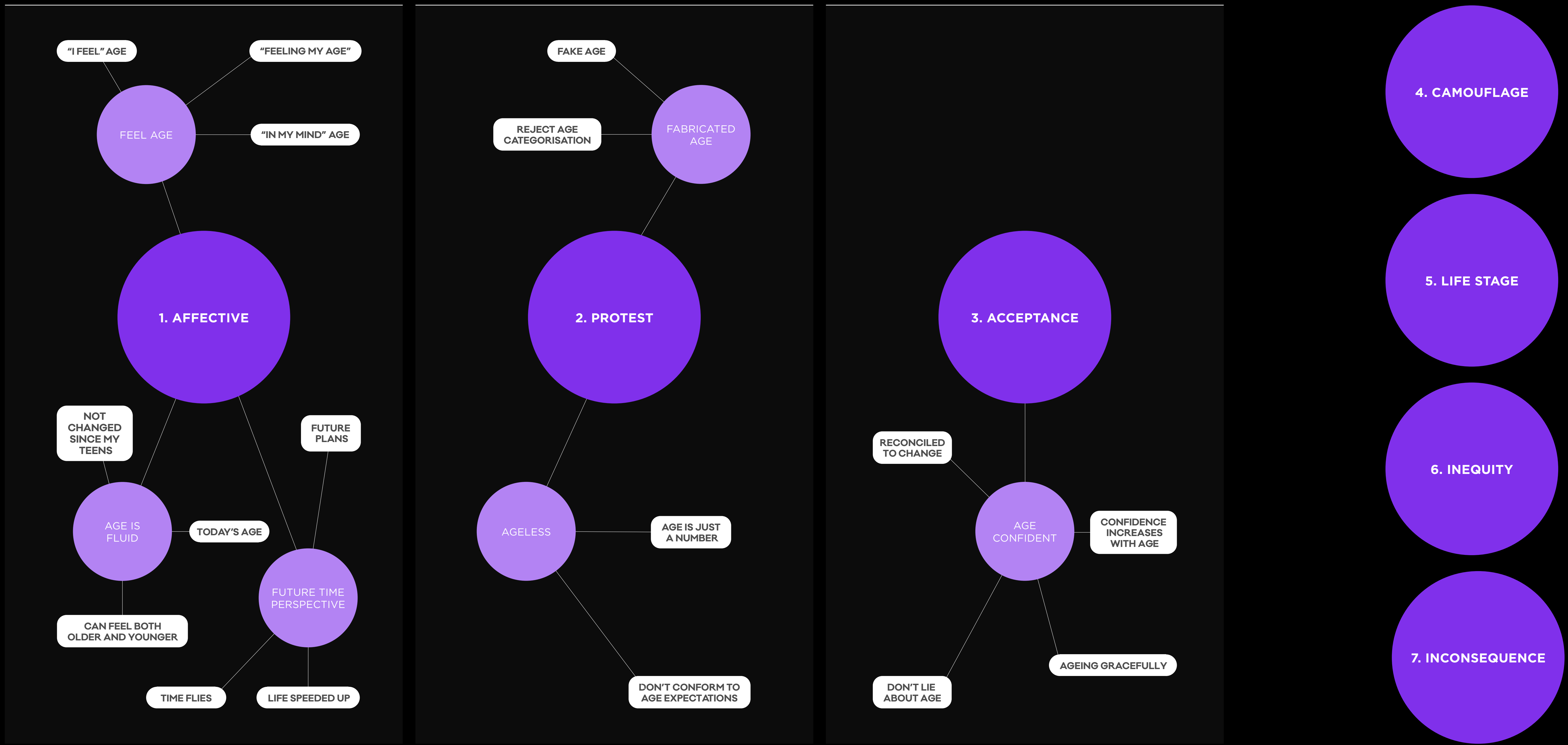
LIFE STAGE

INEQUITY

INCONSEQUENCE

GEN X WOMEN EXPERIENCE AGE IN SEVEN WAYS

If you are interested to find out more details from this study, please click on the link below.



Source: Qualitative Study, University of Nottingham Trent 2023
https://phys.org/news/2023-05-generation-women-age-ways.html

WHAT DO GEN X CARE ABOUT?

BRANDS THAT SPEAK TO A WOMAN'S LIFE STAGE IN A PERSONAL WAY HAVE A BETTER CHANCE TO CONNECT TO WOMEN WITH THE RIGHT MESSAGE IN THE RIGHT MOMENT.

A beauty fan at heart or a believer in more natural, holistic methods of body care – these attitudes and habits tend to carry through women's lives irrespective of age.

Product needs and usage evolve: big factors are life milestones, from childbirth, menopause or simply getting older and seeing age take a toll on skin and body. For Millennials and Gen Z, beauty is a playground, led by testing outlooks and seeking self-expression. As women grow older, the focus shifts towards prevention and addressing specific needs. For Gen X, beauty is becoming a part of a holistic approach to overall wellness as they consider all the ways to make themselves look and feel their best.

Skincare is taking a lead role with specific solutions to glowing, healthy looking skin from the inside and out. Skin is a key signifier of beauty and youthfulness, and Gen X are outspending Gen Z by 53%.

Key trends for Generation Z within the health and beauty category include health and wellbeing, personalisation, cruelty free and the environment.

GEN/X

Generation X outspend **Generation Z** on skin care by

53%

Source: FOB 2023 Survey

2019 GEN X TRENDS

HEALTHY SKIN

CRUELTY-FREE

INGREDIENTS

HOLLISTIC

LESS PLASTIC

MINMAL PACKAGING

SKIN TYPE

HEALTH

PERSONALISATION

EYELASHES

KEEPING FIT

YOUNGER LOOKING SKIN

EFFICACY

BEAUTY FROM WITHIN

AROMA THERAPY

LOCALLY SOURCED

LESS CHEMICALS

SUPPLE-MENTS

ENVIRONMENTALLY FRIENDLY

LOOK GOOD

LESS IS MORE

VITAMINS

NATURAL

SUPER FOODS

GOOD SKIN

NEW PRODUCT TECHNOLOGY

REVIEWS

ORGANIC

WELLNESS

FEEL GOOD

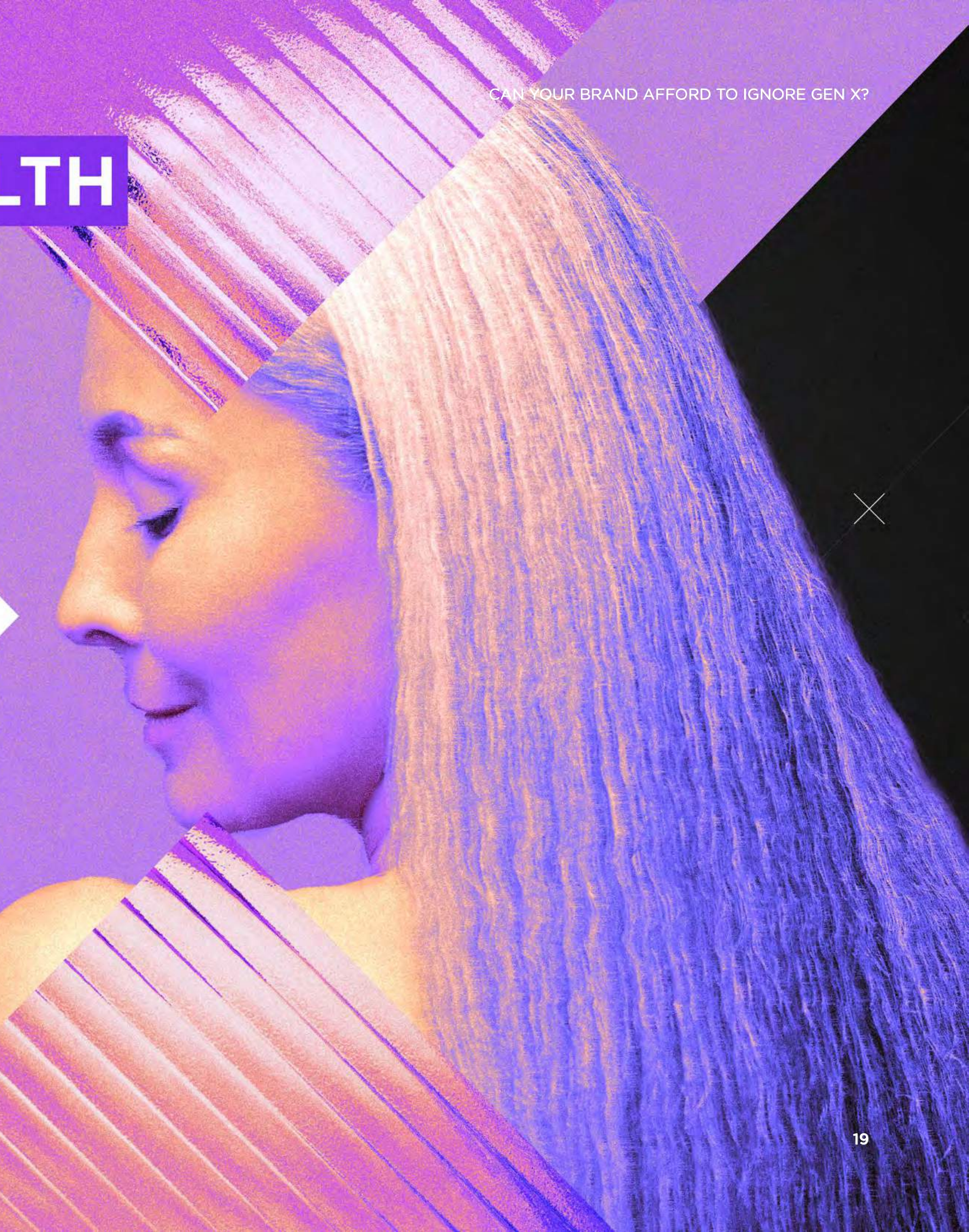
VEGAN

ETHICAL

DISCOVERING THE HEALTH & BEAUTY CATEGORY

GEN X ARE CONFIDENT DIGITAL ADOPTERS OPEN TO TRYING NEW THINGS

Many Gen Xers would describe themselves as experienced health and beauty shoppers who know what they are looking for. That does not mean they are stuck in the past. In fact, only 12% are sticking to tried and trusted products. In part this is driven by changing needs and with it comes a shift from makeup to skincare and health products. 70% of Gen X are using skincare products daily compared to 51% for makeup.



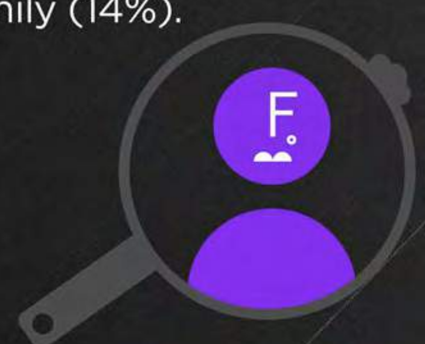
Source: FOB 2023 Survey

> “I NOW SPEND LESS TIME PUTTING ON MAKEUP AND MORE TIME ON SKINCARE”

FUTURE OF BEAUTY RESPONDENT

DISCOVERING THE HEALTH AND BEAUTY CATEGORY

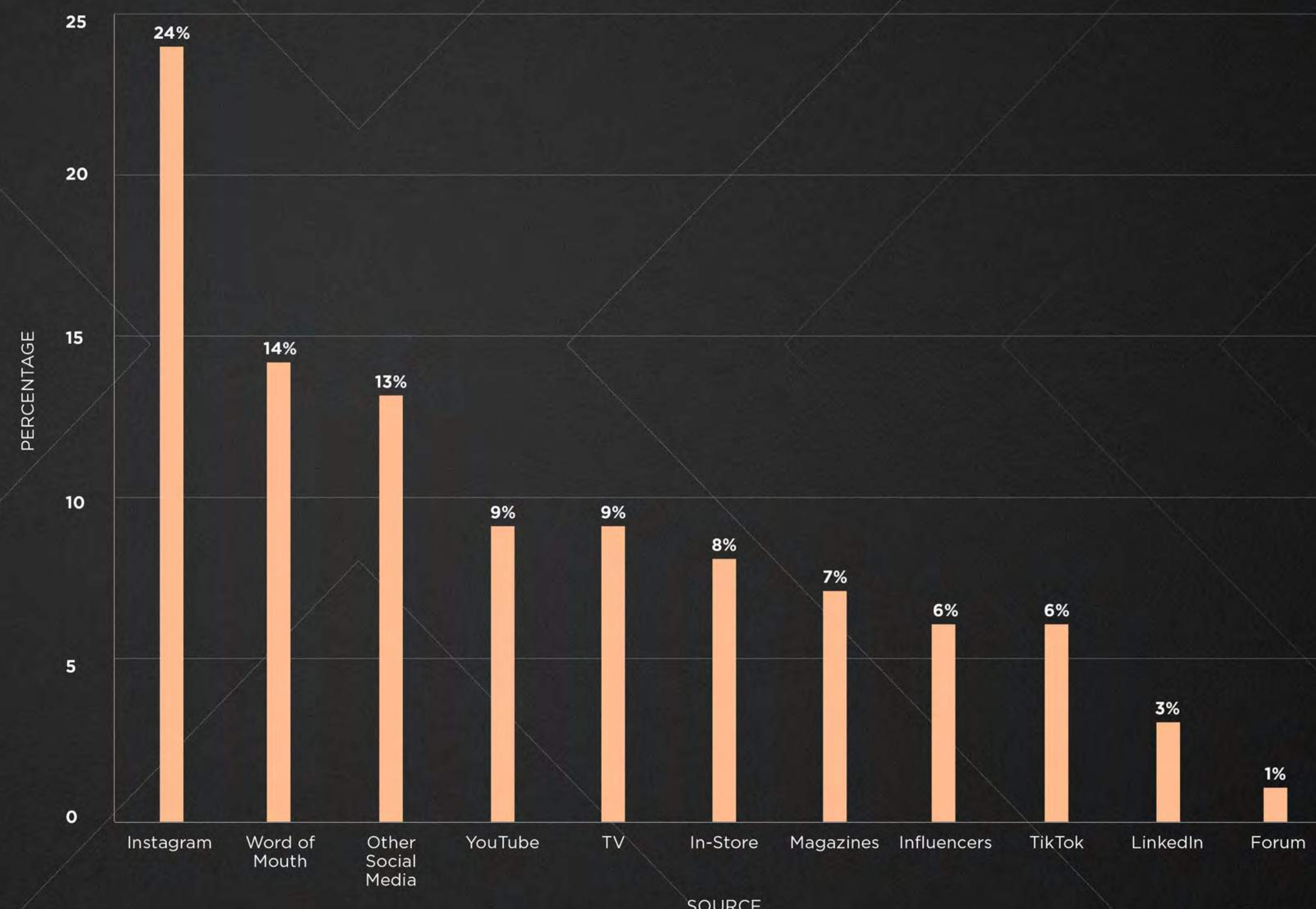
As Gen X are extending their skincare and healthcare regimes, discovery of new trends and looks is important to them and happens mostly online. Gen X women describe themselves as time poor – often juggling a mixture of career, childcare and supporting elderly relatives. With 95% smartphone ownership, it is not surprising that mobile and bite-size friendly online discovery takes the lead. Our research showed that nearly half of Gen X women are discovering trends through social media (47%) or YouTube (9%) compared to TV (9%) or magazines and influencers (7%). A quarter are looking at advertising (cross channels) to discover new products, but are also browsing in-store (15%) or look to recommendations from friends and family (14%).



54% of **Gen X** are looking online for health and beauty inspiration.

WHERE DO YOU DISCOVER NEW LOOKS OR TRENDS?

FIG. 8



Source: FOB 2023 Survey

DISCOVERING THE HEALTH AND BEAUTY CATEGORY

Gen X are information-led and want to be told what exactly products are offering. Made up pseudo-scientific ingredient names, or claims endorsed by a meagre handful of women, are not winning over women who are both savvy as well as straight-talking. Gen X are keen to understand exactly what's in it for them and **77% will put effort into researching new products further**.

Many assume this generation would feel more comfortable going in-store to shop rather than dive into the online world. But for this time-poor cohort, the convenience to explore and order products at the touch of a button is just as attractive, if not more than for younger demographics. In fact, twice as many Gen Z (28%) are exclusively researching and buying in-store rather than Gen X (14%) or Millennials (15%).

When it comes to researching product, online plays a major role for more than two thirds of Gen X: 31% search and buy online with a further fifth (19%) researching online and then buying in-store and 13% browse/try products whilst out at stores to then buy online.

Exclusively buying and researching in store:

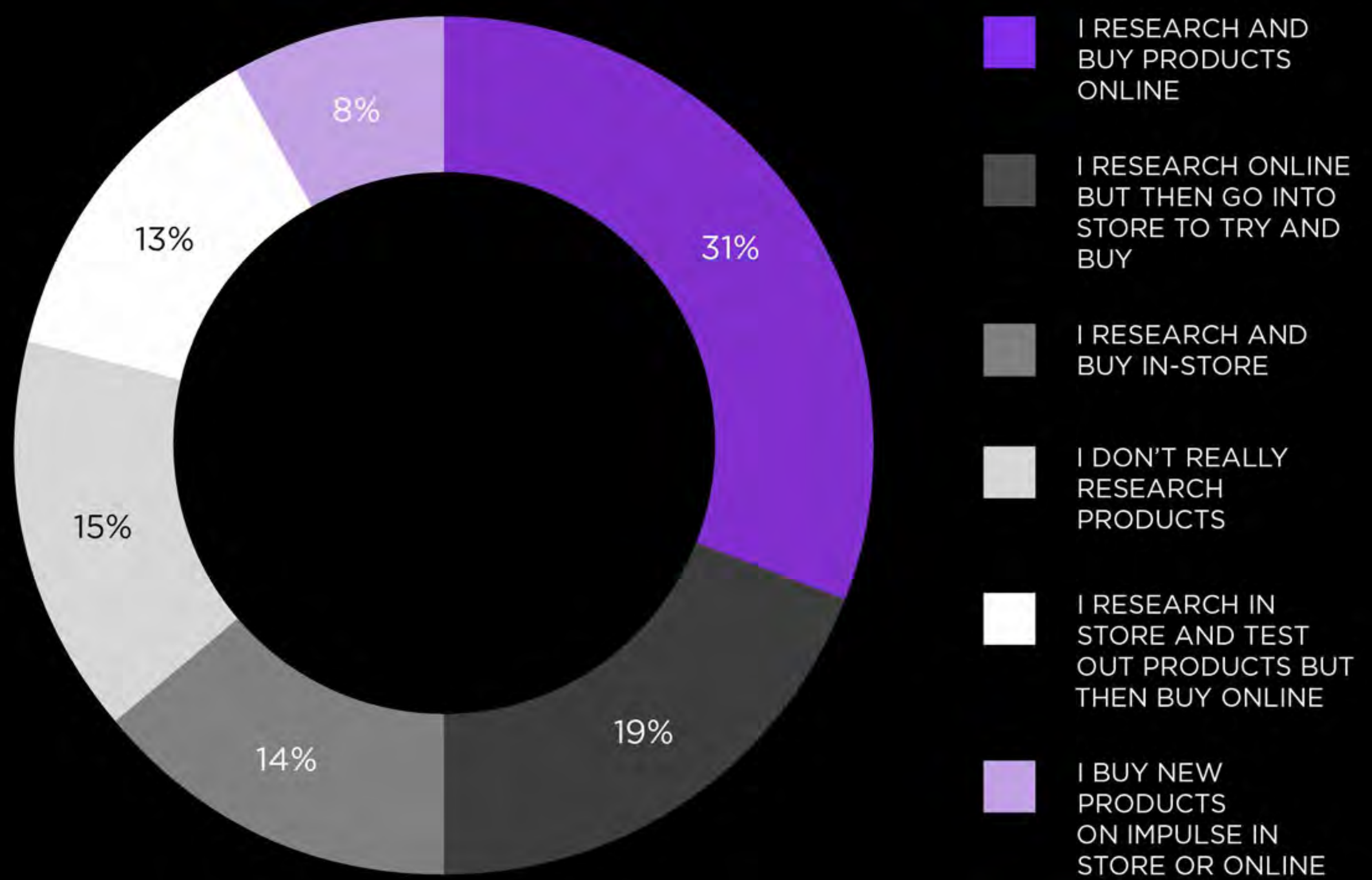
14%
GEN X

15%
MILLENNIALS

28%
GEN Z

HOW DO YOU RESEARCH NEW HEALTH AND BEAUTY PRODUCTS BEFORE YOU PURCHASE?

FIG. 9



Source: FOB 2023 Survey

THE POWER OF ENDORSEMENTS

GEN/X

GEN X ARE SCEPTICS – MAKE IT PERSONAL TO WIN THEIR TRUST

When learning more about health and beauty products, Generation X mostly trust talking to real people: half of the respondents rely on word of mouth from friends and family (50%) or professionals (33%).

Gen X women are taking increased note of influencers, but whilst one in five can be persuaded by influencers (up from 7% in 2020), most Gen X do not put much trust in their content. Scepticism is particularly high when it comes to celebrity endorsements. Lack of expertise, bias from sponsorship fees and faked authenticity undermine their credibility. What resonates more with Gen X women is 'getting real', talking about body confidence and life-stage issues that really matter, or credible experts explaining in simple terms how the body changes with age and how exactly products and ingredients can help.

Source: FOB 2023 Survey

“WHY DIDN’T YOU TELL ME THOSE FACTS RATHER THAN FLUFFY MARKETING SPEECH WHICH TELLS ME NOTHING ABOUT HOW THE PRODUCT WORKS?”

FUTURE OF BEAUTY RESPONDENT

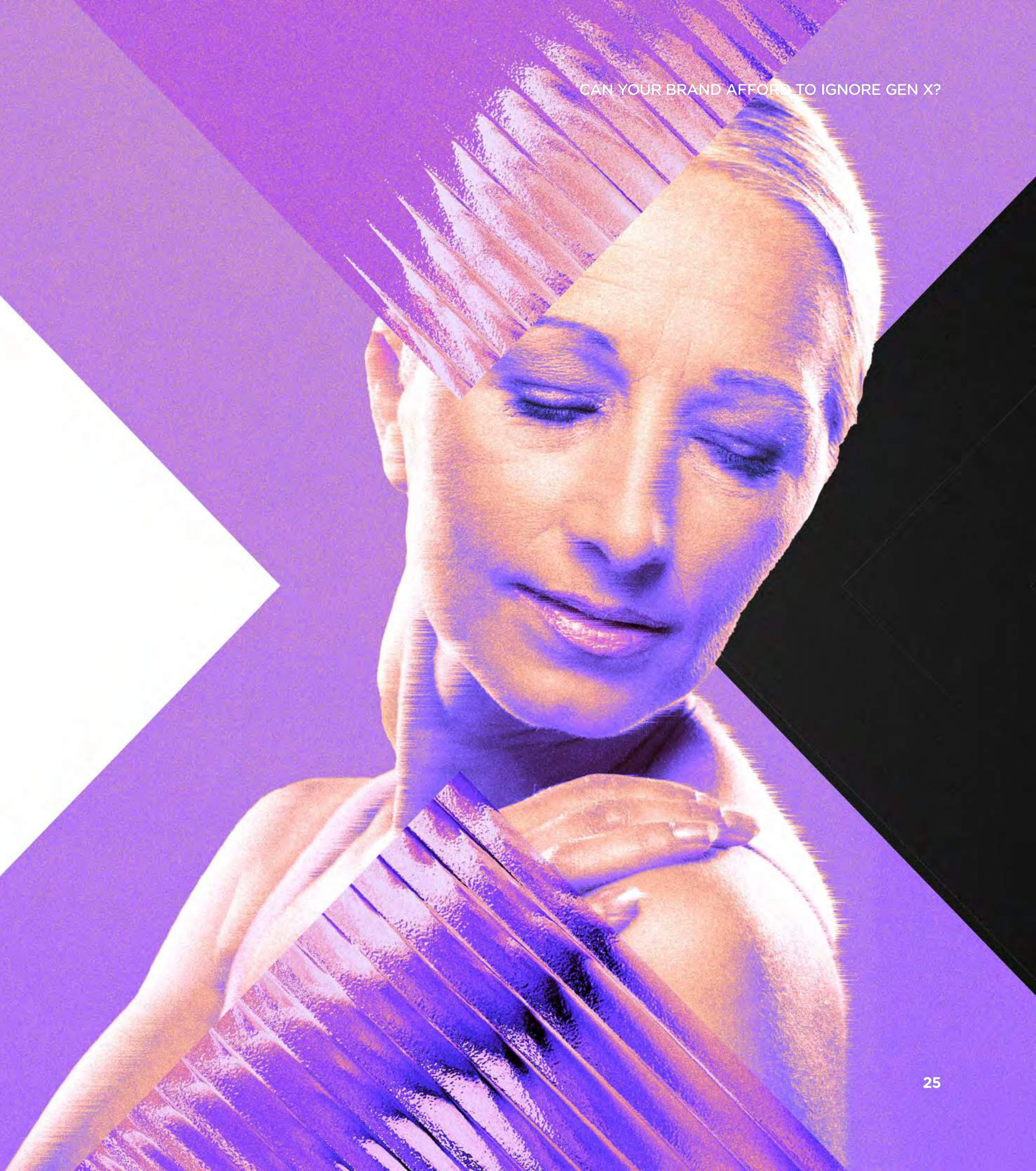
GEN/X

DISCOVERING THE HEALTH AND BEAUTY CATEGORY

GEN X ARE SCEPTICS – MAKE IT PERSONAL TO WIN THEIR TRUST

Online product reviews prove powerful to validate women's interest in a brand or product: three quarters of Gen X women will be influenced by online reviews. 39% of them will then go into store to try and buy. 34% move straight from online reviews to online purchases.

75% of Gen X are influenced by product ratings and reviews when purchasing a health and beauty product.



Source: FOB 2023 Survey

THE POWER OF ENDORSEMENTS

WHO ARE YOU MOST LIKELY TO BE INFLUENCED BY WHEN THINKING ABOUT HEALTH AND BEAUTY PRODUCTS?

FIG. 10

	GEN Z	MILLENNIALS	GEN X
CELEBRITY	4%	8%	12%
AN INFLUENCER/ VLOGGER/ BLOGGER	20%	26%	23%

Source: FOB 2023 Survey

"JUST BECAUSE THEY ARE FAMOUS DOES NOT MEAN THEY KNOW ABOUT HEALTH AND BEAUTY"

FUTURE OF BEAUTY RESPONDENT

GEN/X

"MOST OF CELEBRITIES HAVE USED AESTHETIC TREATMENTS OR PHOTOSHOP. IT'S NOT THE PRODUCT THAT MADE THEM LOOK BETTER"

FUTURE OF BEAUTY RESPONDENT

GEN X ARE GOING ONLINE TO LEARN MORE ABOUT PRODUCTS

GEN/X

At the same time, we can observe a shift over time in how many Gen Xers are seeking information on the high street: between 2020 and 2023, the percentage of people learning about products in-store dropped from 50% to 30%. Usage of social media for information is up 10 percentage points versus 2020. Contrary to popular belief and 79% registration levels, Facebook is not the most widely used platform: 41% of Gen X are likely to utilise Instagram, 36% Facebook and 22% YouTube. Traditional channels such as TV, magazines and branded websites are still in play, but have dropped to lower levels compared to 2020.

YouTube has successfully positioned itself as a video content platform where 43% of Gen X women like to be inspired or educated. Whilst not everyone is interested in tutorial videos, those who are, are twice as likely at 40% to browse on YouTube than other platforms.

25%

Yes, I look to videos for health and beauty inspiration

20%

Yes, I search for videos that provide education and tutorials

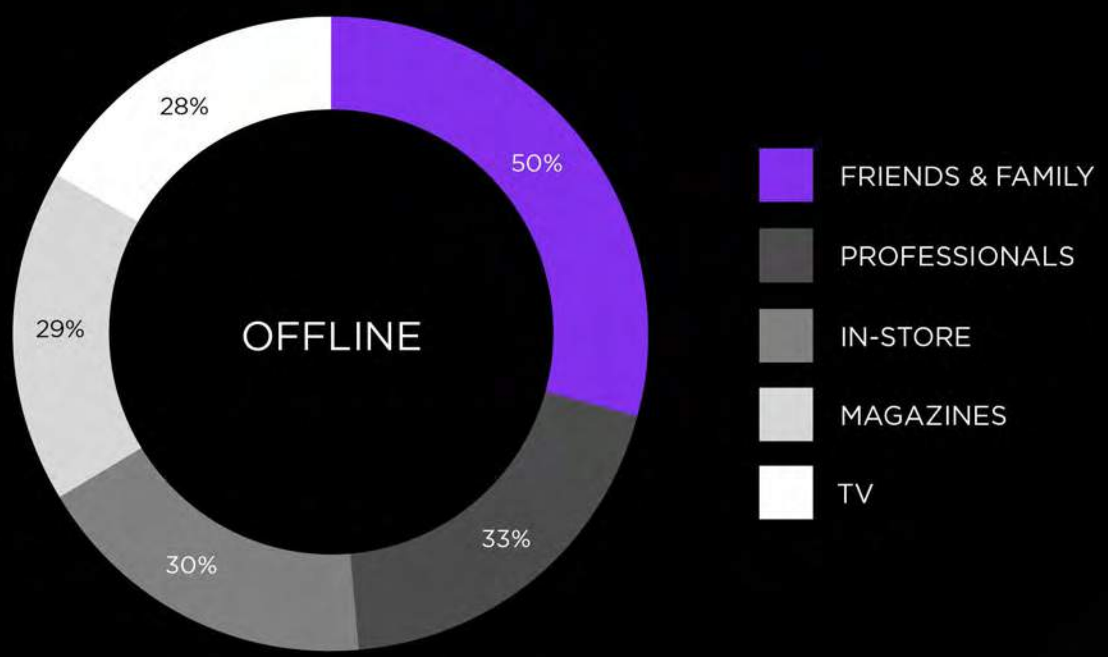
Source: FOB 2023 Survey

GEN X ARE GOING ONLINE TO LEARN MORE ABOUT PRODUCTS

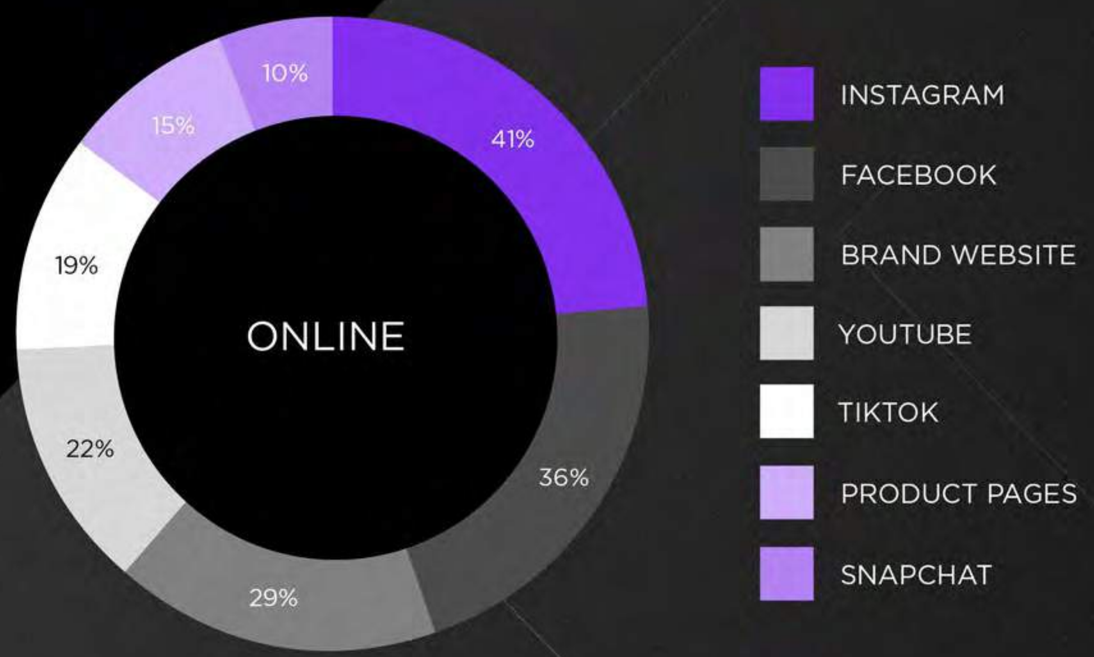
WHERE DO YOU LEARN ABOUT HEALTH AND BEAUTY PRODUCTS?
SELECT ALL THE PLACES BELOW WHERE YOU LEARN MORE ABOUT HEALTH AND BEAUTY PRODUCTS

FIG. 11

OFFLINE/TRADITIONAL CHANNELS



ONLINE CHANNELS



Source: FOB 2023 Survey

HOW DO GEN X SHOP?

A TALE OF TWO HALVES – DISCOVERY VERSUS CONVENIENCE

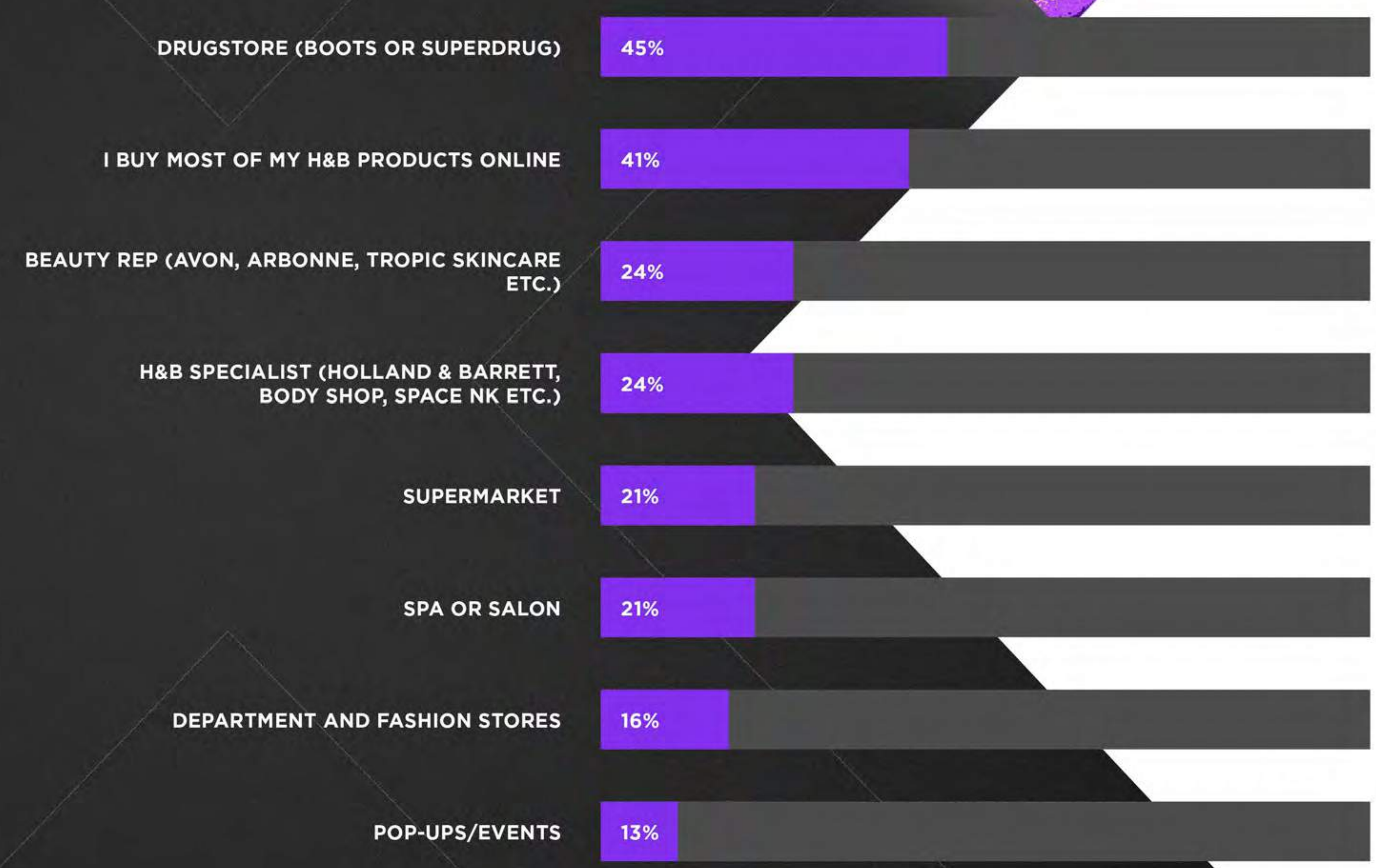
Close to half **(45%) of Generation X prefer to shop for health and beauty products in a high street chemist** and **another quarter head into a beauty specialist**, but **online shopping amongst Gen X has risen in popularity from 15% in 2020 to 41% in 2023**.

Whilst the high street remains the clear destination for health and beauty brand discovery, where Gen X women can try products or get personal advice from a variety of health and beauty specialists, online shopping has become a close second favourite. Virtual try-on or personalisation technologies, product demos and in-depth information, combined with the convenience of home delivery, have attracted a loyal following of Gen X online shoppers.

When it comes to supermarkets, it is **twice as likely to be a Millennial (37%) stocking up health and beauty products as part of their weekly shop than Gen X women (21%)**. Gen X are increasingly moving to more advanced solutions that are not as widely stocked in grocery stores.

WHERE DO YOU SHOP MOST OFTEN/REGULARLY FOR H&B PRODUCTS?

FIG. 12



Source: FOB 2023 Survey

WOMEN ARE AT PEAK SPENDING POWER IN THEIR 40S & 50S

GEN X HAVE MONEY AND DESIRE TO INVEST IN HEALTH AND BEAUTY

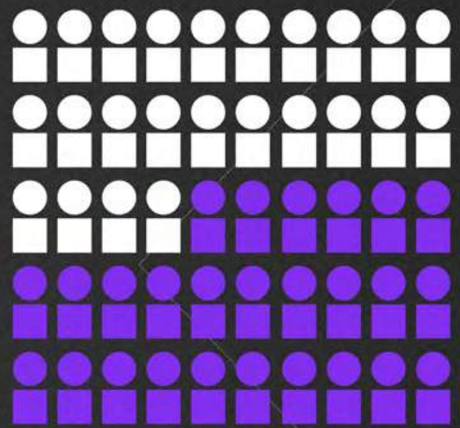
94%

Have money left after spending bills

Gen X spend

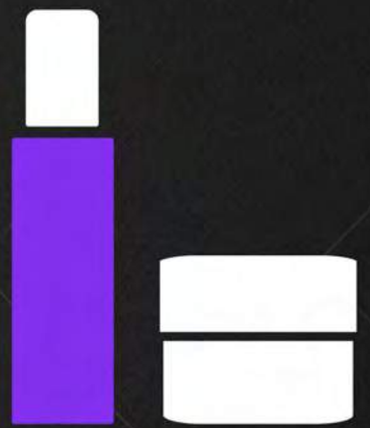
53%

More on skin/haircare than Gen Z



49%

Nearly half of Gen X spend between £16 and £50 per month on health and beauty



35%

Spend between £30 and £100 on vitamins and supplements

Source: FOB 2023 Quant and Qual Survey

"I LOVE ANYTHING THAT'S COLLAGEN BOOSTING, YOUR COLLAGEN REDUCES EVERY YEAR BY 2.3%. SO THAT'S THE THING, ELASTICITY, COLLAGEN TO MAKE YOUR SKIN FEEL REALLY GOOD. I'M A CLINICAL DATA KIND OF GIRL, I NEED TO SEE THE STUDIES AND WHAT IT IS THAT'S REALLY GOOD ABOUT IT - WHAT STANDS OUT ABOUT THIS PRODUCT FROM EVERYTHING ELSE IN THE MARKET."

FUTURE OF BEAUTY RESPONDENT

GEN/X

PRODUCTS AND REGIMENS – FROM SELF-EXPRESSION TO HEALTH AND WELLBEING

GEN/X

ROUTINES SHIFT FROM LESS TIME SPENT ON MAKEUP AND MORE ON SKINCARE

We asked Gen X women in focus groups if and how their routines or product usage changed over time. In their 20s and 30s, external looks and finding your style are important. Cosmetics are at the front of younger women's efforts. Moisturisers and cleansers were used with less diligence and regularity. In their 40s and 50s general ageing and the (peri)menopause are becoming noticeable and this leads to women becoming more aware of emerging conditions such as dry/sagging skin, blemishes, spots and more, and the importance of good regimes.

GEN X ARE HEALTH AND BEAUTY'S HEAVIEST USERS ACROSS CATEGORIES

Gen X women are outspending and using products a lot more frequently than younger generations. It is most significant for skincare, but the usage gap applies to all categories except nailcare. 70% are using skincare daily compared to just 11% Gen Z and 39% Millennials.

If the products work, GenX are willing and have more disposable income to spend on health and beauty:

- Gen X spend 53% more on skin/haircare than Gen Z
- Nearly half of Gen X spend between £16 and £50 per month on health and beauty
- More than a third spend between £30 and £100 per month on vitamins and supplements

FIG. 13

	DAILY USAGE		
	GEN Z	MILLENNIALS	GEN X
SKINCARE	11%	39%	70%
HAIRCARE	12%	12%	46%
COSMETICS	10%	29%	51%
VITAMINS & SUPPLEMENTS	4%	25%	42%
NAILS (UP TO 3X A WEEK)	31%	33%	31%

Source: FOB 2023 Survey

"I PROBABLY SPEND THE SAME TIME AS I HAVE HAD. THE MIXTURE HAS CHANGED – MAYBE MORE CLEANSING. I SPEND LESS TIME PUTTING ON MAKEUP AND MORE TIME ON SKINCARE – I THINK I AM MORE AWARE OF THE THINGS THAT ARE IMPORTANT""

FUTURE OF BEAUTY RESPONDENT

GEN/X

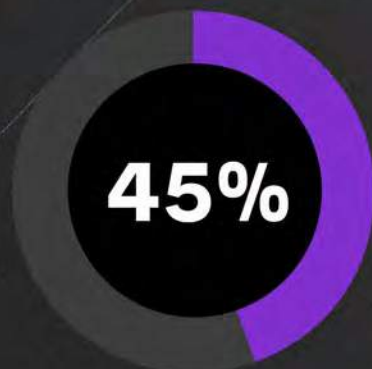
GEN X LIKE SIMPLICITY – SPEED AND EASE-OF-USE ARE CRITICAL

...UNLESS THEY ARE A BEAUTY FAN TO WHOM AGE DEFYING IS A MUST

We assumed that juggling busy lives and more extensive skincare needs would make concise three-step routines most popular among Gen X. However, the survey revealed that women are more likely to fall into loving their extensive beauty routines or be quick and done with it. The middle way only resonated with one in five.

More than a third of Gen Xers (35%) value an extensive routine. It is their "me time" and gives them confidence to deliver best results. Of women with an age-defying mindset, **nearly half (47%) invest time in extended rituals or have found a single-step product that fulfils their needs (45%)**. **Only one in ten believe in concise three-step regimes**.

For **nearly half of Gen X (45%), time is most of the essence** and these are looking for single-step products with great efficacy. It is thus not surprising that **nearly half (48%) like advanced hybrid solutions such as makeup products with added skincare nutrients**.



Prefer single-step product to fit into busy lives

Source: FOB 2023 Survey

GEN X ARE ACTIVELY ON THE LOOKOUT FOR NEW AND BETTER PRODUCTS

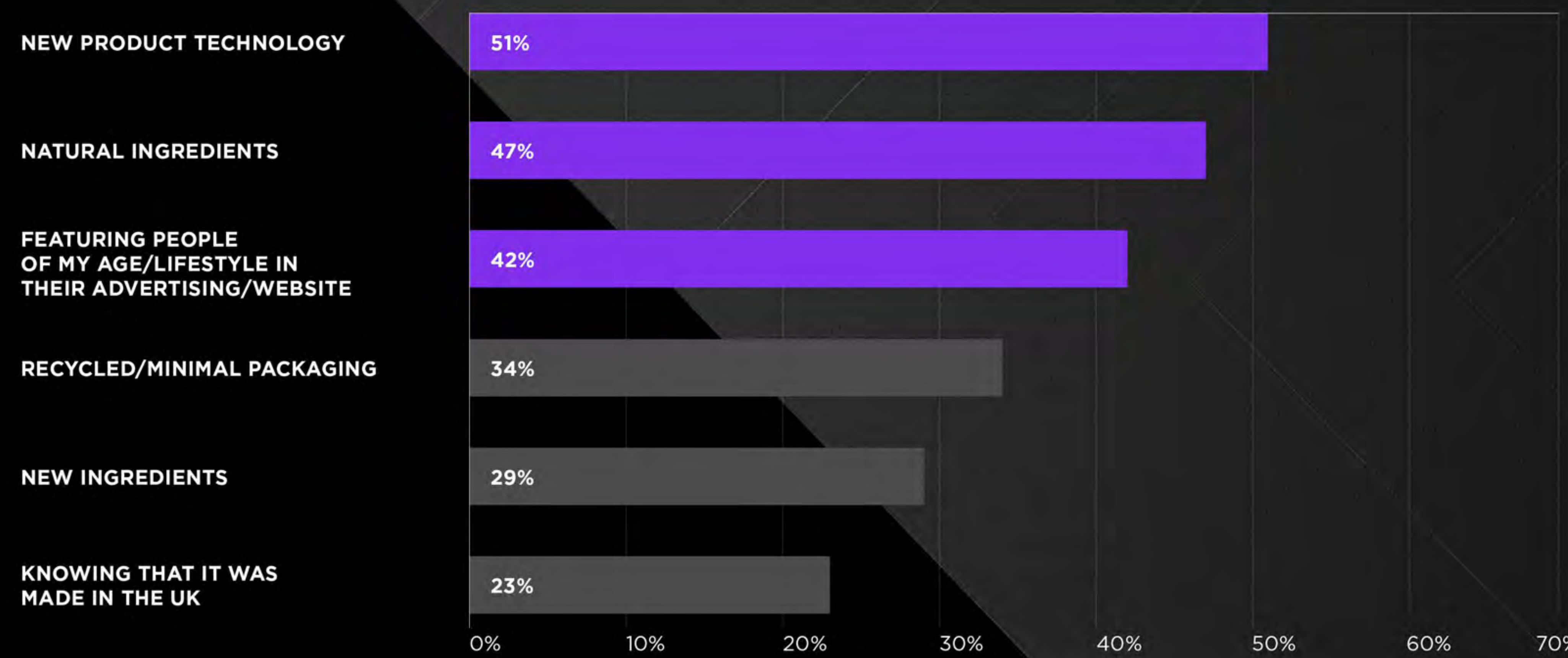
GEN X ARE LESS SCEPTICAL ABOUT INNOVATIONS – OPEN DOORS FOR YOUR BRAND

Nine out of ten Gen Xers are open to trying new products. With more noticeable signs of ageing, they are willing to believe that product development and scientific research can lead to better products.

We found that Generation X are more open to new product ingredients and technologies (40%) and less cynical about new products and brands overpromising and not delivering (19%). It seems that as their needs become more advanced and frequent, they are willing to believe and try new products and brands.

WHAT ELSE WOULD INFLUENCE YOU TO BUY A NEW HEALTH AND BEAUTY PRODUCT?

FIG. 14



GEN/X

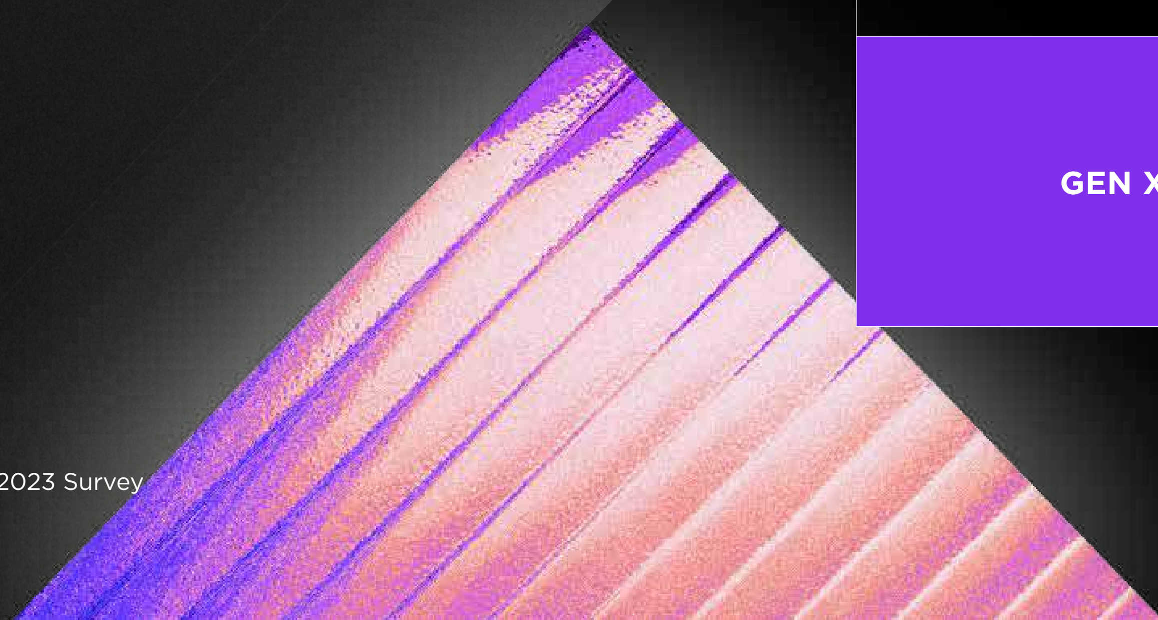
Source: FOB 2023 Survey

SMALLER BRANDS DON'T AUTOMATICALLY HAVE THE EDGE WITH GEN X

The fight between big, established brands isn't new news, and with online being an integral part of today's consumer path to purchase, smaller brands have a better chance of being noticed. However, this does not automatically translate into Gen X trusting smaller, online brands more than established names. Larger brands often benefit from long-standing scientific experience and deep pockets to develop and test product innovation. For a result-driven Gen X audience, this is a key benefit. Only 11% believed that smaller brands are better for them and the environment compared to nearly a third of Gen Z.

WHICH OF THESE STATEMENTS BEST REFLECTS YOUR ATTITUDE TO NEW H&B BRANDS? FIG. 15

	NEW PRODUCTS COME AND GO. THEY PROMISE SOMETHING BETTER AND DON'T DELIVER	EVERY NOW AND THEN SOMETHING NEW COMES ALONG THAT REALLY IS BETTER	I TRUST NEWER SMALLER BRANDS TO BE BETTER FOR ME AND THE ENVIRONMENT MORE THAN THE BIG ESTABLISHED BRANDS
GEN Z	34%	59%	31%
MILLENNIALS	33%	54%	18%
GEN X	18%	66%	11%



Source: FOB 2023 Survey

GEN X WANT PRODUCTS THAT WORK 'FOR ME'

GETTING PERSONALISATION RIGHT MULTIPLIES YOUR CHANCES FOR TRIAL, REPURCHASE AND RECOMMENDATIONS

To date, only one in five Gen X have used tools such as augmented reality, but **64% would be interested in personalisation or trying technology to help select and try products** that best suit their individual needs*. Our survey identified that key personalisation criteria include matching skin tone/colour, specific skin conditions, and creating recommendations for general signs of aging, from wrinkles to improved complexion.

A 2021 McKinsey study** demonstrated how personalisation can drive growth for your brand: **71% of consumers nowadays expect a personalised shopping experience** online and in-store. **58% of beauty shoppers said they are more likely to buy from a brand that offers an online survey to create a tailored, personal recommendation**. **45% are more likely to complete a purchase if Augmented Reality allowed them to try the product** on. Three quarters of consumers who have found products that work for them through a personalised experience claim that they will make a repeat purchase or recommend the brand to friends.

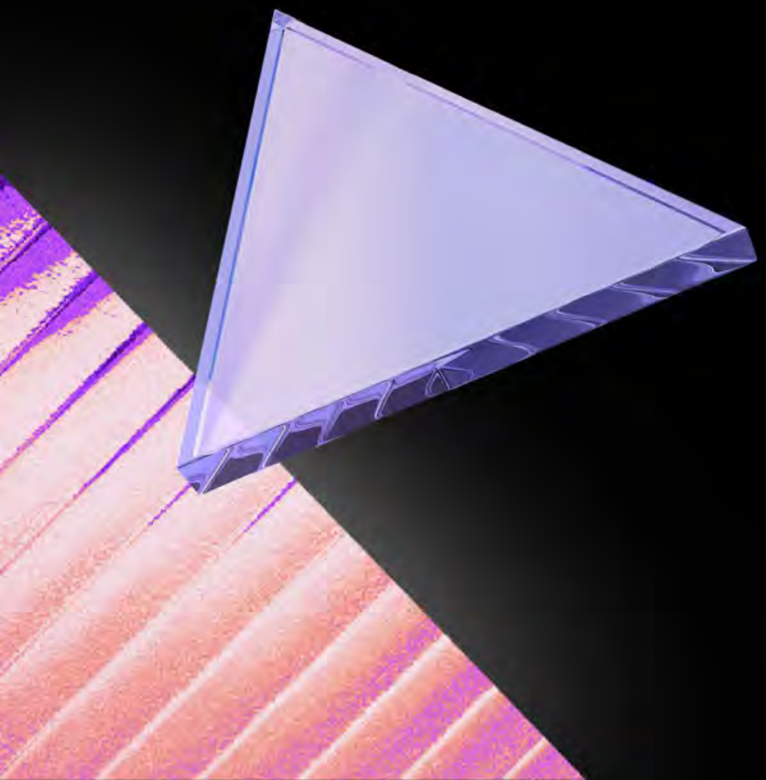
These are powerful stats to justify the right investment into technology for your brand.

Source: *FOB 2019/2023 Surveys
**McKinsey 2021 Consumer Survey

KEY TAKE-OUTS

8 KEY TACTICS FOR EFFECTIVE GEN X MARKETING STRATEGIES

Marketing to the middle-aged consumer requires sophistication. These women are savvy through years of buying products. They are less easily fooled or lured in by promises. They just want to hear it straight and in a relatable manner. Win them over and the prize is sizeable. So, how do you best engage with Gen X women?



1 **GenX is a moving target, defined by 7 frames of mind** – Avoid stereotyping, as women tend to move between them depending on situational context or mood.

2 **Which of the Gen X attitudinal mindsets is resonating with your brand?** If needed, conduct some level of research to shape your brand's target personas based on attitudes rather than just demographics.

GEN/X

3 **GenX women are characterised by self-identity, forged through perceived rather than biological age.** Avoid calling out simplistic age brackets like 40s-50s, over 50s etc. or drifting into stereotypes that could lead to loss of trust and brand rejection.

4 **Promoting non-ageing as a universal desire is neither realistic nor always wanted, and certainly not achievable.** Not all Gen X women define beauty simply by staying young. More motivating messages focus on acting young, feeling and looking good for your age. At most, aim for helping consumers appear just a few believable years younger. Keep it real and approachable.

KEY TAKE-OUTS

GEN/X

5

Product efficacy is non-negotiable. Gen X women know what is in it for them, have high expectations and are results-oriented. Focus on what products are designed to do rather than generic ingredients or claims. And then, make sure products do what they say – visibly. Gen X are less likely to be won over on impulse, but products that deliver have a high chance of getting a loyal following.

6

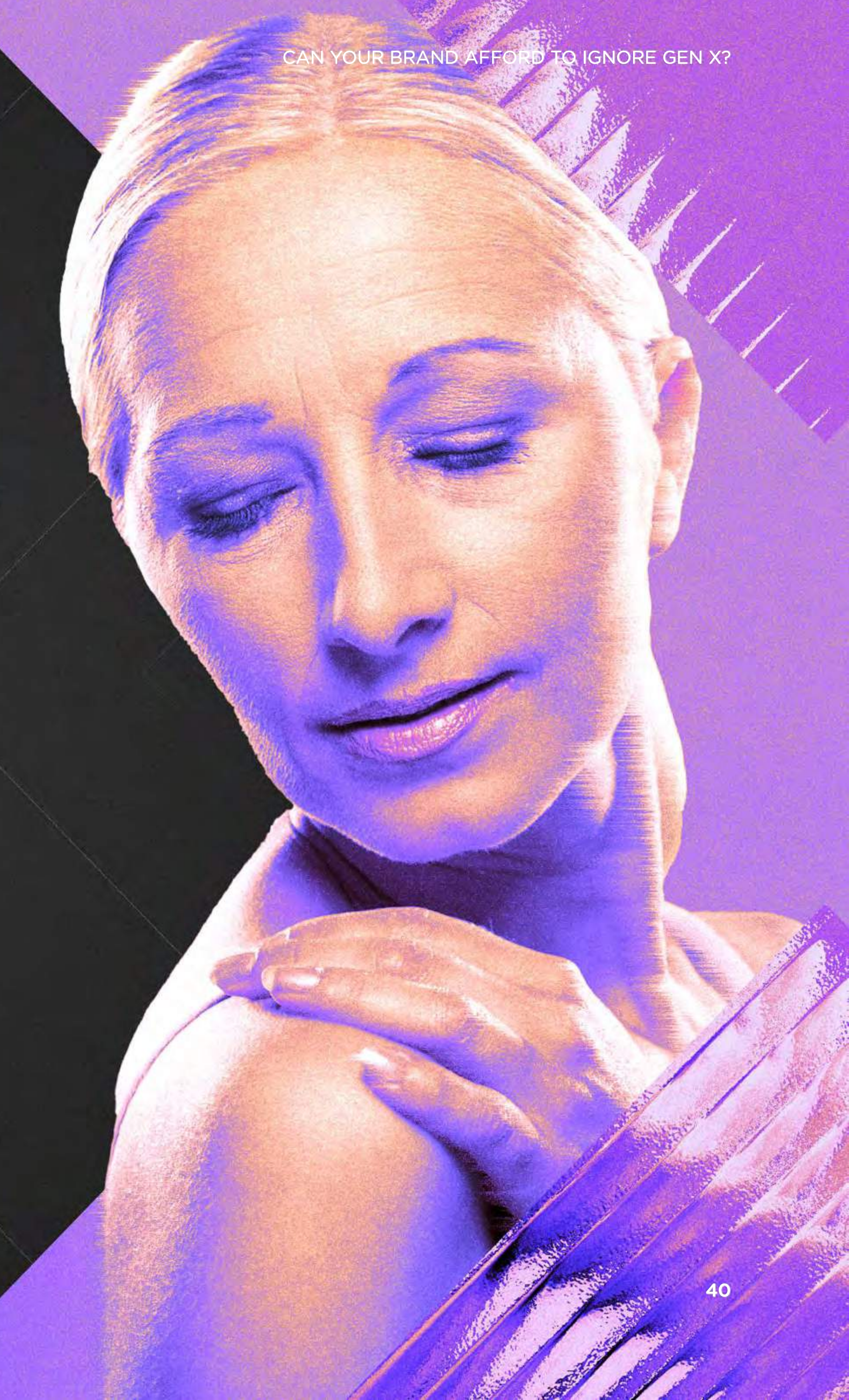
Authentic communication wins. Middle aged women know and accept that no matter how great the skincare, no product or treatment can turn the clock back to give you the skin you had when you were 18. Looking and feeling your best version of 'now' is just fine and far more credible than advertising anti-wrinkle serums with a 20-year-old model.

7

Think Omnichannel. Gen X women are easily reached on and offline from TV, magazines, in-store to social media, YouTube and apps. Brand websites or branded pages on retailer sites are popular amongst older women. The Gen X demographic is equally at ease shopping online or in-store. Their range of touchpoints in areas such as beauty, health and shopping, in general, is much wider than that of younger, tech-driven populations or older generations less inclined to use technology.

8

Build on Gen X's trust in peers and experts. Product reviews combine Gen X desire for advanced solutions with trusted endorsement from real women. Influencers are met with indifference or scepticism unless you can partner with a relatable brand ambassador that has credible expertise and is not sponsored.

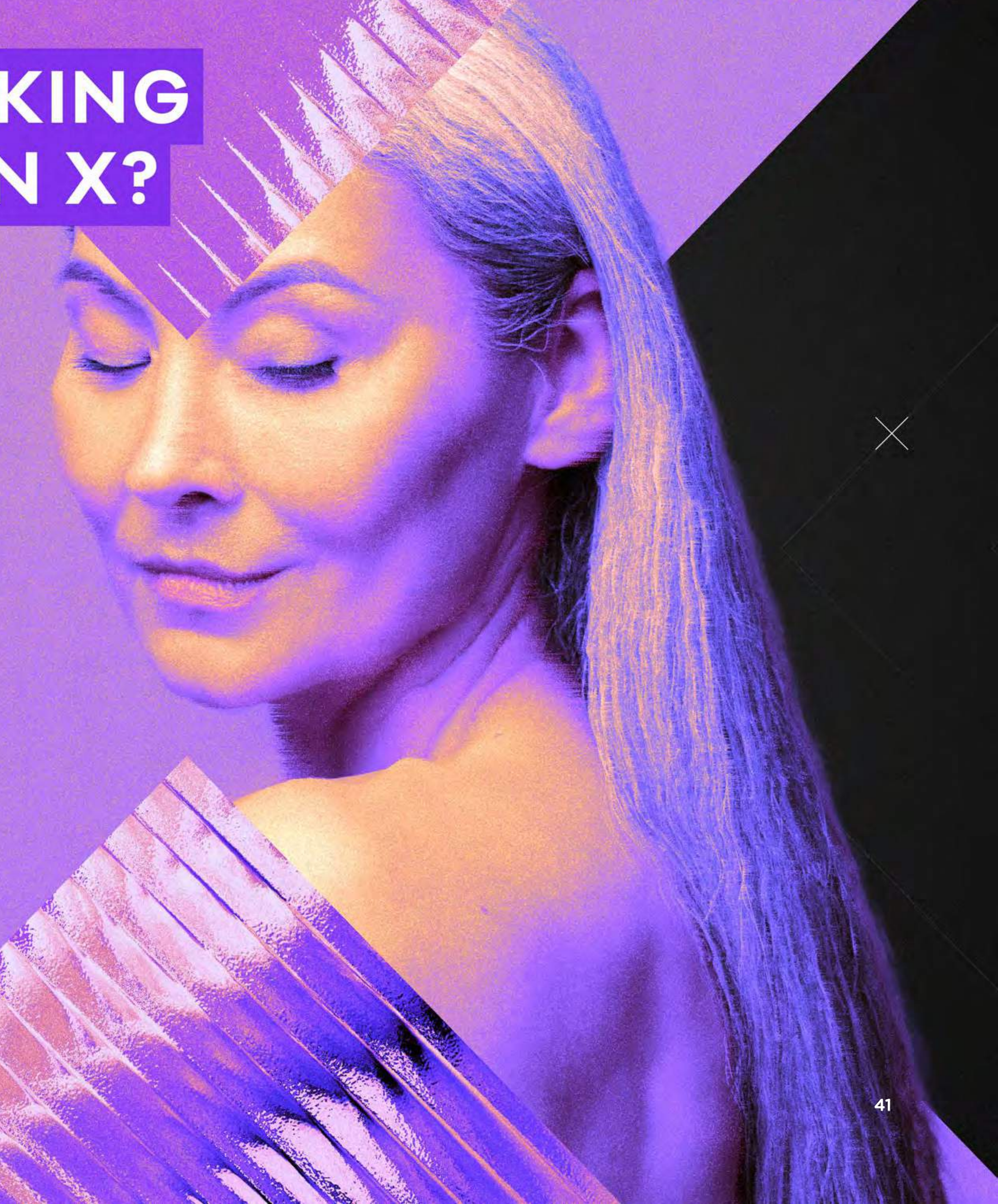


WHICH BRANDS ARE MAKING GOOD STRIDES WITH GEN X?

BE INSPIRED BY SOME BRANDS WHO ARE GETTING IT RIGHT

We have collected just a few examples of brands that we believe have found a positive way to normalise talking about growing old and portraying their brand in manner that proves highly engaging for Gen X. These are by far not the only brands that are starting to positively embrace Gen X.

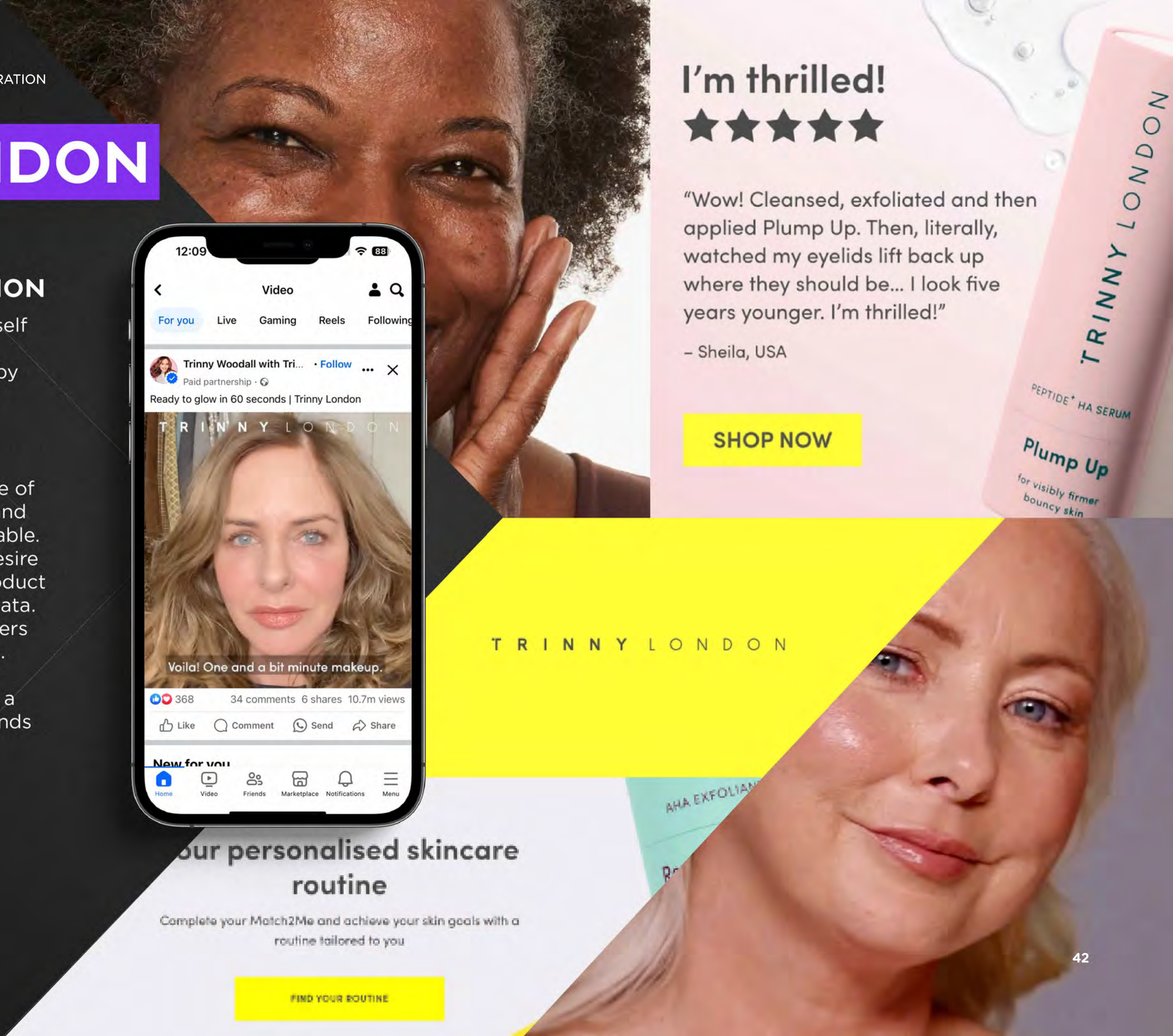
If you have another great brand story to tell, we'd love to hear from you.



TRINNY LONDON

A WINNING BUNDLE FROM PRODUCTS TO COMMUNICATION

Consumers often comment on Trinny herself confidently demonstrating her products. She credibly makes herself ‘one of them’ by starting from scratch, not shy of showing wrinkles nor blemishes. She also finishes on a realistic result that feels attainable and therefore aspirational. But it’s not all about Trinny. The brand uses a huge range of ‘normal’ women across ages, skin colour and conditions, making the brand highly relatable. The brand successfully plays to Gen X’s desire for clarity and ease through impactful product demos, consumer reviews and scientific data. Personalisation technology helps consumers choose which products are right for them. Online activities and reviews create an air of community and honesty that recreates a feeling of being amongst like-minded friends that can be trusted.



NEAL'S YARD

CHALLENGING THE STIGMA OF GROWING OLD AS A NEGATIVE EXPERIENCE

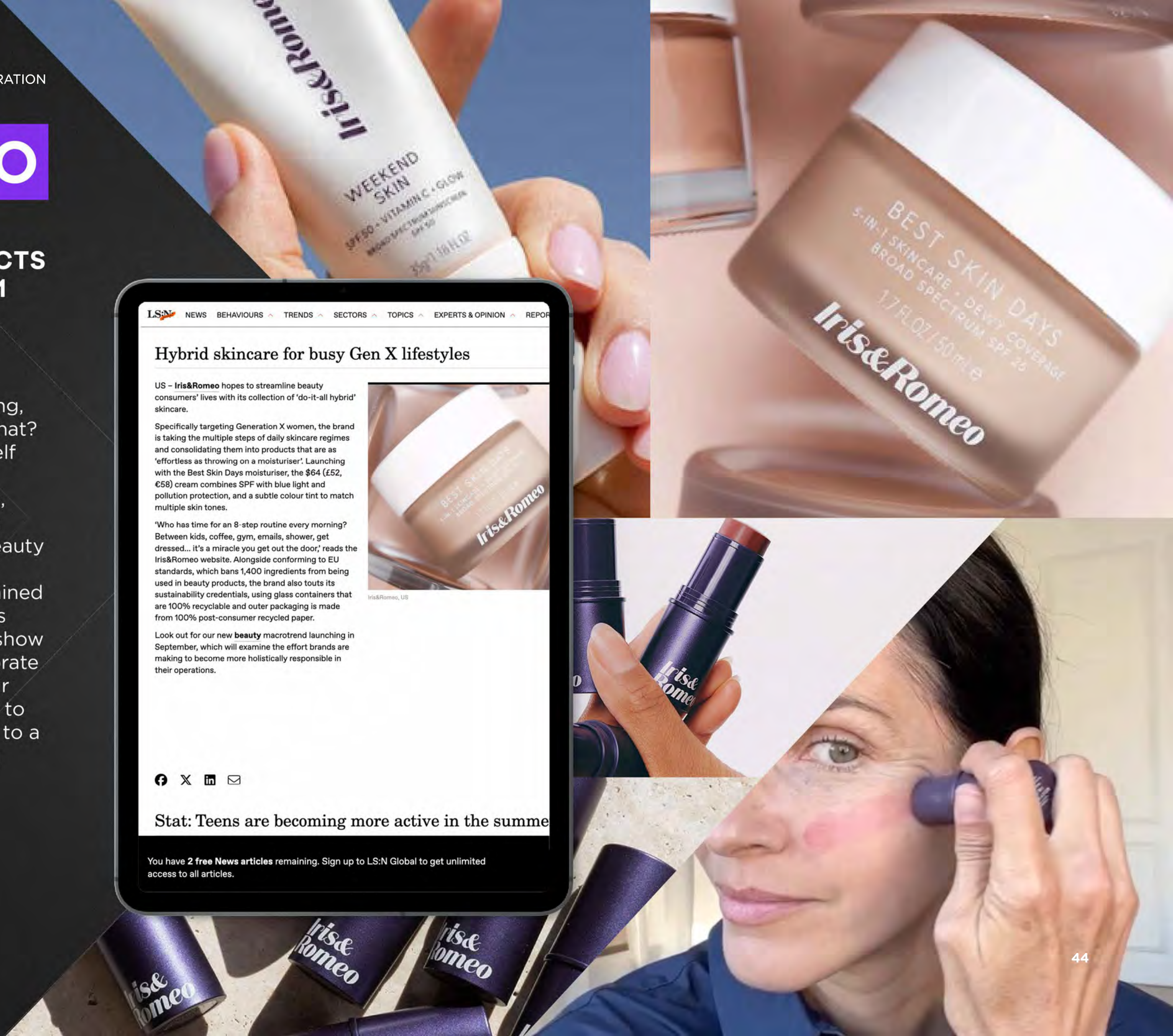
The 'Age Well' campaign – launched in 2018 – challenges negative perceptions of age. It wins consumers over by playing to Gen X's positive sentiments around ageing: "With age comes confidence", "I am x years old, still don't feel grown up – whatever that means", "Ageing well means feeling well". The campaign is on a mission to break society's last taboo by portraying women in their 40s and 50s as strong, inspiring, and far from being past their best.

To see more executions of the Age Well campaign, follow the facebook link here.

IRIS & ROMEO

MASTERS OF HYBRID PRODUCTS THAT DELIVER RESULTS FROM EIGHT-STEP ROUTINES INTO JUST ONE SINGLE PRODUCT

Gen X women want it all – high product performance, but without the need for long, complex routines. Who has got time for that? The Iris & Romeo brand has dedicated itself to create a collection of ‘do-it-all hybrid’ skincare products that combine effortless, speedy application with advanced results normally only found through extensive beauty regime. Specifically developed for Gen X women, the online-first brand was determined to normalise getting older. The brand uses content generators in their 40s and 50s, show skin texture without retouching and celebrate that beauty can be found at any age. Their choice of brand ambassadors is designed to inspire women to shift from ‘fighting age’ to a sentiment of ‘wanting to be like her when I get older’.



LS:N NEWS BEHAVIOURS TRENDS SECTORS TOPICS EXPERTS & OPINION REPOR

Hybrid skincare for busy Gen X lifestyles

US – **Iris&Romeo** hopes to streamline beauty consumers' lives with its collection of ‘do-it-all hybrid’ skincare.

Specifically targeting Generation X women, the brand is taking the multiple steps of daily skincare regimes and consolidating them into products that are as ‘effortless as throwing on a moisturiser’. Launching with the Best Skin Days moisturiser, the $64 (£52, €58) cream combines SPF with blue light and pollution protection, and a subtle colour tint to match multiple skin tones.

‘Who has time for an 8-step routine every morning? Between kids, coffee, gym, emails, shower, get dressed… it's a miracle you get out the door,’ reads the Iris&Romeo website. Alongside conforming to EU standards, which bans 1,400 ingredients from being used in beauty products, the brand also touts its sustainability credentials, using glass containers that are 100% recyclable and outer packaging is made from 100% post-consumer recycled paper.

Look out for our new **beauty** macrotrend launching in September, which will examine the effort brands are making to become more holistically responsible in their operations.

Iris&Romeo, US

Stat: Teens are becoming more active in the summe

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Source: FOB 2023 Survey

EPIC LIGHT BEAUTY

BEAUTY DOESN'T GET OLD: HOW TO MAKE THE MOST OF GEN X'S LOVE FOR MAKEUP

The brand sets out to debunk the misunderstanding that older women don't care about makeup and our survey validates this: more than half of Gen X women are wearing makeup daily compared to just 10% of Gen Z and 29% of millennials. From an efficacy perspective, the brand addresses one of the key complaints from Gen X women when it comes to makeup: settling in the fine lines and making wrinkles look worse rather than conceal. Hybrid, skincare-first makeup product innovations play to evolving skincare needs of older consumers whilst keeping the fun alive, because looking and feeling beautiful never gets old. The brand is a good example of how to showcase well: 'women in the middle' – neither 20 nor senior with grey hair.

IN SUMMARY

Gen X women are a complex yet down-to-earth group of women with high expectations for more advanced needs. They are also a high-spending, sizable segment. This makes it an attractive audience for many health and beauty brands.

Whilst there is much diversity within this age segment, a few key factors hold true for the cohort as a whole.

1. **Gen X are outspending younger consumers by up to 44%**

2. **Product needs are evolving from self-expressive colour cosmetics to advanced solutions led by skincare**

3. **Gen X can just as easily be reached online. Digital media and social platforms are not the prerogative of younger people**

4. **Age is neither just a number nor an 'evil' that can be stopped. Many Gen X women have grown in confidence with age and it is not all about anti-ageing**

5. **Feeling good and looking good goes hand-in-hand with plenty of opportunities for health and beauty brands to explore wellness or hybrid products**

6. **Advertising that features relatable, real women remains a gap: models appear either too young or too old. As a respondent put it "I am neither 20 nor do I have grey hair"**

7. **Gen X are pragmatic and respond best to 'no nonsense', to-the-point communication and product regimes**

DON'T MISS OUT ON GEN X

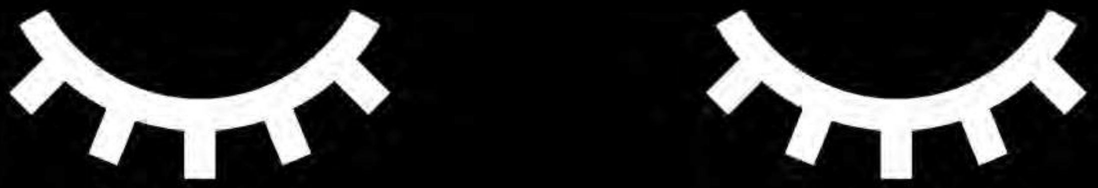
GEN/X

20% OF THE UK POPULATION

PRAGMATIC, SAVVY, READY TO LISTEN

USING AND SPENDING MORE THAN YOUNGER GENERATIONS

#FUTUREOFBEAUTY



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