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ASIAN AMERICAN BEAUTY CONSUMER - US - 2023

The rich heritage of Asian culture has transformed the beauty industry, with products drawing on century-old traditions as well as cutting-edge innovations. Not surprisingly, Asian Americans are important drivers of the beauty industry. This diverse, influential audience includes high-income shoppers and highly engaged beauty aficionados. Winning the Asian American audience will provide brands with a loyal base of customer advocates but it will require a commitment to quality, value, aggressive new product development and making Asian consumers feel truly seen.

Joan Li, Senior Analyst, Beauty and Personal Care

30 JUNE 2023

REPORT

This Report looks at the following areas:

- Demographics of the diverse Asian population
- Key product trends in the Asian beauty space
- Asian American beauty routines and purchasing
- Where Asian Americans get information about beauty products
- Drivers of beauty product purchases by Asian Americans

OVERVIEW

Overview

What you need to know

Consumers are increasingly demanding that the US beauty market become more diverse and inclusive. The affluent and influential Asian American audience has played an outsized role in driving this change, due to surging interest in beauty trends and products from Korea and other Asian nations. With strong cultural interest in beauty, Asian Americans are highly engaged with their beauty routines: 81% are interested in improving their beauty and personal care skills and 67% of Asian women have a beauty routine with six or more steps.

In this Report Mintel examines trends in the beauty space and Asian American demographics, purchasing behavior and attitudes. The analysis uncovers key drivers of Asian Americans' beauty purchases and makes recommendations regarding how brands can connect with this important group and gain wallet share.

Key issues covered in this Report

- Demographics of the diverse Asian population
- Key product trends in the Asian beauty space
- Asian American beauty routines and purchasing
- Where Asian Americans get information about beauty products
- Drivers of beauty product purchases by Asian Americans

Definition

This Report examines Asian Americans' attitudes and behaviors toward beauty products and services. Findings in this Report can be supplemented by analysis presented in *Marketing to Asian Americans – US, 2022*, *Asian Americans: Culture and Community – US, 2022* and *Diversity and Inclusivity in Beauty – US, 2022*.

Market context

Consumer markets have faced an unprecedented level of turmoil in recent years, from the massive economic disruption in 2020 from COVID to 40-year highs in inflation in 2022. Coming up to the first half 2023, the US continued to see economic improvement across key areas. Real GDP (the inflation-adjusted measure of GDP) grew for the third consecutive quarter, sitting at an annualized rate of 1.3% as of Q1 2023. Prices cooled for the eleventh consecutive month, with CPI rising 4% for the 12 months ending May – the lowest it has been in over two years and sharply falling from the 40-year high of 9.1% in June 2022. Along with cooling, the labor market remains at historically low levels, with the unemployment rate sitting at 3.7% as of May.

While inflation has been easing, it still remains two times above the Federal Reserve's target rate of 2%. The continued resilience of the labor market further underscores the challenges the central bank will have in getting back to that target rate – a journey that has required the central bank to raise interest rates to their highest levels in over 15 years to make borrowing costlier and cool consumer demand as a result.

The consumer survey for this Report was fielded in May 2023 and the Report was written in June 2023.

Executive Summary

"The rich heritage of Asian culture has transformed the beauty industry, with products drawing on century-old traditions as well as cutting-edge innovations. Not surprisingly, Asian Americans are important drivers of the beauty industry. This diverse, influential audience includes high-income shoppers and highly engaged beauty aficionados. Winning the Asian American audience will provide brands with a loyal base of customer advocates but it will require a commitment to quality, value, aggressive new product development and making Asian consumers feel truly seen."

Joan Li, Senior Analyst – BPC

Top takeaways

- **Asian consumers offer a growth opportunity.** After a strong rebound following pandemic declines, the beauty and personal care sector is expected to resume its slow, inflation-pacing growth trajectory. However, Asian Americans may be a sweet spot, with many high-income consumers as well as extensive beauty regimens. While there are many imported products and a growing number of Asian American brands, there is opportunity for mass brands to better represent Asian consumers and connect more deeply with this group.
- **Appealing to beauty mavens will be key.** The K-beauty trend focuses on elaborate 10-step skincare regimens and one third of Asian consumers take the "more is more" approach. Female beauty mavens have at least nine components in their beauty and personal care routines, and this group is more likely to buy high-quality, premium brands. Empowering these amateur experts will pay of valuable dividends as they pass on their knowledge and product discoveries.
- **Haircare could be the gateway for Asian men.** While Asian men are far less engaged with beauty and personal care, younger Asian men appear to have relatively strong interest in hair. This interest could be leveraged to expand sales in other areas like skincare, and also encourage the current younger generation to do more when it comes to grooming and personal care.

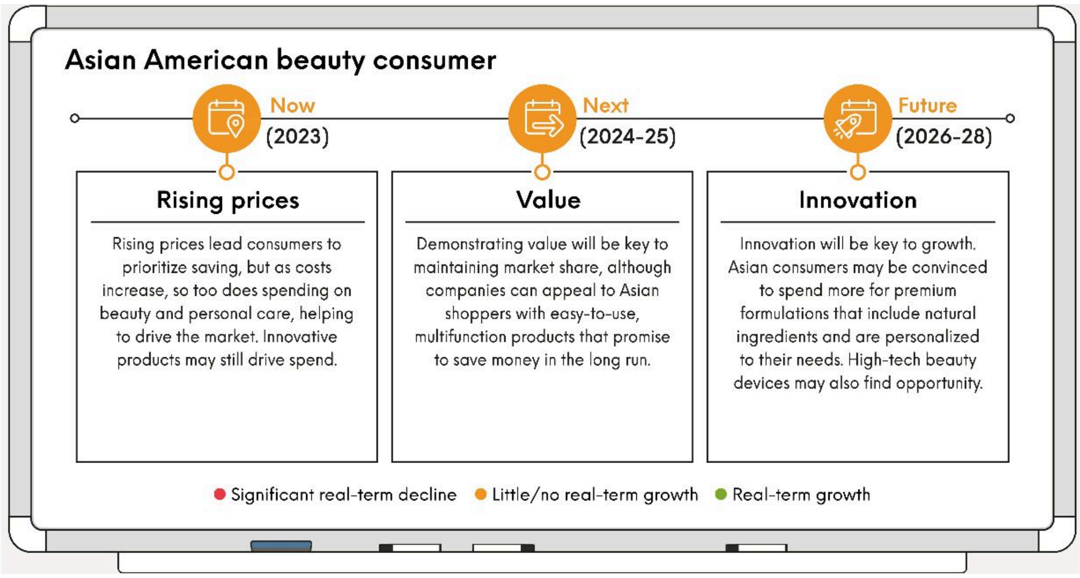
Market overview

The 20.2 million Asian American consumers are a particularly attractive audience for brands, with high average household incomes of more than $101,000, buying power of over $1.3 trillion and many Millennials and Gen Xers in their peak spending years. However, the Asian demographic is also highly complex, fragmented across many countries with different languages and cultures who also have wide disparities in income driven in part by immigration policies.

Many of these countries have a strong heritage when it comes to beauty and personal care. In India, traditional practices like Ayurveda go back centuries, while markets like South Korea invest heavily in R&D and are years ahead of the US in product innovation. This audience is helping to buoy the beauty sector, which took a steep drop in 2020 due to the pandemic, as consumers in lockdown felt less need to spend time and money on their appearance.

Asian Americans include many committed beauty consumers. With trends drawn from different Asian cultures now going mass and available at even local drugstores, Asian consumers may finally achieve the representation that has long eluded them. However, Asian consumers are also not immune to broader economic trends and many have expressed a desire to spend less on beauty and personal care, and consolidate their daily routines.

Figure 1: Outlook on Asian Americans and beauty, 2023-28



Source: *Mintel, July 2023*

Opportunities and challenges

Connecting with an incredibly diverse audience

The Asian American audience is quite diverse, with three disparate cultures – Chinese (including those from China and Taiwan), Indian and Filipino immigrants making up 63% of the US Asian population, with over a dozen countries of origin such as Vietnam, Korea, Japan, Pakistan and Sri Lanka making up the rest. Many of these immigrants speak different languages, and immigration policies have played a significant role in shaping their demographics and prosperity.

For example, Indians have for many years made up the majority of H1B visa entrants, creating a base of highly educated and skilled Indian tech workers. As a result, even though US Indians are seemingly less established than other Asian populations – 68% are foreign born and less than half of those citizens – they also have the highest median incomes, at $119,000. Meanwhile, many Vietnamese arrived in the US in the aftermath of the Vietnamese War. While these immigrants tend to have been here for longer – 75% for more than 10 years – the chaotic nature of their arrival has led to far lower median household incomes of $69,800 and higher poverty rates than the average.

As would be expected, this multifaceted group includes many different attitudes and perspectives. For example, Filipinos are particularly likely to value natural ingredients, at 58%, while just 37% of Japanese consider this a priority. Meanwhile, Koreans come from a culture known for beauty innovation and are the least likely to prefer familiar brands, at 25%. Needs are also different within these groups, with many East Asian consumers prioritizing skincare that delivers radiant, blemish-free results while a broad range of skin tones can lead many South and Southeast Asian consumers to struggle to find appropriate makeup shades.

Representing this audience in all its different aspects will be critical to forging deep connections. Yet many mainstream brands have yet to try, with few Asian spokesmodels employed by major Western beauty companies. Instead, imported products have filled many of the gaps, with influential K-beauty entrepreneur Alicia Yoon curating selections at retailers like Macy's, Sephora, Target and CVS. A rising tide of Asian American beauty innovators are also launching their own product lines. While some established brands have partnered on collabs with Asian beauty experts, they clearly risk losing market share if they don't do more.

Figure 2: Beauty/personal care product purchase drivers, by country of origin, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."

Asian internet users aged 18+ who use beauty and personal care products or treatments	All Asian consumers	Chinese*	Filipino	Indian	Japanese	Vietnamese	Korean	Other
	991	*252*	*159*	*156*	*114*	*95^*	*77^*	*179*
	%	%	%	%	%	%	%	%
Easy to use	66	67	70	64	66	64	72	64
Natural ingredients	46	40	58	46	37	42	46	53
Familiar brand	40	44	46	37	41	25	41	35
Multi-purpose	32	31	40	31	28	30	36	31
Scent	32	32	38	26	37	32	36	28
Environmentally friendly	31	27	36	36	31	25	35	30
Format (eg stick, tube)	22	22	19	18	31	22	27	21
Trying a new brand	18	17	21	20	12	10	21	21
Social media influencer	16	10	21	19	16	18	17	14
Advertising featuring Asians	12	10	14	10	17	5	15	17
Cool packaging	12	7	7	20	9	9	22	17

*The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each beauty/personal care purchase driver. * not including Taiwanese ^ small sample (<100)*

***Base:** 991 Asian internet users aged 18+ who have purchased beauty or personal care products or treatments*

***Source:** Kantar Profiles/Mintel, May 2023*

Appeal to the Asian female beauty maven

Multistep routines are the cornerstone of Korean and Japanese skincare, and it's not surprising that there is a core group of Asian Americans who maintain elaborate beauty routines. Indeed, approximately one third of Asian women have nine or more steps in their beauty regimens. With their high purchasing levels, interest in discovering new products and influence over friends and family, these beauty mavens are particularly important consumers for the beauty industry.

Compared to Asian consumers overall, beauty mavens are particularly likely to use higher-end as well as natural brands. Although they view at-home treatments as a way to save money, almost all of this group is open to investing in quality tools and products in order to make home treatments successful. They enjoy improving their skills and heavily rely on social media to learn about beauty and personal care.

Brands that want to connect with female beauty mavens will need to provide them with both the quality and the information they require. As they are willing to pay more for products that deliver salon-quality results, higher-end "prosumer" offerings could be particularly successful for this group. Loyalty clubs can help this group feel valued and encourage loyalty: With their interest in new products, samples and pre-launch access would be especially valuable. Partnering with influencers and providing plenty of how-to videos will also be critical – Asian beauty mavens love YouTube and getting and sharing their inspirations.

Figure 3: Select beauty attitudes and behaviors, by female beauty mavens, 2023

“Do you agree or disagree with the following statements about at-home beauty and personal care?” [Agree]

“Where do you learn about beauty and personal care? Please select all that apply.”

“How would you describe your current usage of beauty and personal care products (eg skincare, makeup)? Please select all that apply.”

“Why do you get some beauty/grooming treatments done by a professional out of home (eg salon, spa) rather than doing them at home yourself? Please select all that apply.”

	All Asian consumers	Female Mavens (9+ steps)	
Asian internet users aged 18+ who use beauty and personal care products or treatments/ 175 female Asian internet users aged 18+ who have a beauty routine with 9+ steps	991	175	Index to All*
	%	%	
Attitudes toward beauty/personal care			
Investing in quality tools and products can help to improve the outcome of at-home treatments	86	97	113
I prefer to use beauty and personal care products designed for people my age	83	91	110
I am interested in doing more at-home grooming/beauty treatments to help me save money	83	91	110
I am interested in improving my at-home beauty/personal care skills	81	94	116
Mainstream brands work just as well as premium brands	77	70	91
Sources of beauty information			
Learn about beauty and personal care through social media	65	84	129
Beauty product usage			
I mostly use natural brands	32	44	138
I mostly use higher-end brands	24	36	150
Salon motivation			
Get salon services to pamper myself^	34	66	194

*** How to read:** an index of 100 = average. An index of 110 means female beauty mavens are 10% more likely than All Asian consumers to select the response; an index of 90 means they are 10% less likely. ^ 476 Asian internet users aged 18+ who have sought professional services for at least some beauty and personal care treatments / 78 female beauty mavens (small sample, <100)*

***Base:** 991 Asian internet users aged 18+ who use beauty and personal care products or treatments/175 female Asian internet users aged 18+ who have a beauty routine with 9 or more steps*

***Source:** Kantar Profiles/Mintel, May 2023*

Leverage younger men’s strong interest in hair

Consistent with broader gender norms, Asian men seem far less engaged with beauty and personal care than women. They perform fewer beauty routines, spend less time learning about beauty and personal care products, and are more motivated by savings. However, Asian men aged 18-34 do seem to have some interest in hair care, which could provide an opportunity for brands. A significant 40% of younger Asian men have styled their hair at home while 57% are getting their hair done in salons.

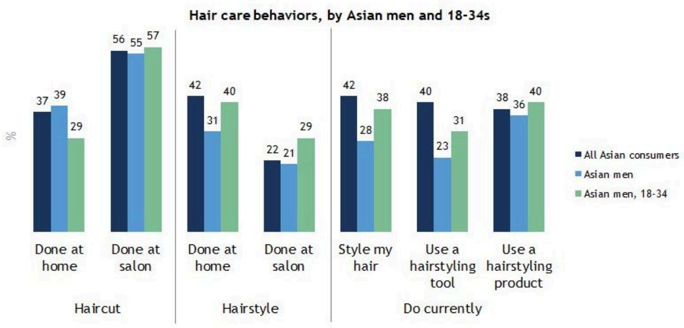
K-pop artists like BTS have become increasingly influential in the US and have provided a showcase for a broad range of hairstyles, including straight and tousled looks and pastel and ombre shades. While many Asian men may not want to go that far, they could certainly be encouraged to buy more products like gels and pomades. In general, Asian consumers buy fewer hair styling products than other groups, and focusing on more wearable versions of these looks could help drive excitement and purchasing.

Once brands have created relationships with younger men through haircare, they can then look to grow wallet share by marketing other products like skincare to these customers. Ease of use and familiar brands are critical drivers of product choice for Asian men, so building on existing relationships and promising simple solutions to everyday problems will be key. Messaging that highlights a scientific foundation for skincare along with an innovation "cool factor" could also be effective.

Figure 4: Haircare behavior, by Asian men and 18-34s, 2023

"Which of the following beauty and personal care treatments have you done in the past 12 months? Please select all that apply."

"Which of these do you currently do? Please select all that apply."



Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

Key consumer insights

- **Asian women are the key beauty consumers:** 35% of Asian women have 6-8 steps in their beauty routine, and 32% have nine or more steps. Washing their hair and facial and body skincare are the most popular steps. With hair styling lacking (just 53% of Asian women style their hair regularly at home) there would seem to be an opportunity to drive more interest, commensurate with this group's significant engagement with skincare.
- **Salons face challenges:** Apart from haircuts, which 56% of Asian consumers have had professionally, visits to salons seem comparatively rare. 84% of Asian consumers agree that they only go to salons for services they cannot do themselves, while 83% are interested in doing more services at home to save money. This creates an opportunity for brands to sell "prosumer" products offering salon-quality results at home. Meanwhile, salons may want to promote themselves as a form of wellness and relaxation, as well as a group outing for friends.
- **Easy and natural products are preferred:** Ease of use is the most desired product attribute among Asian consumers, and is cited by 66%. Natural ingredients follow as a priority at 46%, followed by familiar brands at 40%. An easy to use, natural product from a familiar brand would be of interest to 90% of Asian women and 85% of Asian men.
- **The social media dilemma:** Social media provides a powerful channel for beauty information, but also can lead to negativity. 87% of Asian women aged 18-34 and 74% of their male counterparts get beauty and personal care information from social media, with YouTube the most popular platform. However, six in 10 Asian consumers aged 18-34 also agree that they feel pressured by social media to look a certain way. Empowering consumers and celebrating a broad range of looks will be critical to forging a positive connection.

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A relatively small, but fast growing population

In the US, Asian Americans account for 6% of the population in 2023, or roughly 20.3 million. Although this group is smaller than others, the Asian population is set to grow at nearly three times the rate of the total from 2018-28 (13.4 vs 5.4%, respectively). Immigration has been an important factor driving growth of the Asian American population. From 2009-18 more Asian consumers than Hispanics migrated to the US, with Asian consumers making up 37% of newly arrived immigrants in 2018 vs 31% for Hispanics, according to an analysis by the Pew Research Center.

COVID-19 disrupted these patterns, due to a combination of strict US rules discouraging migration from Asian countries as well as policies like China's "Zero-COVID" policy limiting all types of travel between Asia and the US. Political tensions between the US and China may also be further discouraging immigration from the region. As a result of these factors, projections of the size of the Asian American population have been lowered. Still, the Asian American audience remains significant and powerful. Brands and marketers need to understand this group and actively address their needs.

Figure 5: US population, by race and Hispanic origin, 2018-28

Race	**2018**		**2023**		**2028**		**2018-28**
	000	**% of total**	**000**	**% of total**	**000**	**% of total**	**% change**
Asian	19,134	5.9	20,274	6.0	21,696	6.3	13.4
Black	43,732	13.4	45,637	13.6	47,436	13.8	8.5
White	249,961	76.5	254,629	75.8	258,061	74.9	3.2
Other*	13,860	4.2	15,531	4.6	17,246	5.0	24.4
Hispanic origin							
Hispanic	59,640	18.3	64,568	19.2	69,668	20.2	16.8
Non-Hispanic	267,048	81.7	271,504	80.8	274,771	79.8	2.9
Total	**326,688**	**100.0**	**336,071**	**100.0**	**344,439**	**100.0**	**5.4**

** includes American Indian/Alaska native, native Hawaiian/other Pacific Islander and two or more races Note: data may not equal totals due to rounding*

Source: *US Census Bureau, interim population projections released 2017 and annual population estimates/Mintel*

Concentrated within the Millennial and Gen X generations

The Asian American population skews younger than White consumers, yet older than Black consumers. 47% of Asian consumers are either Millennials or Gen X (or between the ages of 26-58 in 2023). This means that many Asian consumers are still young enough to be interested in new trends, yet are also in their peak earning years, with many being part of families with children. These demographics would make Asian consumers a prime target for beauty brands, given their need to purchase products for a whole family and openness to trying new things.

Figure 6: US population by race and generation, 2023

Generation	Asian		Black		White		Other*	
	000	% of total	000	% of total	000	% of total	000	% of total
Gen Alpha	2,901	14.1	8,180	17.9	37,277	14.6	4,408	28.9
Gen Z	3,425	16.7	8,887	19.5	43,307	17.0	3,896	25.5
Millennials	5,586	27.2	11,323	24.8	56,495	22.2	3,433	22.5
Generation X	4,139	20.1	7,982	17.5	46,035	18.1	1,952	12.8
Baby Boomers	3,413	16.6	7,675	16.8	55,708	21.9	1,551	10.2
Swing/WWII	1,087	5.3	1,590	3.5	15,808	6.2	15	0.1
Total	**20,551**	**100.0**	**45,637**	**100.0**	**254,629**	**100.0**	**15,254**	**100.0**

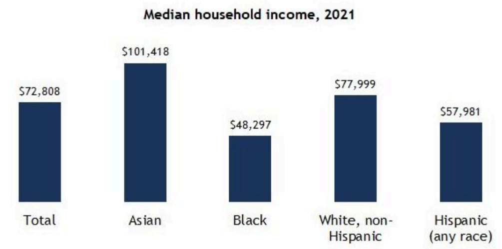
** includes American Indian/Alaska native, native Hawaiian/other Pacific Islander, and two or more races Note: Data may not equal totals due to rounding*

Source: *US Census Bureau, interim population projections released 2017 and annual population estimates/Mintel*

A more affluent group

When viewed as a whole, Asian consumers are by far the most affluent racial and ethnic population in the US. As of 2021, the median household income for Asian Americans was $101,418 – nearly 40% higher than the overall median. The University of Georgia's Selig Center estimated that Asian American buying power was $1.3 trillion in 2020 – larger than the annual GDP for all but the 13 biggest economies.

Figure 7: Median household income, by race and Hispanic origin of householder, 2021

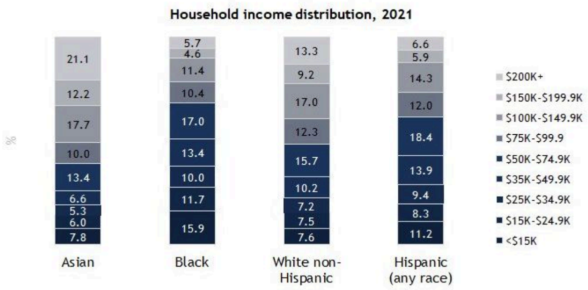


Note: Data may not equal totals due to rounding

***Source:** US Census Bureau, Current Population Survey, Annual Social and Economic Supplement/Mintel*

Asian Americans' affluence becomes particularly clear when analyzing household income distribution. More than half of earns $100K+ per year, as compared to 36% for consumers overall. In other words, approximately 9 million Asian Americans have a median household income of $100K or more, making the importance of this audience difficult to deny. However, it's again important to note how fragmented the Asian American population is. As discussed further below, income and education levels can vary significantly by country of origin.

Figure 8: Household income distribution, by race and Hispanic origin of householder, 2021

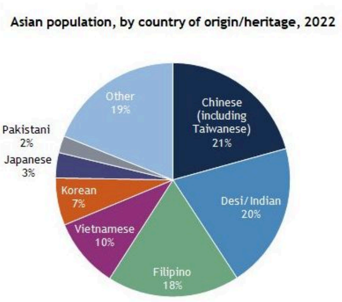


***Source:** US Census Bureau, Current Population Survey, Annual Social and Economic Supplement/Mintel*

Incredible diversity among the Asian American population

Connecting with Asian Americans can be complex given their significant diversity. While more than six in 10 US Hispanics have origins in Mexico, the Asian American population is far more fragmented. Chinese (and Taiwanese) make up the largest subgroup at 21% or 4.63 million consumers, but Indians are close behind at 20% or 4.51 million. Filipinos are the third-largest group at 18% or 4.09 million, followed by Vietnamese (2.16 million) and Koreans (1.47 million). Well over a dozen countries of origin are represented in the remaining 17% of Asian Americans, including nations such as Cambodia, Thailand, Laos, Bangladesh, Indonesia and Sri Lanka. However, none of these other nations have even a half-million immigrants living in the US.

Figure 9: Asian American population, by country of origin/heritage, 2022



** includes: Bangladeshi, Bhutanese, Burmese, Cambodian, Hmong, Indonesian, Laotian, Nepalese, Pakistani, Sri Lankan, Thai, Malaysian, Mongolian, Okinawan, other Asian countries.*

***Source:** Based on US Census Bureau, 2019, and American Community Survey/Mintel*

Unlike the Hispanic population, most of these countries also do not share a language, further contributing to cultural differences. These differences have been further shaped by immigration policies, which can have a major impact on acculturation and education levels as well as household incomes among different groups.

- **Chinese**: This large group is itself quite diverse, including both well-educated, high-earning populations as well as a comparatively high 13% living in poverty. These demographics are related in part to three distinct waves of immigration, beginning with laborers brought in for menial labor in the 1800s; a second wave of often highly educated and affluent immigrants who were able to navigate tough quota standards from the 1950s through to 1980; and a third, wave where less educated illegal immigrants became a major factor. China's stringent Zero-COVID policies did have a chilling impact on migration to the US and it remains to be seen if these trends will continue long-term.
- **Indian**: The US Indian population is very likely to be foreign-born, at 68%, and less likely to be citizens, at 49%. However, they are by far the most prosperous, with a median household income of $119K – contrary to conventional wisdom that more established second-generation immigrants are more affluent. This is due in large part to the H1B visa program, which currently gives approximately 130,000 skilled foreign workers entry into the US every year. In 2022, Indian workers made up close to 73% of these visas, with many recruited into the high tech firms that dominate visa allocations. (Chinese workers had the next largest share, at 12.5%.) Due to this program, large numbers of highly educated Indians have come to the US and settled and started families.
- **Filipino**: Filipinos are well established in the US, with half born in the US. This is due in part to WWII treaties that automatically granted citizenship to any Filipinos that served in the US Navy, and also made it easier for any Filipinos who married US military personnel to enter the US. As a result, Filipinos are comparatively affluent, with a median household income of $90,400 and just 6% living in poverty. Not surprising, English fluency is also highest amongst this group, with 84% speaking English "very well."
- **Vietnamese**: With 62% born overseas, US Vietnamese are a comparatively less-established group, although 75% of these first-generation immigrants arrived more than 10 years ago. Vietnamese immigration levels abruptly increased during the Vietnam War, following 1975 regulations that gave war refugees special status and resettlement aid. As conditions continued to worsen in Vietnam, the US then passed another act making it easier for Vietnamese to enter the US. With many immigrants fleeing unplanned from a region in turmoil, Vietnamese have struggled more financially, with comparatively low median incomes of $69,800 and a high 12% living in poverty.
- **Korean**: Korean immigration patterns are similar to Chinese immigration patterns, with 59% foreign born and 34% arriving within the last 10 years. However, a more open relationship between the US and Korean governments as compared to China likely made it easier for Koreans to enter the US throughout the post-Korean War era. As with Chinese, there is also a noticeable segment that lives in poverty, due in part to illegal immigrants who face more challenges when it comes to employment and education. A comparatively high 12% of US Koreans live in poverty, and median household income is comparatively low at $72,200.
- **Japanese**: Close to 80% of US Japanese were born in the US, due in part to relatively open immigration policies between the US and Japan up through 1924, when the Immigration Act brought Japanese immigration to an abrupt end. The earlier wave led to the establishment of a group of over 200,000 *Issei*, or first-generation immigrants, concentrated in Hawaii and the West coast. This group and their descendants faced significant discrimination during WWII, when approximately 120,000 US Japanese were placed in internment camps. While Japanese could immigrate relatively freely after immigration laws were reformed in 1965, numbers remained comparatively low as a strong economy in Japan provided little incentive to emigrate.

Figure 10: Asian American demographics, by country of origin/heritage, 2019

	US Asians	US Chinese	US Indians	US Filipinos	US Vietnamese	US Koreans	US Japanese
	%	%	%	%	%	%	%
Foreign born	57	62	68	50	62	59	27
Arrived in past 10 years	34	34	43	25	23	34	36
Citizen (for foreign born)	59	58	49	71	76	64	33
Education - < high school	27	29	15	22	45	23	21
Education - High school+	49	42	42	68	45	55	61
Education - Bachelor's degree+	24	29	43	10	10	22	18
Speaks English "very well"	72	61	82	84	54	67	85
Median household income	$85.8K	$81.6K	$119.0K	$90.4K	$69.8K	$72.2K	$83.0K
In poverty	10%	13%	6%	6%	12%	12%	9%

***Source:** Pew Research Center, US Census Bureau, 2019, and American Community Survey/Mintel*

Understand and reflect Asian American diversity

Given the diversity of the Asian American population, it will be critical for brands to be sensitive to these differences when marketing to this audience. In addition to their distinct cultural backgrounds, Asian sub-groups often have differing needs. For example, East Asian consumers may have long been frustrated by eye makeup palettes with instructions that don't work for their features, while Indians and other Southeast Asian consumers may struggle to find products that match their skin tones.

Hong Kong-based online retailer YesStyle acknowledges these differences by allowing shoppers to filter its products by country of origin. This can make it easier for a Taiwanese immigrant to find products from back home, for example, or allow fans of K-Beauty trends to find the right products for every step of their "glass skin" routine. Notably, the site focuses exclusively on East Asian products, with selections from South Korea, Japan, China and Taiwan.

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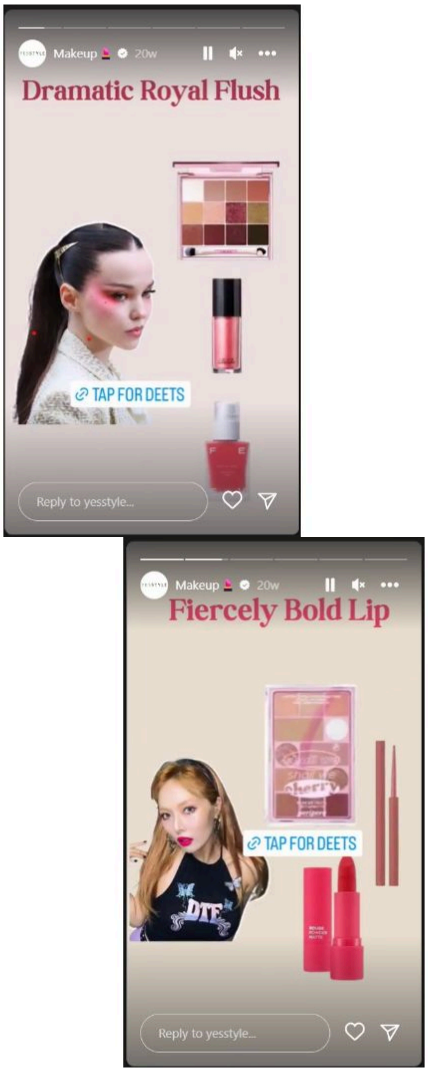
Figure 11: YesStyle Instagram reel – Makeup, 2023



Source: *Instagram/YesStyle, June 2023*

Figure 11: YesStyle Instagram reel – Makeup, 2023

Source: *Instagram/YesStyle, June 2023*

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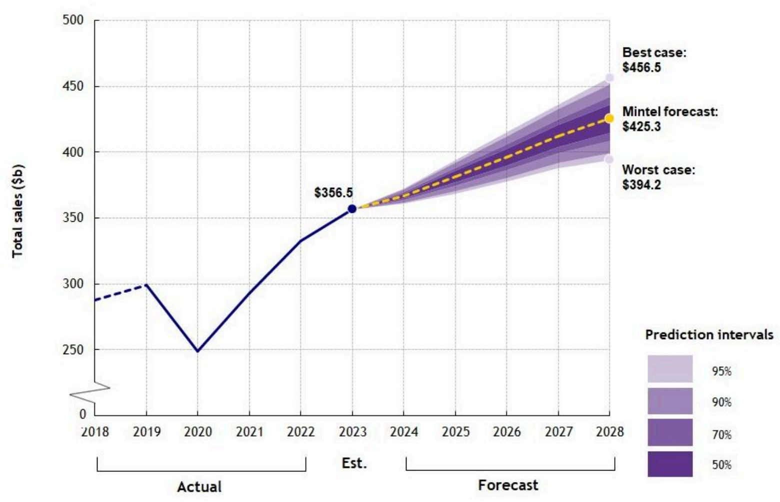
Slow growth projected for beauty and personal care in the years ahead

After a historic trend of modest growth, beauty and personal care product sales plunged in 2020 due to the pandemic. Consumers who rarely left their homes didn't need to adhere to the same beauty routines, and profound economic uncertainty caused many to pare their beauty budgets. As was the case with many other product categories, sales then rebounded robustly, but experienced relatively little growth after factoring in inflation. Indeed, after adjusting for inflation 2023 revenues are identical to 2019 revenues, and projected 2028 revenues are forecast to increase by just 8%.

However, there can still be winners in a challenging market, and Asian consumers may indeed still represent a growth opportunity. Despite the ups and downs of the current economy, this group remains affluent as a whole and still has plenty of disposable income. During uncertain times, beauty products can also be viewed as low-cost indulgences, and spending may even grow. Indeed, research for Mintel's *Beauty Retailing – US, 2022* found that 30% of Asian consumers reported they had increased spending on beauty and personal care in the aftermath of COVID due to returning to work and social activities vs 19% of beauty consumers overall. Additionally, a majority of Asian Americans are foreign-born. Relative to Western cultures, Asian consumers tend to have stricter beauty standards that may influence Asian Americans' approach toward their appearance, as Asian consumers over indexes for making the most beauty and personal care purchases.

Figure 12: Total US sales and fanchart forecast of beauty and personal care, at current prices, 2018-28



Includes haircare, shaving, bath, nail care, oral care products; cosmetics and perfumes; electrical personal care appliances; hairdressing salons and personal grooming establishments; miscellaneous personal care services.
***Source:** based on Bureau of Economic Analysis/Mintel; American Lifestyles – US, 2023*

Looking at individual product segments, skin care and bodycare make up the largest segment of the market, at $28.5 billion or 47% share as of 2022. Cosmetics are the next-largest segment, at $15.6 billion in 2022 or close to 26% of the market. While cosmetics may seem to be the fastest growing, this is due in large part to a rebound from a significant decline in spend during the first year of COVID, when consumers rarely left their homes and thus spent less on these beauty products.

Figure 13: Total US retail sales of beauty products, by segment, at current prices, 2020 and 2022

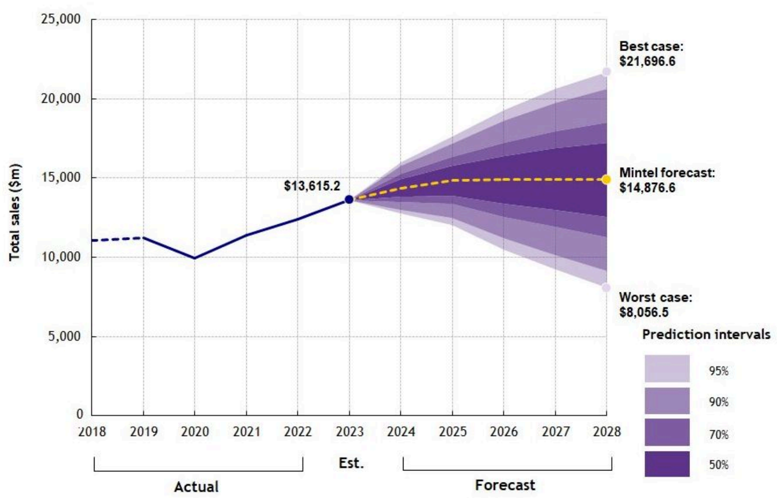
Segment	2020	Market share	2022	Market share	2020-22
	$ billion	% of total	$ billion	% of total	% change
Cosmetics	12.16	22.5	15.59	25.8	28.2
Haircare	11.77	21.8	12.75	21.1	8.3
Skincare and bodycare products	26.57	49.2	28.53	47.1	7.4
Shaving and hair removal products	3.51	6.5	3.67	6.1	4.7
Total	**54.00**	**100.0**	**60.54**	**100.0**	**12.1**

***Source:** based on Circana InfoScan® Reviews; US Census Bureau, Economic Census/Mintel; Online Beauty Retailing – US, 2022*

Color cosmetics sales paces inflation

Color cosmetics total sales growth comes, in part, from price increases. However, consumer demand for color cosmetics remains organically resilient thanks to category's reputation as an affordable luxury. The market's tie to emotional rather than functional necessity is projected to protect – and even strengthen – it during times of low consumer confidence. Mintel's *Color Cosmetics – US, 2023* expects that by the end of 2023, total retail sales of the color cosmetics market is projected to increase by 10.1% from 2022 and exceed $13.6 billion; when adjusted for inflation, 2023 sales are just 1% ahead of 2019.

Figure 14: Total US sales and fan chart forecast of color cosmetics, at current prices, 2018-28



Source: *based on Circana InfoScan® Reviews; US Census Bureau, Economic Census/Mintel; Color Cosmetics – US, 2023*

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Rising inflation, economic uncertainty, stubbornly low consumer sentiment

The US economy has been on a rollercoaster since 2020, with COVID lockdowns causing a steep downturn followed by a frenzy of hiring and spending as consumers reentered the world in 2021. Supply chain issues, higher energy costs and wage hikes then caused inflation to spike in 2022, leading to Federal Reserve rate increases intended to cool down prices and create a "soft landing," at the potential risk of summoning a recession.

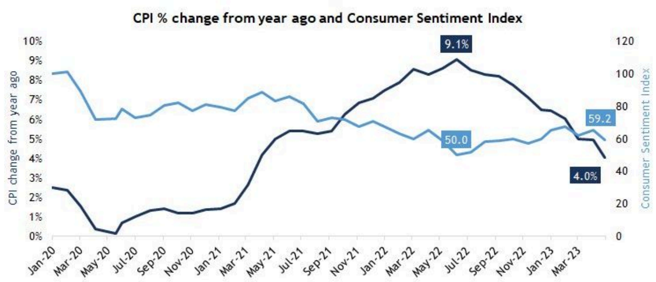
As of mid-2023, the Fed's efforts appear to have succeeded somewhat. Inflation has calmed while employment has remained strong. Specifically, in May 2023 the all-items CPI showed a 4% increase over the past year, a steep decline from highs of over 9.1% in July 2022. Meanwhile, unemployment remained at a highly satisfactory 3.7%.

However, not all signs are positive. Issues related to the crypto collapse contributed to the failures of Silicon Valley Bank, Silvergate Bank and Signature Bank in March 2023; declines in digital advertising and concerns about over hiring helped fuel layoffs at major tech firms including Amazon, Google, Meta and Microsoft; and mortgage rates have been climbing, getting close to 7% in June 2023 – nearly double what they were a year prior.

Combined with geopolitical factors such as the war in Ukraine and the US debt ceiling battle, the result for consumers has been a sense of unease. As of May 2023, the University of Michigan Consumer Confidence Index sat at 59.2 – higher than the previous year's result, but well below the level of 72.3 seen in May 2020, during the peak of pandemic lockdowns. With employment still high, inflation trending down and many consumers still relatively flush due to pandemic savings, this persistent malaise would not seem to reflect current economic reality.

However, negative sentiment can be a self-fulfilling prophecy, with skeptical consumers cutting back on spending and bringing down the economy as a result. If the growing belief that the US economy has dodged a recession becomes accepted fact, attitudes may change; but in the meantime, it's likely that many consumers will remain conservative when it comes to spending.

Figure 15: Consumer Price Index % change from year ago and Consumer Sentiment Index, 2007-23



Source: *US Bureau of Labor Statistics, January 2007-May 2023; Thomson Reuters/University of Michigan Survey of Consumers, January 2007-May 2023*

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Hallyu: catching the Korean Wave

Korean culture has become incredibly influential over the past two decades, with K-pop bands such as Psy and BTS topping US charts and movies and shows such as *Parasite* and *Squid Game* receiving both critical and popular acclaim. K-beauty has also been part of *hallyu* (a Chinese term that translates as Korean Wave), shaping trends for Asian American as well as general consumers in the US.

Korean beauty products first started taking hold with the arrival of Korean skincare brand Dr. Jart+ at Sephora stores in 2011. Soon after, the K-Beauty online retailers Peach & Lily and Soko Glam launched in the US. Extensive education was required as Korean skincare products were far more sophisticated than their US equivalents. The “skin first” school of thought focused on preventing problems like acne and uneven tone before they occur through extensive daily skincare routines like “double cleansing” – a two-step process that includes an oil-based cleanser to remove sebum and deep grime followed by a water-based cleanser for surface dirt.

Attention grew over the next few years, thanks in part to the ceaseless advocacy of Peach & Lily founder Alicia Yoon. Born in Korea but raised both there and in the US, she brought understanding of both cultures as well as a Harvard MBA to the sector. In 2014, she launched curated assortments of K-beauty products at retailers including Macy’s, Target, Urban Outfitters and QVC. In 2017, she then launched a major collection at CVS. Market research firm Rakuten Intelligence (now Nielsen IQ) estimated that US sales nearly tripled from 2016-18, and as of 2021 economics think tank CEPII found that South Korea was the world’s second-largest exporter of beauty products, at $7.8 billion – behind France at $10.8 billion.

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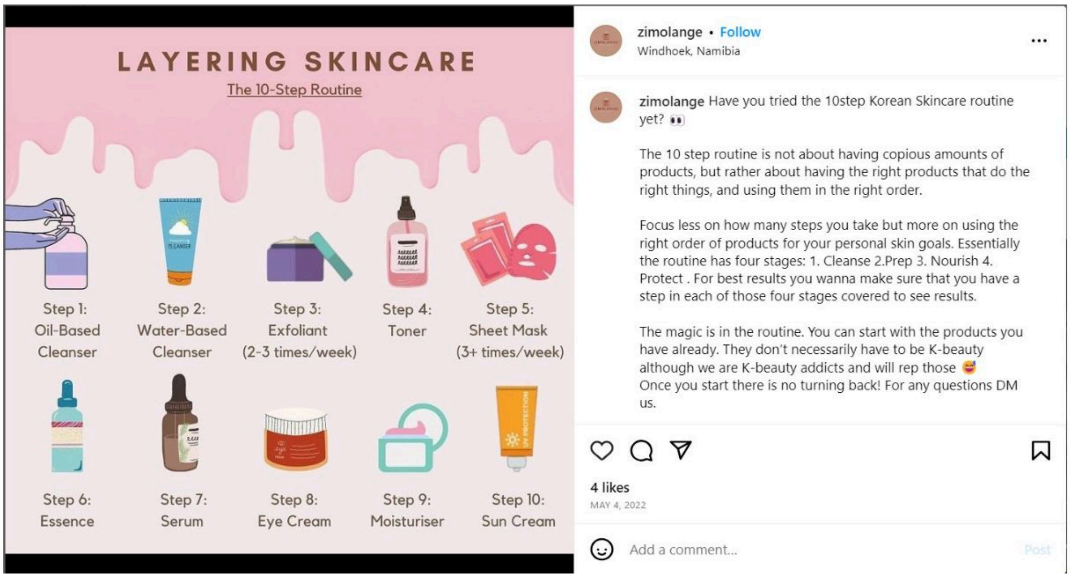
K-beauty advocates introduced US consumers to a plethora of new products. BB (beautifying balm) and CC (color correcting) creams were among the first to take hold. These multipurpose products could replace moisturizer, sunscreen and foundation and are now produced by most cosmetics companies, including brands like Olay, Clinique and Chanel. However, over time K-beauty typically led fans to increase rather consolidate the products they were purchasing. Products like lip masks and pimple patches addressed targeted issues, while unfamiliar ingredients like snail mucin encouraged experimentation. Many Korean products were also comparatively low cost, and combined with fun packaging from brands like Tony Moly could be an affordable treat.

Today the seemingly daunting10-step K-beauty routine is quite well known, although many consumers may only be doing part of it regularly. Many influencers and makeup artists have sought to achieve "glass skin" (a poreless, highly reflective complexion similar to a pane of glass), "honey skin" (semi-glossy and plumper than glass skin) or "dumpling skin" (dewy and moist). And US consumers do seem to be adopting more complex skincare routines. As of March 2023, 36% of consumers were using five or more facial skincare products, as compared to 28% the year prior (see *Facial Skincare – US, 2023*).

Interest in K-beauty has also caused consumers to explore products from other East Asian countries, including China, Taiwan and Japan. These trends have undoubtedly led to Asian Americans feeling better represented at the cosmetics counter – and purchasing more beauty products as a result.

Figure 16: Zimolange Instagram post – 10-step K-beauty skincare routine, 2022



Source: *Instagram/Zimolange, 2022*

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Future Opportunities and Strategies

For brands that are looking to better understand the market and the direction consumers are headed, understanding the perspectives of Mintel's Global Consumer Trend Drivers will help uncover new opportunities as they relate to each segment. Mintel's Global Trend Drivers track seven fundamental themes that influence consumer choice and change. These drivers (*Wellbeing, Experiences, Rights, Technology, Identity, Value* and *Surroundings*) and their underlying Pillars can help explain the key behavioral changes likely to impact consumers in the years ahead.

The thematic nature of these Trend Drivers and their Pillars will help streamline brand thinking about consumers' motives by category. Below is a discussion of relevant Trend Drivers and how they influence the Asian beauty consumer.

Figure 17: Mintel Trend Drivers

***Source:** Mintel Trends*

Meeting Asian beauty consumer needs through the lens of the Identity Trend Driver

Mintel's Global Trend Driver *Identity* describes the ways in which consumers are seeking physical and mental wellness. *Heritage*, a Pillar of *Identity,* focuses on cultural identity and connection, while *Community* focuses on a group of people who share something in common. During a period when the COVID pandemic and political tensions led to a surge in hate crimes against Asian Americans, supporting their communities and celebrating their identities has become more important for Asian Americans than ever.

These drivers have impacted Asian American beauty purchasing trends: 60% of Asian consumers have purchased from a brand demonstrating diversity or inclusivity as compared to 50% of consumers overall (see *Diversity and Inclusivity in Beauty – US, 2022*). Beauty brands have an opportunity to authentically demonstrate strong ties to Asian heritage and supporting the Asian community.

Trend Driver	Associated Pillars
Identity Understanding and expressing themselves and their place in society 	**INDIVIDUALITY** – Consumers are comfortable expressing themselves and expect brands to meet and respect their unique demands **HERITAGE** – Cultural identity, connection with a location, within a certain ethnic group **COMMUNITY** – A group of people who share something in common (work community, neighborhood community, interest group community, etc) **MORALS** – A person's own set of standards that they live to and judge others against

Commemorate AAPI Heritage in May and beyond

INH shows support for the broader Asian community, including fellow beauty entrepreneurs, through collaborative efforts.

AAPI Heritage Month, celebrated in May, has become an important part of demonstrating solidarity with the AAPI community. Hair product company INH, which was co-founded by Korean American Sharon Pak, began promoting a special gift set as part of AAPI Month in 2022. The 2023 edition was priced at $125 and included eight products from seven emerging brands founded by Asian Americans. All profits from sales were donated to the advocacy group The Asian American Foundation.

Figure 18: INH Instagram post – AAPI Beauty Box, 2023

Source: *Instagram/INH, May 2023*

In a brand environment inundated with diversity marketing, consumers are becoming more wary towards brands that appear self-serving in their diversity initiatives. Above, INH Hair proves its commitment to the AAPI community by donating all of its proceeds from its AAPI Beauty Box. Other brands seeking to engage Asian American beauty consumers through AAPI Heritage Month might consider treating May as one moment among many others in the year to celebrate AAPI heritage and visibility. These moments might include cultural holidays, such as Diwali, and/or finding cross-category collaborations to commemorate major Asian American milestones in sports and entertainment.

Lead with authentic solutions

Targeting Asian American beauty consumers' real problems can help brands create authentic connection with this diverse audience. According to *Diversity and Inclusivity in Beauty – US, 2023,* 50% of women of color struggle to find beauty products that match their skin tone, 53% of this group struggle to find products suited for their skin type, and 44% struggle to find products suited for their hair type. While AAPI Heritage Month promote Asian American visibility, frustrations with finding the right product take place year-round.

Live Tinted is an example of a solutions-driven brand that grew out of a founder's personal, highly-relatable needs that resonated with a broader group. In 2015, beauty expert Deepica Mutyala went viral with a YouTube video showing how she used red lipstick to neutralize her undereye circles. The video received over 10 million views, and Mutyala was able to translate this success into the beauty brand Live Tinted, which launched in 2018.

Live Tinted's stated mission is to "change the beauty narrative & celebrate and unite beauty for all tinted skins." Its signature product is the Huestick, a multiuse product that comes in many different shades and can be used on eyes, lips and cheeks as well as to balance out dark spots. Grounded in Mutyala's real life story, Live Tinted does not seem like an attempt to pander to diverse consumers, but rather an authentic solution to a universal problem.

Figure 19: Live Tinted – Instagram post for Huestick Multisticks, 2023

Source: *https://www.instagram.com/p/CsoVQW6O0cL/Instagram/Live Tinted, May 2023*

Meeting Asian beauty consumer needs through the lens of the Value Trend Driver

Mintel's Global Trend Driver *Value* describes the ways in which consumers are finding tangible, measurable benefits from what they purchase. Consumers' value equation for beauty products can include premium products as well as affordable ones, as long as they deliver sufficient quality for the price. Time savings can also be as valuable as financial ones. Value clearly resonates strongly with Asian consumers, with 71% agreeing that they choose to do beauty treatments at home in order to save money, while 55% find it more convenient (see Self-care vs Salon Motivation).

Trend Driver	Associated Pillars
Value Finding tangible, measurable benefits from what they invest in 	**QUALITY** – Willingness to pay more for products of a higher quality **BUDGET** – A limited supply of money, so what you can afford, also "affordable" **CONVENIENCE** – Always on the lookout for things that make life easier **PREMIUM** – A tendency to buy the premium version of a product

Combine "cheap and cheerful" with convenience

Founded by Christina Kao, a marketing executive who has worked both in the US and Shanghai, Le Mini Macaron promises to save consumers time and money in a fun package. Its home gel manicure kits include polish, prep tools and a small LED lamp shaped like a macaron cookie for an RSP of $38. While certainly more expensive than a standard bottle of polish, this pricing represents significant savings over regular salon manicures. The kit also promises time savings as well over going to salons or even other home gel solutions – users can just apply one coat as the polish includes base, color and topcoat, and each nail just needs to cure for 30 seconds. This ideal combination of savings, convenience, innovation and cute packaging should have lots of appeal for Asian consumers.

Figure 20: Le Mini Macaron gel manicure kit

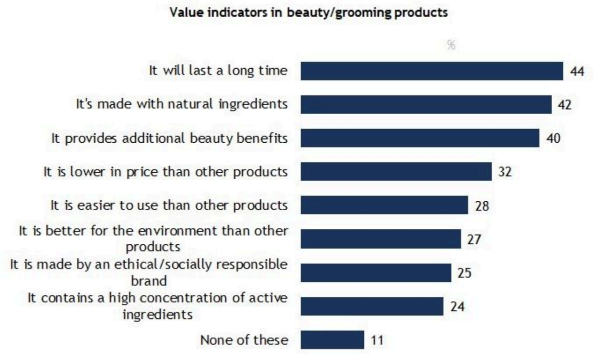
Source: *Mintel GNPD; Record ID 5317771*

Target multi-functionality as value beyond price

Beauty consumers' perceptions of value are multifaceted. According to Mintel's Global Consumer survey, the most popular indicators of value among U.S. beauty, personal care and household consumers are in fact longevity, natural ingredients, and additional beauty benefits, before low price.

Figure 21: Value indicators in beauty/grooming products, 2022

"Which of the following indicates that a beauty/grooming product is a good value for the money? Please select all that apply."

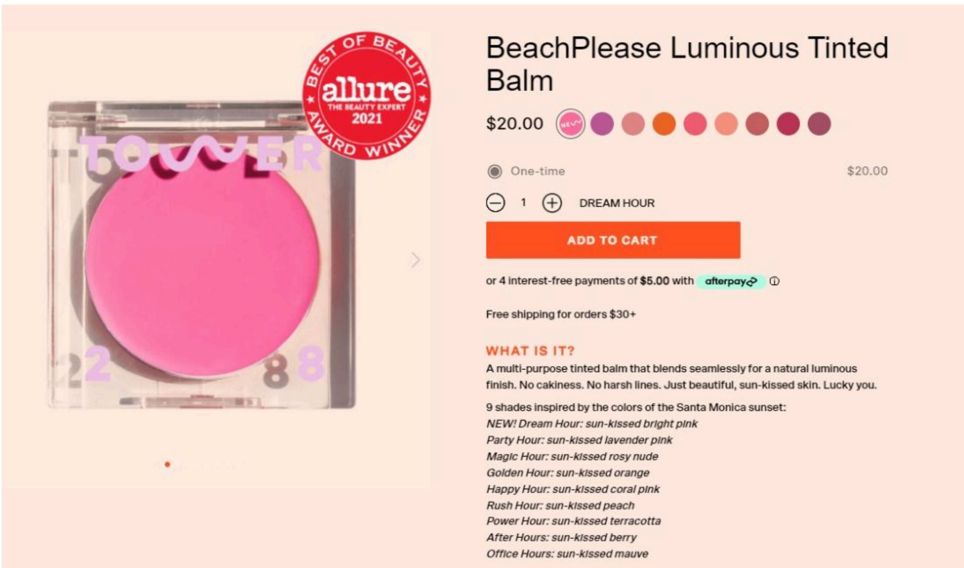


Base: *1,000 internet users aged 18+*

Source: *Kantar Profiles/Mintel, August 2022*

Multi-functional products may be a way for brands to justify their price to the 80% of Asian beauty consumers who are actively trying to simplify their beauty routines and the70% who are looking to decrease the number of products they use. In line with this strategy, Tower 28, founded by Chinese-American entrepreneur Amy Liu, positions its BeachPlease Luminous Tinted Balm as a multi-functional product for all-over-the-face use.

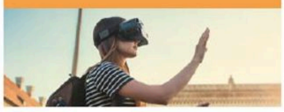
Figure 22: Tower28 BeachPlease Luminous Tinted Balm, 2022



Source: *Tower28 Website*

Meeting Asian beauty consumer needs through the lens of the Technology Trend Driver

The Mintel Trend Driver *Technology* reveals the way in which consumers are motivated to find solutions through technology in both the physical and digital worlds. Technology-based solutions and new innovations may have particular appeal to Asian Americans. Many Asian consumers immigrated to the US through programs for technical workers and students, and many Asian countries are also leading producers and exporters of tech products. Technology can also be an important way to appeal to Asian men, who are less engaged than Asian women with beauty and personal care.

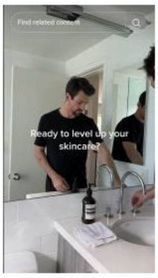
Trend Driver	Associated Pillars
Technology Finding solutions through tech in the physical and digital worlds 	**COMMUNICATION** – Seeking ways to disconnect from technology **DIGITAL ENTERTAINMENT** – Use of digital technologies for leisure activities **EARLY ADOPTERS** – A desire to be among the first to try new technologies **MEDIA** – Keeping well-informed about the latest news/happenings in the world

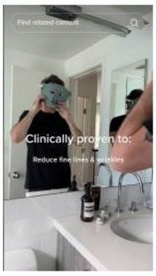
Provide practical benefits to appeal to Asian men

Omnilux highlights technological innovation in its product positioning, and provides a useful example of how to market to Asian men. Founded by Dr. Hni Abi Ghosn, the brand positions itself as “medical-grade” and describes its LED light therapy products as “the first” and “the gold standard” for such treatments. A video on the site notes that the product developed from more than 20 years of peer-reviewed research and states “We’ve perfected the science behind beauty.”

Notably, the Omnilux Men product avoids discussion of aesthetics and beauty, instead emphasizing benefits like looking less tired, curing razor burn and anti-aging. The company’s site emphasizes that the product is specifically designed for men, observing that men’s skin is 25% thicker and requires a different wavelength of LED light for treatment to be effective. The Omnilux site also clearly positions the mask as a fitness-related experience rather than a pampering one, showing men using it who are holding gym bags and wearing exercise clothes. Instead of indulgence, the product calls out efficiency and time savings, which – combined with its tech and innovation focus – should help it appeal to Asian men.

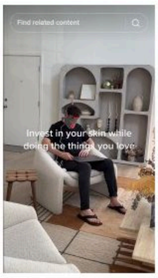
Figure 23: Omnilux Men – TikTok post, 2023





Source: *TikTok/Ominluxled, May 2023*

Figure 23: Omnilux Men – TikTok post, 2023



Source: *TikTok/Ominluxled, May 2023*

Use science to take personalization to the next level

Singapore's Modules takes a personalized approach to skincare, backed by science. It offers monthly deliveries of prescription skincare products following an online consultation with a doctor. Customers choose their desired texture and add their choice of booster ingredients to personalize their products. Pharmacists then create the products starting from an inventory of over 670 formulations. The company heavily emphasizes its medical credentials, describing its products as "Clinical Dermatology" and stated that they are "Personalized Prescription Treatments." It focuses on solving problems like acne, aging, eczema and rosacea. This scientific approach is likely to work well with a segment of Asian Americans, especially men.

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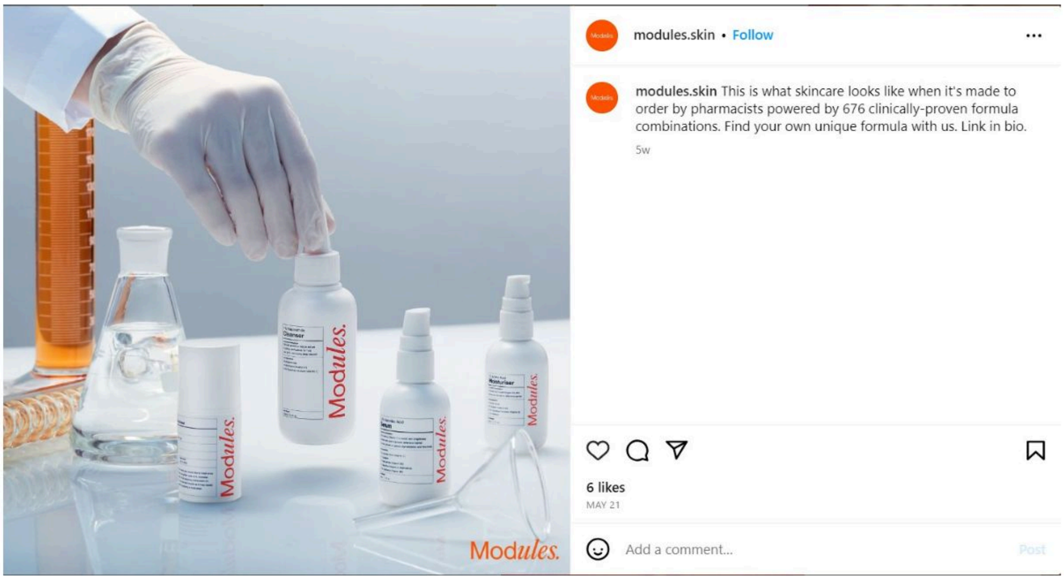
Figure 24: Modules personalized prescription skincare – Instagram post, 2023



Source: *Instagram/Modules Skin, May 2023*

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Asian American Beauty Consumer – Fast Facts

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Women most engaged with beauty

Two thirds of Asian women have a beauty routine that includes at least six steps; 93% wash their hair regularly, 83% use facial and body skincare. Just 53% of Asian women style their hair regularly, pointing to an opportunity to grow interest around hair and scalp care, for example by drawing on traditions like Ayurvedic hair oiling (see Beauty Routines).

Opportunity to grow hair care sales, particularly among men

- Asian men are less engaged with grooming/personal care. While 80% wash their hair and 57% use body lotion, less than half regularly engage in any of the queried tasks/routines. However, younger men appear to have some interest in hair care, with 38% of those ages 18-35 styling their hair, creating a sales opportunity (see Beauty Product Usage).
- Asian consumers buy shampoos and cleansers at relatively high rates but they lag behind for styling products (58% of Asian consumers purchased in the past year vs 63% of consumers overall). Developing products designed for the specific properties of Asian hair and featuring Asian consumers in advertising could help grow sales for these products.

Facial skincare a particular focus

61% of Asian consumers use facial moisturizer as compared to 52% of consumers overall, and this group also uses facial cleansers and serums at higher levels than the average. Multi-step facial skincare regimens are common in a number of East Asian countries such as Korea and China and have attracted many consumers in the US as well. With this heritage, Asian women would seem to be particularly important audiences for facial products (see Beauty Product Usage).

Salons lag behind home treatments

While Asian consumers are more likely to get the hair cut in salons (56% vs 32% for in-home cuts), otherwise salon visits appear to be relatively rare, with Asian consumers preferring home treatments for hair styling, facials and manicures. Cost savings is cited as a key factor by 71%, followed by convenience at 55%. Positioning salons as offering quality that can't be matched at home, as well as a form of relaxation may help drive interest (see Beauty Treatments Used and Self-care vs Salon Motivation).

Social media rules for beauty information

Beauty influencers have vast and enthusiastic audiences, and it's not surprising that social media platforms are Asian consumers' primary source of beauty information. 65% of Asian consumers overall and 87% of Asian women aged 18-34 rely on them. YouTube is the most popular channel, though young women also use Instagram and TikTok regularly. Social media campaigns and partnerships with influencers will be key for brands, although reviews, word of mouth and samples can also play a role particularly for older consumers (see Sources of Beauty Information).

A preference for easy-to-use, natural products and desire to simplify

- 66% of Asian consumers seek products that are easy to use; 46% of all (and 51% of Asian women) are interested in natural ingredients. Familiar brands are also particularly compelling for Asian men, although some audiences – like Koreans and female beauty mavens – prefer experimenting with new brands (see Purchase Drivers).
- Consistent with the desire for easy to use products, 80% of Asian consumers are actively trying to simplify their beauty routines, while 70% are looking to decrease the number of products they use. The popularity of multifunction products like BB and CC creams shows there is opportunity to consolidate, although true beauty mavens will not accept any compromise in performance (see Attitudes toward At-home Beauty and Personal Care).

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Asian women are highly engaged in beauty

Asian women have fairly extensive routines, indicating they will purchase multiple products to address various beauty needs. Although Asian men take a more streamlined approach to grooming, they are just as confident as women in their ability to do beauty/personal care treatments at home.

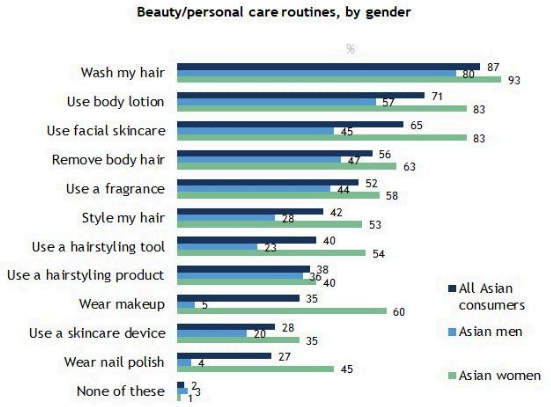
Personal care/grooming is more common than enhancing appearances. 93% of Asian women wash their hair, as do 80% of Asian men. 83% of Asian women use both facial skincare and body lotion and while 57% of Asian men use body lotion, less than half participate in any of the other queried beauty routines.

The strong cultural focus on skincare in many Asian cultures translates to greater use of these products among Asian Americans. Asian consumers are 17% more likely than the average to use facial skincare (according to data collected for *Facial Skincare – US, 2023*). Asian consumers' greater-than-average participation in the facial skincare category suggests that this group may also be better versed than the average consumer in facial skincare ingredients, innovations and claims. This presents an opportunity for body and haircare brands to tap into Asian beauty consumers' pre-existing enthusiasm for facial skin health, extending said enthusiasm into total skin and scalp health.

Meanwhile, just 38% of Asian consumers use hairstyling products, which is significantly below the average. Mintel's *Shampoo, Conditioner and Hairstyling Products – US, 2023* shows that 63% of consumers overall have used a hairstyling product such as hairspray or mousse over the past year. These results indicate an opportunity for brands to understand how hair style contributes to different Asian cultural groups' sense of style and personal identity to authentically promote hairstyling and hair health products.

Figure 25: Beauty/personal care routines, by gender, 2023

"Which of these do you currently do? Please select all that apply."



Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

Opportunities to draw on Asian hair care traditions

Highlighting traditional practices like scalp massage (common in both East and Southeast Asian cultures) and Ayurvedic hair oiling could help drive engagement.

While there are many offerings for Black hair care, Asian hair care has been less of a focus, which could be a contributing factor to lower levels of hair product usage among Asian consumers. Hair oiling was spotlighted during the second season of the Netflix hit show *Bridgerton*, in a scene where heroine Kate Sharma helps oil her sister Edwina's hair. The practice is common in India, where both men and women routinely oil their hair once a week to help strengthen and condition it.

60% of all haircare consumers say that they're paying more attention to their hair health than they were a year ago (see *Shampoo, Conditioner and Hairstyling Products – US, 2023*). Given the growing interest and new product development in the haircare category, haircare brands are well-positioned to extend their reach by tapping into Asian hair care traditions such as Ayurveda hair oiling. For instance, Dutch beauty brand Rituals, which emphasizes "the power of rituals," extended its body and hair care line to an Ayurveda-inspired collection, The Ritual of Ayurveda. The Ayurveda Dry Oil Body & Hair references the tradition of *abhyanga*, or self-massage, and inviting consumers to "awaken inner harmony."

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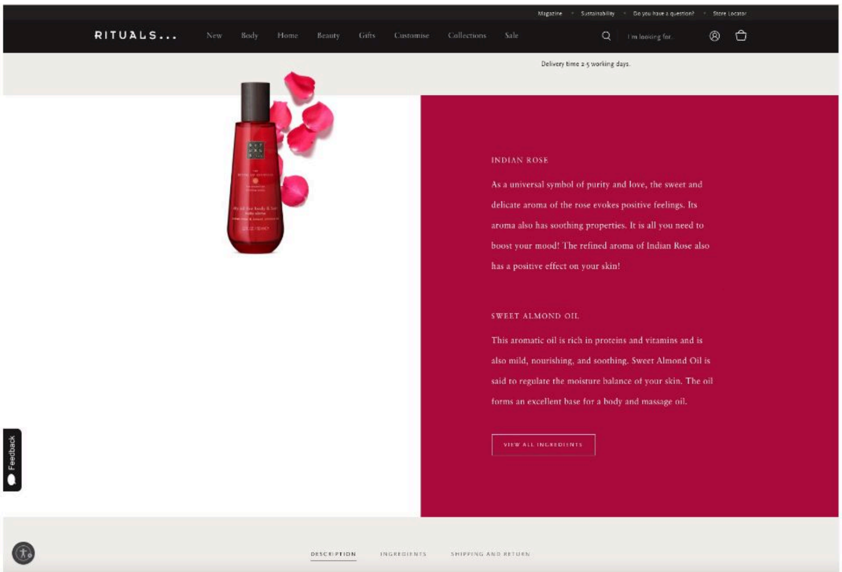
Figure 26: Rituals Ayurvedic Dry Oil for Body and Hair, 2023



Source: *Rituals.com*

Younger men have more extensive grooming routines

Asian consumers aged 55+ are significantly less likely than young Asian consumers to spend time on purely aesthetic beauty routines such as wearing cosmetics or styling their hair. However, mature Asian women are still very likely to use body lotion and facial skincare. Positioning such products as ways to stave off aging and also protect the skin could undoubtedly be helpful when marketing to this group.

Meanwhile, Asian men aged 18-34 devote more thought to their grooming/personal care routines. Half use fragrances – almost double the share of Asian men aged 55+ – and 40% use some type of hairstyling product. The elaborate looks seen on male K-pop stars and variety of male hair tutorials on TikTok to achieve these looks may be encouraging younger men to experiment more with their appearance. Still, comparatively few even of this group choose to wear makeup or nail polish.

Figure 27: Beauty/persona care routines, by gender and age, 2023

“Which of these do you currently do? Please select all that apply.”

	All Asian consumers	Male, 18-34	Male, 35-54	Male, 55+	Female, 18-34	Female, 35-54	Female, 55+
Asian internet users aged 18+	*1,000*	*211*	*160*	*84^*	*219*	*203*	*121*
	%	%	%	%	%	%	%
Wash my hair	87	76	83	82	94	93	93
Use body lotion	71	59	63	38	82	85	83
Use facial skincare	65	48	50	25	83	85	78
Remove body hair	56	45	49	49	77	63	36
Use a fragrance	52	51	45	26	69	60	36
Style my hair	42	38	26	10	63	51	38
Use a hairstyling tool	40	31	16	15	55	53	51
Use a hairstyling product	38	40	38	24	44	36	37
Wear makeup	35	8	5	0	67	61	48
Use a skincare device	28	25	18	11	44	33	24
Wear nail polish	27	7	3	0	53	44	34
None of these	2	4	1	7	0	1	0

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of beauty routine used. ^ small sample (<100)

Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

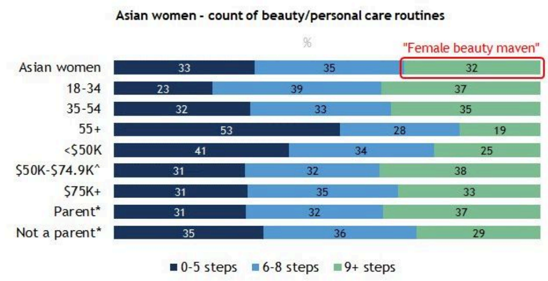
Understanding Asian beauty mavens

Understanding core beauty consumers is critical to connecting with this important group and enlisting them as loyal customers and brand advocates.

Mintel has identified groups of “beauty mavens” who are highly engaged with grooming and personal care routines. For Asian women, that translates to the 32% who have nine or more steps in their beauty routines. Female beauty mavens skew younger than the norm; they are more likely to be middle-income rather than affluent, likely due to their somewhat younger ages. Consistent with their age group, they are also more likely to be a parent with children under age 18 in the home.

Figure 28: Female beauty mavens – Count of beauty/personal care routines, by key demographics, 2023

“Which of these do you currently do? Please select all that apply.” [Count of total number of routines used]



** of children under 18 ^ small sample (<100)*

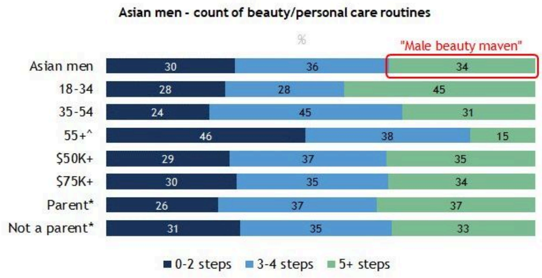
Base: *543 female Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

Meanwhile, male beauty mavens include the 34% of Asian American men who have five or more steps in their beauty routine. Interestingly, this group skews somewhat older than the female beauty mavens, and is most likely to be age 35-54. They are also more likely to be parents. While it might be expected that mavens would primarily consist of younger men, the youngest men may be less focused on meticulous grooming and may, for example, not be shaving regularly or applying lotion. These trends could indicate opportunities to increase consumption amongst younger men as they age and enter new life stages. Younger Asian males are already more focused on their appearance when it comes to hairstyling and some aspects of skincare; if they can be persuaded to keep this focus on style and add on new routines for hygiene, anti-aging and wellness, they could potentially increase consumption significantly compared to prior generations.

Figure 29: Male beauty mavens – Count of beauty/personal care routines, by key demographics, 2023

“Which of these do you currently do? Please select all that apply.” [Count of total number of routines used]



** of children under 18 ^ small sample (<100)*

Base: *457 male Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

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Beauty Product Usage

Asian consumers show high engagement with facial skincare

Single-function skincare products targeted toward achieving a specific result may appeal more than multi-functional products that address a variety of issues.

When compared with other groups, Asian consumers are strong users of facial skincare products. More than half use facial moisturizers and cleansers, and usage of products like facial toner, sheet masks and facial mists are also well above the norm (see *Facial Skincare – US, 2023*). A number of these products feature prominently in multi-step K-beauty routines. While Asian consumers do express interest in streamlining their beauty routines and limiting the products they use, in the near term there would seem to be significant opportunity to market a range of single-function skincare products to this group as part of an overall regimen.

Figure 30: Facial skincare products used, by race, 2023

"Which of the following products do you currently use at home? Please select all that apply."

	All	Asian or Pacific Islander	Black or African American	White	Other race	Asian or Pacific Islander
internet users aged 18+	2000	84^	301	1385	230	Index to All*
	%	%	%	%	%	
Any treatment - NET	37	38	35	36	44	103
Any mask - NET	24	27	24	23	30	113
Facial moisturizer	52	61	54	51	50	117
Lip balm	49	50	50	48	53	102
Facial cleanser	47	54	52	46	48	115
Eye cream	25	37	15	25	31	148
Make-up remover	24	25	18	24	33	104
Anti-aging treatments	23	25	17	23	33	109
Facial serums	21	29	16	20	30	138
Acne treatments	20	23	24	18	25	115
Facial toner/astringent	19	25	20	17	25	132
Rinse-off masks	18	18	17	17	25	100
Facial oil	13	14	18	12	16	108
Sheet masks	13	19	10	12	17	146
Facial mist	11	17	13	10	14	155
None of these	17	12	12	19	18	71

*The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of facial skincare product used. * **How to read:** an index of 100 = average. An index of 110 means Asian consumers are 10% more likely than All to use the skincare product; an index of 90 means they are 10% less likely. ^ small sample, <100*

***Base:** 2,000 internet users aged 18+*

***Source:** Kantar Profiles/Mintel, March 2023; Facial Skincare – US, 2023*

Clean beauty: shampoo and cleanser main focus for hair care

Haircare brands can take a cue from skincare to market haircare products with ingredients, results that have specific relevancy to the needs of Asian consumers – particularly young Asian men.

When it comes to haircare products, Asian consumers are more likely than the norm to use shampoos and cleansers, but are significantly less likely to use styling products (see *Shampoo, Conditioner and Hairstyling Products – US, 2023*). Regular shampoo is the most commonly used product among Asian consumers, at 76% vs 72% of all consumers. Asian consumers also use dandruff shampoo and all-in-one products at higher levels than the average. In terms of styling products, gel/cream/lotion is the most popular at 30% vs 34% overall; hair treatments like bond builders and keratin are one of few treatments Asian consumers are more likely than the average to use, at 20% vs 13% overall.

These results would seem to indicate further opportunity to market haircare products to Asian consumers, especially young Asian men. This group does seem relatively engaged in hair maintenance and styling. Partnering with the growing number of well-known Asian and Asian-American celebrities to help promote looks Asian men can try, might be a way to drive sales activity from this group.

Figure 31: Haircare products used, by race, 2023

“Which of the following products have you used at home in the last 12 months? Please select all that apply.”

	All	Asian or Pacific Islander	Black or African American	White	Other race	Asian or Pacific Islander
Internet users aged 18+ who have hair	*1936*	*79^*	*285*	*1348*	*224*	Index to All*
	%	%	%	%	%	
Any shampoo - NET	84	90	76	87	80	107
Any cleanser - NET	92	91	86	94	88	99
Any conditioner - NET	71	71	79	69	73	100
Any treatment - NET	48	47	70	43	51	98
Any styling - NET	63	58	72	62	62	92

*Note: Any shampoo - NET: Regular shampoo OR Dandruff shampoo OR Dry or no-rinse shampoo (eg spray, powder); Any cleanser - NET: Regular shampoo OR Dandruff shampoo OR 2-in-1 body/hair product (eg all-in-one) OR Cleansing conditioner (eg cowash); Any conditioner - NET: Cleansing conditioner (eg cowash) OR Regular conditioner OR Leave-in conditioner OR Deep conditioning mask; Any treatment - NET: Pre-shampoo treatment (eg pre-poo) OR Specialized hair treatments (eg bond builder, keratin) OR Hair serum OR Hair oil (eg Moroccan, marula) OR Scalp treatment (ie treatment before shampooing); Any styling - NET: Heat protectant product OR Hairspray OR Styling mousse/foam OR Styling gel, cream, or lotion OR Hair texturizer (eg putty, wax) The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of haircare product used. * **How to read:** an index of 100 = average. An index of 110 means Asian consumers are 10% more likely than All to use the skincare product; an index of 90 means they are 10% less likely. ^ small sample, <100*

Base: *1,936 internet users aged 18+ who have hair*

Source: *Kantar Profiles/Mintel, January 2023; Shampoo, Conditioner and Hairstyling Products – US, 2023*

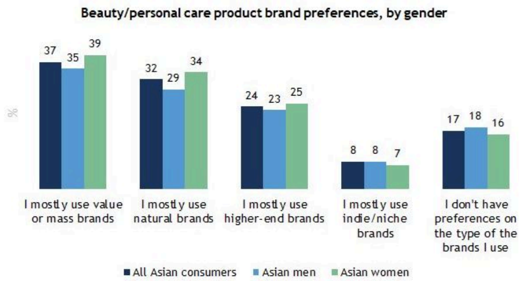
Mass, natural brands most popular

Asian consumers use a variety of brand types – likely devoting higher spend to the beauty areas that are most important (ie facial skincare) and turning to mass brands for areas they feel contribute less to their personal care and/or appearance.

While value or mass brands lead with 37% of Asian consumers mostly using these brands, use of natural and higher-end brands is not far behind; at 32% and 24%, respectively. Given their relatively high average incomes, there would seem to be an opportunity to drive adoption of higher-end brands for certain subgroups of Asian American consumers – as long as a higher price tag is backed up with real results and they see the value in investing in that particular area of beauty/personal care.

Figure 32: Beauty/personal care product brand preferences, by gender, 2023

"How would you describe your current usage of beauty and personal care products (eg skincare, makeup)? Please select all that apply."



Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

Beauty companies can promote rare natural ingredients to increase spending

Korean brand Innisfree, which also has stores in the US, describes itself as an "eco-conscious beauty brand." Its messaging heavily promotes its ties to "the clean island of Jeju" and 10 natural ingredients Innisfree has sourced from that locale. While Innisfree is a relatively affordable brand, some of its more expensive products like its $25 Cica Balm feature bija seed oil, which is derived from a fruit that takes 20 years to grow. Innisfree states that it sources its bija through a fair trade partnership with local Jeju villagers, harvesting only tree-fallen fruit.

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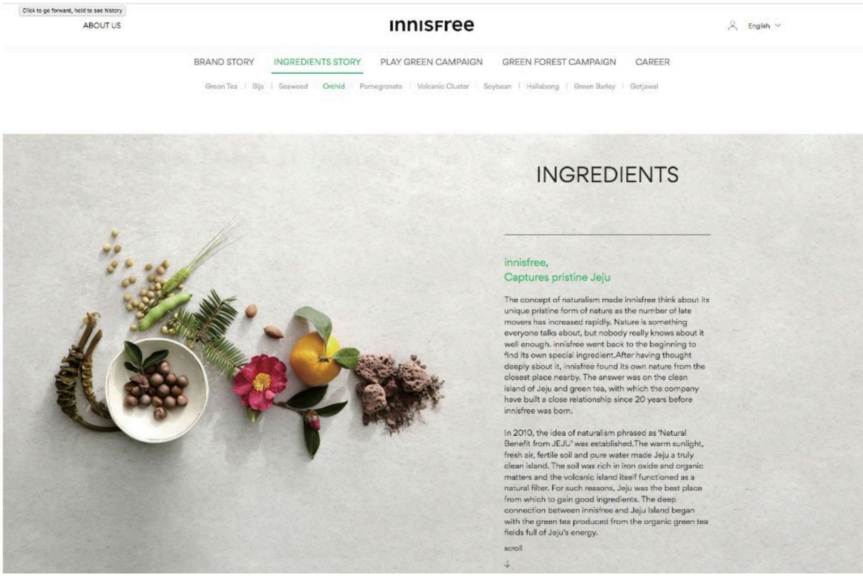
Figure 33: Innisfree ingredients, 2023



Source: *Innisfree.com*

Affluent Asian consumers are more likely to use higher-end brands. However, just 17% of affluent adults aged 55+ are using such brands. With older adults less likely to follow trends, emphasizing value for spend and efficacy is especially critical for this audience.

Figure 34: Beauty/personal care product brand preferences, by age and household income, 2023

"How would you describe your current usage of beauty and personal care products (eg skincare, makeup)? Please select all that apply."

	All Asian consumers	18-34, <$75K	18-34, $75K+	35-54, <$75K	35-54, $75K+	55+, <$75K	55+, $75K+
Asian internet users aged 18+	*1,000*	*196*	*236*	*91^*	*272*	*73^*	*132*
	%	%	%	%	%	%	%
I mostly use value or mass brands	37	31	32	44	42	40	41
I mostly use natural brands	32	39	33	33	33	19	21
I mostly use higher-end brands	24	19	31	19	26	26	17
I mostly use indie/niche brands	8	10	11	5	7	3	3
I don't have preferences	17	22	15	14	12	25	23

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of facial skincare product used. ^ small sample, <100

Base: *1,000 Asian internet users aged 18+*

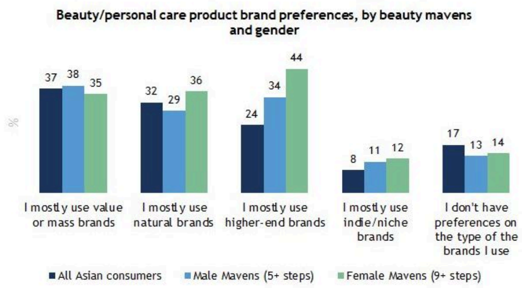
Source: *Kantar Profiles/Mintel, May 2023*

Both male and female beauty mavens are important audiences for higher-end brands, with 44% of female mavens and 34% of male mavens stating they mostly use such products. Female mavens place a higher priority on natural brands, and both groups are also more likely than Asian consumers, overall, to use indie or niche brands. It stands to reason that the most engaged beauty and personal care customers would be willing to spend the most, and winning and maintaining loyalty from this group will be critical.

Loyalty programs like Sephora's Beauty Insider Rouge could certainly help engage this audience. Consumers who spend at least $1,000 per year with Sephora get free shipping, points they can redeem for products, early access to productions and invitations to special events. Enlisting customers as brand ambassadors in social media is also a good strategy.

Figure 35: Beauty/personal care product brand preferences, by beauty mavens and gender, 2023

"How would you describe your current usage of beauty and personal care products (eg skincare, makeup)? Please select all that apply."



***Base:** 1,000 Asian internet users aged 18+*

***Source:** Kantar Profiles/Mintel, May 2023*

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DIY is more popular than going to professionals

Retail beauty brands have an advantage over salons. Promote ease of use, fun and indulgence in at-home beauty marketing to appeal to self-sufficient consumers.

When asked about what beauty treatments they've had over the last year, hair was in the lead, with close to 70% having a haircut or hair styling done either at a salon or at home. No other queried treatment was done by more than a third of Asian consumers, although close to a third had done facial treatments, nail treatments or body scrubs at home.

Asian consumers are significantly more likely to perform beauty treatments at home, with haircuts the only service they are more likely to have performed at a salon (at 56% vs 37% for at home). While approximately 20% did have manicures or pedicures as well as hair color done at salons, over a fifth did not have any of the queried services performed out of home.

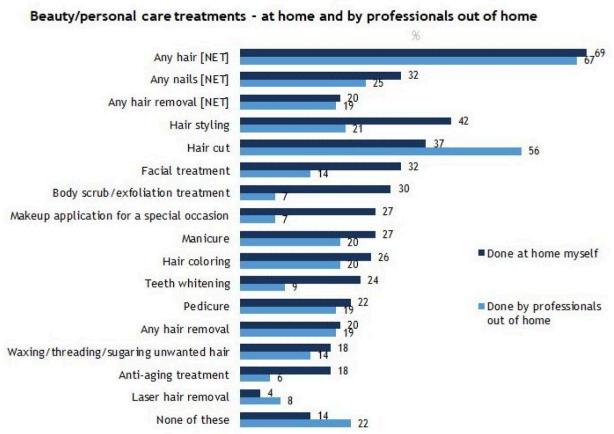
These results indicate a challenging outlook for salons hoping to drive business from Asian consumers. With the exception of haircuts, visits appear to be comparatively infrequent, and given the higher cost of salon services, usage may decline further if there is an economic downturn. Co-locating nail and skincare services with hair salons may be one way to strengthen relationships with Asian consumers. Emphasizing wellness or medical benefits (for example, with ties to fitness or dermatology) may also help move salon services from "nice to have" to "must have" status.

Figure 36: Beauty/personal care treatments – Done at home vs done at salon, 2023

“Which of the following beauty and personal care treatments have you done in the past 12 months? Please select all that apply.

-Done at home myself

-Done by professionals out of home (ie at a salon)”



Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

And, of course, highlighting Asian consumers in promotional efforts will inspire Asian clients to try new looks and be confident their needs will be met. To commemorate AAPI month, professional color brand Joico highlighted stellar work on Asian hair showcased on social media by some of its client salons, focusing on more extreme transitions like dark blonde, bright red and blonde highlights which would be best require professional expertise.

Figure 37: Joico blog post, May 2023

Source: *Joico.com*

Home skincare an important focus for women

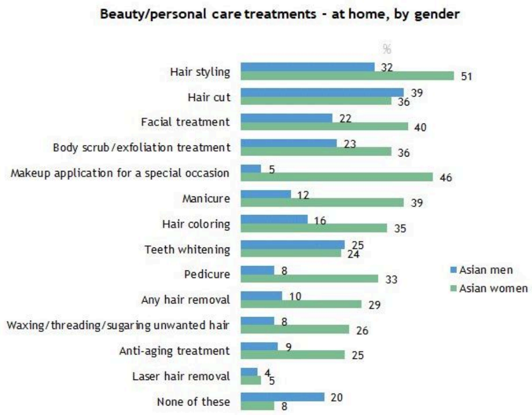
There is a significant market for home beauty solutions aimed at Asian women.

Consistent with their greater interest overall in beauty and personal care, women are far more likely to have done various beauty treatments at home. Hair styling remains in the lead at 51% of Asian women, but makeup, facial treatments and manicures are also popular.

Meanwhile, Asian men are actually slightly more likely to cut their own hair, as well as to use home teeth whitening solutions. A comparatively high 32% also styled their own hair. Hair appears to be a particular area of focus for young Asian men and could be a good gateway for establishing brand awareness and then marketing line extensions like skincare. For example, the brand Baxter of California has an award-winning pomade product that is widely recommended for Asian men. Promoting its skincare line to pomade customers would be a natural next step.

Figure 38: Beauty/personal care treatments done at home, by gender, 2023

"Which of the following beauty and personal care treatments have you done in the past 12 months? Please select all that apply. -Done at home myself"



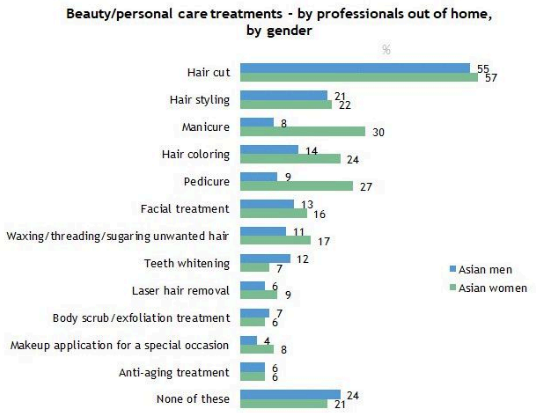
***Base:** 1,000 Asian internet users aged 18+*

***Source:** Kantar Profiles/Mintel, May 2023*

When salon services are considered, haircuts and styling again remain the primary services Asian men have done by professionals. Haircuts are also the dominant service women had performed in salons, at 57%. However, manicures and pedicures are also fairly popular. There has been significant innovation in the nail space in recent years, and trendy nail looks are popular on social media and the red carpet. In addition to getting ornate looks they can't do at home, women also often find the nail salon a good place to relax or catch up with friends. Emphasizing this pampering aspect in salon design and marketing should be an effective marketing technique.

Figure 39: Beauty/personal care treatments done at salon, by gender, 2023

"Which of the following beauty and personal care treatments have you done in the past 12 months? Please select all that apply. -Done by professionals out of home (ie at a salon)"



Base: *1,000 Asian internet users aged 18+*

Source: *Kantar Profiles/Mintel, May 2023*

Meanwhile, just 16% of Asian women have had a facial in a salon over the past year – seemingly quite low given the high interest this group has in skincare. Given the popularity of K-beauty, promoting facial treatments based on the latest trends in Korean spas might help drive interest, as could positioning regular facials as the 11th step in the 10-step beauty routine. There appears to be strong interest in these services. Influencer Tina Yong's YouTube video about a facial she received in Seoul has received over 2.5 million views. Notably, the facial includes advanced treatments like high-frequency ultrasound lasers that consumers could not do at home.

Figure 40: Best in Beauty "I Got a 10 Step Korean Facial" video, 2019

Source: *https://www.youtube.com/watch?v=ORQAm9tg5pgYouTube/Tina Yong*

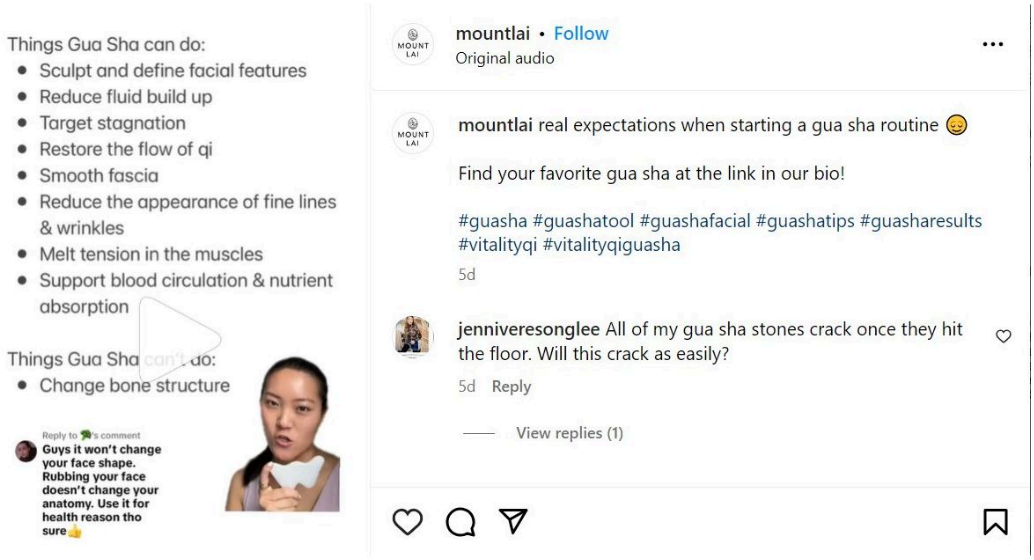
Younger consumers do more treatments, at home and in salon

Promote self-care products to young Asian consumers as an effective, affordable and fun way to get salon-level results.

Asian consumers aged 18-34 are most likely to do virtually all home treatments queried with the exception of hair coloring and anti-aging treatments. These results aren't surprising – younger consumers are more likely to follow trends, are often focused on dating, and have numerous events to prep for, including graduations, new jobs and weddings. Given limited disposable income for this group, targeting fun, approachable at-home routines will keep this group engaged. As is often the case with fads, what is new with younger beauty consumers may even be what is old: this year, perhaps uplifted by the growing intersection between beauty and wellness, the traditional Chinese medical practice of *gua sha* has grown in popularity as #guasha videos has received over 2.4B views.

It's worth mentioning that while routines rooted in cultural tradition can promote visibility and inclusion, leveraging them also necessitates some care. As case in point, the *gua sha* trend also comes with the backlash against influencers who erroneously suggest that the practice can slim down one's face, thus reducing a longtime tradition to a face lift hack. Brands taking part in such trends, including ones that also take inspiration from Ayurvedic medicine (see Beauty Routines), should therefore ensure their messaging to consumers around product claims and use is grounded in accuracy and respect for others' heritage. For instance, Mount Lai, a beauty brand that positions itself as a modern approach to traditional Chinese medicine, regularly post educational content about *gua sha* techniques on its social channels.

Figure 41: Mount Lai Gua Sha, 2023



Source: *Instagram/mountlai*

Despite their typically higher incomes, Asian consumers ages 35-54 are still slightly less likely than their younger counterparts to get services done at salons. Cost and convenience are obviously still factors for this group, and indeed 74% of those ages 35-54 describe saving money as a motivation for doing services at home. Again, bringing salon services out of the realm of “nice to have” could help drive further engagement. Focusing on health and wellness as well as pragmatic benefits like looking younger to be more competitive at work could be effective.

Figure 42: Beauty/personal care treatments – Done at home vs done at salon, by age, 2023

“Which of the following beauty and personal care treatments have you done in the past 12 months? Please select all that apply.

-Done at home myself

-Done by professionals out of home (ie at a salon)”

		Done at home myself				Done by professionals out of home			
Asian internet users aged 18+		All Asian consumers	18-34	35-54	55+	All Asian consumers	18-34	35-54	55+
		1,000	432	363	205	1,000	432	363	205
		%	%	%	%	%	%	%	%
Hair	Hair styling	42	49	42	29	21	28	19	13
	Hair cut	37	39	36	37	56	55	56	57
	Hair coloring	26	23	26	34	20	19	23	16
Nails	Manicure	27	28	27	22	20	22	23	12
	Pedicure	22	22	23	21	19	20	21	13
Face	Facial treatment	32	35	33	23	14	18	13	9
	Makeup application for a special occasion	27	31	27	21	7	9	6	3
	Anti-aging treatment	18	12	23	19	6	6	8	4
Body	Body scrub/exfoliation treatment	30	37	29	18	7	9	8	2
	Waxing/threading/sugaring unwanted hair	18	25	16	6	14	17	15	4
	Laser hair removal	4	6	4	1	8	11	8	1
	Teeth whitening	24	31	24	12	9	12	9	4
	None of these	14	10	12	23	22	18	21	32

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each beauty treatment within “Done at home myself” and “Done by professionals out of home.”

***Base:** 1,000 Asian internet users aged 18+*

***Source:** Kantar Profiles/Mintel, May 2023*

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Savings a primary motive for home treatments

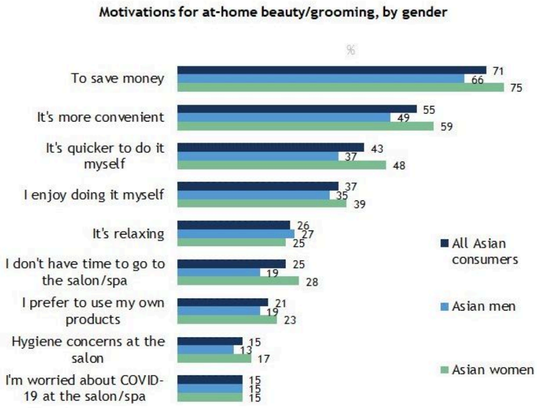
Motivations for at-home beauty treatments center on savings: time and money. Brands can leverage these attitudes by promoting salon-quality results, while salons will need to provide more than a "result" to draw customers.

Self-care is always going to be cheaper than a salon service, and particularly in an uncertain economy it's not surprising that value is an important concern. Time savings are also a high priority, with 55% of Asian consumers overall and close to 60% of women stating that home services are more convenient, and close to half agreeing that DIY is quicker.

Emphasizing value and convenience is thus a good strategy, as seen with brands like Le Mini Macaron, the gel nail solution company promises DIY "salon quality" manicures (see Future Opportunities and Strategies). Its blog promotes products like nail stickers as a way "to add a bit of personality and flair to a manicure without having to spend a lot of time and money at the nail salon."

Figure 43: Motivations for doing beauty/grooming treatments at home, by gender, 2023

"Why do you do certain beauty/grooming services at-home yourself, rather than seeking professional help out of home (eg salon, spa)? Please select all that apply."



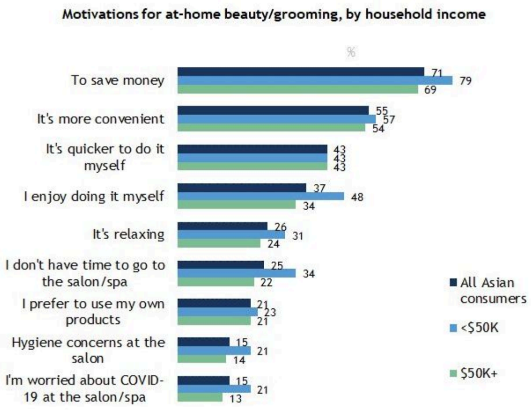
Base: *475 Asian internet users aged 18+ who have done beauty/grooming treatments at home*

Source: *Kantar Profiles/Mintel, May 2023*

As would be expected, cost is even more of a concern for lower-income Asian consumers, with a high 79% of those earning less than $50K agreeing that that they do treatments themselves to save money. However, cost remains an important concern for higher-income Asian consumers as well. Accordingly, there could be a market for higher-end home products. Promoting the lifetime savings from higher-end beauty devices like home anti-aging lasers – which can cost hundreds or even thousands of dollars – may be effective.

Figure 44: Motivations for doing beauty/grooming treatments at home, by household income, 2023

“Why do you do certain beauty/grooming services at-home yourself, rather than seeking professional help out of home (eg salon, spa)? Please select all that apply.”



Base: *475 Asian internet users aged 18+ who have done beauty treatments at home*

Source: *Kantar Profiles/Mintel, May 2023*

Quality is key to drive salon services

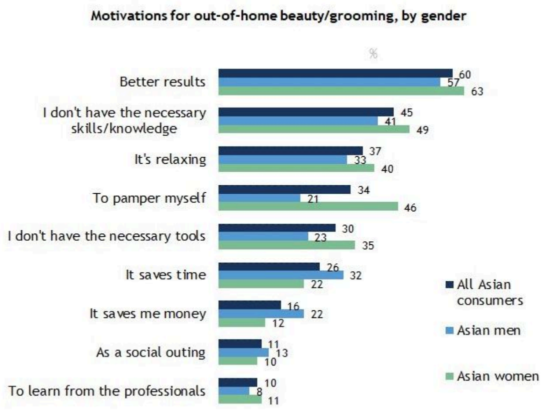
While results are the main motivation driving salon visits, pampering elements and the escape that a salon experience offers are also key for Asian women.

60% of Asian consumers agree that they chose a professional due to better results, while 45% state they lack the skills and knowledge to do treatments at home. Female beauty mavens place particular priority on results, with 79% of those who have beauty routines with nine or more steps citing this factor.

In general, Asian women are also more likely to view beauty as a form of relaxation and pampering – not surprisingly given traditional gender roles. Focusing on functional benefits may be more effective when it comes to encouraging Asian men to spend more time and money at spas. Meanwhile, indulgence should work particularly well for female beauty mavens who are most likely to find professional beauty treatments relaxing (60%), while 66% agree they do them to pamper themselves.

Figure 45: Motivations for doing beauty/grooming treatments at salon, by gender, 2023

“Why do you get some beauty/grooming treatments done by a professional out of home (eg salon, spa) rather than doing them at home yourself? Please select all that apply.”



Base: *476 Asian internet users aged 18+ who have sought professional services for at least some beauty and personal care treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Older Asian consumers are particularly focused on quality

69% of Asian consumers aged 55+ cite better results from a salon and 54% agree they lack the skills or knowledge to do treatments themselves. However, this older group is the least likely to actually seek salon treatment despite their belief in its quality and results. Price, as mentioned earlier, may be a key barrier, but it’s interesting to note that Asian consumers 55+ are the least likely to find salon treatments relaxing, to seek out-of-home treatments as a way of pampering themselves, and to believe that it saves time. It follows that services looking to cater towards older Asian beauty consumers must take strides to understand what makes an environment comfortable for this group and to communicate such services’ convenience.

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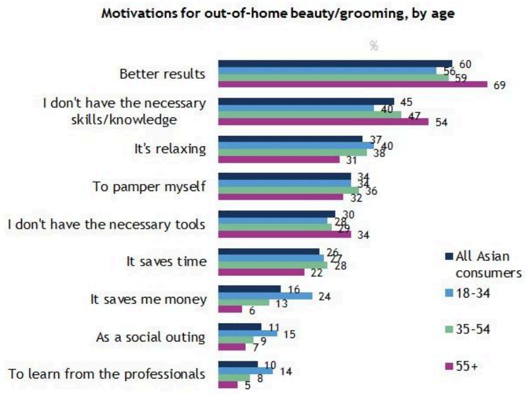
Figure 46: Motivations for doing beauty treatments at salon, by age, 2023

“Why do you get some beauty/grooming treatments done by a professional out of home (eg salon, spa) rather than doing them at home yourself? Please select all that apply.”



Base: *476 Asian internet users aged 18+ who have sought professional services for at least some beauty and personal care treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Sources of Beauty Information

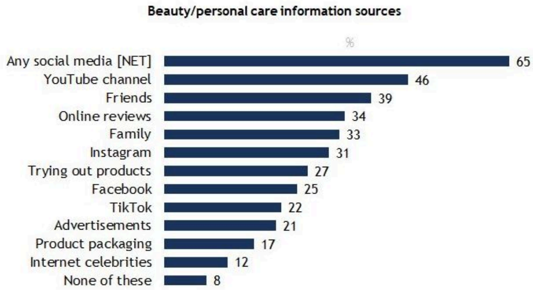
Social media is critical, especially for reaching the young

A robust industry has sprung up around Asian beauty influencers, and it’s not surprising that young Asian consumers rely heavily on social media when it comes to learning about beauty and personal care.

87% of Asian women aged 18-34 and 74% of their male peers state they have gotten beauty information from social media, making it a must for brands looking to reach Asian American beauty audiences. Unlike advertisements and celebrity partnerships, which are limited, social media content – which is plentiful and varied – can be more helpful and relevant to Asian American consumers’ beauty needs.

Figure 47: Beauty/personal care information sources, 2023

“Where do you learn about beauty and personal care? Please select all that apply.”



Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

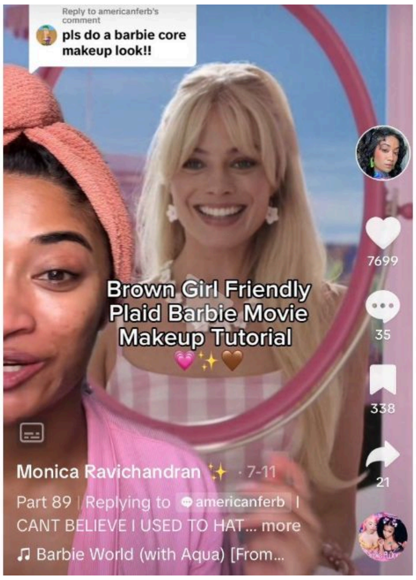
Source: *Kantar Profiles/Mintel, May 2023*

Video tutorials can play a critical role in beauty education

YouTube’s global reach puts it at the top of the social media platforms for regular use, and it’s longer-form video format allows influencers to provide detailed tutorials and commentary.

YouTube is the most used social platform for young Asian consumers, relied on by 60% of Asian women aged18-34 and half of men ages 18-34. Close to half of young women rely on Instagram and TikTok as well, although TikTok is less popular among men. Given frustrations around shopping for beauty products suitable for their skin and hair type (see Future Opportunities and Strategies), Asian American beauty consumers may find video-based tutorials particularly helpful in learning what products and routines are suitable for their individual needs. For instance, beauty influencer Monica Ravichandran developed her online platform on content that features “Brown Girl Friendly” versions of trending makeup looks and products. Successful brands will seek partnerships with content creators that reflect a wide variety of beauty concerns and can help Asian American audiences work with, rather than against, their features.

Figure 48: "Brown Girl Friendly" Makeup Tutorial, 2023



Source: *TikTok/makeupbymonica*

Older Asian consumers rely on sampling and word-of-mouth

Meanwhile, older consumers are significantly less engaged in researching beauty and personal care. 28% of Asian men aged 55+ vs 17% of their female peers state they have not used any of the queried information sources. Sampling and information from friends are used by more than a third of mature Asian women. Enlisting younger relatives could be one way to connect with this group and target both resources. Encouraging younger people to share samples or gift products to mothers and grandmothers might be an effective strategy, especially during the holidays.

In addition to the holidays predominantly celebrated in the US, brands might also consider tapping into major holidays of other Asian cultures in which family gatherings and gifting is common. For instance, this Lunar New Year, Canadian Sephora retailers offered limited-edition gift sets dedicated to the Year of the Water Rabbit, which included sample-sizes of popular products. As an additional touch and nod to Chinese tradition in particular, customers could also opt to buy their loved ones gift cards packaged in a complimentary red envelope.

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Figure 49: Beauty/personal care information sources, by gender and age, 2023

"Where do you learn about beauty and personal care? Please select all that apply."

Asian internet users aged 18+ who use beauty and personal care products or treatments	All Asian consumers	Male, 18-34	Male, 35-54	Male, 55+	Female, 18-34	Female, 35-54	Female, 55+
	991	*206*	*160*	*81^*	*218*	*203*	*121*
	%	%	%	%	%	%	%
Any social media [NET]	65	74	59	26	87	70	36
YouTube channel	46	51	40	21	60	47	31
Friends	39	32	34	36	50	43	36
Online reviews	34	30	28	16	41	45	32
Family	33	32	34	28	31	38	31
Instagram	31	36	28	7	47	32	10
Trying out products	27	18	16	16	35	36	38
Facebook	25	31	27	5	28	31	12
TikTok	22	27	10	4	46	18	4
Advertisements	21	20	16	21	19	25	28
Product packaging	17	14	11	14	17	23	22
Internet celebrities	12	14	6	2	22	10	7
None of these	8	4	11	28	0	4	17

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of information source. ^ small sample (<100)

Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Figure 50: Sephora Lunar New Year Gift Set, 2023

Source: *Instagram/sephoracanada*

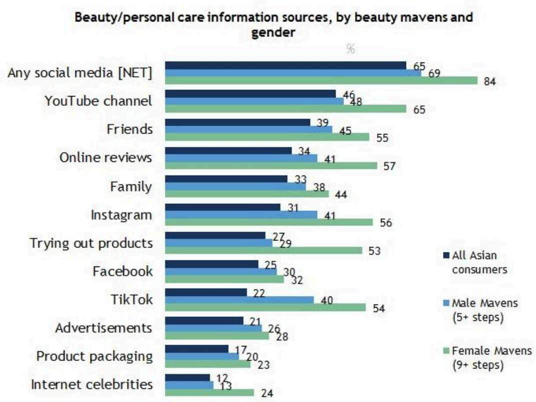
Female beauty mavens rely on many sources

A multipronged approach is the best way to maintain relationships with female beauty mavens. Brands will need to promote themselves through social media but also offer online reviews on their sites and distribute samples at retail.

Asian women with nine or more steps to their beauty routines are obviously spending a lot of time and effort on beauty maintenance, and the same goes for researching beauty information. Social media is not surprisingly their primary channel, with 84% relying on some kind of social platform; but more than half are also getting recommendations from friends, reading online reviews and using samples. Male mavens (those with five or more steps to their routine) are not as engaged as the women, but 69% rely on social media and close to half use recommendations from friends.

Figure 51: Beauty/personal care information sources, by beauty mavens and gender, 2023

"Where do you learn about beauty and personal care? Please select all that apply."



Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Filipinos particularly engaged with researching beauty

When viewed by country of origin, Filipinos emerge as particularly enthusiastic fans of beauty research and education. A high 74% have used social media to learn more about beauty, and this group is also more likely to get tips from friends and family as well as read online reviews compared to the norm. Filipinos are also the most likely to use TikTok.

Meanwhile, Japanese are the least likely group to rely on social media, at 46%. This may be due to the US Japanese population skewing somewhat older than other Asian American groups, due in part to less growth through immigration. However, this group is the most likely to rely on ads and also is more likely than the norm to use samples, creating possibilities for brands to reach out directly rather than rely on influencers.

Figure 52: Beauty/personal care information sources, by country of origin, 2023

“Where do you learn about beauty and personal care? Please select all that apply.”

Asian internet users aged 18+ who use beauty and personal care products or treatments	All Asian consumers	Chinese*	Filipino	Indian	Japanese	Vietnamese	Korean	Other
	991	*252*	*159*	*156*	*114*	*95^*	*77^*	*179*
	%	%	%	%	%	%	%	%
Any social media [NET]	65	54	74	69	46	75	62	76
YouTube channel	46	35	59	47	27	54	42	54
Friends	39	41	46	42	39	44	35	30
Online reviews	34	35	38	36	33	34	36	30
Family	33	34	37	31	35	41	26	31
Instagram	31	23	35	31	25	32	36	40
Trying out products	27	33	27	24	30	33	22	23
Facebook	25	17	32	28	16	36	16	28
TikTok	22	17	28	26	10	26	18	26
Advertisements	21	19	27	22	24	20	13	20
Product packaging	17	18	19	15	21	17	16	17
Internet celebrities	12	10	12	15	10	13	6	15
None of these	8	12	5	6	13	5	9	3

*The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each type of information source. * not including Taiwanese ^ small sample (<100)*

Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

Source: *Kantar Profiles/Mintel, May 2023*

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Purchase Drivers

Product qualities such as ease, natural ingredients are most sought after

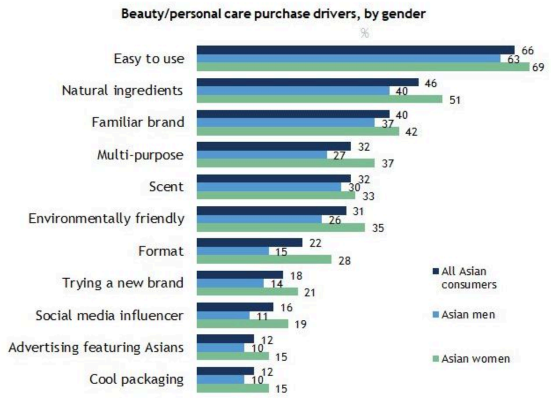
Communicate product qualities (eg easy to use, natural ingredients, multi-purpose, scent) first, but ensure that package aesthetics, social media influencer endorsements and representation are present to reach Asian beauty consumers.

Ease of use and natural ingredients are the top attributes Asian beauty consumers value when making purchases. Ease of use is particularly important for Asian women, which perhaps is not surprising given the often complex beauty regimens recommended by many influencers. These two product qualities are significantly more important than a familiar brand, indicating strong opportunities for new products to break through if they can offer a compelling value proposition. More than one in five Asian women place a priority on trying out new brands.

Although just 12% of Asian consumers prioritize brands with ads featuring Asian consumers, other Mintel studies show Asian consumers feel diverse advertising is important. 87% of Asian consumers agree they would like to see racial diversity in ads for beauty and grooming products, as compared to 82% of consumers overall (see *Diversity and Inclusivity in Beauty – US, 2023*). Seeing Asian consumers in ads may be a relatively lower priority because few mainstream brands showcase Asian consumers in their advertising. Changing this could provide an important advantage when marketing to the Asian audience.

Figure 53: Beauty/personal care product purchase drivers, by gender, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."



Base: *991 Asian internet users aged 18+ who have purchased beauty or personal care products*

Source: *Kantar Profiles/Mintel, May 2023*

Country of origin impacts Asian consumers' perspectives

Filipino and Vietnamese consumers are more likely to look for easy-to-use and multipurpose products. This is in contrast to Japanese and Koreans, who are culturally accustomed to multistep beauty routines. Filipinos are the most likely to prefer natural ingredients.

Koreans are significantly less likely than the norm to prioritize familiar brands. The Korean beauty sector is a hotbed of innovation, and trying new brands may be much more exciting for this group. Solutions that make trial of such new brands more affordable (eg subscription boxes, sample size, etc) could be particularly compelling for Korean American beauty fans.

Indians are noticeably more likely than the average to value cool packaging, but are also among the most likely to prefer environmentally friendly products. For some consumers of Indian heritage and other heritages, eco-friendly claims may have direct connection to their countries of origin and the wellbeing of potential relatives abroad, as climate disasters have already devastated some countries more than others. The haircare brand Shaz & Kiks demonstrates commitment to plastic neutrality by collaborating with nonprofits to collect and recycle plastic waste from the Indian Ocean, an initiative that organically aligns with their brand identity as an Ayurveda-inspired brand borne out of the founders' childhood memories in India. While Shaz & Kiks is relatively new, the brand makes clear the connection between climate and heritage; it entered Credo in 2022 and will be sold in Sephora this year.

Figure 54: Beauty/personal care product purchase drivers, by country of origin, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."

Asian internet users aged 18+ who use beauty and personal care products or treatments	All Asian consumers	Chinese*	Filipino	Indian	Japanese	Vietnamese	Korean	Other
	991	*252*	*159*	*156*	*114*	*95^*	*77^*	*179*
	%	%	%	%	%	%	%	%
Easy to use	66	67	70	64	66	64	72	64
Natural ingredients	46	40	58	46	37	42	46	53
Familiar brand	40	44	46	37	41	25	41	35
Multi-purpose	32	31	40	31	28	30	36	31
Scent	32	32	38	26	37	32	36	28
Environmentally friendly	31	27	36	36	31	25	35	30
Format (eg stick, tube)	22	22	19	18	31	22	27	21
Trying a new brand	18	17	21	20	12	10	21	21
Social media influencer	16	10	21	19	16	18	17	14
Advertising featuring Asians	12	10	14	10	17	5	15	17
Cool packaging	12	7	7	20	9	9	22	17

*The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage for each purchase driver. * not including Taiwanese ^ small sample (<100)*

Base: *991 Asian internet users aged 18+ who have purchased beauty or personal care products*

Source: *Kantar Profiles/Mintel, May 2023*

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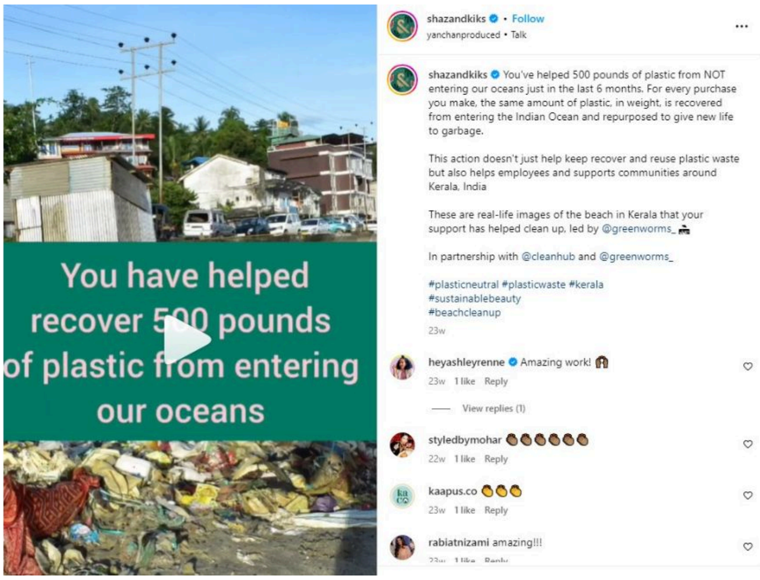
Figure 55: Shaz & Kiks Eco-Friendly Initiative, 2023



Source: *Instagram/shazandkiks*

Even beauty mavens look for simplicity in product application and use

Even though the critical audience of beauty mavens is very sophisticated when it comes to beauty, ease of use remains important to them. Both male and female beauty mavens place a higher priority on ease of use compared to Asian consumers overall, and 45% of female beauty mavens re also interested in multipurpose products. Given how many steps they already have in their beauty routines, it may be difficult for these experts to justify adding further complexity. While they are unlikely to compromise when it comes to results, a high quality multifunction product could be received well by this group.

Notably, influencer recommendations and ads featuring Asian consumers are particularly important for female beauty mavens. Collaborations with influencers and promoting them on social media would appear to be solid approaches for reaching this group.

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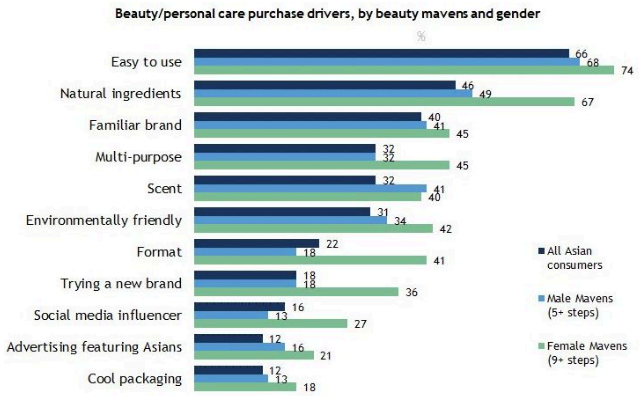
Figure 56: Beauty/personal care product purchase drivers, by beauty mavens and gender, 2023

“Which of the following are important to you when selecting beauty and personal care products? Please select all that apply.”



Base: *991 Asian internet users aged 18+ who have purchased beauty or personal care products*

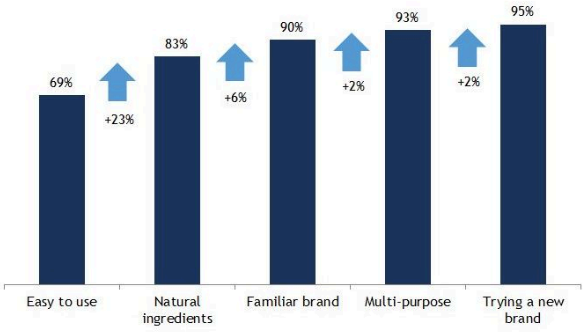
Source: *Kantar Profiles/Mintel, May 2023*

Easy, natural products from familiar brands have broad appeal

With ease of use and natural ingredients such high priorities for Asian women, it’s not surprising that a product that delivers both of these would appeal to more than 80% of this group. If this product came from a familiar brand, nine in 10 Asian women would have interest. These results would indicate that it is important for companies to emphasize functionality and ingredients over features like scent or ecofriendly properties. While some of the most engaged Asian women do enjoy discovering new brands, an existing brand offers the broadest appeal.

Figure 57: TURF Analysis – Beauty/personal care product purchase drivers for Asian women, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."



How to read: *If only two beauty and personal care product attributes were offered, 83% of Asian female respondents would find either easy to use or natural ingredients appealing. If only three beauty and personal care product features were offered, 90% of respondents would find either easy to use, natural ingredients, or familiar brand appealing.*

Base: *543 female Asian internet users aged 18+ who use beauty and personal care products*

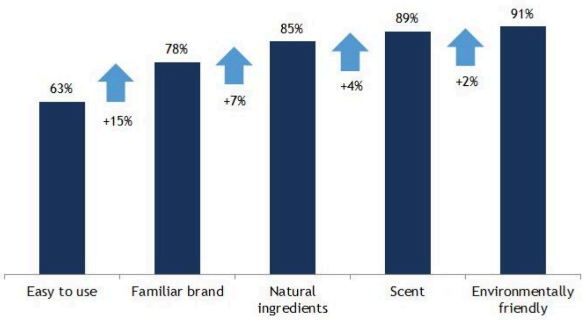
Source: *Kantar Profiles/Mintel, May 2023*

Meanwhile, Asian men have somewhat different preferences. Familiar brands are more important for them, and in combination with ease of use would appeal to 78% of this group. A product that included those components along with natural ingredients and a pleasant scent would reach close to 90% of Asian men.

Asian men are less engaged with beauty and personal care products than women, and likely spend less time researching or even thinking about the category. Accordingly, a familiar brand and the promise of an easy solution are paramount. However, emphasizing additional secondary benefits may be necessary to appeal to less engaged customers who may not be sure they need to buy more beauty or personal care products at all. While brands should certainly lead with ease of use and avoid overcomplicating their message, natural ingredients or scent could be a good supplemental message. Licensing familiar brand names for use with personal care brand extensions also seems to be a less risky strategy than trying to develop an entirely new brand aimed at Asian men.

Figure 58: TURF Analysis – Beauty/personal care product purchase drivers for Asian men, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."



How to read: *If only two beauty and personal care product attributes were offered, 78% of Asian male respondents would find either easy to use or familiar brand appealing. If only three beauty and personal care product features were offered, 85% of respondents would find either easy to use, familiar brand, or natural ingredients appealing.*

Base: *449 male Asian internet users aged 18+ who use beauty and personal care products*

Source: *Kantar Profiles/Mintel, May 2023*

"Prosumer" opportunity with Asian women

Marketing tools and products as salon or professional quality should help drive sales, as could promoting in-home treatments as a cost-effective alternative to the salon.

More than eight in 10 Asian women aged 18-54 are interested in improving their skills and doing more treatments at home. Meanwhile, more than nine in 10 agree that quality tools and products can help home treatments be a success. Brands like Omnilux describes its $395 Contour LED light therapy mask for women as delivering "professional-quality results at a fraction of (the) cost," adding "For the price of 2 or 3 in-clinic light treatments, you can have your own professional-quality Omnilux device and treat your skin in only 10 minutes, whenever and whenever you like!"

While Asian men are in general less engaged with beauty and personal care, interest in home treatments is still quite high. Asian men aged 18-34 are interested in improving their skills and doing more treatments at home. However, Asian men aged 55+ are significantly less interested in experimenting with these products.

Figure 59: Attitudes toward at-home beauty/personal care – 1, by gender and age, 2023

"Do you agree or disagree with the following statements about at-home beauty and personal care?" [Agree]

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage agree response to each statement. ^ small sample (<100)

***Base:** 991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

***Source:** Kantar Profiles/Mintel, May 2023*

Recruit female beauty mavens to act as brand ambassadors

As would be expected, female beauty mavens are even more interested in at-home treatments than Asian women as a whole. An overwhelming 97% agree that good tools and products make for more successful at-home treatments and 94% are interested in improving their skills – although a high 85% are already confident in their skills currently. This group clearly takes real pride and enjoyment from doing at-home treatments.

Encouraging mavens to not just develop their skills but also try them out on others could be a great way to both drive purchases and encourage mavens to act as brand ambassadors. For example, brands could launch makeover challenges with prizes for the best looks posted on social media. Brands could also offer added samples and coupons to share with friends when it introduces members of its loyalty program to new products.

Figure 60: Attitudes toward at-home beauty and personal care – 1, by beauty mavens and gender, 2023

"Do you agree or disagree with the following statements about at-home beauty and personal care?" [Agree]

Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Younger Asian beauty consumers feeling pressure from social media

60% of Asian consumers ages 18-34 agree they feel pressured to look a certain way due to social media; young Asian men are slightly more likely to feel this way. Given the significant amount of time this group spends on social media these results aren't surprising. To address this, brands must recognize the influence they exert in appearance-based expectations and acknowledge the diversity that exists even among their Asian American audiences. Partnerships with a variety of Asian American content creators – opposed to just one or two – can help towards this end. Patrick Ta, a makeup artist and founder of Patrick Ta Beauty, uses his social media platform to feature a variety of models and personalities using his products, including Bretman Rock and Gia Gunn. Bretman Rock is a beauty influencer who identifies as Filipino-American and subverts gender-conforming appearances. Gia Gunn is a Japanese-American drag performer known for her appearance in RuPaul's Drag Race. Their inclusion in Patrick Ta Beauty's platform helps expand who can use beauty products and what Asian beauty can look like.

Figure 61: Patrick Ta Beauty Tutorial ft. Gia Gunn, 2022

Source: *TikTok/patrickta*

Meanwhile, Asian women are particularly interested in products tailored to their age. This group could find personalized products like the ones offered by Singapore's Module.skin particularly compelling. As this group is also very interested in simplifying their beauty routines and using fewer products, a customized all-in-one solution could be particularly compelling.

Figure 62: Attitudes toward at-home beauty and personal care – 2, by gender and age, 2023

"Do you agree or disagree with the following statements about at-home beauty and personal care?" [Agree]

The green, yellow, red scale is presented horizontally, indicating the highest (green) and lowest (red) percentage agree response to each statement. ^ small sample (<100)

Base: *991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

Source: *Kantar Profiles/Mintel, May 2023*

Interestingly, beauty mavens are actually somewhat less likely than younger Asian consumers overall to feel pressured to look a certain way by social media. With this group's true love of beauty and personal care, they may find the tips and ideas offered by social media empowering rather than intimidating, and feel confident about choosing the looks and products that work for them while disregarding the ones that don't.

Meanwhile, female beauty mavens are much less likely than the average to agree mainstream brands are as effective as premium ones. While three quarters agree they purchase most of their beauty products in stores, this is still noticeably below Asian consumers, overall. Discovering new niche products is likely part of the fun for female beauty mavens in particular, and retailers who help them make these discoveries are sure to be rewarded. Providing loyal shoppers with early access to new products, as seen in Sephora's Beauty Insider program, is a sound strategy.

Figure 63: Attitudes toward at-home beauty and personal care – 2, by beauty mavens and gender, 2023

"Do you agree or disagree with the following statements about at-home beauty and personal care?" [Agree]

***Base:** 991 Asian internet users aged 18+ who use beauty and personal care products or treatments*

***Source:** Kantar Profiles/Mintel, May 2023*

Appendix – Data Sources and Abbreviations

Data sources

Sales data

- US retail sales and forecast of color cosmetics based on Circana InfoScan® Reviews; US Census Bureau, Economic Census/Mintel (sourced from *Color Cosmetics – US, 2023*).
- US retail sales and forecast of beauty and personal care based on Bureau of Economic Analysis/Mintel (sourced from *American Lifestyles – US, 2023*).
- US retail sales of beauty products, by segment: based on Circana InfoScan® Reviews; US Census Bureau, Economic Census/Mintel (sourced from *Online Beauty Retailing – US, 2022*).

Consumer survey data

For the purposes of this Report, Mintel commissioned exclusive consumer research through Kantar Profiles to explore Asian Americans' attitudes and behaviors toward beauty and personal care. Mintel was responsible for the survey design, data analysis and reporting. Fieldwork was conducted in May 2023 among a sample of 1,000 Asian adults aged 18+ with access to the internet.

Mintel selects survey respondents so that they are proportionally balanced to the US Asian adult population using the internet based on the key demographics of gender, age, region and household income. For this study, Mintel applies post-stratification weights to survey respondents so that results are proportionally balanced to the entire US Asian adult population. Please note that our surveys are conducted online and in English only. Asian respondents who are not online and/or do not speak English are not included in our survey results.

While race and Hispanic origin are separate demographic characteristics, Mintel often compares them to each other. Please note that the responses for race (White, Black, Asian, Native American or other race) will overlap those that also are Hispanic, because Hispanics can be of any race.

Starting in July 2017, Mintel's consumer research has been conducted using a device-agnostic platform for online surveys (ie respondents can now take surveys from a smartphone in addition to a computer or tablet). This methodology change may result in data differences from previous years; any trending should be done with caution.

For more information, please contact Account Services Management at 312.450.6353 or www.mintel.com.

Abbreviations and terms

Abbreviations

The following abbreviations are used in this Report:

AAPI.API	Asian American Pacific Islander/Asian Pacific Islander
BLS	US Bureau of Labor Statistics
CEP	Centre d'Etudes Prospectives et d'Informations Internationales
CDC	Centers for Disease Control and Prevention
CPI	Consumer Price Index
GDP	Gross domestic product
K-beauty	Korean beauty
LED	Light-emitting diode
OTC	Over-the-counter

Mintel defines generations as:

World War II/Swing Generation	Members of the WWII generation were born in 1928 or before and are aged 95 or older in 2023. There are fewer than 1.5 million members of the WWII generation still alive today. Members of the Swing generation were born between 1929 and 1945 and are aged 77-94 in 2023.
Baby Boomers	The generation born between 1946 and 1964. In 2023, Baby Boomers are between the ages of 58 and 77.
Generation X	The generation born between 1965 and 1979. In 2023, Gen Xers are between the ages of 43 and 58.
Millennials	The generation born between 1980 and 1996. In 2023, Millennials are between the ages of 26 and 43.
Generation Z	The generation born between 1997 and 2010. In 2023, members of Gen Z are between the ages of 13 and 26.
Generation Alpha	The newest generation began in 2011. In 2023, members of Gen Alpha are younger than age 13.

Note: In 2021 Mintel made minor adjustments to generational definitions, and thus the size and age of each generational group may not match previous Reports.

To provide an inflation-adjusted price value for markets, Mintel uses the CPI to deflate current prices. The CPI is defined as follows:

CPI	The Consumer Price Index is a measure of the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services. The CPI and its components are typically used to adjust other economic series for price changes and to translate these series into inflation-free dollars. Examples of series adjusted by the CPI include retail sales, hourly and weekly earnings and components of the national income and product accounts. In addition, and in Mintel Reports, the CPI is used as a deflator of the value of the consumer’s dollar to find its purchasing power. The purchasing power of the consumer's dollar measures the change in the value to the consumer of goods and services that a dollar will buy at different dates. The CPI is generally the best measure for adjusting payments to consumers when the intent is to allow consumers to purchase, at today’s prices, a market basket of goods and services equivalent to one that they could purchase in an earlier period. It is also the best measure to use to translate retail sales into real or inflation-free dollars. *Based on Bureau of Labor Statistics definition.*

Appendix – The Market

Figure 64: Total US sales and forecast of beauty and personal care, at current prices, 2018-28

	$ billion	% change	Index (2018 = 100)	Index (2023 = 100)
2018	287.6	-	100	81
2019	299.5	4.1	104	84
2020	249.2	-16.8	87	70
2021	292.9	17.6	102	82
2022	332.6	13.5	116	93
2023 (est)	356.5	7.2	124	100
2024 (fore)	366.8	2.9	128	103
2025 (fore)	381.3	4.0	133	107
2026 (fore)	396.4	4.0	138	111
2027 (fore)	412.1	4.0	143	116
2028 (fore)	425.3	3.2	148	119

Note: includes haircare, shaving, bath, nail care and oral care products; cosmetics and perfumes; electrical personal care appliances; hairdressing salons and personal grooming establishments; miscellaneous personal care services

Source: *based on Bureau of Economic Analysis/Mintel*

Figure 65: Total US sales and forecast of beauty and personal care, at inflation-adjusted prices, 2018-28

	$ billion	% change	Index (2018 = 100)	Index (2023 = 100)
2018	347.9	-	100	98
2019	355.8	2.3	102	100
2020	292.4	-17.8	84	82
2021	328.4	12.3	94	92
2022	345.3	5.1	99	97
2023 (est)	356.5	3.3	102	100
2024 (fore)	358.9	0.7	103	101
2025 (fore)	366.1	2.0	105	103
2026 (fore)	373.1	1.9	107	105
2027 (fore)	379.9	1.8	109	107
2028 (fore)	384.1	1.1	110	108

Source: *based on Bureau of Economic Analysis/Mintel*

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TURF Analysis

Methodology

TURF (Total Unduplicated Reach & Frequency) analysis identifies the mix of features, attributes, or messages that will attract the largest number of unique respondents. It is typically used when the number of features or attributes must be or should be limited, but the goal is still to reach the widest possible audience. By identifying the Total Unduplicated Reach, it is possible to maximize the number of people who find one or more of their preferred features or attributes in the product line.

The resulting output from TURF is additive, with each additional feature increasing total reach. The chart is read from left to right, with each arrow indicating the incremental change in total reach when adding a new feature. The final bar represents the maximum reach of the total population when all shown features are offered.

Figure 66: Table – TURF Analysis – Beauty/personal care product purchase drivers for Asian women, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."

BPC purchase influences	Total reach	Incremental
	%	%
Easy to use	69	N/A
Natural ingredients	83	14
Familiar brand	90	7
Multi-purpose (eg one product with multiple uses)	93	3
Trying a new brand	95	2
Environmentally friendly	96	1
Social media influencer recommendations	97	1
Cool packaging	97	0
Advertising featuring Asians	97	0
Scent	97	0
Format (eg stick, tube)	97	0

Base: *543 female Asian internet users aged 18+ who use beauty and personal care products*

Source: *Kantar Profiles/Mintel, May 2023*

Figure 67: Table – TURF Analysis – Beauty/personal care product purchase drivers for Asian men, 2023

"Which of the following are important to you when selecting beauty and personal care products? Please select all that apply."

BPC purchase influences	Total reach	Incremental
	%	%
Easy to use	63	N/A
Familiar brand	78	15
Natural ingredients	85	7
Scent	89	4
Environmentally friendly	91	2
Trying a new brand	92	1
Social media influencer recommendations	93	1
Multi-purpose (eg one product with multiple uses)	94	1
Cool packaging	95	1
Advertising featuring Asians	95	0
Format (eg stick, tube)	95	0

Base: *449 male Asian internet users aged 18+ who use beauty and personal care products*

Source: *Kantar Profiles/Mintel, May 2023*

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Meet the expert

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Joan joined Mintel in 2023 as a Senior Analyst in Beauty and Personal Care. Prior to this role, she was an agency-side brand planner and consumer insights analyst for multiple CPG accounts.

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