VENAS

Taking Perspective of Gen X, Gen Y and Gen Z in Their Beauty Behavior

A Venas Report

NOVEMBER 2022

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WHAT YOU'LL GET FROM THE VERSION

MORE ON KALEIDOSCOPE

MORE ON DIGITAL PLATFORM PREFERENCE

MORE ON CASE STUDY

MORE ON GENERATIONAL BEAUTY HABIT

MORE ON PRODUCT PREFERENCE IN EACH GENERATION

MORE ON SHOPPING PREFERENCE AND EXPERIENCE

MORE ON GENERATIONAL BEAUTY PURCHASE BEHAVIOR GENERATION

MORE ON STYLE APPROACH FOR EACH GENERATION

MORE ON TYPES OF USER PERSONA

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FOREWORD

Through our various researches and beauty consumer engagements, we found that there are stark differences between generations in terms of beauty product preferences, preferred communication styles and their overall beauty behaviors.

We realized that brands can benefit from understanding these key differences between their consumer groups and finding ways on how to fill in the gaps. This is why decided to conduct a more thorough research in identifying the generational cohort and get a deeper understanding of their perception towards beauty.
We hope this year's #VenasReport can serve as a guidance for brands to make better business decisions and strategic plans.

Warmest Regards,
Affi, Amalia, and Vanya
Venas Counsulting

METHODOLOGY

PRIMARY RESEARCH

Online Survey

Online survey was conducted for 50 days, starting from April 19 2022 to June 16 2022. The survey was distributed through Venas Consulting and Venas Team's social media accounts. Additionally, several social media influencers such as Arion, Kinan’s Review and paid media such as ohmybeautybank on Twitter also helped to distribute the survey.

The survey observes diverse consumer perspectives surrounding their unique purchase journey and habits, including their experience surrounding live shopping. A total of 1,647 respondents were garnered. The respondents came from various sociodemographic profiles such as age group, monthly income range, occupation, others.

Focus Group Discussion

We arranged three sessions of Focus Group Discussion with representatives from each generations; Generation X, Generation Y, and Generation Z. Each Focus Group has the same set of questions and visual aids related to their beauty shopping experience focusing on live shopping phenomenon, identifying past and current beauty trends, and unique shopping experiences.

SECONDARY RESEARCH

Venas Team also performed extensive desk research for the whole month of June 2022, in order to find, collect, and review relevant and accessible information about the topic. Some of the resources include Venas prior research, research articles, publications and social media posts.

METHODOLOGY

GENERATION DEFINITION

GEN X

Generation X is the generation born starting from 1966 to 1981 or being in the age bracket between 41 years old to 56 years old.

GEN Y

Generation Y is the generation born starting from 1982 to 1997 or being in the age bracket between 25 years old to 40 years old.

GEN Z

Generation Z is the generation born starting from 1998 to 2013 or being in the age bracket between 9 years old to 24 years old.

ANALYSIS METHODS

Several statistical analyses were performed in order to draw reliable conclusions from the data.

- Descriptive statistics are used to gain summary of the data pattern that came from the survey
- Cross-tabulation analysis is further used to examine the relationship between groups and variables
- Quarter-on-quarter analysis is used on desk research regarding beauty products launched from the year 2017 to 2022.
- ANOVA test is performed in order to compare the means of Likert responses among different generations based on the constructed attributes.

In addition to the analysis, Venas expert opinions are also used as a basis in constructing insight and recommendation.

LIMITATIONS & BIAS

The survey findings may be affected by the distribution profile, majority of age group, income group, and location.

PART 1
KALEIDOSCOPE 2022

Indonesian Beauty Industry

Beauty Industry

In this section, we gathered historical data of beauty product launches in Indonesia from the year 2017 to 2022. The historical data was extracted from the publicly available data of product launches in Indonesia from website https://cekbpom.pom.go.id/ with the related keywords on four types of beauty products: Skin Care Products, Hair Care Products, Body Care Products, and Make Up Products. The related keywords based on the related types of beauty products are explained on the appendix.

SKINCARE KALEIDOSCOPE

SKINCARE LAUNCH

25% In 2022, there is an increase in skincare launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q3 2022.

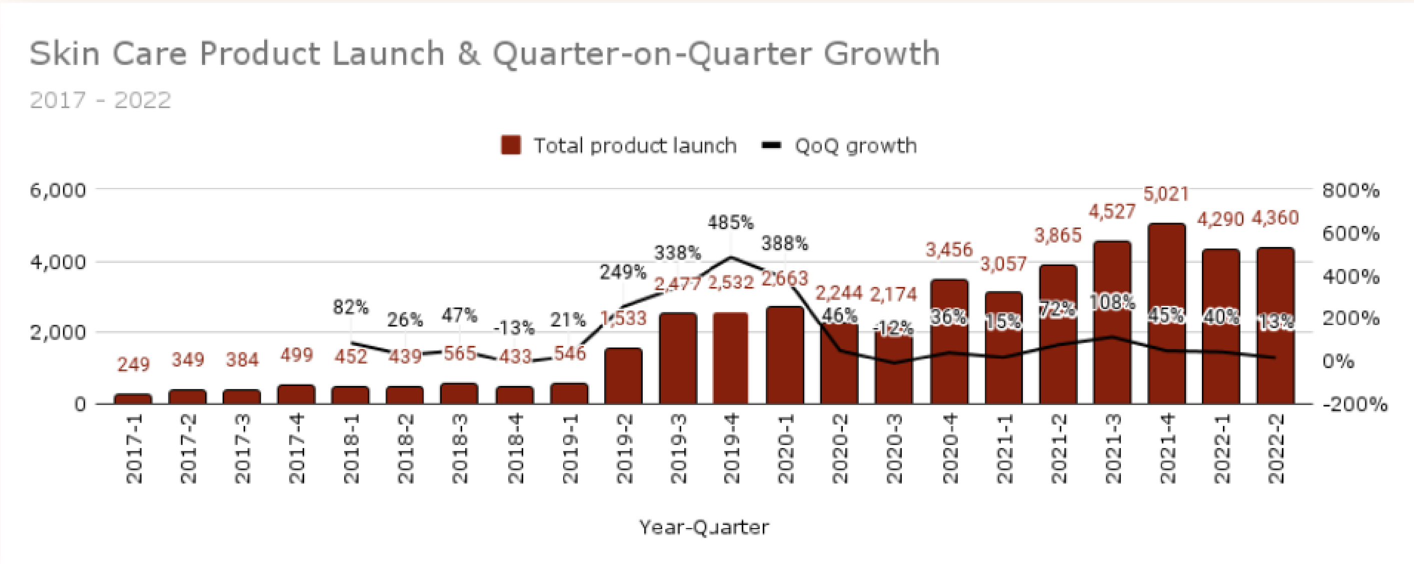

Fig. 1.1 Total product launch and QoQ% Change in the Skin Care Category

As can be seen from the chart, after a relatively stagnant 2 year period, there is an exponential growth in the number of product launches in 2019. There is a slight decrease in early 2020 due to the start of the pandemic, but we are confident to say that the number of products launches will keep on increasing in the coming years.

SKINCARE KALEIDOSCOPE

SKINCARE LAUNCH

For skincare product launches, we grouped the data into the most common skincare categories. Serum products are make up 35% of the total skincare launches or 16,470 products. The second category is moisturizer, around 30% or 13,235 products. Additionally, sunscreen product launches increased from the previous period and showed up as the third category of the most shown in the data.

Total Skincare Product Launch by Category

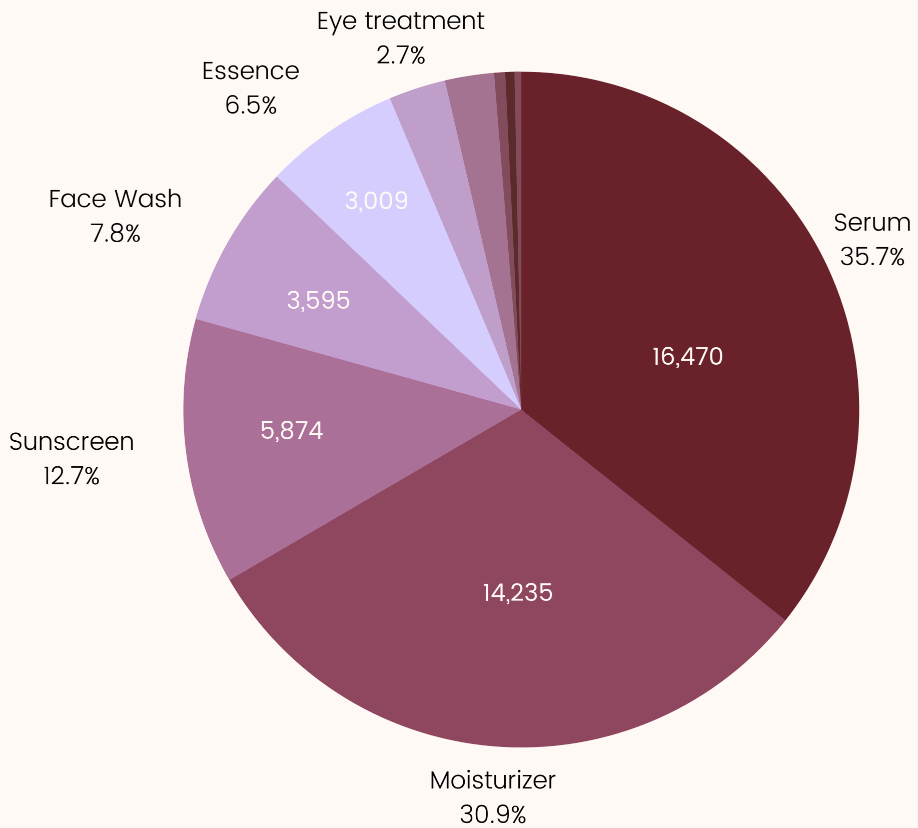

Fig. 1.2 Proportion of Skin Care Category

NOTABLE CHANGES

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q2 2022.

Sunscreen	+37%	Masker	-62%
Serum	+35%	Exfoliating product	-10%

SKINCARE KALEIDOSCOPE

> *Sunscreen is an attractive product category in the market, even more so considering that sunscreen is now the top 3 product used by skincare consumers.*

Based on our upcoming report, Venas Internal Survey, "General Skincare Habit Survey" that was conducted on April 2022 with the total respondents of 3,728 respondents; around 77% of the total respondents choose Sunscreen as one of the 3 skincare products that they routinely use.

The top 3 skincare products used are [redacted]

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HAIR CARE KALEIDOSCOPE

HAIR CARE LAUNCH

17%

In 2022, there is an increase in hair care launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q3 2022.

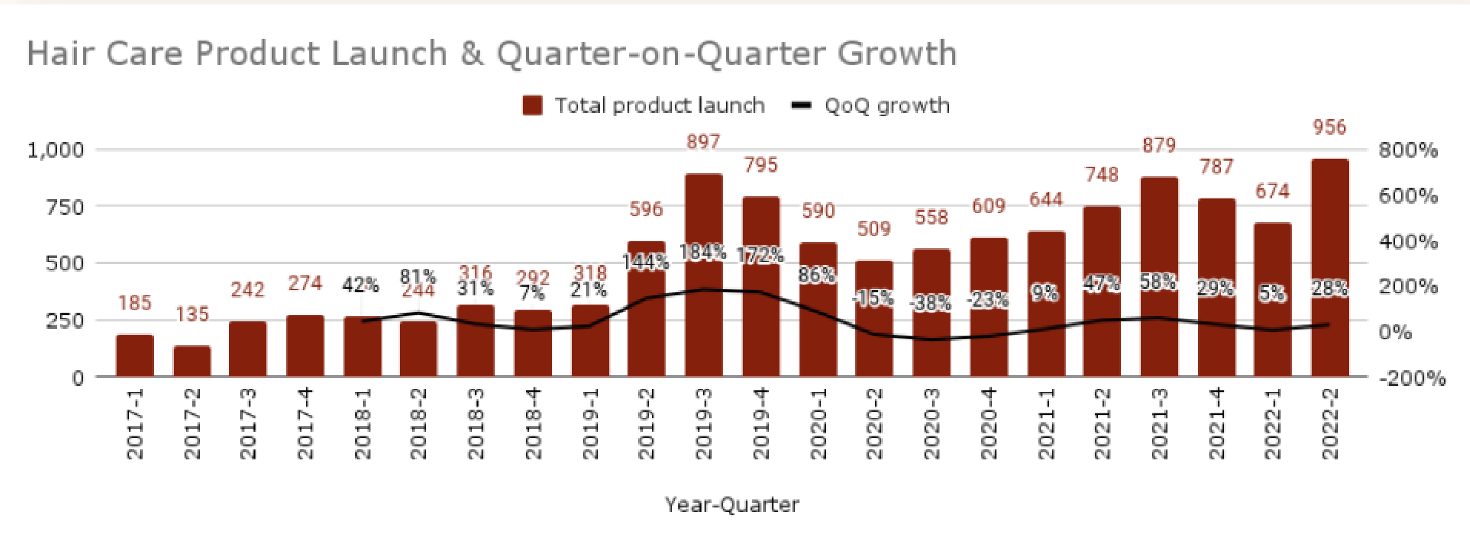

Fig. 1.3 Total product launch and QoQ% Change in the Hair Care Category

As seen from the above chart, the peak growth of hair care launch is apparent in the period of 2019-3 (+184%). The growth after the said period has declined and experienced a few turmoil that caused these sections to experience negative growth in three quarters on 2020-2 (-15%), 2020-3 (-38%), 2020-4 (-23%). This decline is possibly due to the pandemic. However In the recent quarters in 2022, the growth has slowly increased especially in 2022-2 (+28%) that showed the highest QoQ growth compared to the other types of beauty products.

HAIR CARE KALEIDOSCOPE

HAIR CARE LAUNCH

For hair care product launches, we grouped the data into most common hair care categories. Shampoo products makeup up a considerable amount around 54% or 6,210 products. The second category is Conditioner, around 24% or 2,824 products.

Total Hair Care Product Launch by Category

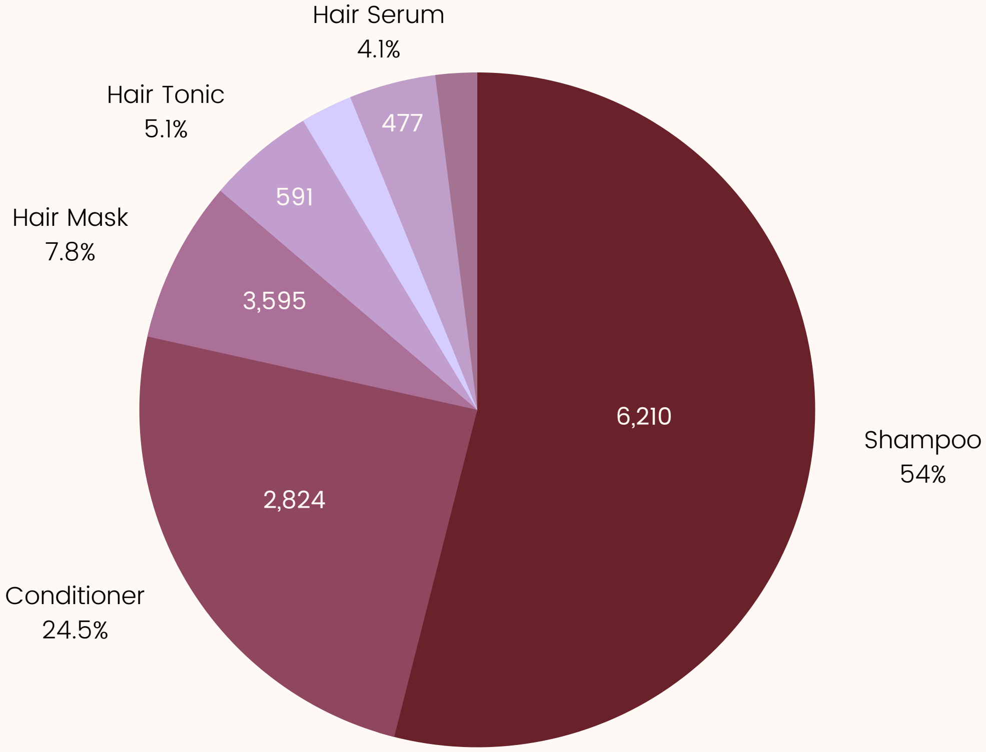

Fig. 1.4 Proportion of Hair Care Category

NOTABLE CHANGES

Based on accumulated hair care launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q2 2022

Hair Oil	+132%	Hairstyling Product	-20%
Hair Tonic	+68%	Hair Mask	-11%

HAIR CARE KALEIDOSCOPE

When talking about ideal hair care product proposition, consumers mostly consider fragrance as an integral part of it.

In our "General Hair Care Habit Survey" that was conducted in January 2022 with the total respondents of 1,163; we asked their preference on fragrance in hair care products.

A wide arrays of scent options from fruity, floral, to fragrance-free were shown to the respondents for them to choose to reflect their personal preference on an ideal hair care product. The findings showed that the preference of "fragrance-free" haircare products is only found in 7% of the total respondents or equals to only 83 respondents.

Other than fragrance, we asked our respondents about hair care products that they regularly use.

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BODY CARE KALEIDOSCOPE

BODY CARE LAUNCH

21%

In 2022, there is an increase in body care launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q3 2022.

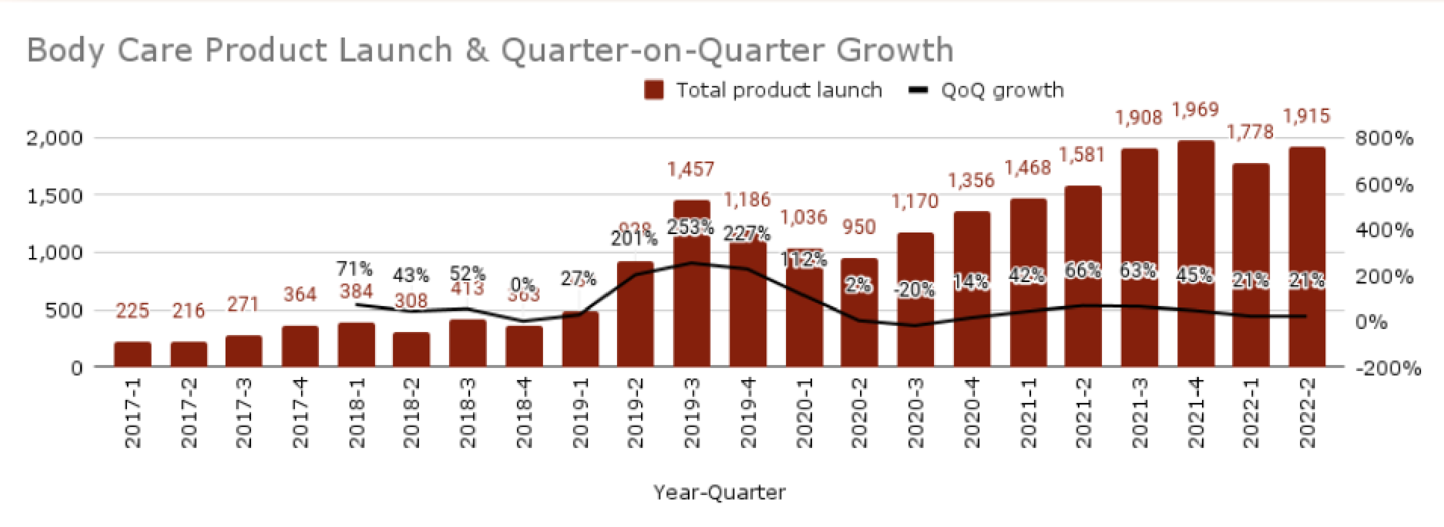

Fig. 1.5 Total product launch and QoQ% Change in the Body Care Category

As seen from the above chart, there was a substantial amount of body care product launch growth 2019-3 (+253). The growth after the said period has slowed down and fluctuated the lowest at 2020-3 (-20%) possibly due to the pandemic. In the recent quarters of 2022, even though the growth seemed slow, it shows a positive trend on the QoQ growth that stabilized around +21% on 2022-1 and 2022-2.

BODY CARE KALEIDOSCOPE

BODY CARE LAUNCH

For body care product launches, we grouped the data into the most common body care categories. Body Moisturizer category make up a considerable amount around 36% or 8,017 products. The second category is Body Cleanser, around 21% or 4,689 products. Followed by Body Treatment and Hand Treatment.

Total Body Care Product Launch by Category

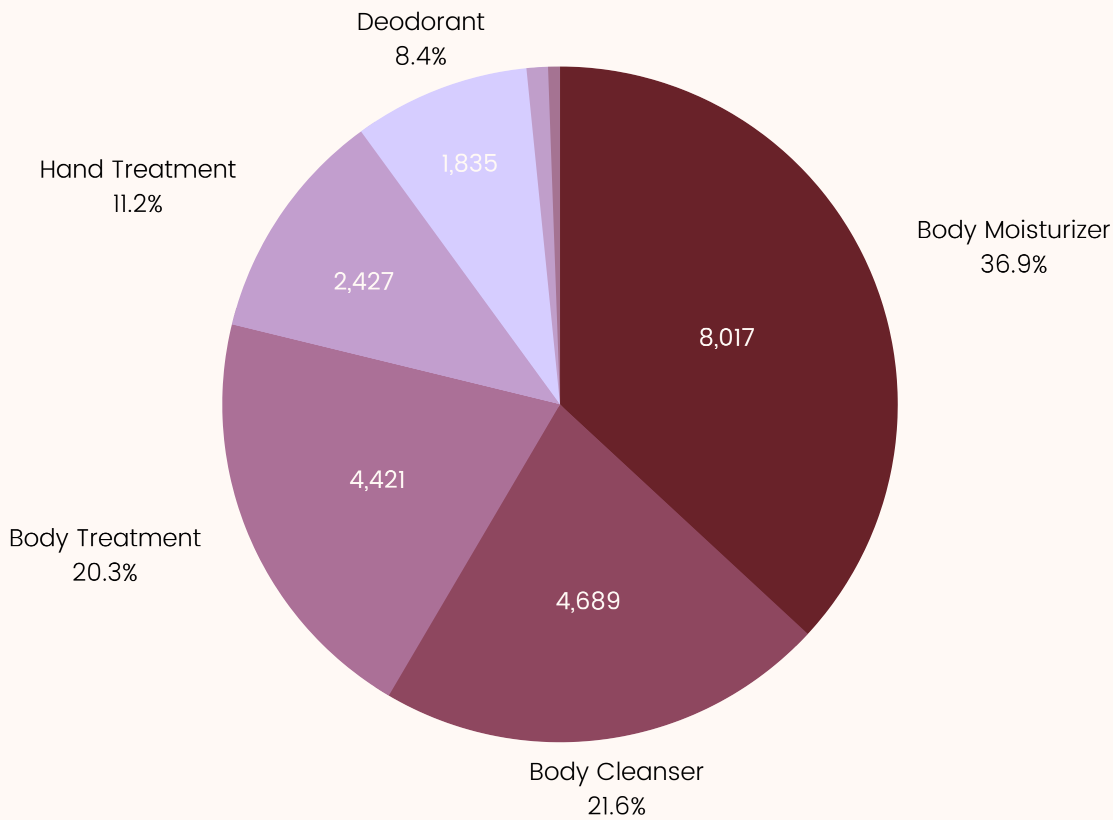

Fig. 1.6 Proportion of Body Care Category

NOTABLE CHANGES

Based on accumulated body care launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q2 2022.

Body Treatment	+41%	Foot Treatment	-16%
Body Moisturizer	+25%	Hand Treatment	-16%

BODY CARE KALEIDOSCOPE

Sun protection awareness is now more than just for face.

In our "General Body Care Habit Survey" that was conducted in August 2022 with the total respondents of 574 respondents; we asked about their preference on functional aspect of body care products.

One of the interesting findings in the survey is the rising interest on sun protection factor on a body product.

When we asked them about their ideal body care product sensorial texture, the most-chosen aspects are

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MAKEUP KALEIDOSCOPE

MAKEUP LAUNCH

10% In 2022, there is an increase in makeup launch

Based on accumulated skincare launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q3 2022.

Fig. 1.7 Total product launch and QoQ% Change in the Makeup Category

As seen from the above chart, the peak growth is apparent in the period of 2019-3 (+514%). The growth after the said period has declined and experienced experience negative growth in five quarters on 2020-2 (-22%), 2020-3 (-50%), 2020-4 (-34%), 2021-1 (-18%), and 2021-2 (-3%) possibly due to the pandemic. In recent quarters of 2022, the growth has slowly increased especially in 2022-2 (+14%).

MAKEUP KALEIDOSCOPE

MAKEUP LAUNCH

For makeup product launches, we grouped the data into most common makeup categories. Lip Makeup category came up as the most number of products launched around 37% or 16,492 products. The second category is Base Makeup, around 34% or 15,360 products.

Total Makeup Product Launch by Category

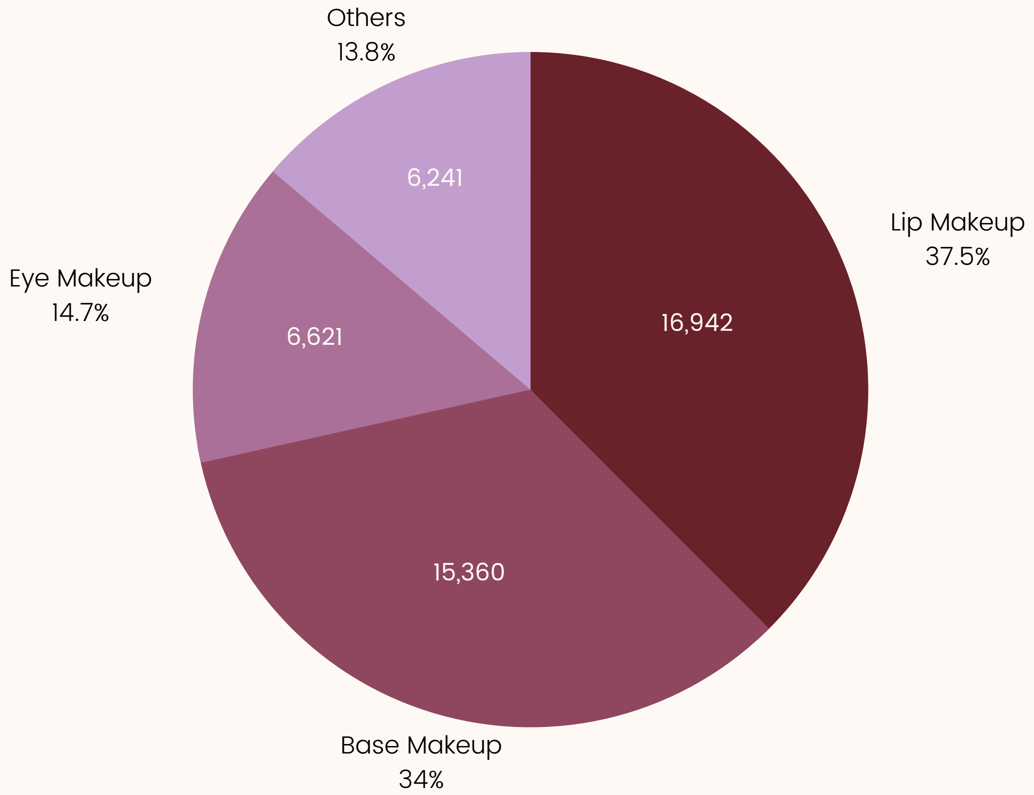

Fig. 1.8 Proportion of Makeup Category

NOTABLE CHANGES

Based on accumulated makeup launch from cekbpom.go.id, Q1-Q2 2021 & Q1-Q2 2022.

Base Makeup	+41%
Lip Makeup	+25%
Others*	-24%

Others: "blush", "highlighter", "strobe", "bronzer", "contour", "setting spray"

MAKEUP KALEIDOSCOPE

By understanding the extrinsic aspect of makeup, one must realize the intrinsic and emotional values that become the reason why people use it.

In our "General Makeup Habit Survey"; one of the questions that we asked is the purpose of wearing makeup products.

Most of the respondents use makeup for its emotional benefit with 78% of them claimed that it increases their self confidence while 46% wear makeup as a form of self respect. Around 45% of respondents wear makeup for its functional benefit such as concealing flaws in their face.

PART 2
RESEARCH INFORMATION

SOCIO-DEMOGRAPHICS

Age Group

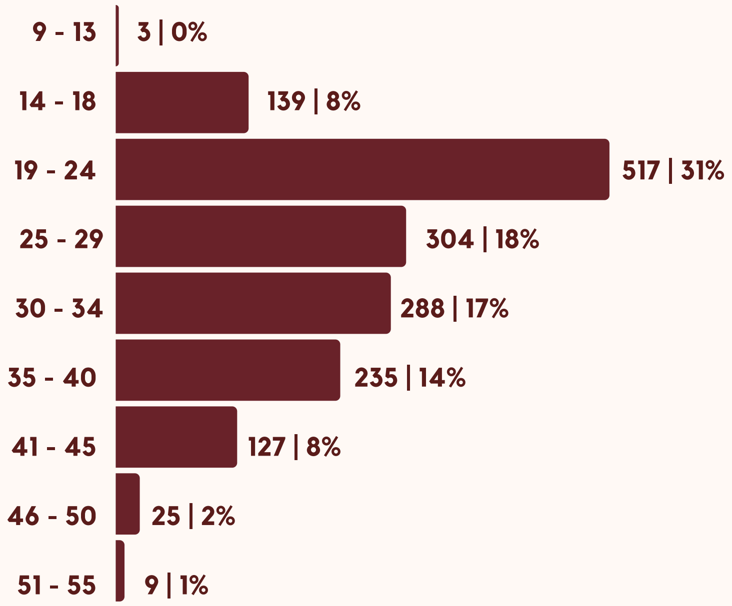

Fig. 3.1 Age group distribution

1,647

BEAUTY ENTHUSIASTS

Gender

1,609 | 98%
FEMALE

38 | 2%
MALE

Generation Group

161 | 10%
GEN X

827 | 50%
GEN Y

659 | 40%
GEN Z

Location

TOP 3

1. **Jabodetabek - DKI Jakarta 266 | 16%**
2. **Jawa Timur 224 | 14%**
3. **Jawa Tengah 193 | 12%**

4. Jabodetabek - Bekasi 132 | 8%
5. Jawa Barat 112 | 7%
6. Bandung 85 | 5%
7. DI Yogyakarta 84 | 5%
8. Jabodetabek - Tangerang Selatan 73 | 4%
9. Jabodetabek - Bogor 66 | 4%
10. Jabodetabek - Depok 59 | 4%
11. Jabodetabek - Tangerang 52 | 3%
12. Sulawesi Selatan 35 | 2%
13. Sumatra Selatan 32 | 2%
14. Banten 32 | 2%
15. Sumatra Utara 31 | 2%
16. Lampung 26 | 2%
17. Kalimantan Selatan 23 | 1%
18. Kepulauan Riau 21 | 1%
19. Bali 18 | 1%
20. Sumatra Barat 17 | 1 %
21. Kalimantan Timur 15 | 1%
22. Riau 12 | 1%
23. Nusa Tenggara Barat 9 | 1%
24. Kalimantan Barat 9 | 1%
25. Aceh 7 | 0%
26. Kalimantan Tengah 4 | 0%
27. Nusa Tenggara Timur 4 | 0%
28. Jambi 4 | 0%
29. Sulawesi Barat 1 | 0%
30. Papua 1 | 0%

SOCIO-DEMOGRAPHICS

Marital Status

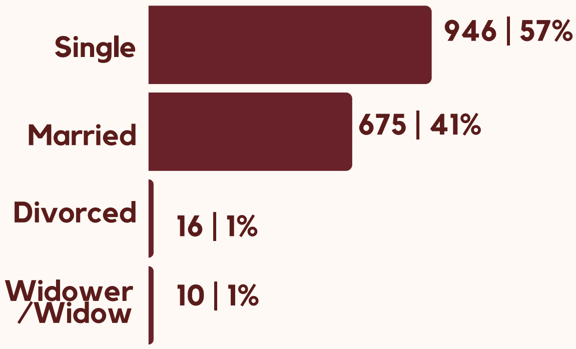

Fig. 3.2 Marital status distribution

Education

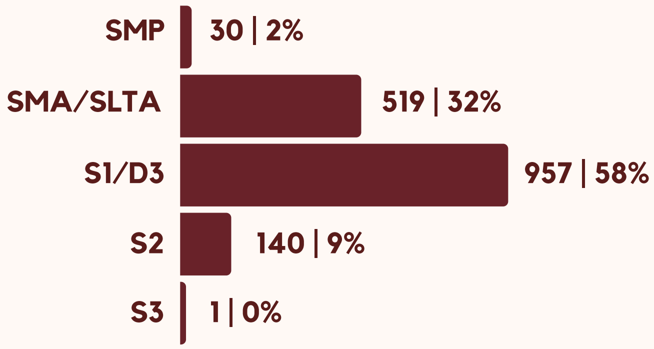

Fig. 3.3 Education distribution

Occupation

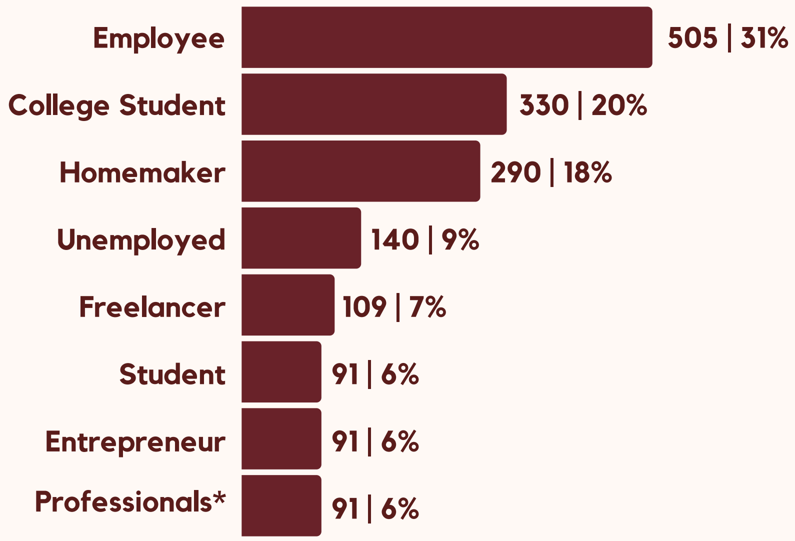

Fig. 3.4 Occupation distribution

* Professional experts such as Doctors, Consultants, Notaries, Accountants, Lawyers, Architects, Actuaries and Appraisal Services.

SOCIO-DEMOGRAPHICS

Average Monthly Income

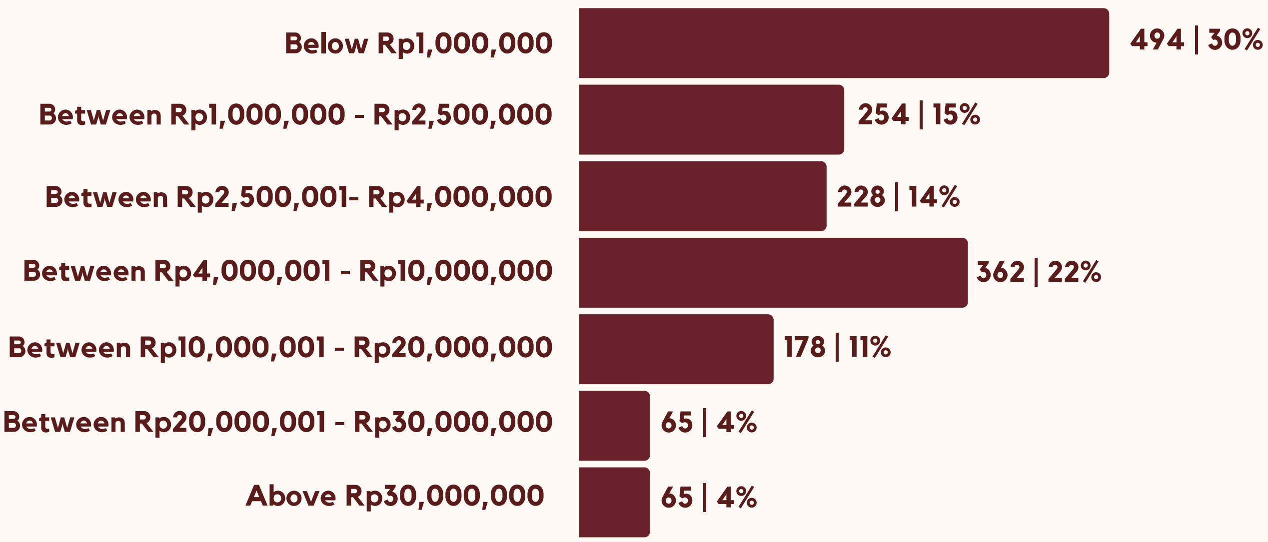

Fig. 3.5 average monthly income distribution

GROUPED BY GENERATION

GEN X

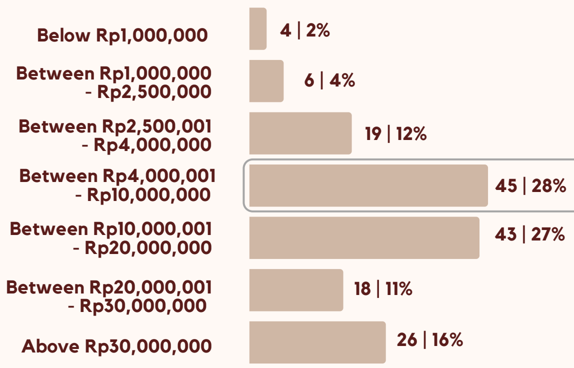

Fig. 3.6 Gen X average monthly income distribution

GEN Y

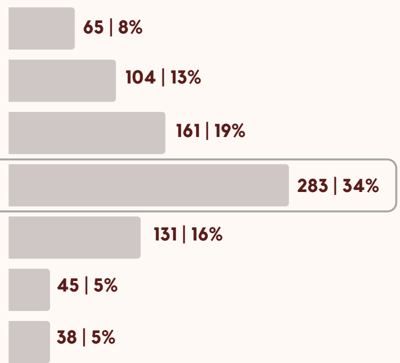

Fig. 3.7 Gen Y average monthly income distribution

GEN Z

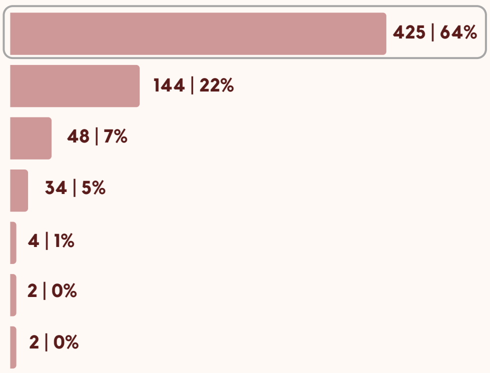

Fig. 3.8 Gen Z average monthly income distribution

30%

With average monthly income below Rp1,000,000

Out of 494 respondents that are in this group 86% of them are Gen Z who are mostly still in university and receive monthly stipend from their parents or on their first job. From several surveys that Venas conducted we found that these group have bigger percentage of disposable income compared to other groups.

SOCIO-DEMOGRAPHICS

Monthly Beauty Spending

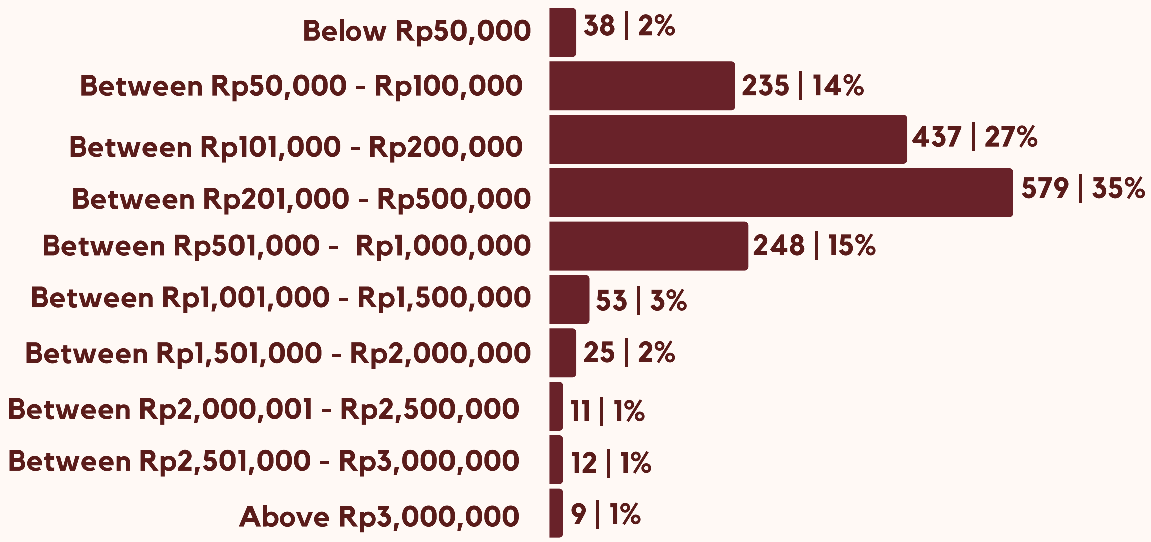

Fig. 3.9 average monthly beauty spending

GROUPED BY GENERATION

GEN X

Fig. 3.10 Gen X average monthly beauty spending

GEN Y

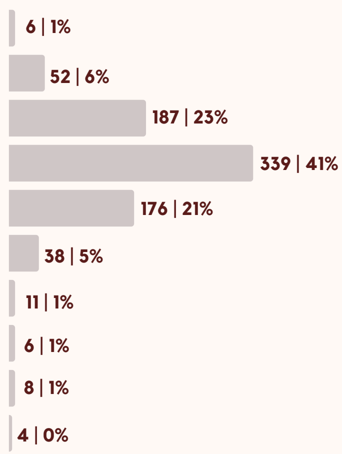

Fig. 3.11 Gen Y average monthly beauty spending

GEN Z

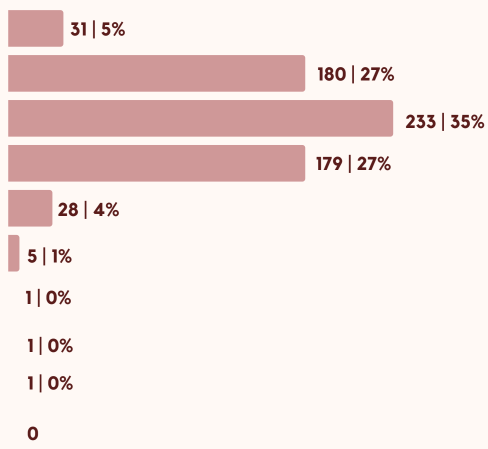

Fig. 3.12 Gen Z average monthly beauty spending

Gen X has the biggest beauty budget,
a few of them even spend over Rp 1.000.000 - Rp 2.000.000 per month.

35% of Gen Z spend between Rp. 101,000 - 200,000 for beauty products. Consider this to number when you're making pricing strategy for products targeting this gen group.

If you have masstige products, focus on winning Gen X and Gen Y first as they spend more for beauty products.

DIGITAL PLATFORM PREFERENCE

To understand the baseline information of how beauty enthusiasts converse and interact with each other on the internet, learning their internet habit & preference is necessary to relate to their lifestyle. We analyzed based on their preferences on social media & messenger app, preferred topics, and others.

Social Media

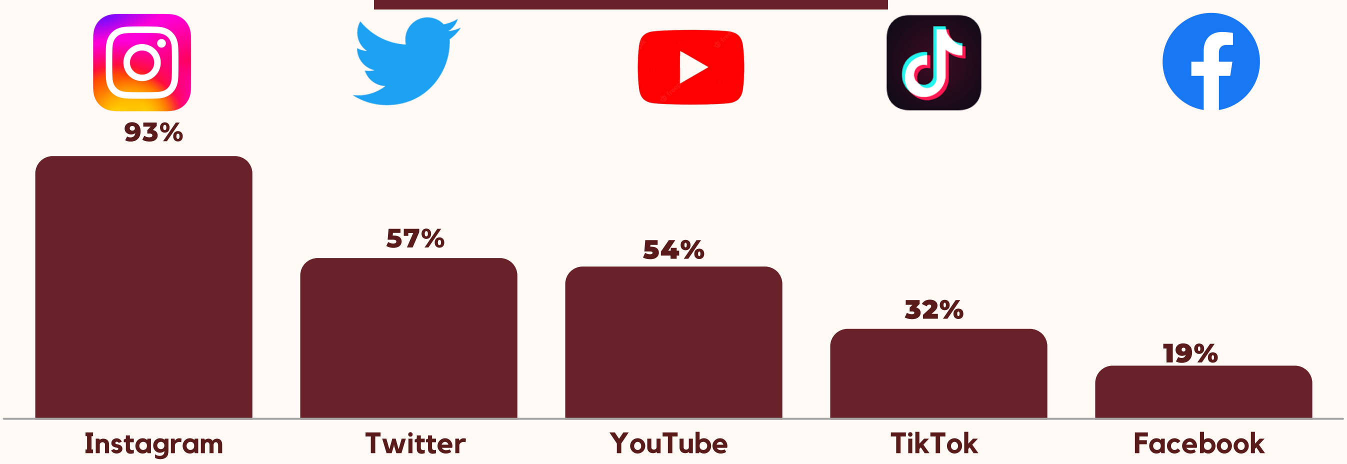

Fig. 3.13 top 5 social media preference

GEN X	98%	29%	43%	16%	30%
GEN Y	97%	42%	52%	22%	24%
GEN Z	86%	82%	59%	49%	16%

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CASE STUDY ABOUT GEN Z INTERACTION IN TWITTER

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DIGITAL PLATFORM PREFERENCE

Messenger App

The majority of the survey respondents choose WhatsApp as one of their preferred Messenger App in a total of 1,633 respondents or 99% from the total respondents. This signifies the importance for brands to have Whatsapp presence for their customer service channel because it is where most people converse directly with brands.

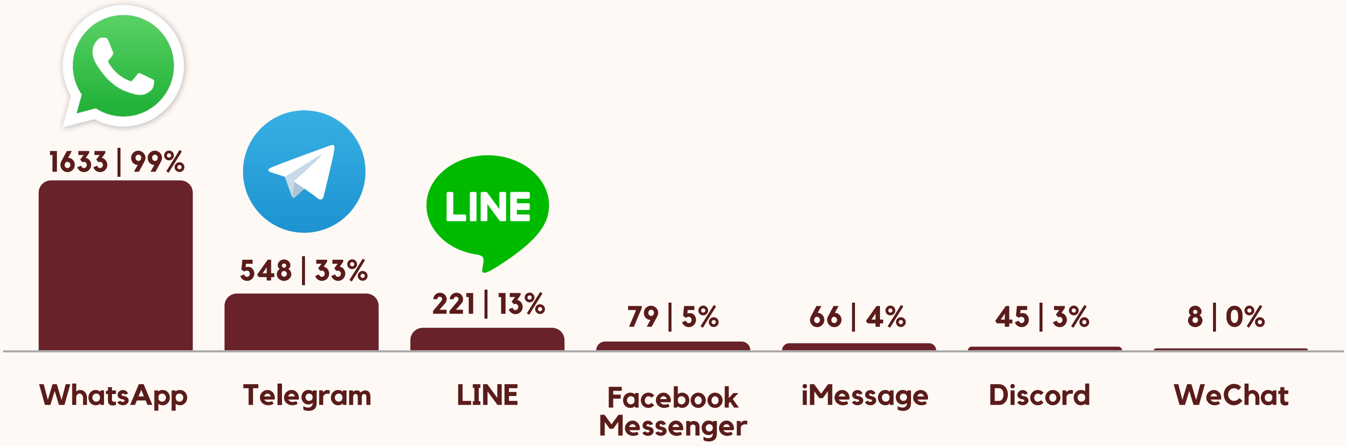
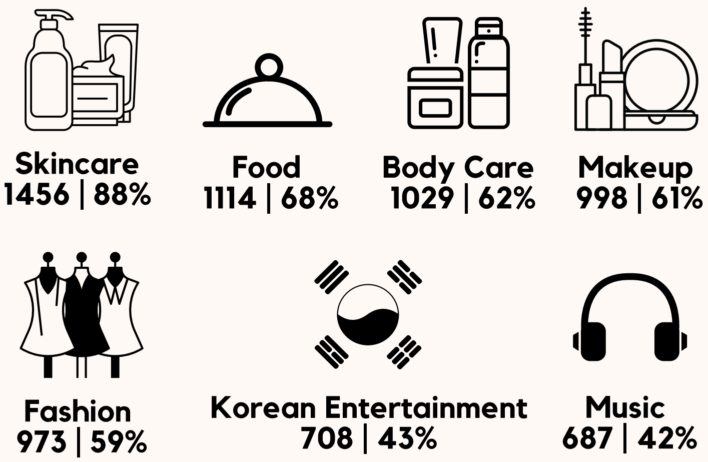


Figure 3.16 top 5 social media preference

Topics/Interest

Beauty and Fashion have always been interconnected. But what other topic beauty enthusiasts are interested in? Among the top 10, topic that are outside these two categories are Food (No 2, 68%), Korean Entertainment (No 6, 43%) and Music (No 7, 42%).



8. Hair Care 639 | 39%
9. Home & Family 625 | 38%
10. Entertainment & Gossips 537 | 33%
11. Arts & Culture 452 | 27%
12. Business & Finance 430 | 26%
13. News 424 | 26%
14. Career Tips 406 | 25%
15. Fitness 384 | 23%
16. Science 315 | 19%
17. Anime & Manga 203 | 12%
118. Sports 191 | 12%
19. Outdoors 158 | 10%
20. Politics 125 | 8%
21. Gaming 76 | 5%
22. E-Sports 36 | 2%

DIGITAL PLATFORM PREFERENCE

Movie/TV Series Providers

The majority of the survey respondents choose YouTube as one of their preferred Movie / TV Series / Documentaries / others platform in a total of 1,130 respondents or 69% from the total respondents.

YouTube
1130 | 69%

Netflix
933 | 57%

Disney+
584 | 35%

4. Viu 332 | 20%
5. WeTV 201 | 12%
6. HBO 113 | 7%
7. Vidio 95 | 6%
8. None 82 | 5 %
9. Google Play Movie 7 | 0%

Music/Podcast Providers

The majority of the survey respondents choose Spotify as one of their preferred Music / Podcast / Audio-based entertainment providers in a total of 1,127 respondents or 68% from the total respondents.

Spotify
1127 | 68%

YouTube Music
672 | 41%

Joox
221 | 13%

4. None 145 | 9%
5. Apple Music 125 | 8%
6. Google Play Music 77 | 5%
7. Soundcloud 62 | 4%
8. Noice 43 | 3 %
9. Resso 26 | 2%
10. Dezzer 5 | 0%

DIGITAL PLATFORM PREFERENCE

Livestream Providers

In the livestream providers section, we asked the respondents about their preferred providers for two different occasions: (1) For entertainment / information and (2) For live shopping. Most of the survey respondents choose Instagram Live for entertainment/information. For live shopping, the survey respondents choose Shopee Live.

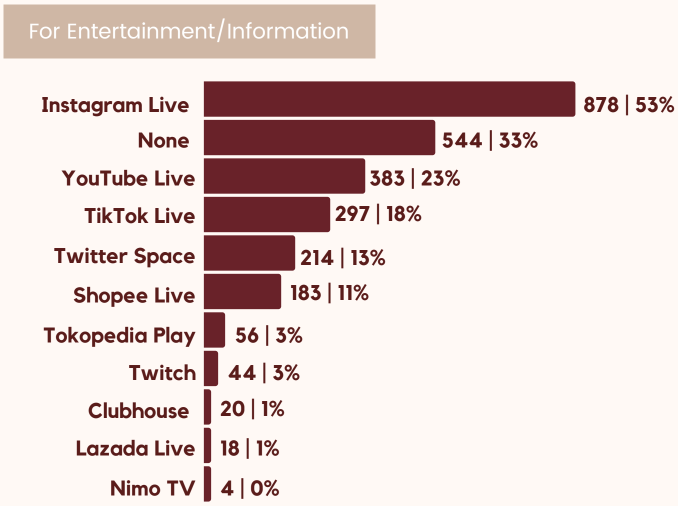


Figure 3.17 livestream providers preference for entertainment/information

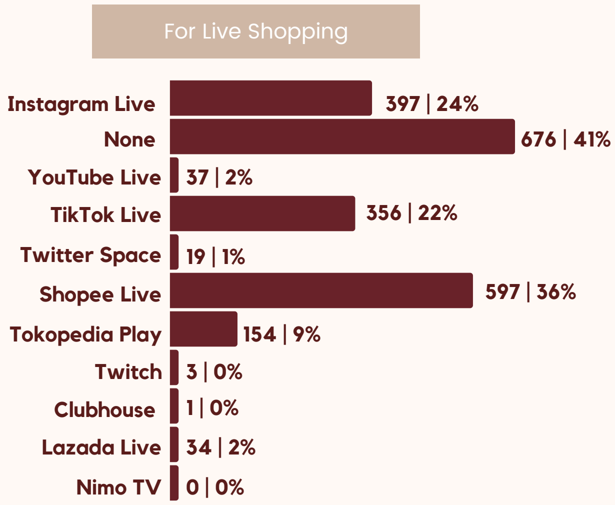


Figure 3.18 livestream providers preference for live shopping

Based on this finding, we gathered further insight on the top 5 live shopping channels and divided the findings based on each generation.

Both of the generations on Gen X and Gen Y considered Instagram Live as their chosen livestream providers on enjoying entertainment and/or live shopping. Meanwhile, Gen Z group is leaning stronger toward TikTok Live compared to the other generation groups.

PART 3 GENERATIONAL BEAUTY HABIT IN INDONESIA

Based on the survey findings, we gathered main insights on their skin care habit divided to the three generation groups.

GEN X GEN Y GEN Z

SKIN GENERAL CONDITION

To understand the consumers' habits and preferences on beauty products, mainly skincare and makeup, we first asked baseline information about their current skin general condition. The sections are from starting age on beauty routine, skin type, skin concerns, sensitive skin concerns, beauty product frequency and product categories used.

Starting Age on Beauty Routine

We asked our respondents to recall the first time they started their skincare routine. Around 35% of the total respondents or 549 respondents started their skincare routine between age 17 and 20 years old.

Table 4.1 starting age on beauty routine distribution on all generation

Age Group	All Gen	
	Total	%
0-8 years old		
9-12 years old		
13-16 years old		
17-20 years old		
21-24 years old		
25-28 years old	REQUEST FOR FULL REPORT TO READ MORE	
29-32 years old		
33-36 years old		
37-40 years old		
41-44 years old		
45-48 years old		
49-52 years old		

SKIN GENERAL CONDITION

Starting Age on Beauty Routine

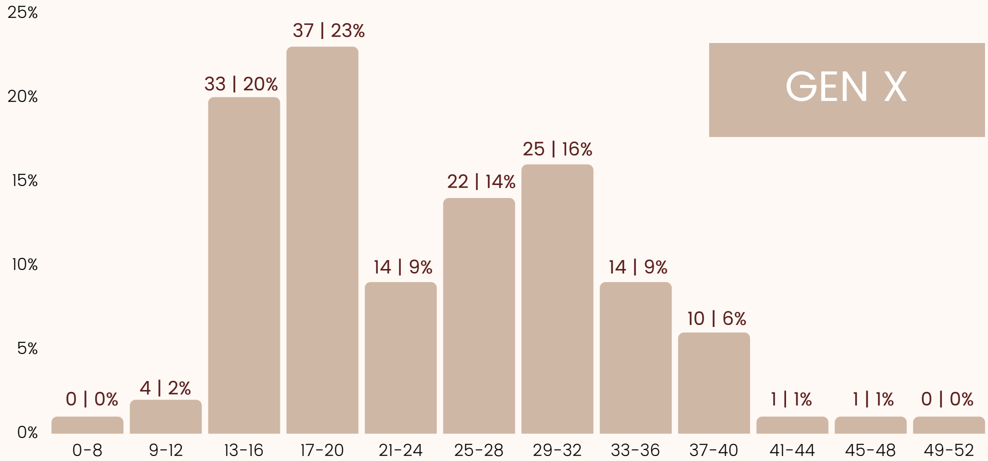


Fig. 4.1 Starting age on beauty routine distribution on Gen X

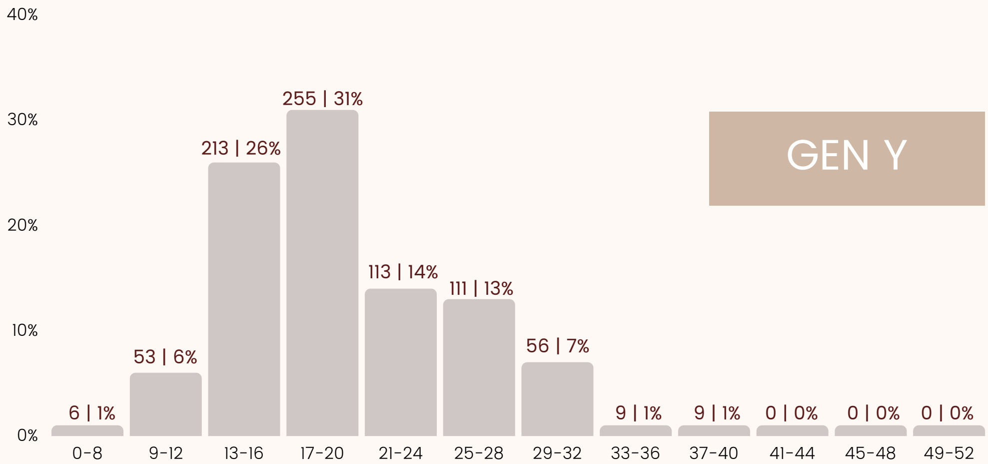


Fig. 4.2 Starting age on beauty routine distribution on Gen Y

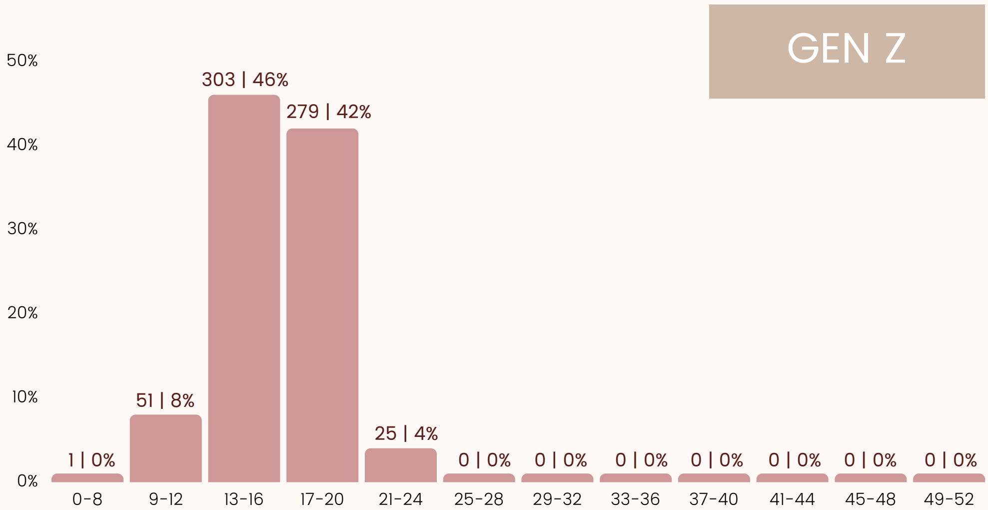


Fig. 4.3 Starting age on beauty routine distribution on Gen Z

"As the generation shifts, the starting age of a beauty routine becomes earlier.
This opens up opportunities to aim for specific age group's needs and concerns."

GENERAL SKIN CONDITION

Skin Type

Based on the survey, around 741 or 45% of the respondents admit to having a combination skin. On the below summarized data of top 3 skin types based on generation groups, we can see the distribution of skin types in each generation. Gen X and Gen Y are quite evenly distributed between Oily, Dry, and Normal. Yet, the Gen Z skewed quite heavily toward Combination and Oily.

Gen X

Combination 54%
Dry 22%
Oily 16%

Gen Y

Combination 46%
Dry 22%
Oily 21%

Gen Z

Combination 42%
Oily 30%
Dry 12%

"As the generation grows more mature, their skin type tends to lean towards less oily.
However, the highest skin type in all groups is Combination skin."

"Consider which target market your brand is going to serve to determine which texture works best."

GENERAL SKIN CONDITION

Skin Concerns

We asked our respondents to select up to three skin concerns that they are currently experiencing. The majority of respondents experience acne marks in a total of 919 respondents or 56% from the total respondents.

If we dissect the skin concerns by generation, the most selected concerns varies. Gen X mostly experience aging signs. Gen Y and Gen Z, on the other hand, still consider acne marks as one of their skin concerns.

Gen X

Aging signs 68%
Sunspots 52%
Dullness 34%

Gen Y

Acne marks 52%
Dullness 42%
Enlarged pores 41%

Gen Z

Acne marks 69%
Dullness 47%
Enlarged pores 41%

"Aging signs concern jumps from 8% in Gen Z to 35% in Gen Y, indicating that early signs of aging start becoming more noticeable at around Gen Y ages."

GENERAL SKIN CONDITION

Sensitive Skin Problems

Additionally, we asked our respondents to read the specified sensitive skin concerns (check Appendix B for details) and choose up to 3 concerns that they are also experiencing. The majority of respondents experienced acne-prone skin, around 787 respondents or 48% from the total respondents.

If we analyze the sensitive skin concerns by generation, the majority of selected concerns varied. Gen X mostly experience itchy, dry, and/or flaky skin. While Gen Y and Gen Z are somewhat mirroring the general findings.

Gen X

- **Itchy, dry and/or flaky skin 37%**
- **Easily irritated and breaking out 22%**
- **Rashes/hives 18%**

Gen Y

- **Itchy, dry and/or flaky skin 33%**
- **Easily irritated and breaking out 25%**
- **Rashes/hives 17%**

Gen Z

- **Easily irritated and breaking out 29%**
- **Itchy, dry and/or flaky skin 28%**
- **Rashes/hives 18%**

48%

perceive "oily skin" as sensitive skin traits

Around 48% of the total respondents consider "oily skin" as sensitive skin traits; even though it is not necessarily so. The highest gen group that misperceive this trait is Gen Z group, around 58%.

BEAUTY HABIT

In this section, we asked about their habit of using skincare and makeup. The two topics are their usage frequency and the product categories used.

Skincare Habit

On the usage frequency, the majority of respondents admit that they do their skincare routine twice a day, in total of 1,126 respondents or 74% from the total respondents.

MORE THAN 70% OF EACH GENERATION DO THEIR SKINCARE ROUTINE TWICE A DAY.

TOP 5 PRODUCTS USED BY EACH GENERATION ARE FACE CLEANSER, SUNSCREEN, SERUM, MOISTURIZER AND TONER RESPECTIVELY.

"Top 5 products for each generation are the same. However when deciding textures for your products, it's not only skin concerns that need to be focused on, also consider the skin type."

BEAUTY HABIT

On the skincare product categories used, we asked them to select the categories provided below as many as they consider relevant with their current skincare routine. Almost all of the respondents list face cleanser (97%) in their skincare routine, followed by sunscreen (92%), serum (90%), moisturizer (88%), and face toner (83%) as the top five of the skincare categories used.

"What is next for toner?"

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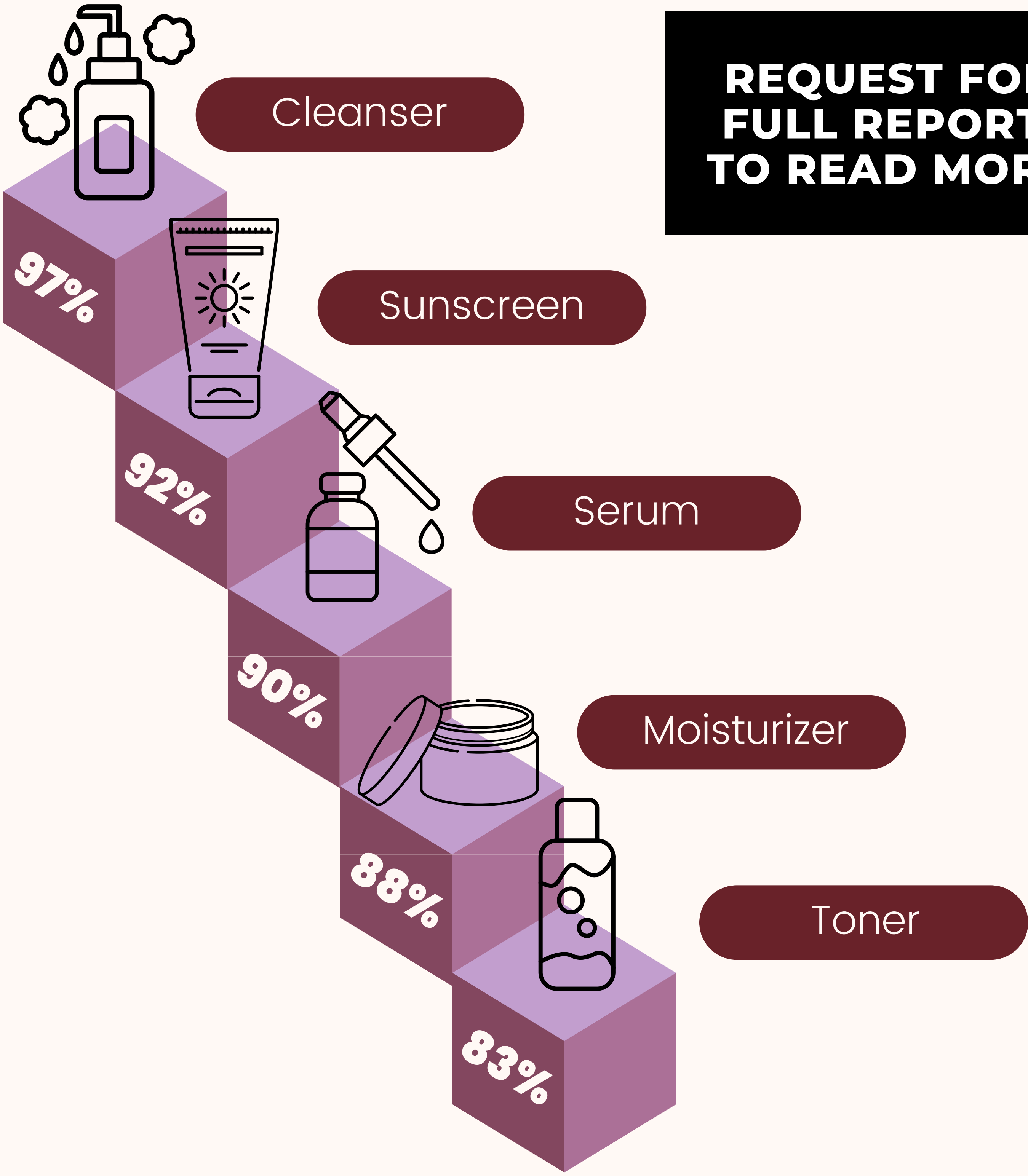

BEAUTY HABIT

Those who started their beauty routine at a later age

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Essence	First Serum	Ampoule

GEN X

GEN Y

GEN Z

GEN X

GEN Y

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“

Basic skincare has shifted from cleanser-toner-moisturizer-sunscreen to cleanser-serum-moisturizer-sunscreen.

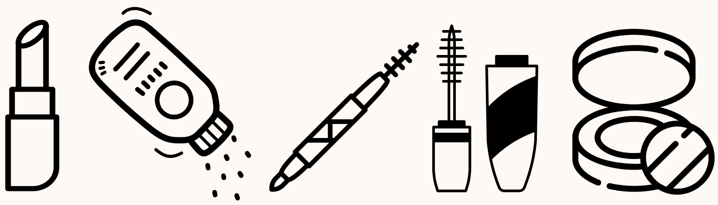
”

BEAUTY HABIT

Makeup Habit

On the usage frequency, the majority of respondents admit that they do their makeup routine only for special occasions in total of 640 respondents or 39% from the total respondents.

EACH GENERATION ONLY USE MAKEUP FOR SPECIAL OCCASIONS.

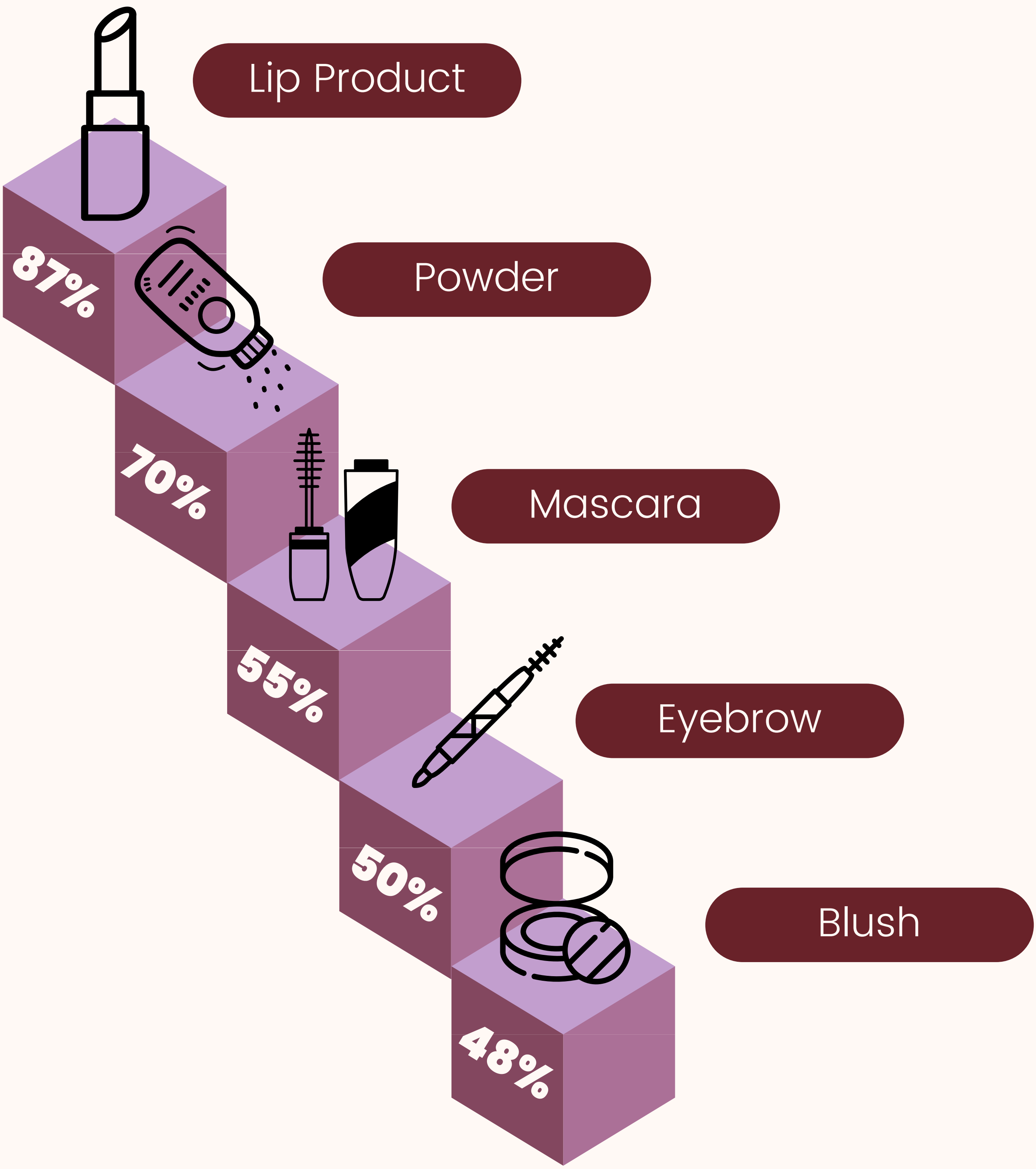


TOP 5 PRODUCTS USED BY GEN X AND GEN Y ARE LIP MAKEUP, POWDER, EYEBROW, MASCARA AND BLUSH WHILE GEN Z FAVOR LIP MAKEUP, POWDER, MASCARA, EYEBROW AND BLUSH.

"Think about different milestones in each generation. They each have their own kinds of special occasions."

BEAUTY HABIT

On the makeup product categories used, we asked them to select the categories provided below as many as suited with their current makeup routine. Almost all of the respondents use Lipstick/lip cream/lip tint (87%) on their makeup routine, followed by powder (70%), mascara (55%), eyebrow product (50%), and blush product (48%) as the top five of the makeup category used in the survey.



BEAUTY HABIT

Each generation has their own distinct look to match their special occasions. For Gen X, they often need a more formal, polished look for events such as weddings and office gatherings.
Gen Y might appreciate a more semi-formal look, for weddings, office events and bridal/baby showers.
Gen Z on the other hand prefer more casual, festive look for birthday parties, graduations and proms.

GEN X

Formal, polished look.

GEN Y

Semi-formal look.

GEN Z

Casual, festive look.

ICONIC BEAUTY BRANDS FOR EACH GENERATION

Following the rise and fall of many brands throughout the years, Venas opted to dig deeper into whether there is a formed generational affinity towards certain brands. "Iconic" has been chosen as the main topic in discussing the brands because each generation might have different perception of what is considered iconic, which might change as they mature. Identifying the perception can help understand how brands form affinity in each generation and how both new and established brands can leave a lasting impression on them.

GEN X

Legacy, Relevancy

LANCÔME PARIS

ESTĒE LAUDER

GEN Y

Legacy, Distinctive Identity

SK-II

Sulwhasoo

ESTĒE LAUDER

GEN Z

Personal Experience & Perception

avoskin

Wardah cosmetic

Gen X and Gen Y's iconic brands are dominated by international brands. They perceive "iconic" as staying relevant for a long period of time, a legacy that stays on top of their mind. Gen X and Gen Y were more influenced by parental habits. Seeing their parents using the iconic brands left a deep impression about the brand and even more so because the brands are still relevant to them in the present days.

"Estee Lauder dan Lancome. Sudah tau dari jaman mamaku, bahkan ketika aku belum kenal skincare tapi udah tau parfumnya. Menurutku mereka adalah brand yang harus lumayan splurge. Memang ditujukan buat perawatan yang lebih advanced, jadi menurutku masih oke. Pasarnya mungkin untuk yang usia 40-an dan memang masih relevan sampai sekarang."

Gen X

"Estee Lauder. Branding udah kenceng banget, been around for ages dan sampai sekarang masih relevan banget"

Gen Y

ICONIC BEAUTY BRANDS FOR EACH GENERATION

Interestingly, a certain pattern can be observed as the generation shifts. The perception of iconic brands has turned to be less influenced by parental legacy. Some Gen Y perceive "iconic" as having a distinctive identity. Gen Z expressed this even more evidently, as their perception of iconic brands is far from aspirational. Gen Z measures iconicity based on their own perspective and experience, which is why their iconic brands are dominated by local brands.

"Estee Lauder dengan Advanced Night Repair Serum, Sulwhasoo dengan ginseng dan SK-II dengan Pitera. Menurutku produknya sudah menjadi identitas mereka dan jadi iconic."

Gen Y

"Avoskin. Karena dia banyak ngeluarin varian baru disesuaikan sama kebutuhan, baru-baru ini nyobain yang Your Skin Bae Ceramide yang banyak di-review dan cocok. Inovatif juga, kayaknya bakalan masih bertahan di beberapa tahun ke depan."

Gen Z

"Wardah. Inget pernah baca cerita perjalanan Wardah sebagai kosmetik halal. Dibikin sama pendirinya sebagai pharmacist, yang sesuai dengan visi misinya. Sering donasi dan bikin event inspiring beauty. Orang sekarang kayaknya hafal kalo Wardah itu halal."

Gen Z

Brands should aim for

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KEY TAKEAWAYS

After we learned about their skin general condition, beauty habit and the brands that are considered as the top of mind for their generation, there are a few of key takeaways that we can acknowledge from the data:

It is important for brands to not only focus on the current trends, but also identify the concerns, that may be different for each consumer segments.

Around 28% of the total respondents are showing a pattern of lessening the steps of their beauty routine down to what is essential to their lifestyle.

PART 4
BASIC PRODUCT PREFERENCE IN EACH GENERATION

We asked our respondents whether they used the basic skincare products, which are: face cleanser, face toner, moisturizer, and sunscreen. If they use those products, they then will be faced with a set of questions that is related to the product attributes. In this section, we grouped the four products based on the similarity of the questions

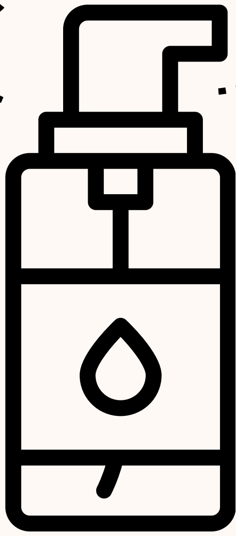
CLEANSER PRODUCT PREFERENCES

41%
Prefer no fragrance in their cleanser

72%
Prefer foaming cleanser

61%
Prefer size 50ml-100ml

87%
Prefer facial wash type



51%
Purchase cleanser between 1 - 3 times in the last 3 months

52%
Does not like to change their cleanser product variant/brand once in a while

Gen X*

- Like to explore new cleanser
- Ideal price: Rp100,000
- Highest user of Cleansing Oil type

Gen Y*

- Like to explore new cleanser
- Ideal price: Rp100,000
- Highest user of Cleansing Gel type

Gen Z*

- Ideal price: Rp30,000
- Highest user of Micellar Water type

*by majority on each gen group

Based on these findings, we then further analyzed the preference on two unique groups based on their monthly beauty spending: The group that spend below Rp200,000.- and the group that spend above Rp200,000.-

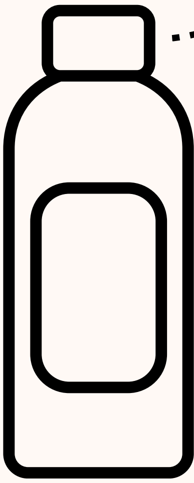
TONER PRODUCT PREFERENCES

46%
Prefer no fragrance in their toner

70%
Use toner morning & night

40%
Prefer size 50ml-100ml

79%
Prefer runny texture in toner



50%
Purchase toner not more than 1 time in the last 3 months

57%
Does not like to change their toner product variant/brand once in a while

Gen X*

- Leaning toward fragranced toner
- Prefer size 101 - 150ml
- Like to explore new toner
- Ideal price: Rp200,000

Gen Y*

- Prefer size 101 - 150ml
- Purchase toner between 1 - 3 times in the last 3 months
- Ideal price: Rp150,000

Gen Z*

- Ideal price: Rp100,000
- Quite strong dislike on fragranced toner

*by majority on each gen group

Based on these findings, we then further analyzed the preference on two unique group based on their monthly beauty spending: The group that spend below Rp200,000.- and the group that spend above Rp200,000.-

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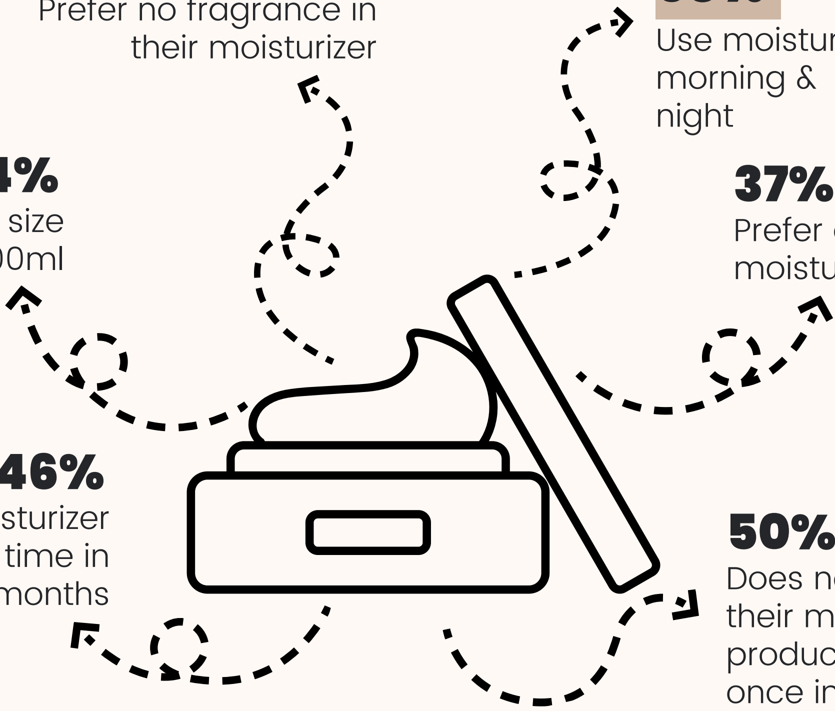
MOISTURIZER PRODUCT PREFERENCES



40%
Prefer no fragrance in their moisturizer

68%
Use moisturizer morning & night

64%
Prefer size 50ml-100ml

37%
Prefer gel texture on moisturizer

46%
Purchase moisturizer not more than 1 time in the last 3 months

50%
Does not like to change their moisturizer product variant/brand once in a while

Gen X*

- Purchase between 1 - 3 times in the last 3 months
- Like to explore new moisturizer
- Ideal price: Rp200,000 or Rp300,000
- Prefer cream texture

Gen Y*

- Purchase between 1 - 3 times in the last 3 months
- Like to explore new moisturizer
- Ideal price: Rp100,000
- Prefer cream texture

Gen Z*

- Ideal price: Rp50,000 or Rp100,000
- Prefer gel texture

*by majority on each gen group

On moisturizer usage preference, around 68% of the total respondents or 1,119 respondents use moisturizer on a daily basis in the morning and at night. We then asked further whether they use a different type or brand of moisturizer for their morning day and night routine, and around 61% of the group or 684 respondents answered "No".

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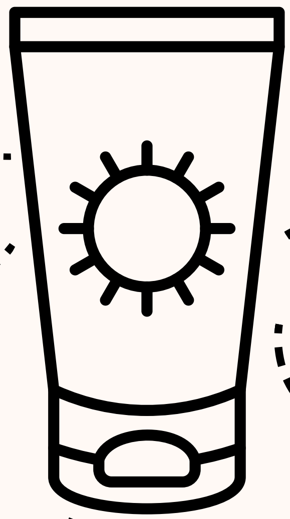
SUNSCREEN PRODUCT PREFERENCES

56%
Prefer no fragrance in their sunscreen

66%
Prefer SPF 45 - SPF 50



68%
Prefer size 50ml-100ml

31%
Prefer hybrid texture (cream & gel) in sunscreen

65%
Purchase sunscreen between 1 - 3 times in the last 3 months

55%
Does not like to change their sunscreen product variant/brand once in a while

Gen X*

- Ideal price: Rp200,000

Gen Y*

- Like to explore new sunscreen
- Ideal price: Rp100,000

Gen Z*

- Ideal price: Rp50,000
- Prefer gel texture

*by majority on each gen group

Based on these findings, we then further analyzed the preference on two unique group based on their monthly beauty spending: The group that spend below Rp200,000.- and the group that spend above Rp200,000.-

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KEY TAKEAWAYS

Gen X

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KEY TAKEAWAYS

Gen Y

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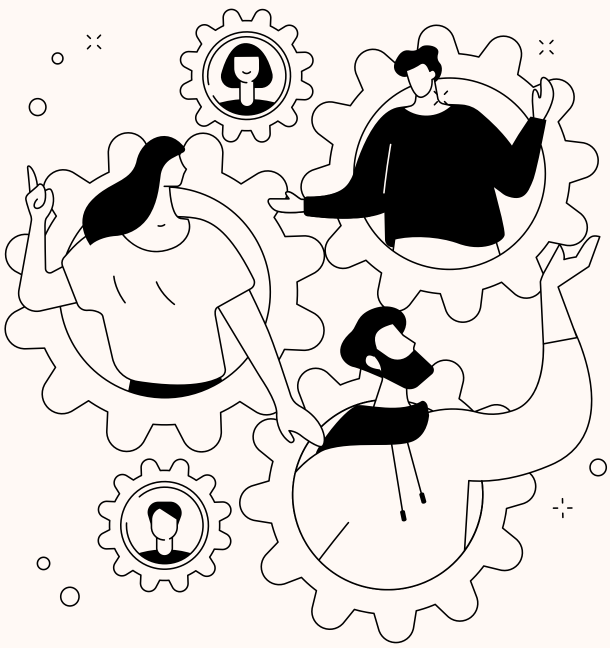

KEY TAKEAWAYS

Gen Z

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PART 5 GENERATIONAL CONSUMER JOURNEY IN INDONESIA

When talking about beauty shopping behavior, it is important to note that beauty purchase is not considered as a primary purchase for the consumers. The data patterns that emerge when talking about their beauty purchase behavior might differ in each generation or even may be affected by their socio-demographic status.

We asked our respondents to identify their monthly beauty shopping budget, their beauty shopping frequency, their purpose, and their shopping channel preferences.

"

Over 55% of each generation shopped beauty product 1-3 time(s) in the last 3 months.

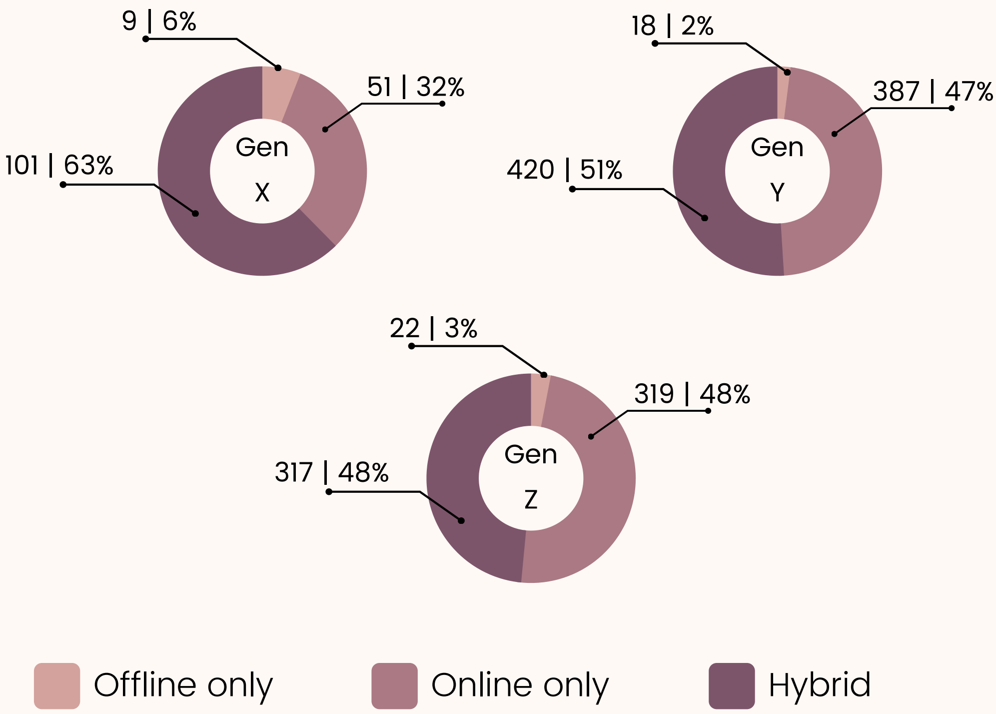
Most of the purchases are intended for personal use.
However,
45% of Gen X also made beauty purchases for their children.

On the other hand, 24% of Gen Z made purchases for their parents, which is the highest percentage among all generations.

"

VENAS

BEAUTY SHOPPING PREFERENCE



We can expect that in their hybrid shopping behavior, Gen X spends the most time shopping offline compared to the other two generations.

"Every generation prefer hybrid shopping (online & offline) for their beauty needs."

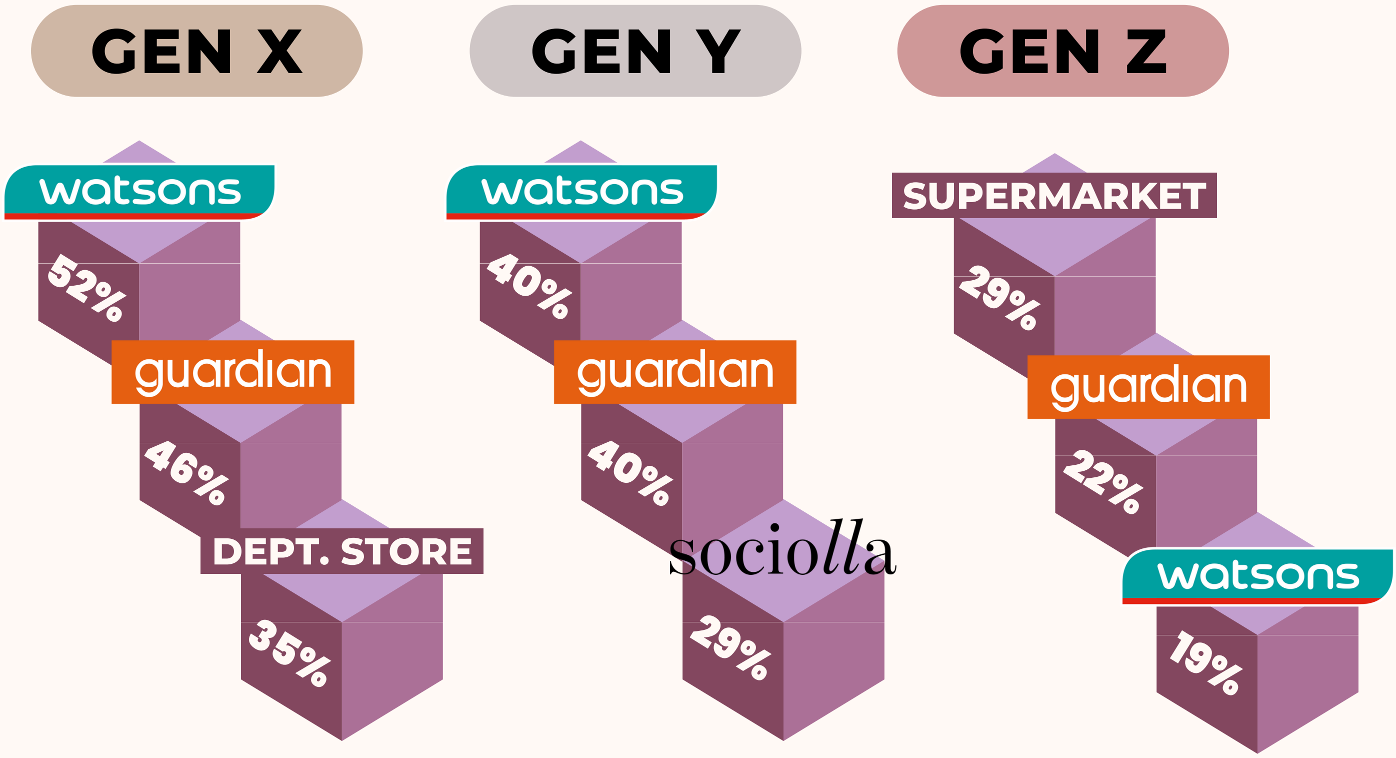
ONLINE SHOPPING CHANNEL PREFERENCE

Furthermore, we asked the group of respondents that answered online shopping to select their online shopping preferences on purchasing beauty products. Shopee was the most chosen by 1,457 respondents or 88% of the total group.

Each generation chooses Shopee, Tokopedia and Sociolla, respectively as their top 3 choices for online shopping channels.

OFFLINE SHOPPING CHANNEL PREFERENCE

We asked the group of respondents that answered offline shopping to select their offline shopping preferences on purchasing beauty products. Drugstores such as Guardian was the most chosen by 553 respondents or 34% of the total group.



"Gen Z mention that they prefer shopping in multi-brand stores because they enjoy exploring different types of products and such stores provide convenience to purchase multiple product categories."

OFFLINE SHOPPING CHANNEL PREFERENCE

“ *Consider*

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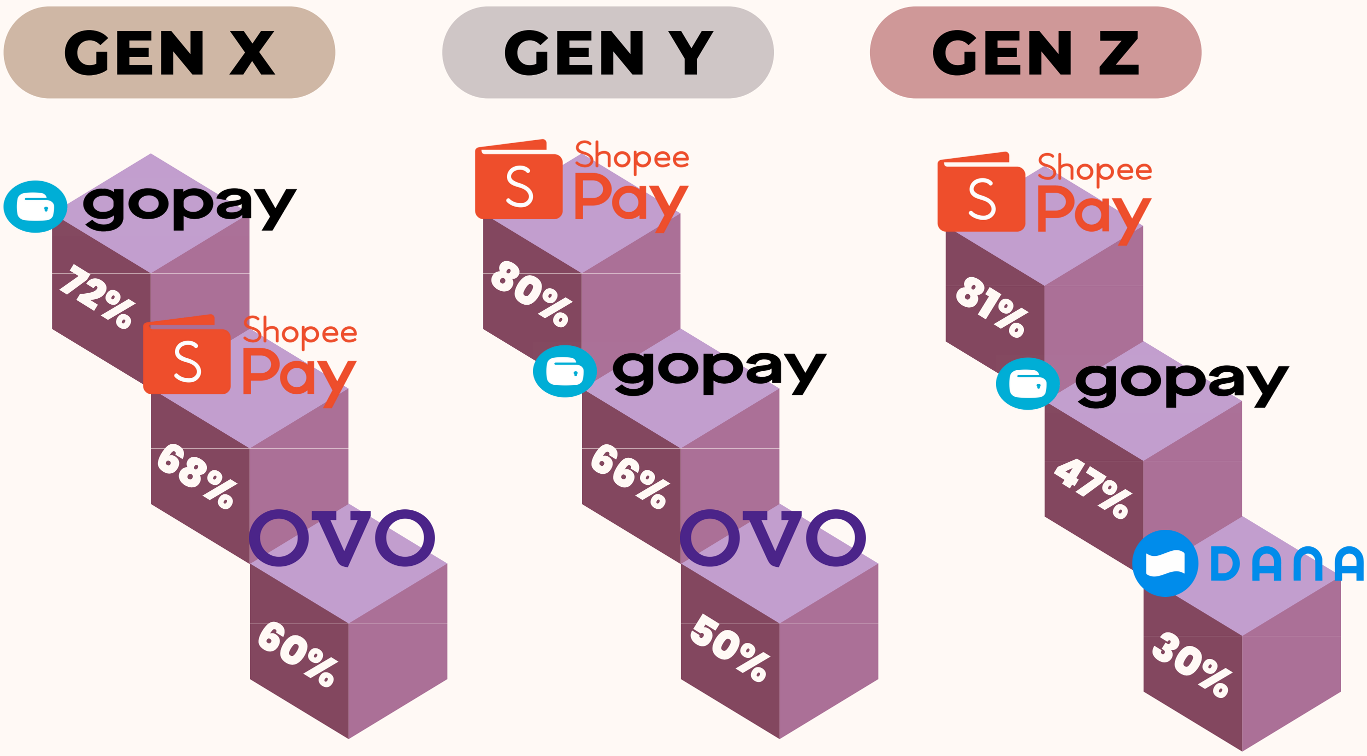
PREFERRED PAYMENT OPTIONS

Additionally, we asked the respondents to select whether they usually utilize digital/mobile payment when purchasing beauty products. Around 87% of the total respondents or 1,426 respondents use digital/mobile wallet payment as can be seen on Table Appendix F.7.

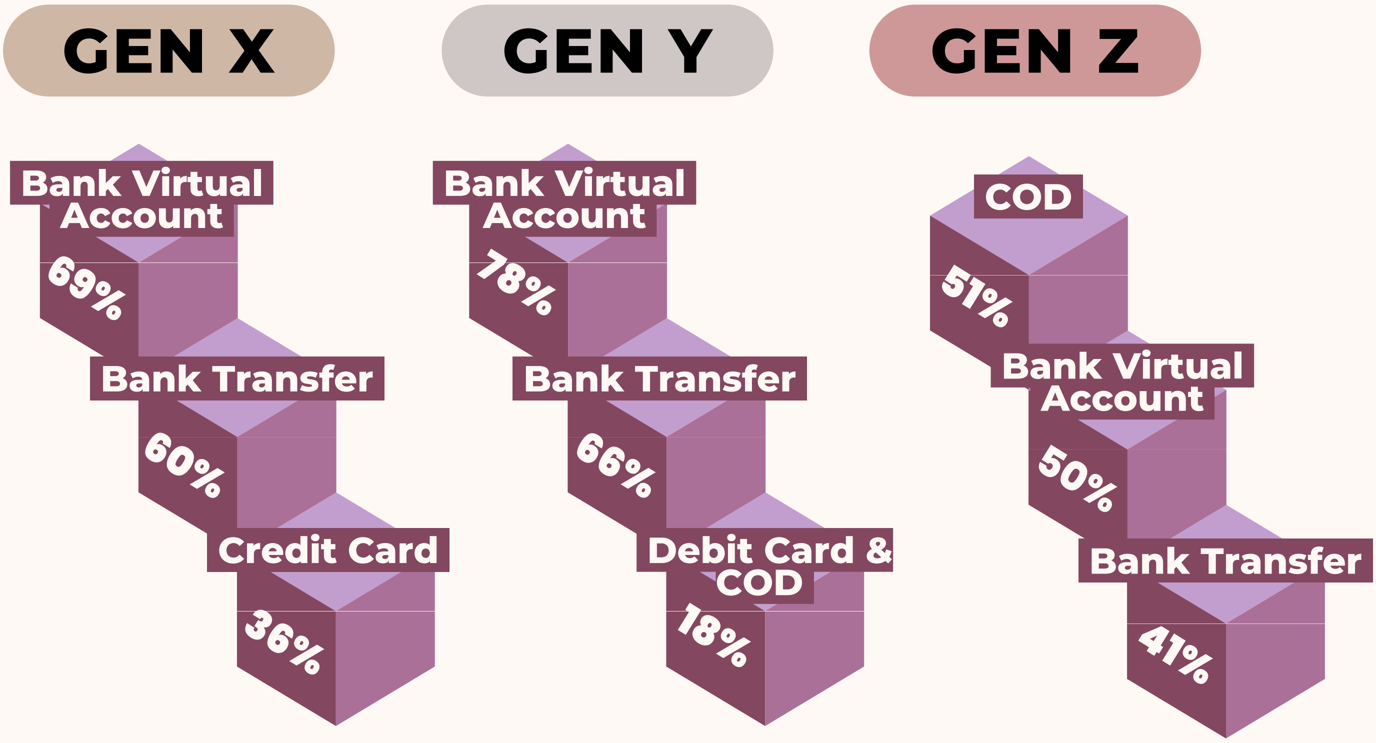
DIGITAL/MOBILE PAYMENT PREFERRED PROVIDERS

For the group that usually use digital/mobile payment options, the majority of them use ShopeePay, around 92% of the total group or 1,308 respondents.



OTHER PAYMENT PREFERRED PROVIDERS

For the group that does not use digital/mobile wallet payment, most of the respondents use Bank Virtual Account as their preferred payment method around 66% of the total group or 1,083 respondents. While the least preferred payment method is prepaid card.



On Gen Z group, we analyzed based on the age groups that is available on the survey options: Under 19 years old and in between 19 years old and 24 years old. The preference of Cash on Delivery (COD) is higher on under 19 years old group, but when we analyze on the 19-24 years old group, their preferred payment shifted to Bank Virtual Account, around 27% of the total 19-24 group or 297 respondents.

"Around 30% of the Gen Z that select Cash on Delivery is within the age group of 14 - 18 years old, possibly because this age group does not have a bank account yet"

LIVE SHOPPING EXPERIENCE

We asked our respondents of their live shopping experience, whether they have only watched the live shopping session, or they have watched and purchased the products showcased on the live shopping session. As seen on Fig. 7.9, it seems like live shopping is still at its early stage because the majority of the respondents have only watched the session without buying anything yet.

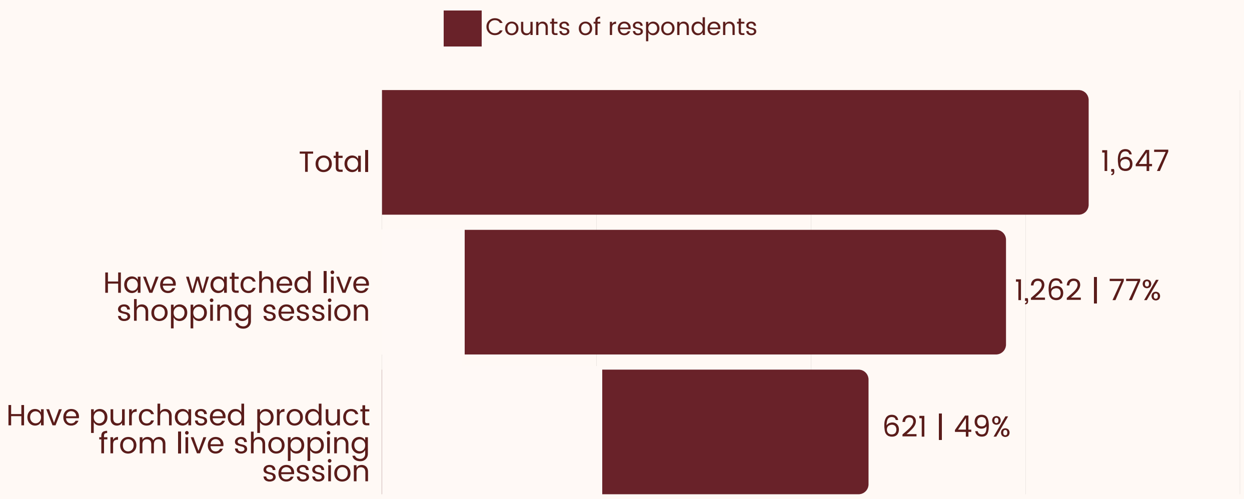


Fig. 7.10 Funnel chart of live shopping experience from watching to purchase

When we analyze based on three generations, the details can be seen on Table Appendix E.3 and E.4 The majority of all generations have watched live shopping sessions. But when we asked whether they have made any purchase from the session, around 56% of the Gen X group or 66 respondents admit to having made a purchase. Meanwhile the group that made a somewhat least experience on making a purchase is Gen Z, around 55% of the Gen Z group or 297 respondents.

LIVE SHOPPING EXPERIENCE

73% of Gen X **74% of Gen Y** **81% of Gen Z**

Have watched live shopping.

56% of Gen X **52% of Gen Y** **45% of Gen Z**

Have made purchases through live shopping.

We asked the groups that have made a purchase from a live shopping session about their platform preference. Social media is still the commonly-used channel for live shopping over e-commerce, moreso for Gen X. Gen Y and Gen Z still gravitate between the two, with social media being slightly more favored.

67% of Gen X

52% of Gen Y

51% of Gen Z

Preferred social media over e-commerce for live shopping.

LIVE SHOPPING EXPERIENCE

From our Focus Group Discussion about this topic, we heard some strong opinions about whether or not live shopping will dominate their shopping experience as a whole.

"Each generation argued against live shopping overtaking the more conventional offline and online shopping."

We then asked the respondents about their main reasons behind making a live shopping purchase. "Exclusive discount offers" is chosen by each generation as the strongest reason for making these purchases.

GEN X

1. Exclusive discount offers. (61%)
2. Live product review from trustworthy host. (41%)
3. Live shopping bundle offers. (38%)

GEN Y

1. Exclusive discount offers. (79%)
2. Live shopping bundle offers. (51%)
3. Gift with purchase (GWP)/ freebies offers. (40%)

GEN Z

1. Exclusive discount offers. (83%)
2. Live shopping bundle offers. (46%)
3. Live product review from trustworthy host. (41%)

"Economical gain is the main driver for Gen Y to purchase from live shopping, possibly because they watch live shopping already knowing what they need beforehand.

LIVE SHOPPING EXPERIENCE

Gen Y on the other hand prefer live shopping which has a more lively approach. Time-constraining aspects such as countdown timer and sale reminder is perceived favorably and chatty host is deemed a fun style for live shopping.

> *Clickbait titles in video promotion is not perceived favorably by each generation. In live shopping and its promotion, it is better to put actual discounts and promotions rather than clickbaiting and fixing up prices just to give an impression of an attractive discount percentage.*

"Aku nggak suka Tapi pasti ada yang suka buat lucu2an aja. Clickbait sah2 aja asal nggak bikin orang salah paham sama yang dia sampaikan."

Gen X

"Nggak suka, kayak overclaim dan too much. Mikir beneran apa nggak sih ini."

Gen Y

"Nggak suka. Ngadi2, kayaknya di-setting supaya sesuai sama harga yang mereka jual."

Gen Z

We then analyzed the live shopping experience based on their location.

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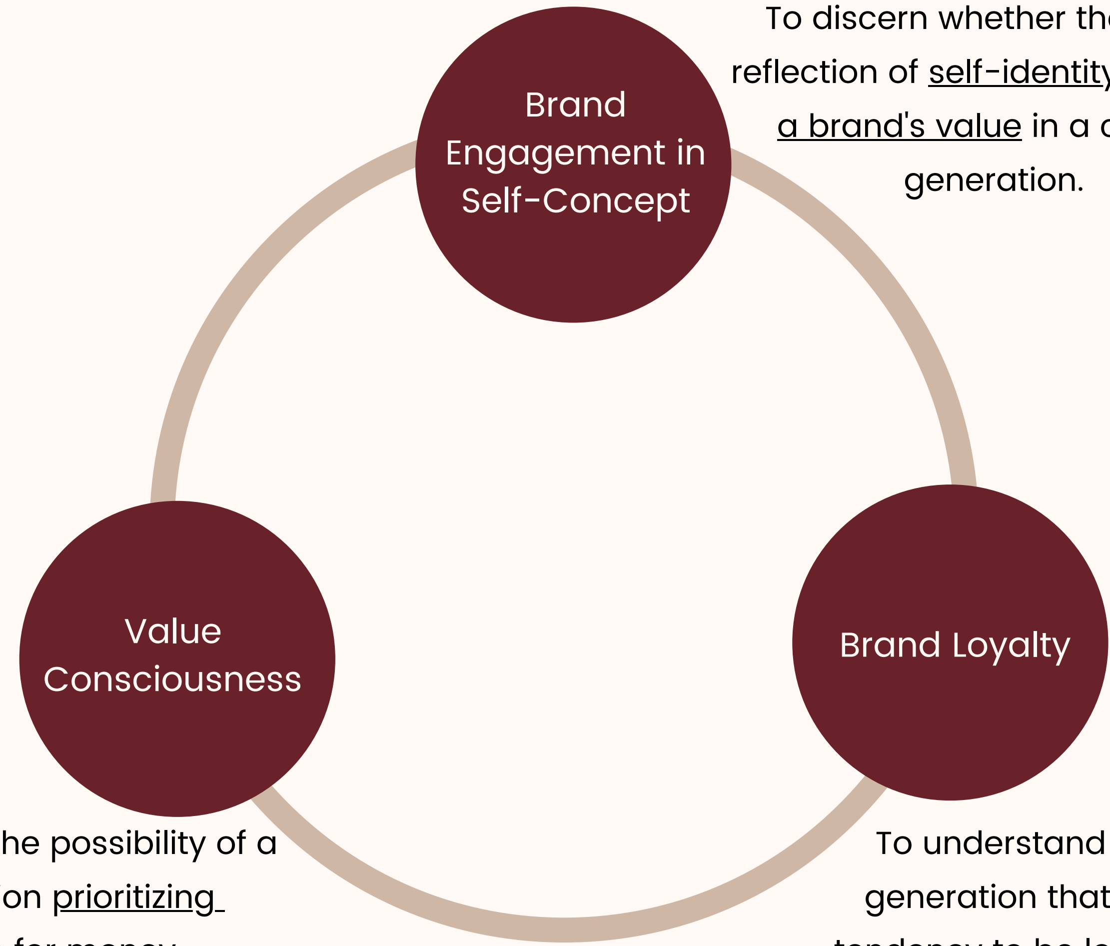
GENERATIONAL BEAUTY PURCHASE BEHAVIOR

Venas categorizes three primary aspects that drive consumer purchase decision for beauty products. These are brand value, value for money and loyalty.

From the aforementioned aspects, Venas has performed literature study and developed three main factors that constitute the beauty purchase behavior. Each factor consists of three Likert statements.



GENERATIONAL BEAUTY PURCHASE BEHAVIOR

Brand Engagement in Self-Concept

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Value Consciousness

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Brand Loyalty

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GENERATIONAL BEAUTY PURCHASE BEHAVIOR

Table 7.16 Statistical analysis for Brand Engagement in Self-Concept, Value Consciousness and Brand Loyalty with respect of each generation. Mean ± Standard Deviation values bearing different letter indicate statistically significant difference through one-way ANOVA test.

Factor	Generational Group	Mean ± Standard Deviation
Brand Engagement in Self-Concept	**Gen X**	
	Gen Y	
	Gen Z	
Value Consciousness	**Gen X**	
	Gen Y	**REQUEST FOR FULL REPORT TO READ MORE**
	Gen Z	
Brand Loyalty	**Gen X**	
	Gen Y	
	Gen Z	

INSIGHT

Brand Engagement in Self-Concept:
Gen Z shows significantly higher Brand Engagement in Self-Concept than Gen X and Gen Y. Gen X is not significantly different than Gen Y in terms of Brand Engagement in Self-Concept.

Value Consciousness:
Every group shows significant difference compared to the others, with Gen Z having a greater Value Consciousness than Gen Y and Gen X, subsequently.

Brand Loyalty:
Gen Z shows significantly higher Brand Loyalty than Gen X and Gen Y. However, Gen X does not show significant difference to Gen Y.

GENERATIONAL BEAUTY PURCHASE BEHAVIOR

GEN X

THE STRONGEST POTENTIAL MARKET

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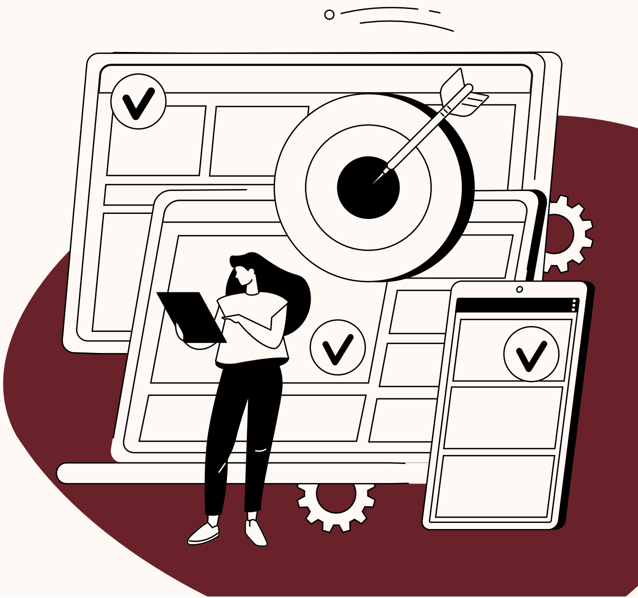

GENERATIONAL BEAUTY PURCHASE BEHAVIOR

GEN Y

THE TRANSFORMING MIDDLE CHILD

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GENERATIONAL BEAUTY PURCHASE BEHAVIOR

GEN Z

THE DIVERGENT GENERATION

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PART 6
TRENDS IDENTIFIED IN THREE GENERATIONS

Identifying the shift along with the currently relevant trends can help brands in pinpointing the gap in the market and strategize accordingly.

GEN X | GEN Y | GEN Z

SKIN IN THE SPOTLIGHT

- Bold color
- High arch eyebrow
- Blush across the cheeks and nose

- Sheer, skin-toned color
- Highlighter
- Browcara

Fig. 6.1 Progress of makeup look from the 1990s to current time using Drew Barrymore's change of look

One of the current hottest trends among others is the acknowledgement of the importance of skin's health. The implementations are focusing on enhancing the skin's natural look and its health in general.

Clean Skin Look

Each generation agrees that the signature makeup look has changed over the years. Gen X and Gen Y notably mentioned that bold colors, high-arch eyebrows and blush across cheeks and nose were the norm for quite some time. However, the current makeup look is now focused towards a more natural look. We do not see as many bold colors used as there were in the makeup looks back then. The current makeup look revolves around sheer skin-toned color, highlighter and browcara to impart a healthy, clean skin look.

Fig. 6.2 Example of clean skin look

Fig. 6.3 Example of minimal makeup look

Minimal Makeup

Following the shift in beauty behavior due to the pandemic along with the rise of skincare, makeup also has its share of changes. Each generation argue that they do less makeup nowadays due to the aforementioned facts. As such, many stated that their makeup has become much simpler, focused on the lip colors and brows whereas a more elaborate makeup is saved only for special occasions..

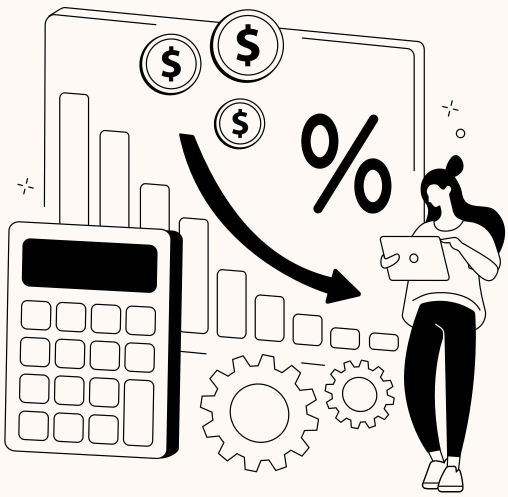
"The focus has now shifted towards achieving an ideal skin condition, not correcting them."

NEXT LEVEL BEAUTY

Beyond A Product

Increasing consumer education in beauty is the main thing that every generation notices and appreciates. Gen X reminisced that back then, the beauty trend was predominated by makeup and how to achieve a look with certain products, with lack of supporting education on how to do it. On a similar note, Gen Y also mention that in the past, beauty was more experimental and risky, noting the bold makeup and procedures such as slimming pills, hair rebonding and clinical treatment to match the relevant beauty standard at that time. The trend has been going towards a more sustainable end, which focuses on health and wellness.

Current consumers are exposed to much more educational content, especially in terms of product ingredients. Following the growth of market knowledge, brands have been thriving to satiate it with market education. The trend for product knowledge is now highlighting hero ingredients, often accompanied by specific percentages to indicate the potency.



However, the market in general is yet to be able to digest such complex information. That being considered, it puts more emphasis on understanding the brand positioning and consumer behavior.

"It is important to note that communicating specific percentage might not be suitable for every brand and consumer.
Identify your brand positioning and understand your consumer behavior."

NEXT LEVEL BEAUTY

Technique Makes Perfect

Innovation has been apparent in the beauty industry, not only in terms of the ingredients but also from the product category itself. Newer product concepts such as biphase toners and serums, milky essence and oil serums have found their ways to fit perfectly into the beauty routine. As consumers have now become increasingly conscious of their beauty needs, they have started implementing various ways to fulfill them through various ways, such as product mix-and-match and application techniques. Here are some of beauty-related techniques that stay on top of the mind of our panelists:

Fig. 6.4 Scrambled Oil Method illustration
Source: Beautynesia.com

Scrambled Oil
Mixing oil into a watery product (such as toner or essence)
Promotes the absorption of oil and in turns makes the product more nourishing.

Fig. 6.5 Slugging illustration
Source: HuffPost UK

Slugging
Using a highly occlusive product (such as petroleum jelly or balm) as the final step in skincare routine in order to lessen transepidermal water loss (TEWL). This technique however has its share of opposition especially from acne-prone and oilier skin types.

NEXT LEVEL BEAUTY

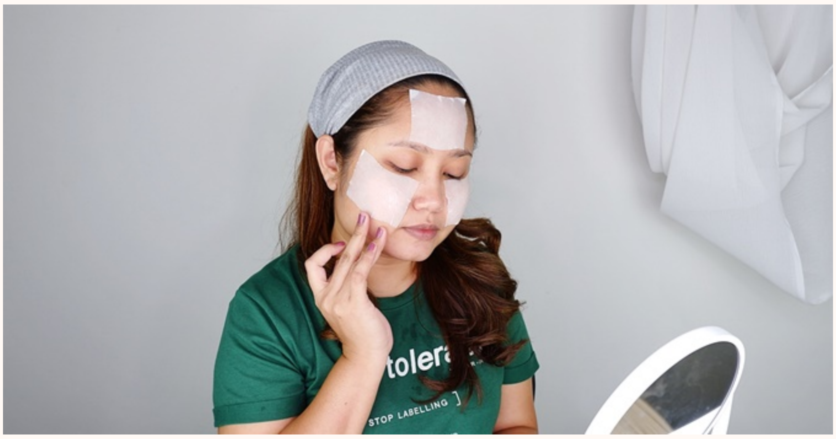


Figure 6.6 Chizu Saeki Method (CSM) illustration
Source: Female Daily

Chizu Saeki Method (CSM)
CSM can be considered as the most popular method in the beauty industry. Leaving cotton pads saturated with toner or essence for a few minutes as a mask has been highly praised for being effective in delivering hydration and soothing effects. Also considering the versatility and ease-of-use, CSM is arguably the most consistent technique to still be applied by many throughout the years.

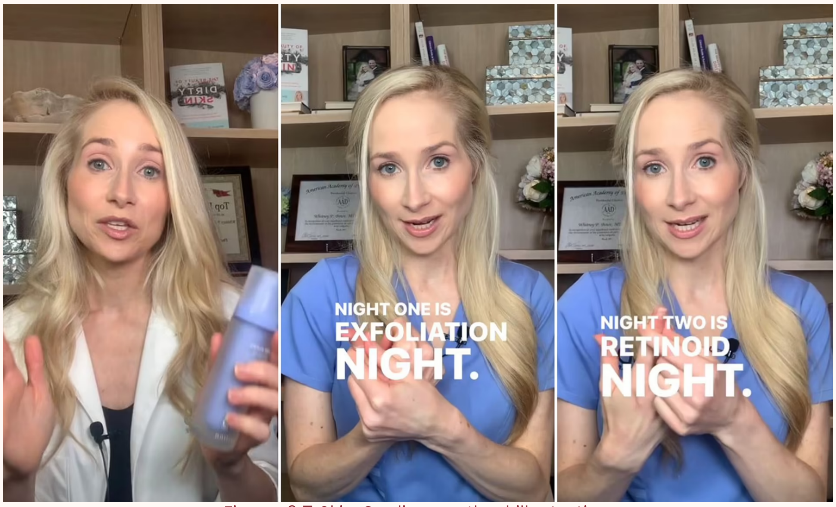


Figure 6.7 Skin Cycling method illustration
Source: Daily Mail

Skin Cycling
A newer trend that has been taking the beauty community by the storm. Skin cycling basically revolves around scheduling the beauty routine based on the types of product active that are currently being used. This technique is especially beneficial for those who are still figuring out their routine and how to implement types of product active in it. Predetermining a rotating schedule could make it easier for them to navigate the product used while introducing types of product active and lowering the risk of irritation.

> *Try not to focus only on the product, think about various ways that the consumers could use the product.*

INCLUSIVE BEAUTY

The Indonesian beauty industry is becoming more inclusive, but unfortunately still only applies to a certain extent.

We asked our respondents about their perception on the representation effort by companies in the beauty industry, the answers were simplified into four options: Uncertain, Yes, No, Do not know.
The question is as follows:

"Do you feel that you are adequately represented (physical appearance, skin color, lifestyle, aspirations, others) by local beauty brands communication style on social media and/or mass media?"

"Apa Anda merasa diri Anda (penampilan fisik, warna kulit, gaya hidup, aspirasi, cita-cita, dan lainnya) sudah cukup direpresentasikan oleh cara merek kecantikan lokal berkomunikasi di media sosial dan/atau media massa?"

INCLUSIVE BEAUTY

HOW EACH GENERATION PERCEIVED THEIR REPRESENTATION IN BEAUTY INDUSTRY

From the Fig. 6.8, if we grouped the response by generation we can conclude that Gen X has the least positive perception of being represented in the beauty industry at a staggering total of 57% with 22% chose an affirmative "No" and 35% still "Uncertain" that they're being represented. While the most positive perception is admitted by Gen Y at 45% that chose "Yes".

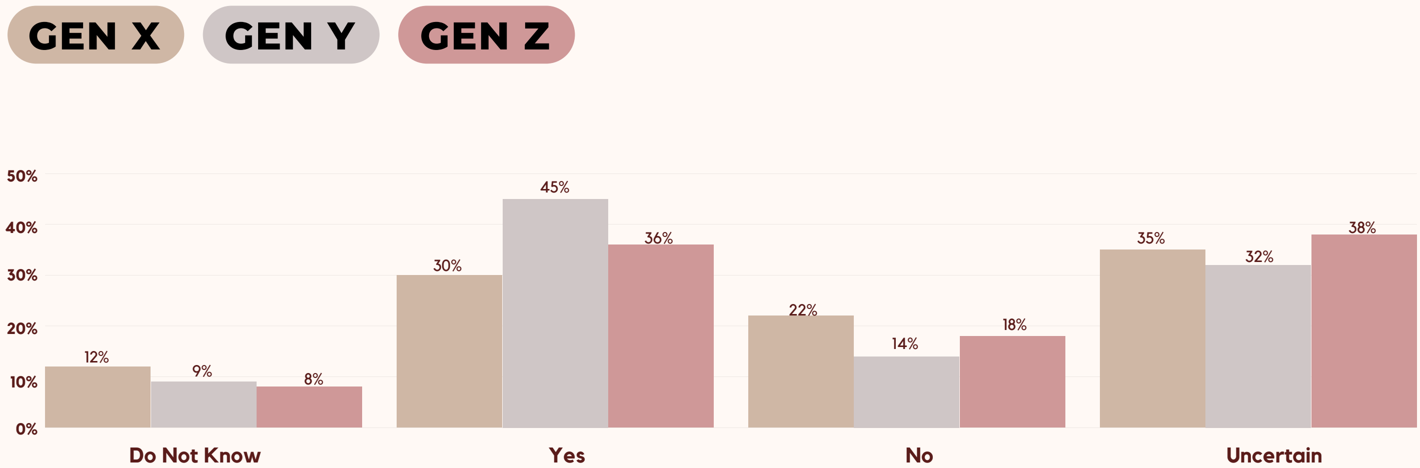


Fig. 6.8 Perceived representation of each generation in beauty industry

> *Gen X and Gen Z feel uncertain that they are adequately represented by the local beauty industry.*

INCLUSIVE BEAUTY

Age Representation

Mature age group is less represented in the current beauty industry. Brands, especially local brands tend to portray a more youthful image of beauty rather than mature ones, even for their anti-aging care line.

"Untuk local brand, tidak nampak ada produk yang ditujukan untuk yang sudah berusia lebih matang (50+). Walau personally belum menjadi masalah bagi saya, tapi saya kesulitan untuk mencari produk yang pas untuk ibu saya yang sudah berusia 67 tahun."

Gen Y

"Rata-rata industri kecantikan menyasar pasar usia 20-30 sementara untuk usia matang masih kurang representasi. Jika pun ada, harga termasuk tinggi."

Gen X

There is still a wide opportunity for brands to effectively penetrate the mature market, especially in terms of communication.

INCLUSIVE BEAUTY

Skin Tone Representation

Skin tone representation effort has been going forward in the past years, however it is yet to satisfy the market. Representation especially for brightening skincare is still restricted for people with brighter complexions.

Along with the surge in local brands using foreign celebrities as their ambassadors, Venas found that quite a few beauty consumers view this unfavorably. They perceive this trend as something that might harm beauty inclusivity, stemming from the fact that the celebrities' traits often do not represent Indonesian beauty.

"Semakin kesini sebenarnya industri kecantikan sudah semakin maju dalam hal representasi bila dibandingkan di tahun 2016an, dimana awal saya kenal skincare dan makeup. Namun hingga saat ini masih butuh banyak perbaikan dalam hal representasi bagi yang berkulit gelap dalam iklan atau pemilihan KOL. Gelap disini meliputi sawo matang-coklat gelap, bukan warna kulit kuning langsat lalu disebut gelap. Lalu swatch produk makeup seperti lipstick dan blush jg sebaiknya dilakukan pada berbagai warna kulit, karena satu warna yg sama akan terlihat sangat berbeda pada warna kulit yg berbeda."

Gen Z

"Kadang representasi industri kecantikan dan diri saya tidak pas. Industri kecantikan lokal berbondong bondong pakai BA korea yang nan putih bersih, sedangkan kulit lokal dan diri saya tidak demikian. Jadi seperti memberi makan pikiran orang lokal bahwa cantik yg diberi industri kecantikan lokal tuh akan seperti cantiknya para BA orang Korea."

Gen Y

"Brands should be able to define the "who and why" when choosing an ambassador, not just choosing one based solely on their popularity."

INCLUSIVE BEAUTY

Gender Representation

Being inclusive does not stop at colors and ages. Gender has become something noteworthy in terms of beauty representation. Male beauty enthusiasts feel that they do not feel represented in the current beauty industry. The conventional negative stigma towards men using beauty products is still apparent in society and the beauty industry is yet to conquer it. The inclusion of men in beauty brands is definitely improving in recent years, however to say it is sufficient is unfortunately not the case yet. The lack of representation is somewhat similar to what happened in the industry years ago, towards women. Stereotypical age, skin color and facial features are still limited to what the general public would consider befitting of a beauty.

"Saya sebagai pria saja sadar, diversity etnisitas, warna kulit, penampilan (terkait femininitas/maskulinitas, style berpakaian) masih stereotype banget yg dipresentasikan atau dipajang dalam buanyak merk skincare, lokal maupun internasional. Itu baru membicarakan dari presentasi wanita. Pria makin parah."

Gen Y

"Cowok belum terepresentasikan. Masih ada stigma taboo kalau cowok pake skincare. Padahal personally cowok juga pengen menyelesaikan masalah kulit dan pengen merawat kulit juga. Brand pake model cowok pun pasti yang bener-bener good looking, jadi kurang representatif."

Gen Y

PART 7
DIFFERENT STYLES OF APPROACHING EACH GENERATION

GEN X

Trust is Earned, Not Given

“Generally having more years of beauty experience under their belt, Gen X has a better understanding of what they need.”

REQUEST FOR FULL REPORT TO READ MORE

GEN Y
Admiration & Aspiration

"Hustle and bustle" describes Gen Y's beauty behavior well."

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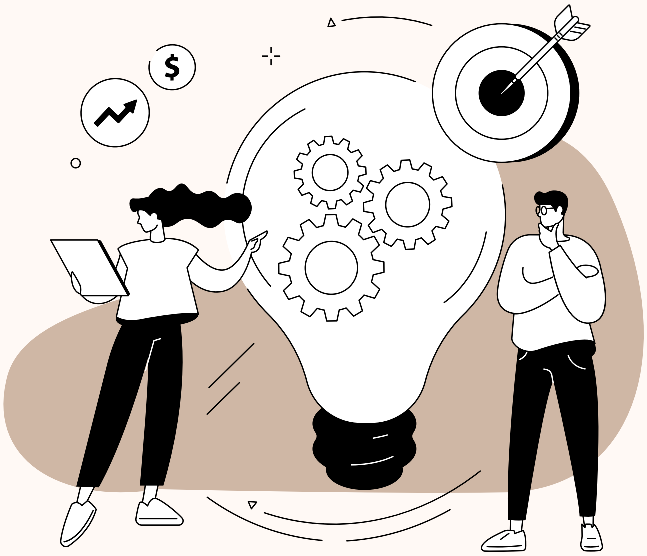
GEN Z

Be Heard & Resonate



"Gen Z is all about belief and story."

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RESET & REDISCOVER BEAUTY EVENTS

> *"Beauty events are expected to be more than just product launches made exclusive with influencers and notable figures."*

- Reaching out to the three generations can also be done offline, through beauty events.
- [redacted]

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Gen Z

"Beauty event menurutku menarik, tapi ada rasa takut dan malu di aku. Pernah dateng ke suatu event beauty yang cukup besar. Aku ngerasanya berbeda di situ, karena kebanyakan isinya perempuan dan berpenampilan bagus, cantik dan mewah. Jadinya aku pulang duluan karena minder. Karena itu, aku ngerasa jadi lebih enak event online daripada offline."

Gen Z

"Ada rasa minder untuk datang ke beauty event karena kulitku jerawatan. Mostly yang dateng kulitnya udah bagus. Event juga biasanya banyaknya yang untuk anti aging dan brightening, bukan jerawat. Padahal cowok apalagi remaja butuh knowledge untuk merawat jerawat."

USER PERSONA

Having performed holistic research in the market and consumer insight, Venas have identified several user persona. Understanding user persona can help brands in navigating each consumer type and developing communication strategy accordingly.

> *Developing effective communication strategy starts from understanding the user persona.*

USER PERSONA

The Explorer

"Exploratory behavior in their core, this group of beauty consumers seek new experience, and innovation."

DEMOGRAPHICS

Men & women, in their late teenagers to early 30s.

BEAUTY DRIVERS

To be in the loop & new experience

BEAUTY BEHAVIOR

Product innovation, solid digital footprint.

BUYING CONCERNS

Overly similar product offering.

BEAUTY STYLE

Seek fun from trying new products, trailblazer.

BRAND AFFILIATIONS

SOMETHINC

SKINTIFIC

COLOURPOP

SKIN1004
THE UNTOUCHED NATURE

PURITO

USER PERSONA

The Traditionalist

[redacted]

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USER PERSONA

The Maverick

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

USER PERSONA

The Refined

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

USER PERSONA

The Amplifier

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“Beauty routine will become increasingly personalized and concise, prioritizing efficacy, efficiency and experience.

Identify the needs and wants of each generation and how your brand can serve them.”

info@venasconsulting.com

THANK YOU

@wearevenas

ABOUT VENAS

We are a consulting firm specializing in the beauty industry that delivers data-driven and targeted solutions for brands aiming to be at the forefront of consumers' minds.

Venas was founded in February 2020 by 3 highly driven women who are industry veterans, combining a multitude of skills and a deep understanding of the beauty audience.

AFFI ASSEGAF
Partner, Branding & Product Development

AMALIA HAYATI
Partner, Data & Research

VANYA SUNANTO
Partner, CX & Marketing

DEVIN VARIAN W.
Associate Consultant

LUNNIE NADIA R.
Project Assistant

RAGIL C. LARASATI
Research Associate

LIST OF APPENDICES

APPENDIX A.
PRODUCT LAUNCH

APPENDIX B
SKIN PROFILE

Table B.1 Skin Type

Skin Type	All Gen		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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Table B.2 Skin Concern

Skin Concern	All generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX B
SKIN PROFILE

Table B.3 Sensitive Skin Concerns

Sensitive Skin Concerns	All generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Note: cells with yellow highlight is considered as ploy questions to experiment whether a certain skin traits is considered as sensitive skin concerns.

APPENDIX C
BEAUTY HABIT

Table C.1 Starting age on skincare routine

Age group	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%
0-8								
9-12								
13-16								
17-20								
21-24								
25-28								
29-32								
33-36								
37-40								
41-44								
45-48								
49-52								

REQUEST FOR FULL REPORT
TO READ MORE

APPENDIX C
BEAUTY HABIT

Table C.2 Skincare Usage Frequency

Skincare usage frequency	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table C.3 Skincare Category Used

Skincare category used	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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APPENDIX C
BEAUTY HABIT

Table C.4 Makeup Usage Frequency

Makeup usage frequency	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table C.5 Makeup Category Used

Makeup product categories used	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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APPENDIX D
INTERNET HABIT

Table D.1 Social media preference

Social media preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table D.2 Messenger app preference

Messenger app preference	All Generation		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX D
INTERNET HABIT

Table D.3 Topics/interest preference

Topics/Interest Preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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APPENDIX D
INTERNET HABIT

Table D.4 TV Series/movies/etc platform preference

TV Series/Movies/etc platform preference	All Generation		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table D.5 Music/podcast platform preference

Music/podcast platform preference	All Generation		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX E
LIVE SHOPPING EXPERIENCE

Table E.1 Livestream platform preference as source of entertainment

Livestream platform preference as source of entertainment	All Generation		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table E.2 Livestream platform preference as source of live shopping

Livestream platform preference as source of live shopping	All Generation		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX E
LIVE SHOPPING EXPERIENCE

Table E.3 Live Shopping Watching Experience

Have watched live shopping session	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table E.4 Live Shopping Purchase Experience

Have purchased a product from live shopping session	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table E.5 Live Shopping Purchase Experience

Live shopping channel preference	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table E.6 Activities on live shopping other than purchase

Activities other than purchase	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX E
LIVE SHOPPING EXPERIENCE

Table E.7 Reasoning of making purchases on live shopping

Reasonings on making purchase from live shopping	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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Table E.8 Reasoning of not making purchases on live shopping

Reasonings on not making purchase from live shopping	General		Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX F
BEAUTY SHOPPING HABIT

Table F.1 Monthly beauty budget

Monthly beauty budget	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

Table F.2 Beauty product purchase frequency in the last 3 months

Beauty product purchase frequency in the last 3 months	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX F
BEAUTY SHOPPING HABIT

Table F.3 Beauty purchase intention

Beauty purchase intention	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table F.4 Favourite shopping options

Favourite shopping options	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX F
BEAUTY SHOPPING HABIT

Table F.5 Accustomed to buy beauty products via online shopping channels

Accustomed to buy beauty products via online shopping channels	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table F.6 Online shopping channel preference

Online shopping Channel Preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX F
BEAUTY SHOPPING HABIT

Table F.7 Digital/Mobile wallet payment usage

Digital/Mobile wallet payment usage	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table F.8 Digital/Mobile wallet provider preference

Digital/Mobile wallet provider preference	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table F.9 Other payment provider

Other payment provider	General		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX F
BEAUTY SHOPPING HABIT

Table F.10 Accustomed to buy beauty products via offline shopping channels

Accustomed to buy beauty products via offline shopping channels	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table F.11 Offline shopping Channel Preference

Offline shopping Channel Preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table F.12 Last time purchased beauty product via offline channels

Last time purchased beauty product via offline channels	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX G
CLEANSER PREFERENCE

Table G.1 Foaming cleanser preference

Foaming Cleanser Preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table G.2 Fragranced cleanser preference

Fragranced Cleanser Preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table G.3 Cleanser ideal size preference

Cleanser ideal size preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT REPORT TO READ MORE

APPENDIX G
CLEANSER PREFERENCE

Table G.4 Cleanser performance perception

Cleanser performance perception	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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Table G.5 Cleanser purchase frequency in the last 3 months

Cleanser purchase frequency in the last 3 months	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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Table G.6 Cleanser ideal price

Cleanser ideal price	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

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APPENDIX G
CLEANSER PREFERENCE

Table G.7 Exploratory behavior on cleanser product category

Like to change variants/brands of a cleanser?	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table G.8 Reasonings on exploring new variants/brands on cleanser product category

"Why do you like to change the variants/brands of your cleanser?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table G.9 Reasonings on not exploring new variants/brands on cleanser product category

"Why do you dislke to change the variants/brands of your cleanser?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX G
CLEANSER PREFERENCE

Table G.10 Cleanser type preference

Cleanser type preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

[redacted]

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX H
TONER PREFERENCE

Table H.1 Toner usage frequency

Toner usage frequency	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.2 Differentiation of toner brands/variants on day and night routine

"Do you differentiate the toner brands/variants on day and night routine?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.3 Toner texture preference

Toner texture preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.4 Fragranced toner preference

Fragranced toner preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX H
TONER PREFERENCE

Table H.5 Toner ideal size preference

Toner ideal size	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.6 Toner performance perception

Toner performance perception	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.7 Toner purchase frequency in the last 3 months

Toner purchase frequency in the last 3 months	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

APPENDIX H
TONER PREFERENCE

Table H.8 Exploratory behavior on toner product category

Like to change variants/brands of a toner?	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.9 Reasonings on exploring new variants/brands on toner product category

"Why do you like to change the variants/brands of your toner?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

REQUEST FOR FULL REPORT TO READ MORE

Table H.10 Reasonings on not exploring new variants/brands on toner product category

"Why do you dislke to change the variants/brands of your cleanser?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX H
TONER PREFERENCE

Table H.11 Toner ideal price

Toner ideal price	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX I
MOISTURIZER PREFERENCE

Table I.1 Moisturizer usage frequency

Moisturizer usage frequency	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table I.2 Differentiation of moisturizer brands/variants on day and night routine

"Do you differentiate the moisturizer brands/variants on day and night routine?"	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table I.3 Moisturizer texture preference

Moisturizer texture preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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APPENDIX I
MOISTURIZER PREFERENCE

Table I.4 Fragranced moisturizer preference

Fragranced moisturizer preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table I.5 SPF preference on moisturizer product

SPF preference	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table I.6 Moisturizer ideal size

Moisturizer ideal size	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX I
MOISTURIZER PREFERENCE

Table I.7 Moisturizer performance perception

Moisturizer performance perception	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table I.8 Moisturizer purchase frequency in the last 3 months

Moisturizer purchase frequency in the last 3 months	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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APPENDIX I
MOISTURIZER PREFERENCE

Table I.9 Exploratory behavior on moisturizer product category

Like to change variants/brands of a moisturizer?	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table I.10 Reasonings on exploring new variants/brands on moisturizer product category

"Why do you like to change the variants/brands of your toner?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table I.11 Reasonings on not exploring new variants/brands on moisturizer product category

"Why do you dislke to change the variants/brands of your cleanser?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX I
MOISTURIZER PREFERENCE

Table I.12 Moisturizer ideal price

Moisturizer ideal price	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX J
SUNSCREEN PREFERENCE

Table J.1 Sunscreen usage

Routinely use sunscreen?	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table J.2 Sunscreen texture preference

Sunscreen texture preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table J.3 SPF preference on sunscreen product

SPF preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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Table J.4 Fragranced sunscreen preference

Fragranced sunscreen preference	All Generation		By Generation					
	Total	%	Gen X		Gen Y		Gen Z	
			Total	%	Total	%	Total	%

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APPENDIX J
SUNSCREEN PREFERENCE

Table J.5 Sunscreen ideal size preference

Sunscreen ideal size	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table J.6 Sunscreen performance perception

Sunscreen performance perception	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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Table J.7 Sunscreen purchase frequency in the last 3 months

Sunscreen purchase frequency in the last 3 months	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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APPENDIX J
SUNSCREEN PREFERENCE

Table J.8 Exploratory behavior on cleanser product category

Like to change variants/brands of a sunscreen?	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%
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Table J.9 Reasonings on exploring new variants/brands on cleanser product category

"Why do you like to change the variants/brands of your sunscreen?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%
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Table J.10 Reasonings on not exploring new variants/brands on cleanser product category

"Why do you dislke to change the variants/brands of your sunscreen?"	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%
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APPENDIX J
SUNSCREEN PREFERENCE

Table J.11 Sunscreen ideal price

Sunscreen ideal price	All Generation		By Generation					
			Gen X		Gen Y		Gen Z	
	Total	%	Total	%	Total	%	Total	%

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