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Skincare, Wellness, Anti-Aging & Consumer Trends

Summer 2024

Background & Objectives

Provoke Insights is a trailblazer in research for branding, advertising, media, and content marketing initiatives. The company conducts a bi-annual study to stay up-to-date with the market trends across multiple industries.

In this comprehensive eighth-wave of the study, Provoke Insights evaluates Americans' sentiment, shopping impulse behaviors, and trust in the media. Continual inflation, layoffs, the presidential election, and the rapid growth of AI have impacted Americans' attitudes, concerns, and spending habits. This wave of research digs deep into the effect of these trends.

Provoke Insights has developed 16 industry-specific decks; this deck focuses on the **wellness & anti-aging industry.**

Methodology

Provoke Insights conducted a 15-minute survey among 1,500 Americans between the ages of 21 and 65. The study was in-field in April 2024.

A random stratified sample followed by weighting was used to ensure a high degree of sample representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household). The sample was modeled to represent the latest US Census data.

Results based on this sample have a maximum margin of sampling error ± 2.5% at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level. Significances are indicated by call out boxes in graphs.

Aging Concerns

Americans are concerned about the impact of getting older on their physical health, mental well-being, and appearance. Interestingly, younger generations, parents, and individuals with higher household incomes are more likely to express concern about how aging affects their mental health and looks.

Interestingly, younger Americans are also more apt to seek advice for anti-aging. Baby boomers do not look for answers to the fountain of youth. As a result, social media and online videos are the predominant ways people look for anti-aging advice.

The Beauty Conscious

Individuals who are concerned about the effects of aging on their appearance are more inclined to purchase skincare products, vitamins, and beauty items. These individuals are typically millennials and predominantly female.

These beauty conscious individuals are inclined to invest in staying updated with the latest trends and make self-care a part of their routine. They often use moisturizer, eye cream, and sunscreen, and regularly go for facials. Keeping fit is also a priority for this group, as they are more likely to engage in activities such as cardio, weight training, yoga, and Pilates. Additionally, they are more likely to prioritize a healthy diet.

Skincare Trends

Skincare sales have had an uptick in the last two years. Those purchasing skincare are predominately female, from urban areas, and frequently impulse shop.

Most skincare purchases are pre-planned, and a quarter of planned purchasers take days to decide, meaning skincare buys take further deliberation. While established and trusted brands are the primary choice for purchase, a new brand is bought a third of the time.

Vitamin Trends

The sales of vitamins have increased compared to six months ago, with high-income individuals showing a higher tendency to purchase them. Consumers plan their purchases of vitamins and demonstrate strong loyalty to their preferred brands. This consistency in consumer behavior results in a short consumer decision journey, with purchasers typically taking only minutes to hours to make a decision. Consumers who incorporate these supplements into their daily or weekly routines primarily buy them from big-box retailers and e-commerce stores.

Beauty Product Shopping Trends

Although sales in the cosmetic industry have only had a slight increase in the past six months, they are notably higher than they were during the pandemic. Gen Z demonstrates a stronger propensity to purchase beauty products compared to older demographics.

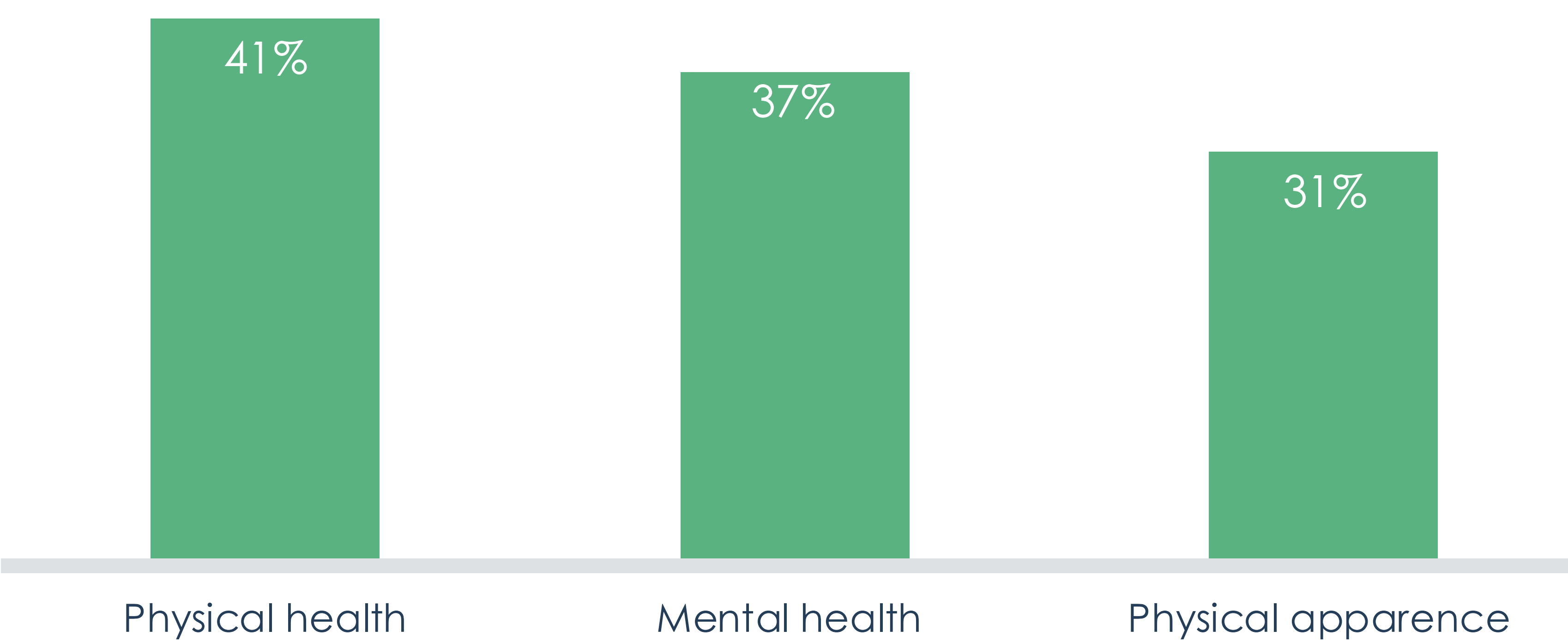
Most beauty products bought are intentional, with few shoppers making spontaneous purchases in this category. Beauty buyers usually stick with their preferred brands and these planned purchases are often quick as they are already familiar with their go-to brand.

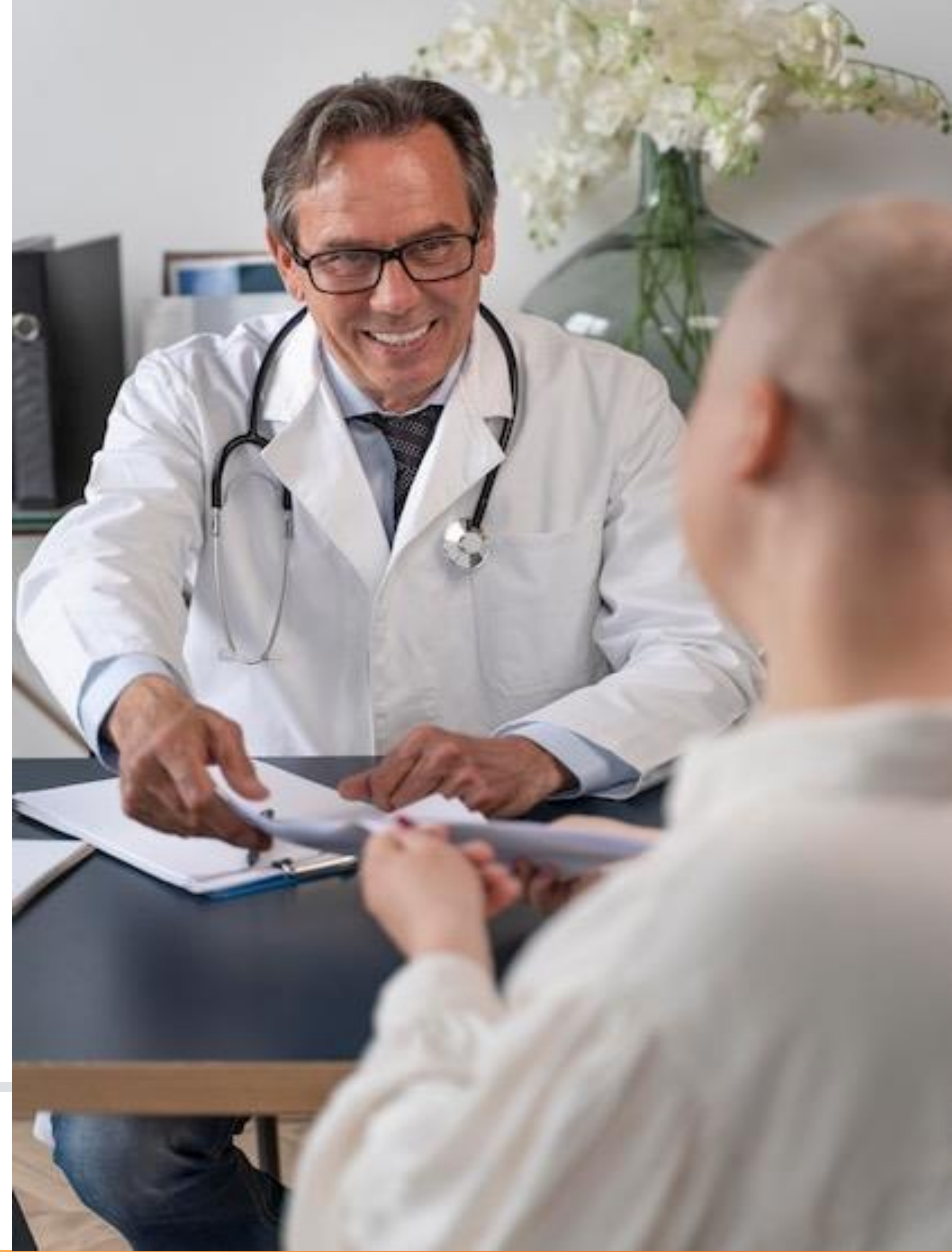
Concerns About Aging

Concerns with Aging

When it comes to aging, Americans are most concerned about their physical health.

Top 2 on a 5-Point Scale Concerned



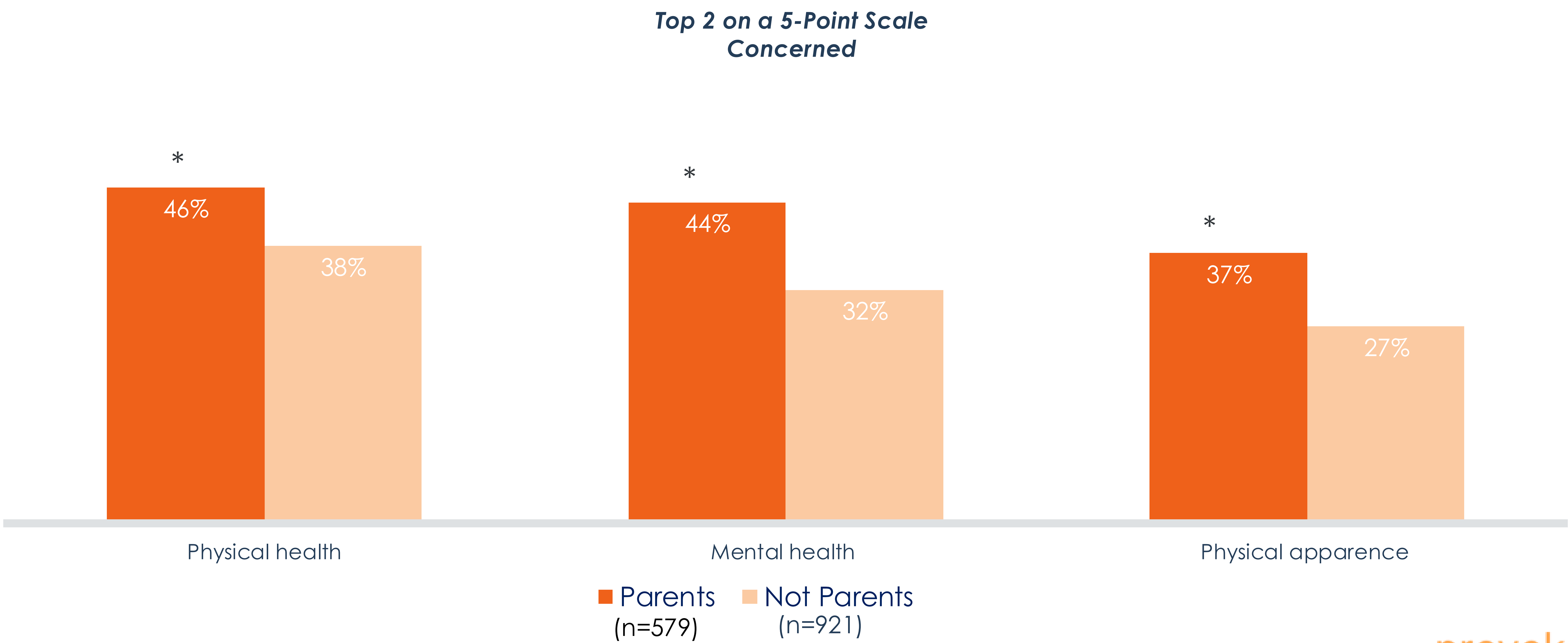


Q. When thinking about aging, how concerned are you with the following areas?

Base: All qualified respondents (N=1,500)

Concerns with Aging: Parents

Parents are significantly more likely to be concerned with all aspects of aging.



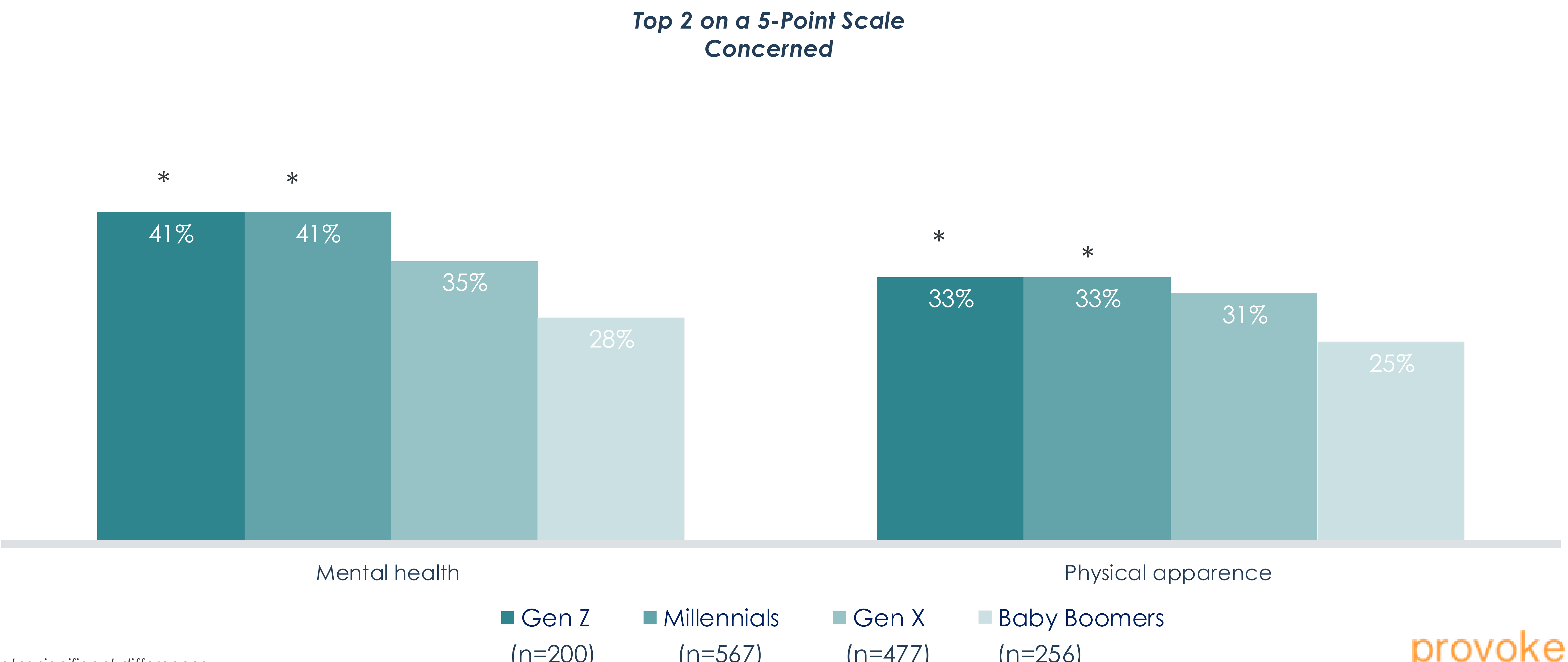
*indicates significant differences

Q. When thinking about aging, how concerned are you with the following areas?

Base: All qualified respondents

Concerns with Aging: Generations

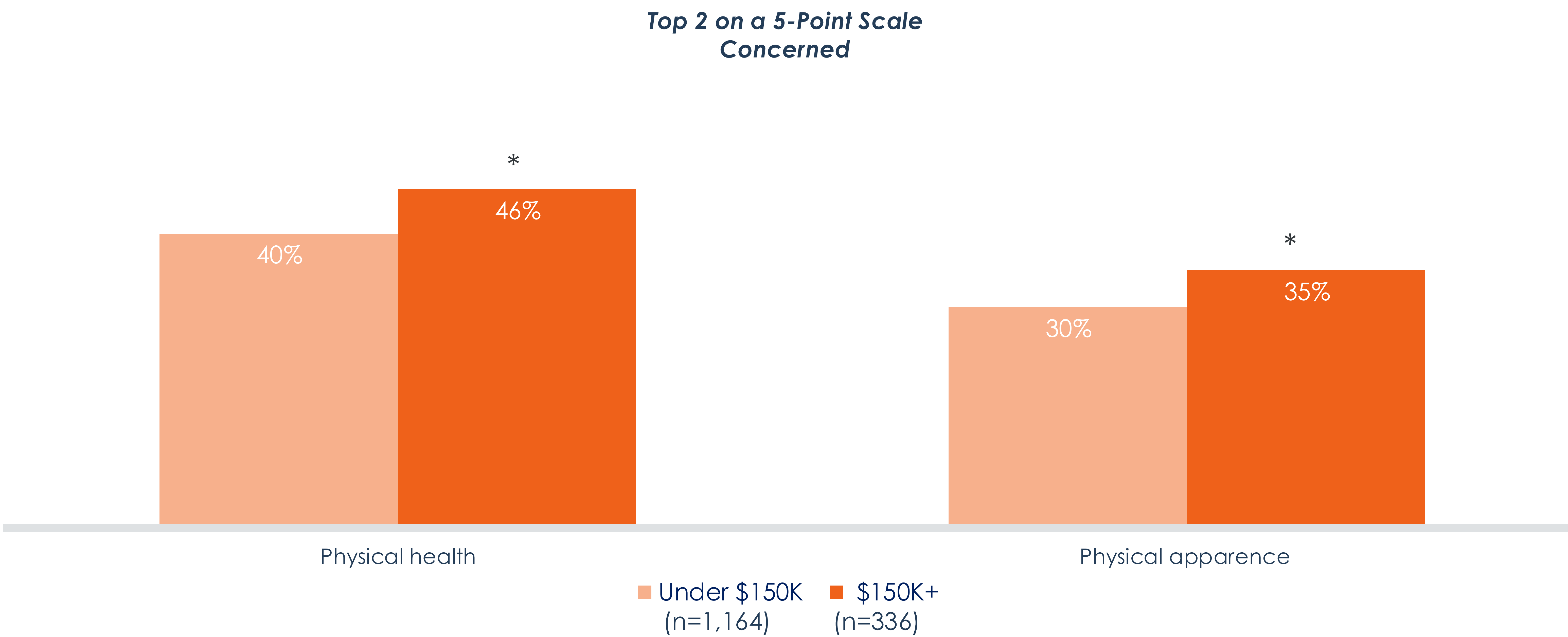
Younger generations are more worried about mental health and physical appearance compared to their older counterparts.



indicates significant differences

Concerns with Aging: Income

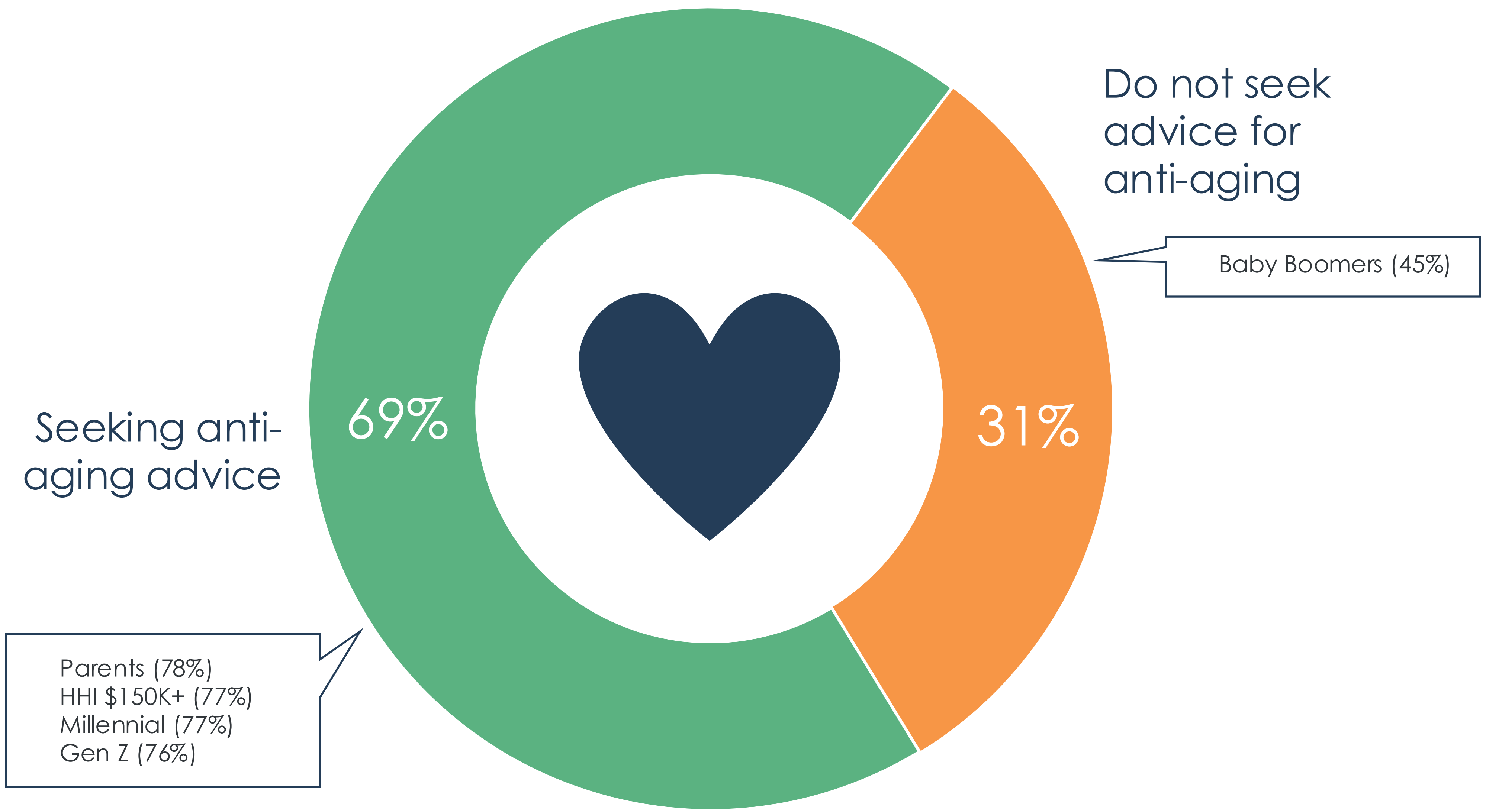
Concerns with physical health and appearance is more prevalent among affluent individuals.



*indicates significant differences

Seeking Advice for Anti-aging

Over two-thirds of Americans are seeking advice on anti-aging. This information is especially sought after by younger Americans.

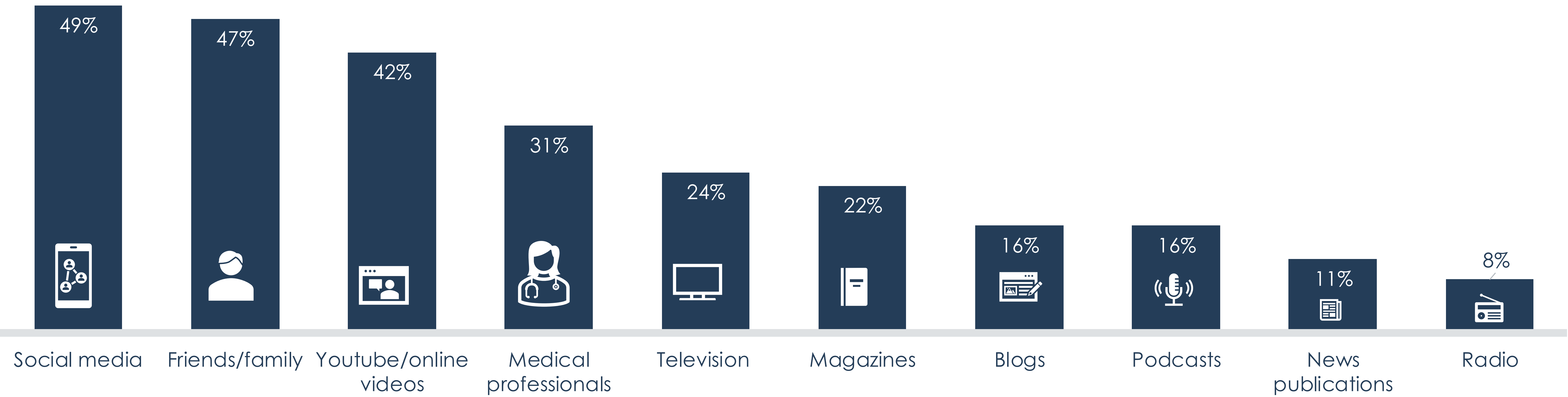


Q. When it comes to your physical appearance, what channels do you look to for anti-aging advice?

Base: All qualified respondents (N=1,500)

Sources for Anti-Aging Advice

Individuals seeking anti-aging advice are more inclined to bypass medical professionals in favor of social media and recommendations from friends and family.



Q. When it comes to your physical appearance, what channels do you look to for anti-aging advice?

Base: Interested in skincare advice (n=1,041)

Sources for Anti-Aging Advice: Generations

Younger generations are seeking advice through several resources including social media, online videos, blogs, and podcasts. Conversely, baby boomers more commonly seek guidance from traditional sources like doctors and news outlets.

	Gen Z	Millennials	Gen X	Baby Boomer
Base: Interested in skincare advice (n=	*152*	*434*	*315*	*140*
Social media	62%*	55%*	42%*	30%
Youtube/online videos	55%*	45%*	35%	33%
Medical professionals	29%	28%	32%	41%*
Blogs	24%*	20%*	10%	6%
Podcasts	17%	19%*	11%	13%
News publications	6%	11%	11%	17%*
Radio	12%*	8%	7%	5%

**indicates significant differences*

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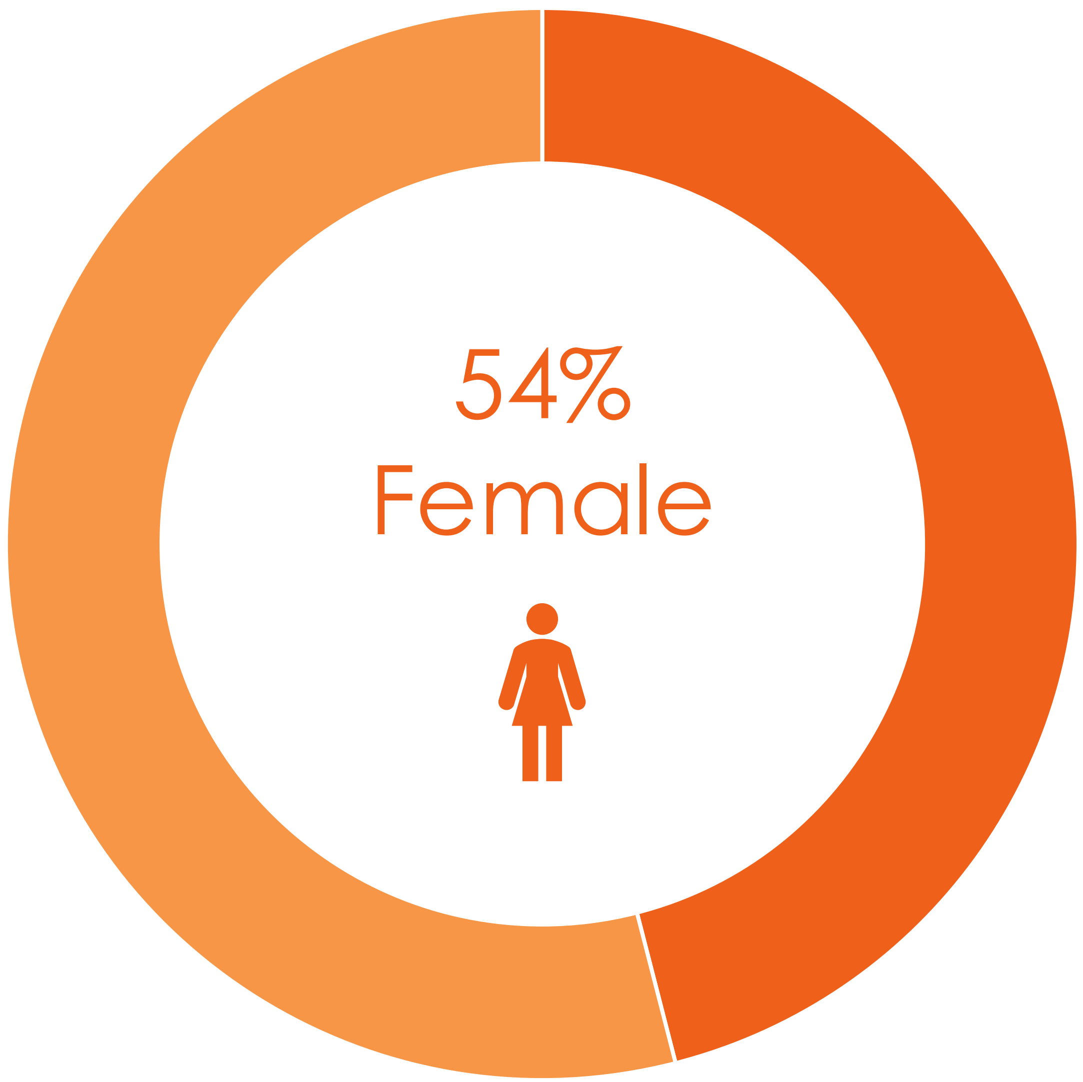
Q. When it comes to your physical appearance, what channels do you look to for anti-aging advice?

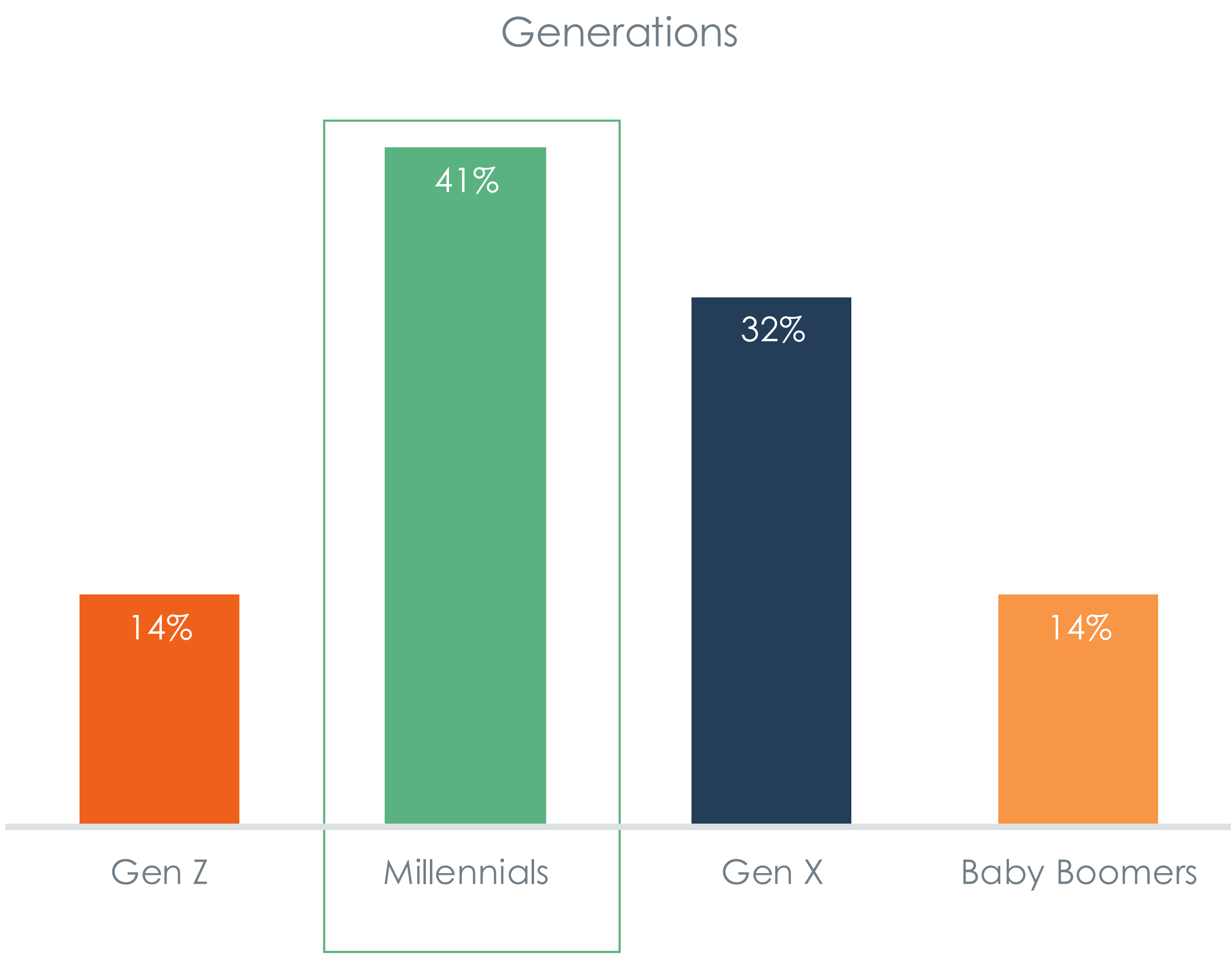
Base: Interested in skincare advice (n=1,041)

Those Concerned About Age Impacting Their Physical Appearance

Who is Concerned that Age Impacts Beauty?

Females and Millennials are the most intensely focused on maintaining a youthful appearance compared to other demographics.





Base: Concerned about aging impact to physical beauty (n=466)

The Beauty Conscious Spend Money to Stay on Top of Trends

Top 2 on a 7 Point Scale Agree

*

22% vs. 9%

*indicates significant differences

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Self Care is Part of the Routine for those Worried About Physical Image

Uses Facial Moistures, Serums or Eye Creams

64% vs. 50%

Self Care (e.g. Facials)

42% vs. 35%

Regularly Uses Sunscreen

42% vs. 31%

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Which of the following do you regularly incorporate into your daily/weekly habits?

Base: Care about Physical Beauty (n=466)

Worries About Physical Image Leads to a More Active Lifestyle

Cardiovascular Exercise
45% vs. 39%

Weight Training
40% vs 31%

Yoga/Pilates
14% vs.9%

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Which of the following do you regularly incorporate into your daily/weekly habits?

Base: Care about Physical Beauty (n=466)

The Beauty Conscious Focus on Healthy Eating

58% vs 50%

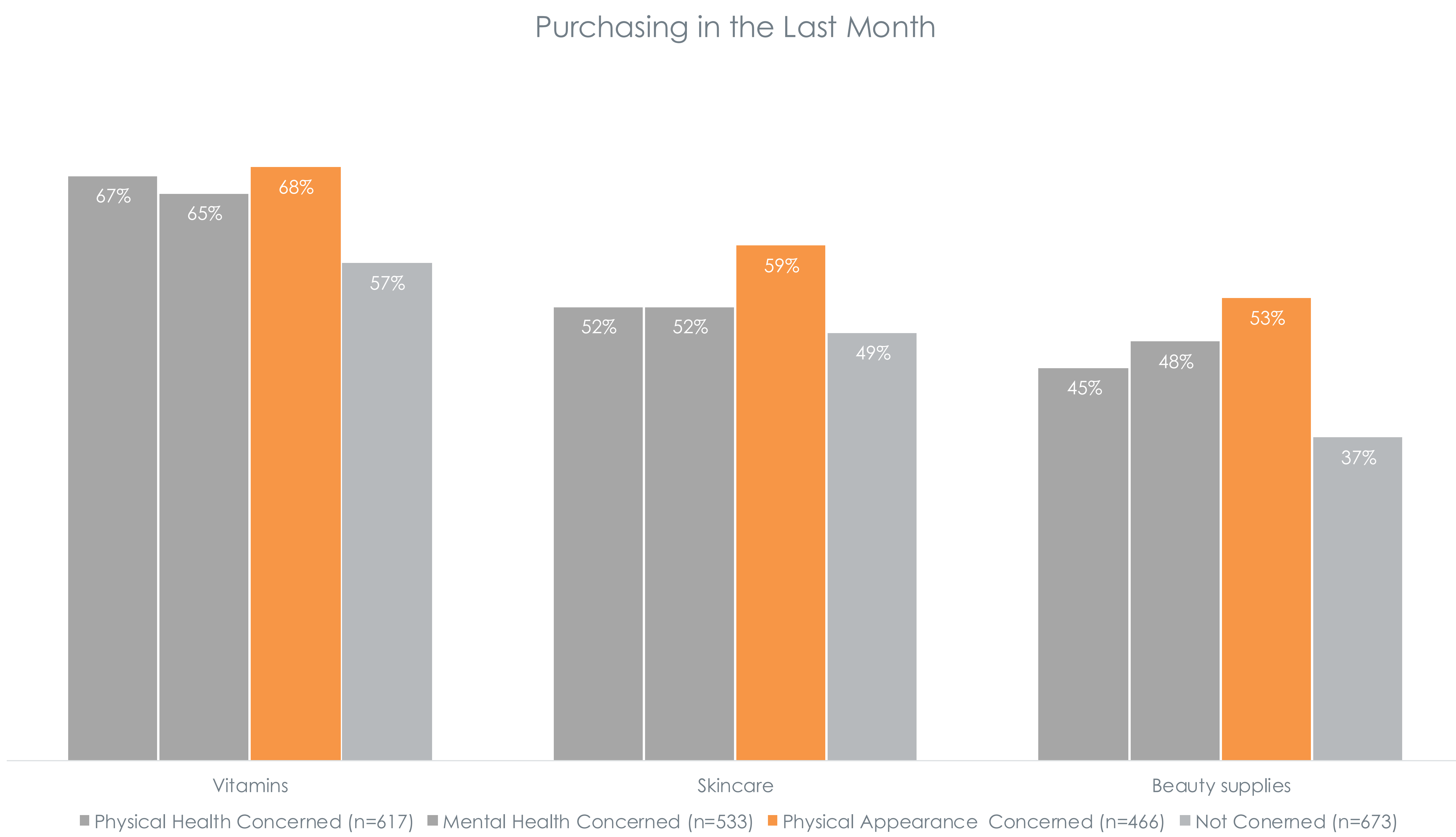
Prioritizes a Healthy Dietary

Which of the following do you regularly incorporate into your daily/weekly habits?

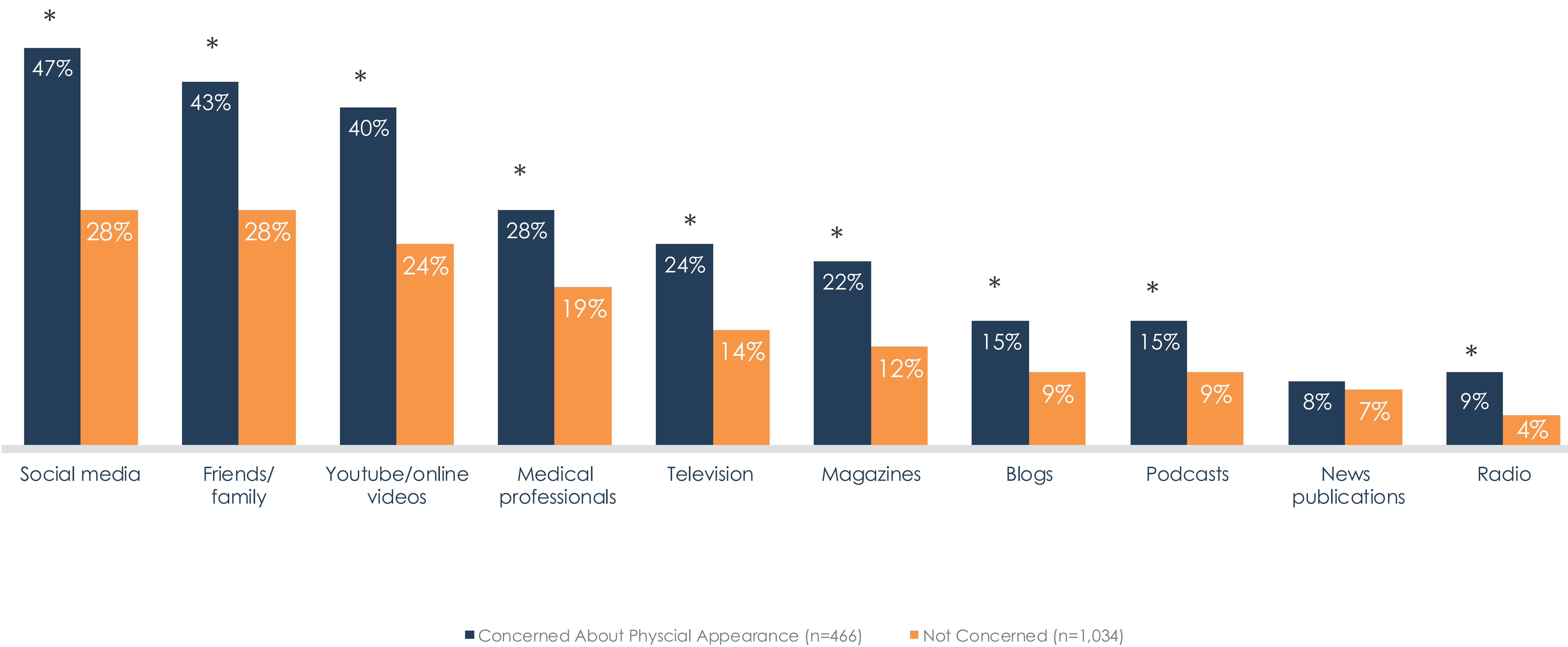
Base: Care about Physical Beauty (n=466)

So why are the Beauty Conscious so Important to Analyze?

Those Concerned with their ***Physical Appearance*** are Buying More



Social Media & YouTube are the Go-to Place for those Concerned About Aging Impacting Beauty



Q. When it comes to your physical appearance, what channels do you look to for anti-aging advice?

Skincare Trends

Skincare Routine

Almost three-quarters of Americans integrate vitamins into their weekly health routines, with this trend being particularly pronounced among older consumers and affluent individuals.

54%

Female (71%)
Major Urban Areas ((65%)
HHI $150K+ (65%)
Have Children (59%)

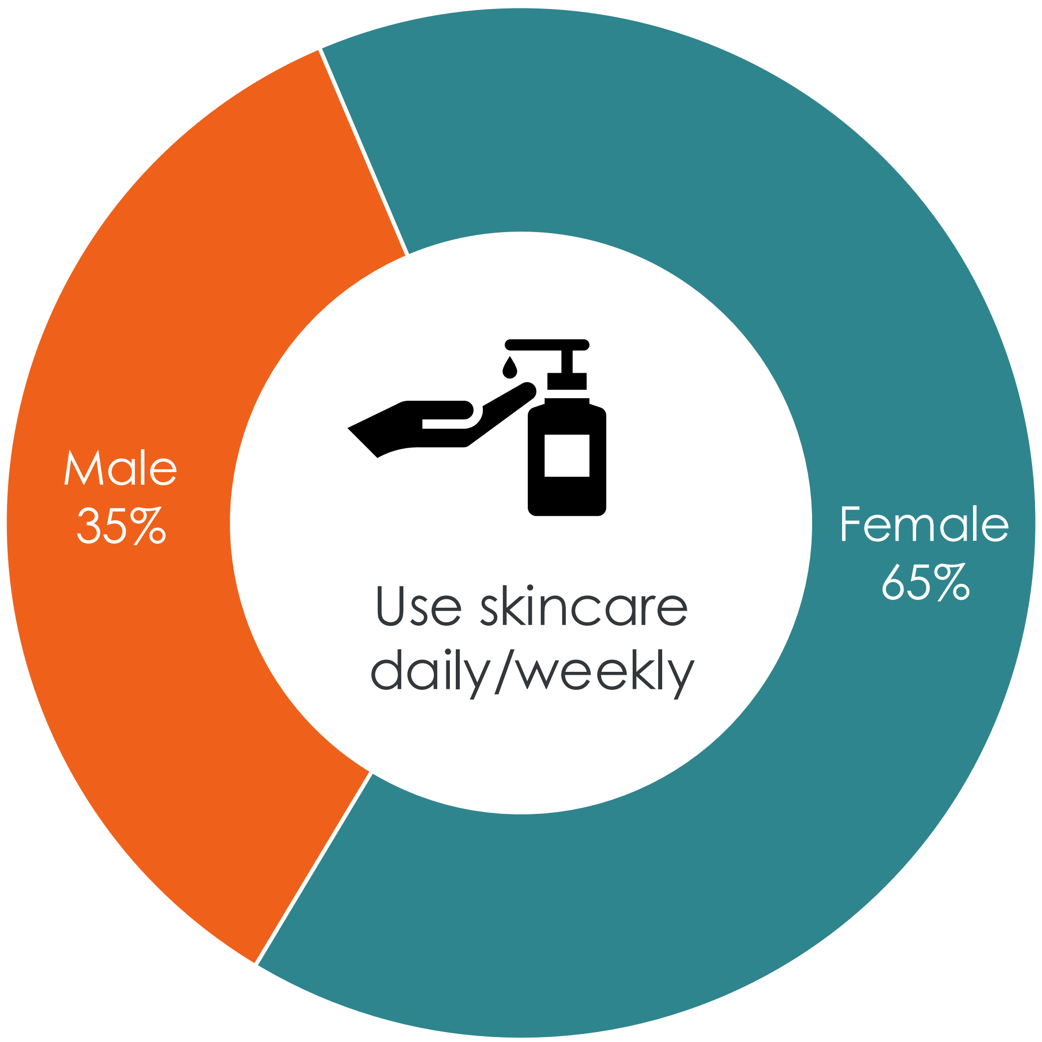
of Americans incorporate moisturizers serums, or creams into their daily/weekly habits

Which of the following do you regularly incorporate into your daily/weekly habits?

Base: All qualified respondents (N=1,500)

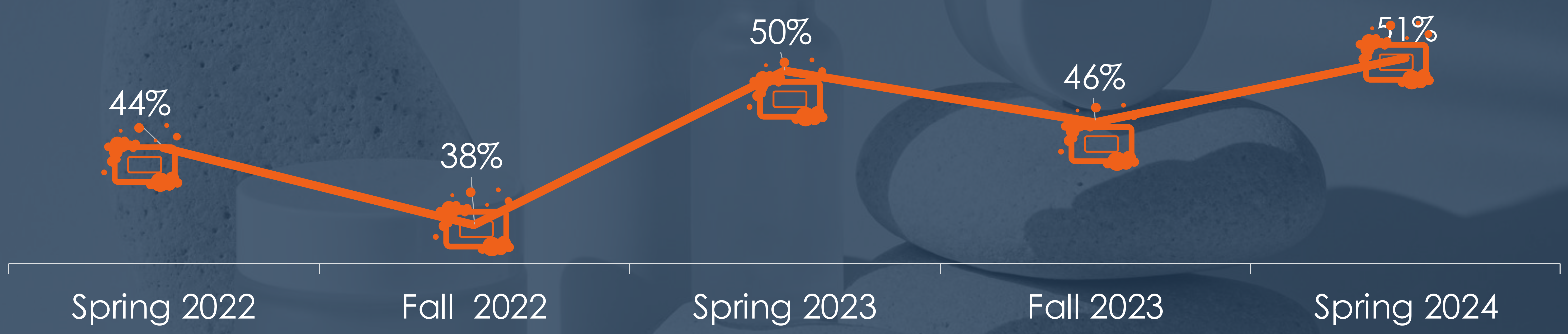
Skincare Routine: Women vs. Men

Women are more likely to incorporate daily or weekly skincare routines



Seasonal Skincare Purchases

Skincare purchases have reached an all-time high compared to the last two years.



Q. Which of the following have you personally bought in the last month? (Select all that apply)

Base (2022-2024): All Qualified Respondents (N=1,500)

Skincare Purchasers

Skincare purchasers predominantly consist of females, Millennials, and urban dwellers. They are high income but also are more likely to impulse shop and carry a credit card balance.

51%

of Americans purchased skincare the last month

Who is Significantly More Likely to Purchase Skincare

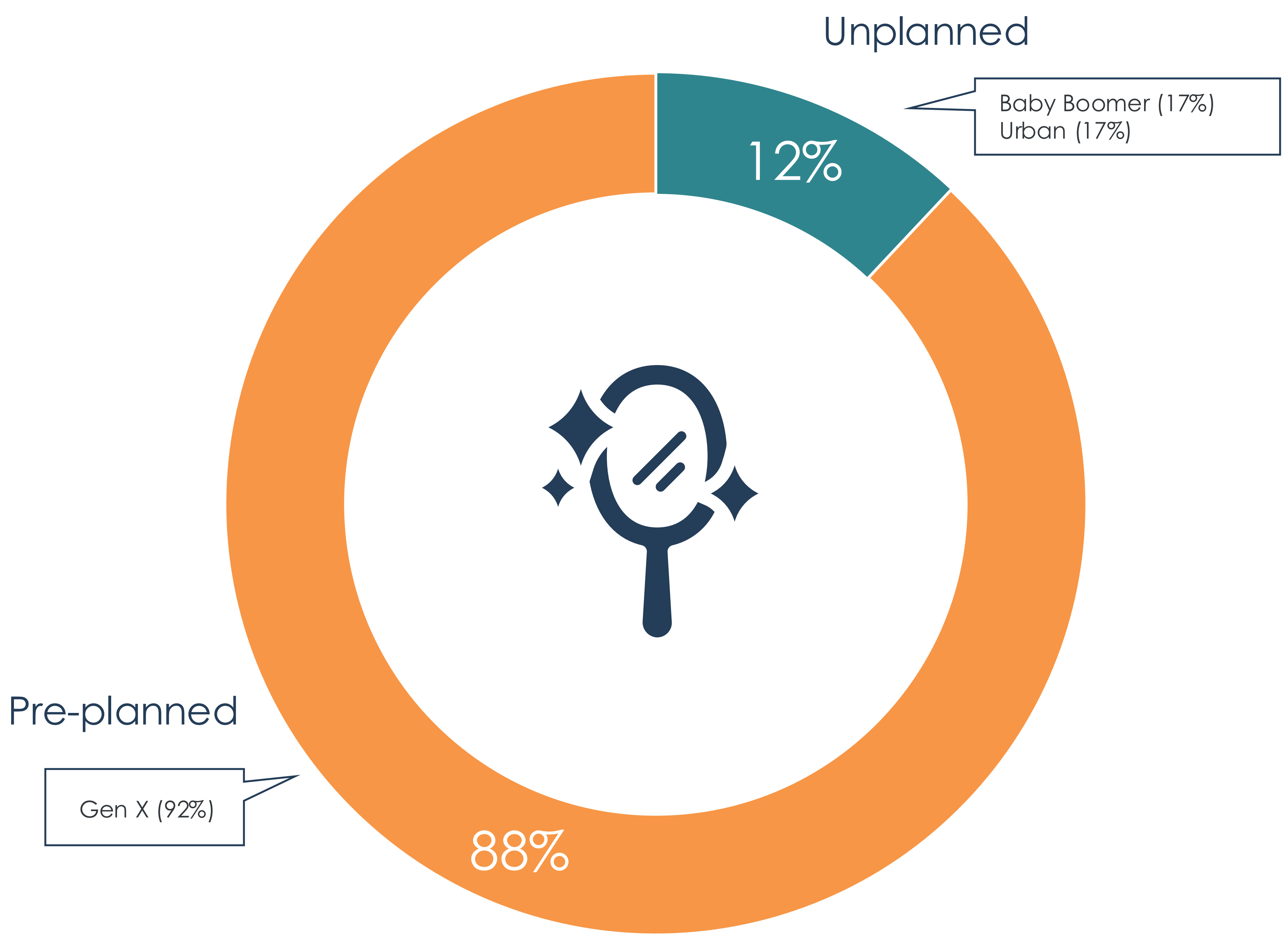
- Female (61%)
- Impulse shop (61%)
- Urban (60%)
- Millennials (59%)
- Parents (57%)
- Carry CC balance (57%)
- HHI $150K+ (56%)

Q. Which of the following have you personally bought in the last month? (Select all that apply)

Base: All qualified respondents (N=1,500)

Planned vs. Spontaneous

Most skincare purchases were pre-planned. People who made spontaneous skincare purchases were more likely to be from older generations and urban areas.

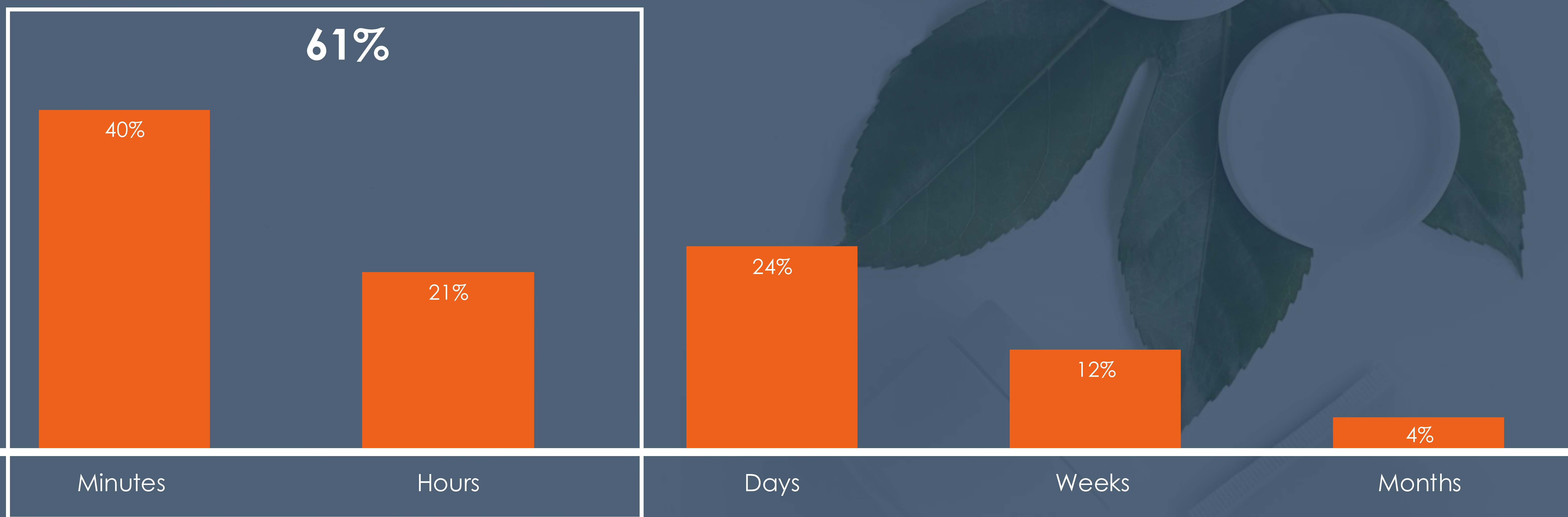


Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Purchased skincare in the last month (n=761)

How Long did it Take to Purchase Skincare Items?

Skincare purchases, though pre-planned, are often made quickly, within minutes to hours of deciding to buy.



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New Brands vs. Tried & True

Skincare purchasers are loyal to their go-to brands. Almost a third were open to purchasing a new brand.

Pre-Planned Skincare Purchases

69%
Purchased
Go-To Brand

31%
Purchased
New Brand

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Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Planned skincare purchases (n=666)

Relevant Promotional Media Sources For Skincare Shoppers

Television, news publication, TikTok and YouTube are the most influential media sources for skincare promotions or sales.

		Index Percent
Above Average	Television	22%
	News publications	6%
	TikTok	5%
	Youtube	2%
Average	Facebook	1%
	Instagram	-1%
Below Average	Radio	-3%
	Magazines	-3%
	Podcasts	-3%
	Blogs	-4%
	X (formally Twitter)	-4%
	Reddit	-5%
	Pinterest	-6%
	Threads	-7%
	Snapchat	-7%

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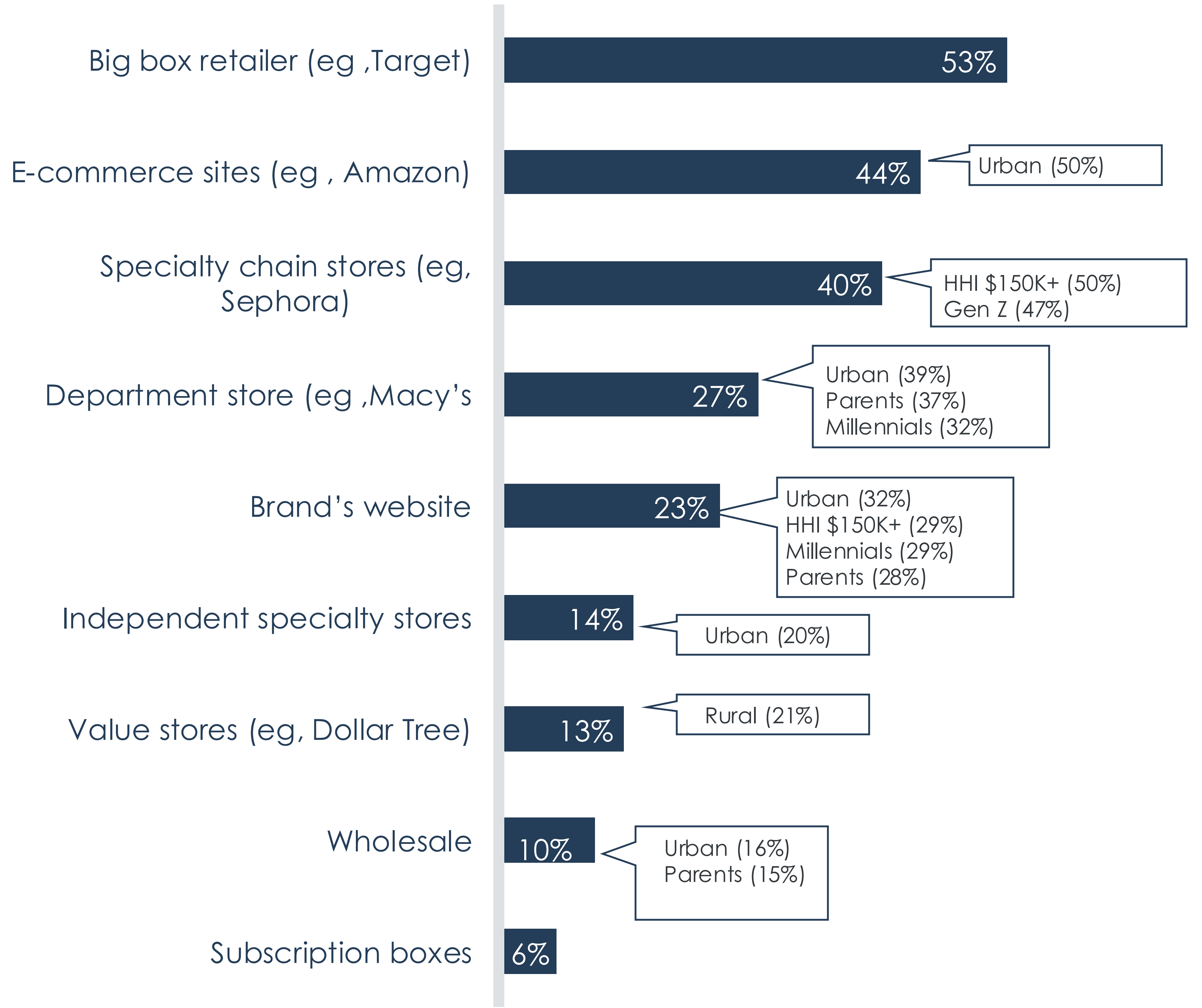
Q. Which of the following channels deliver the most and least relevant brand promotions or sales?

Base: Purchased skincare in the last month (n=761)

Skincare Purchases

Frequent skincare users predominantly shop at big box retailers and e-commerce platforms. High-net-worth individuals gravitate toward specialty stores and brand websites for their purchases.



Skincare Retail Channel: Women vs. Men

Women prefer to shop at specialty chain stores, while men typically explore a broader range of shopping venues, including department stores, discount outlets, wholesale clubs, and subscription boxes.

	Female	Male
Base: Use skincare daily/weekly (n=	*530*	*281*
Big box retailer (e g , Target)	51%	57%
E-commerce sites (e g , Amazon)	42%	48%
Specialty chain stores (e g , Sephora)	44%	31%
Department store (e g , Macy's)	23%	37%
Brand's website	24%	22%
Independent specialty stores	12%	16%
Value stores (e g , Dollar Tree)	10%	19%
Wholesale	6%	18%
Subscription boxes	4%	10%

Q. Where do you typically purchase skincare products?

Base: Use skincare daily/weekly (n=814)

Vitamin Trends

Vitamin Routine

Almost three-quarters of Americans integrate vitamins into their weekly health routines, with this trend being particularly pronounced among older consumers and affluent individuals.

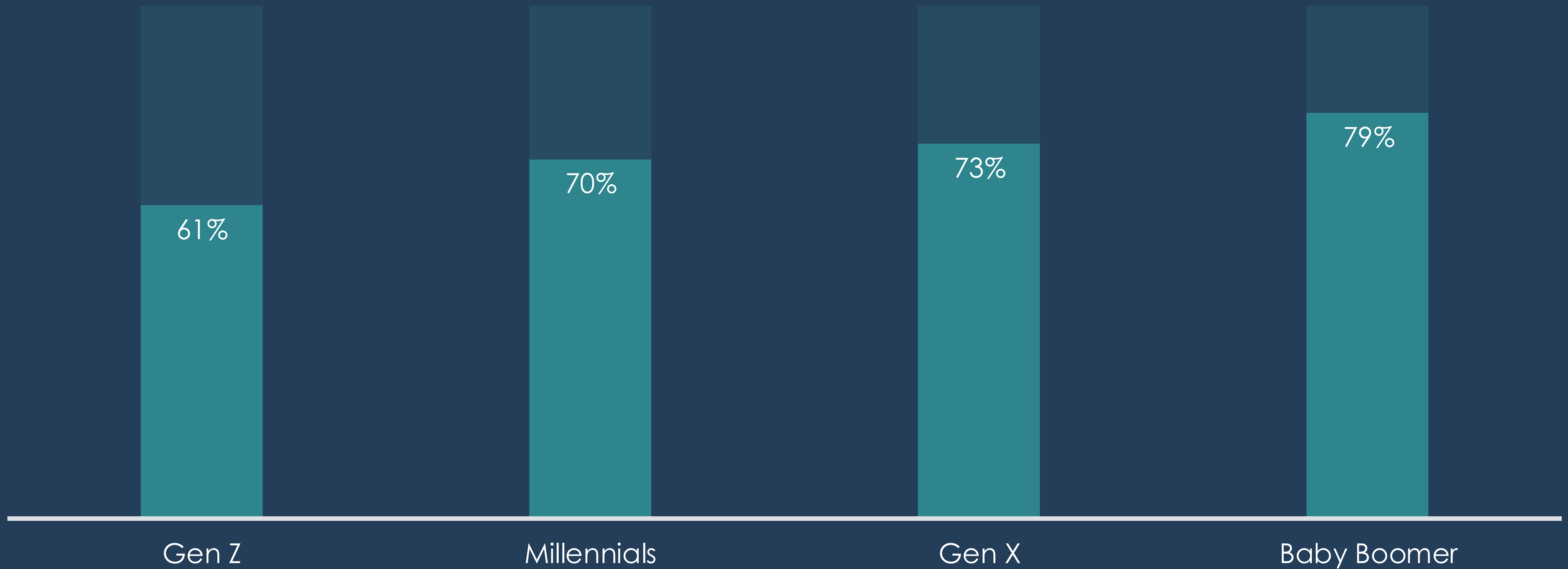
72%

of Americans incorporate vitamins into their daily/weekly habits

Baby boomers (79%)
HHI $150K+ (79%)

Vitamin Usage by Age

As people get older, they are more likely to take vitamins on a regular basis.

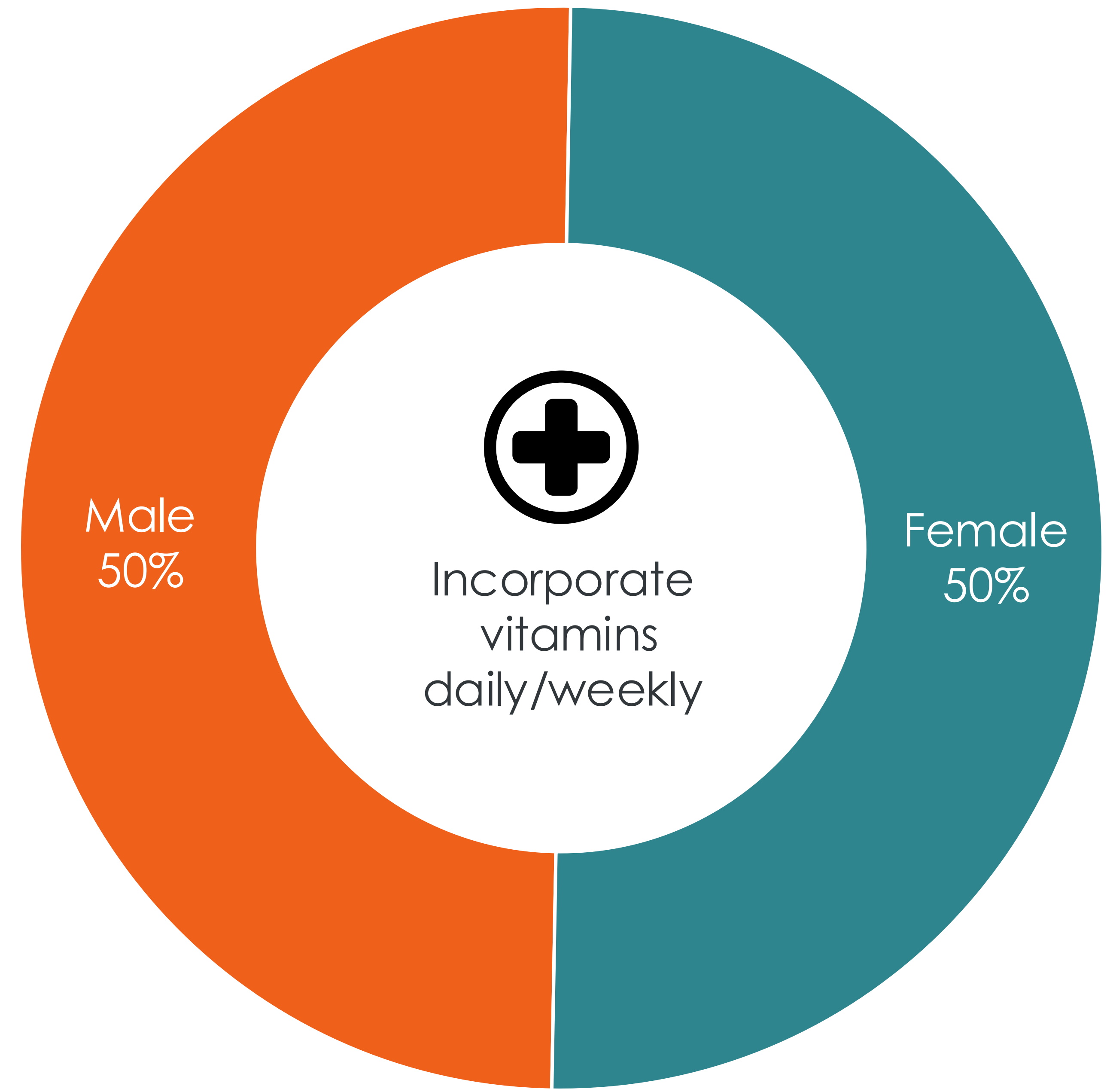


Q. Where do you typically purchase vitamins/supplements?

Base: Use vitamins/supplements daily/weekly (n=1,075)

Gender Vitamin Usage

Men and women are equally integrating vitamins into their daily routines.



Vitamin Purchasers

People who purchase vitamins are more likely to be affluent.

61%

of Americans purchased vitamins/supplements in the last month

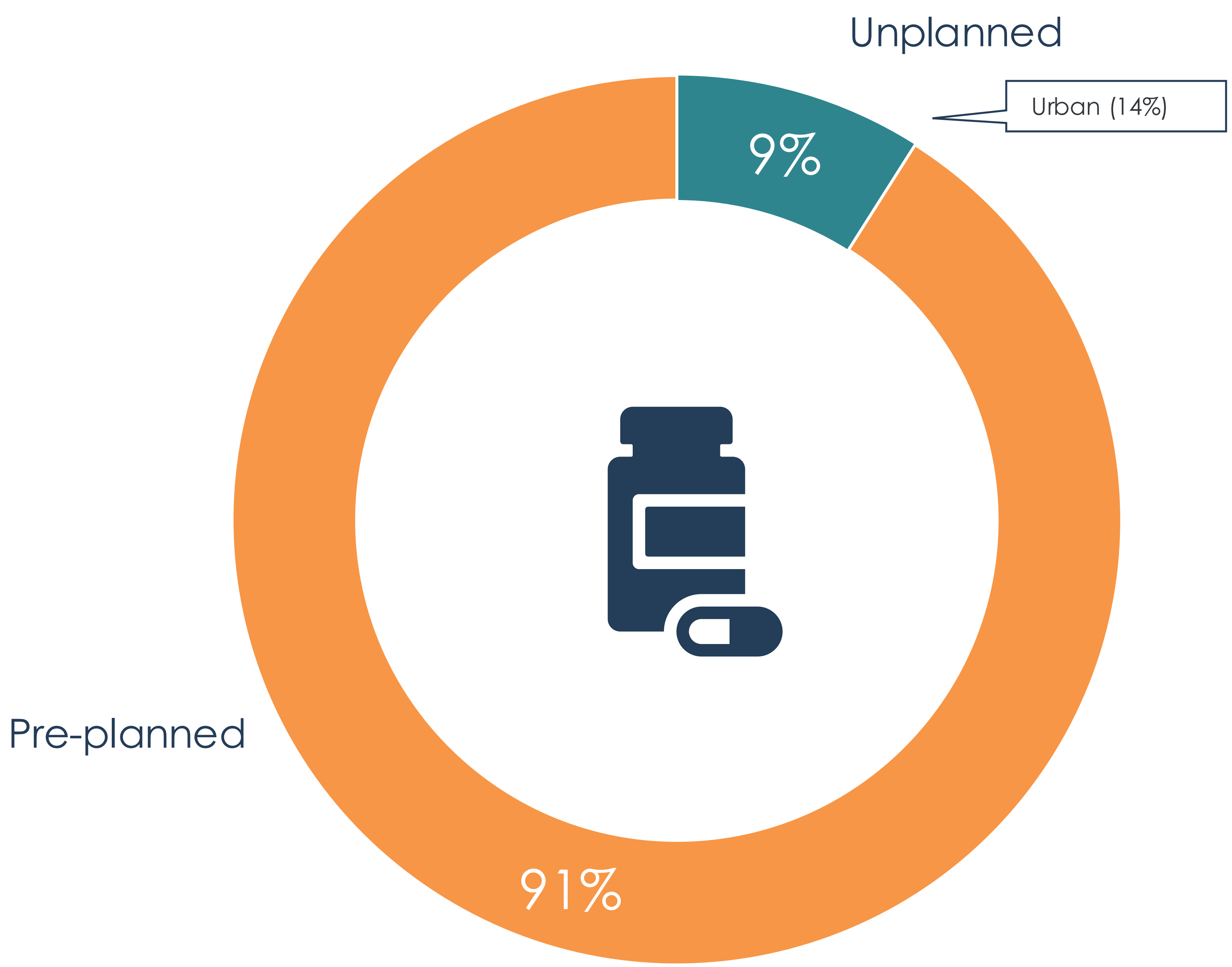
***+5%** since Fall 2023*

Q. Which of the following have you personally bought in the last month? (Select all that apply)

Base: All qualified respondents (N=1,500)

Planned vs. Spontaneous

The majority of vitamin purchases were preplanned. Those that live in urban areas are more likely to purchase them spontaneously.

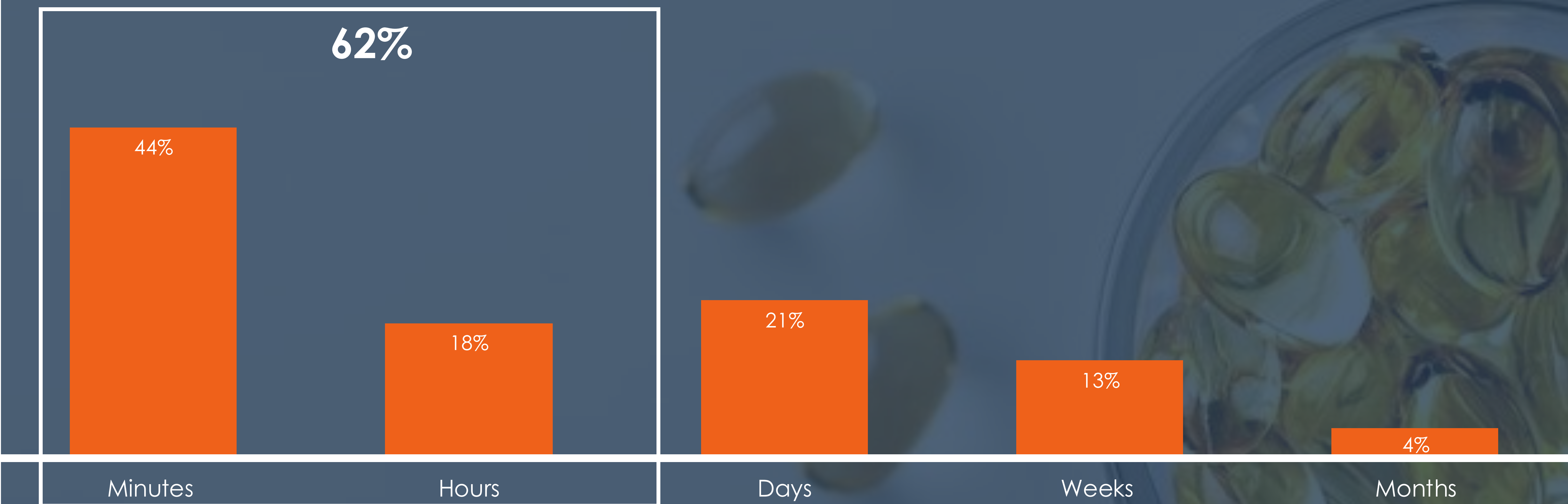


Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Purchased vitamins in the last month (n=915)

How Long did it Take to Purchase Vitamins?

However, vitamins are fast-decision purchases, with almost half taking only minutes to decide.



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New Brands vs. Tried & True

Vitamin purchasers are very loyal to their favorite brand, with less than a quarter recently interested in trying a new brand of vitamins/supplements.

Pre-Planned Vitamin Purchases

78%
Purchased
Go-To Brand

22%
Purchased
New Brand

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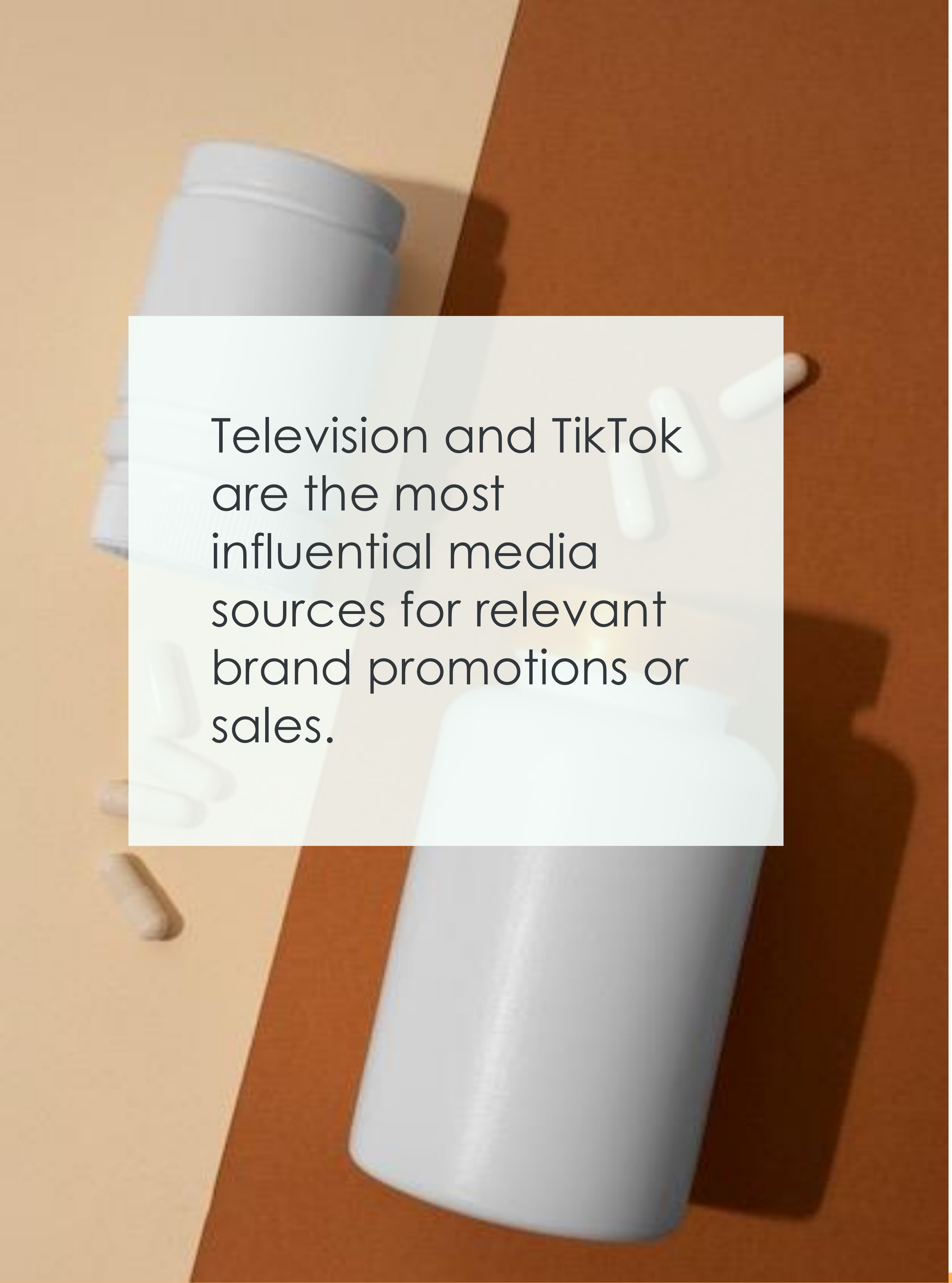
Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Planned vitamin purchases (n=832)



Television and TikTok are the most influential media sources for relevant brand promotions or sales.

Relevant Promotional Media Sources For Vitamin Shoppers

		Index Percent
Above Average	Television	26%
	TikTok	6%
	News publications	3%
	Facebook	3%
Average	Instagram	-1%
	Youtube	-1%
	Radio	-1%
Below Average	Blogs	-3%
	X (formally Twitter)	-3%
	Magazines	-4%
	Podcasts	-4%
	Reddit	-6%
	Pinterest	-6%
	Snapchat	-6%
	Threads	-7%

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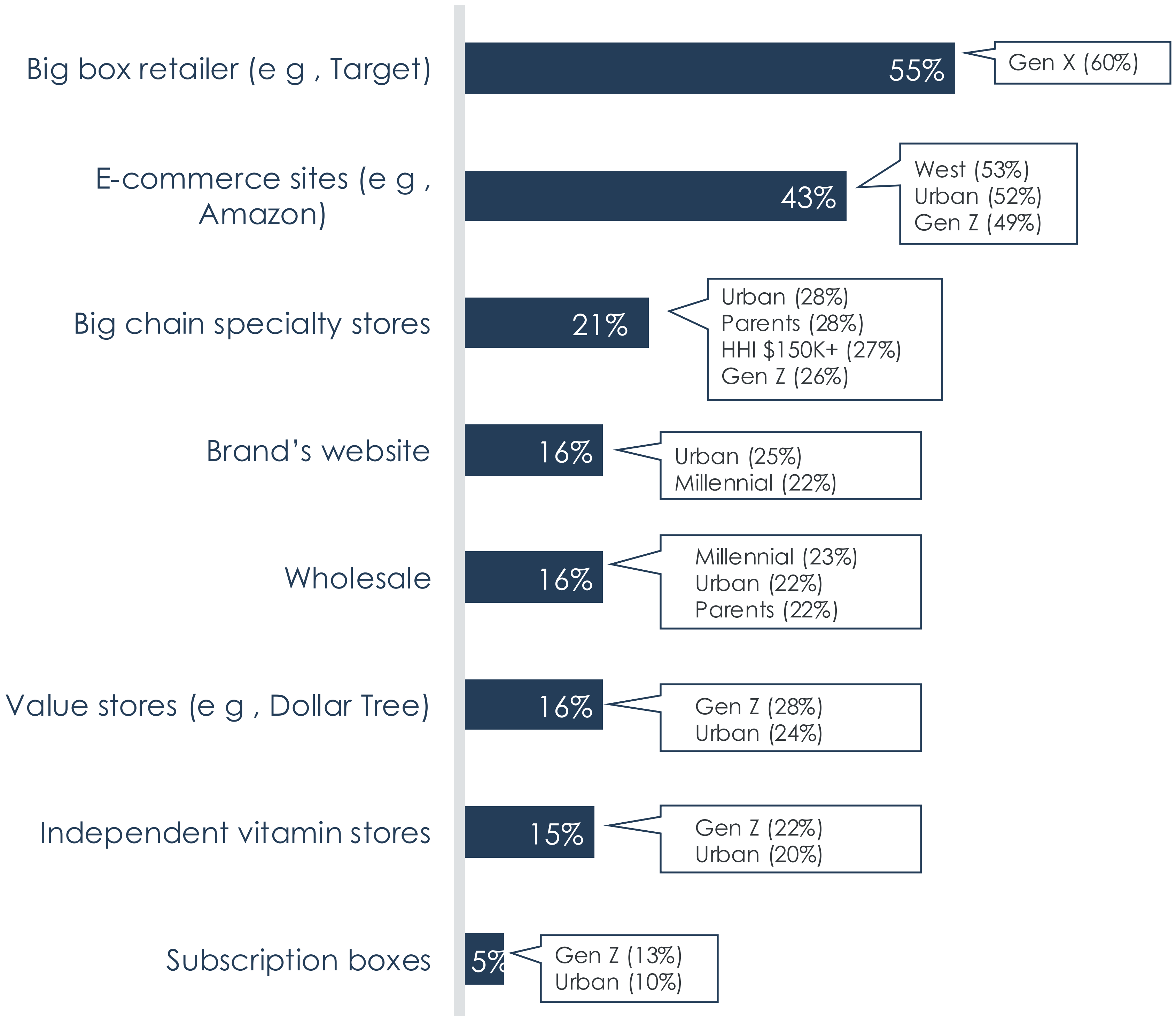
Q. Which of the following channels deliver the most and least relevant brand promotions or sales?

Base: Purchased vitamins in the last month (n=915)

Vitamin Purchases

Vitamins are typically purchased at big box retailers and e-commerce sites.



Q. Where do you typically purchase vitamins/supplements?

Base: Use vitamins/supplements daily/weekly (n=1,075)

Vitamin Retail Channel: Generations

Younger generations tend to buy vitamins from e-commerce sites and big chain specialty stores, while Gen X more often purchases from big box retailers.

	Gen Z	Millennials	Gen X	Baby Boomer
	152	*434*	*315*	*140*
Big box retailer	53%	55%	60%	48%
E-commerce sites	49%	47%	41%	34%
Big chain specialty stores	26%	25%	19%	12%
Value stores	28%	20%	11%	9%
Wholesale	22%	23%	10%	9%
Brand's website	22%	22%	11%	9%
Independent vitamin stores	22%	17%	11%	12%
Subscription boxes	13%	7%	3%	1%

Q. Where do you typically purchase vitamins/supplements?

Base: Use vitamins/supplements daily/weekly (n=1,075)

Vitamin Retail Channel: Women vs. Men

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Men are significantly more likely to purchase vitamins from big chain specialty stores, value stores, and independent vitamin shops.

	Female	Male
Base: Use skincare daily/weekly (n=	*536*	*536*
Big box retailer (e g , Target)	55%	54%
E-commerce sites (e g , Amazon)	44%	41%
Big chain specialty stores (e g , The Vitamin Shoppe)	17%	24%
Value stores (e g , Dollar Tree)	12%	20%
Wholesale	16%	16%
Brand's website	15%	17%
Independent vitamin stores	12%	18%
Subscription boxes	4%	7%
Big box retailer (e g , Target)	55%	54%

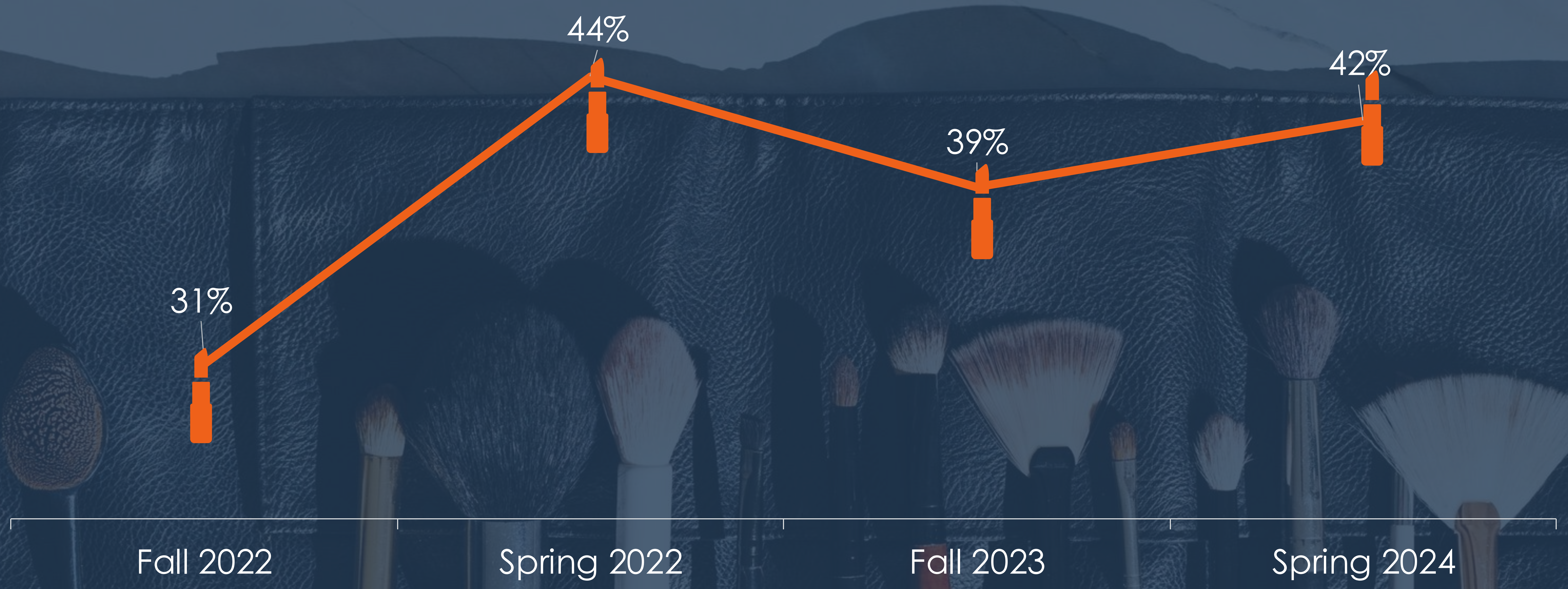
Q. Where do you typically purchase vitamins/supplements?

Base: Use vitamins on daily/weekly (n=1,075)

Beauty Trends

Seasonal Beauty Purchases

Although beauty supply sales have only slightly increased in the last six months, they are significantly higher than they were during the Pandemic.



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Beauty Purchasers

Gen Z is more inclined to purchase beauty products compared to older cohorts.

42%

of Americans purchased beauty products the last month

Who is Significantly More Likely to Purchase Beauty Products

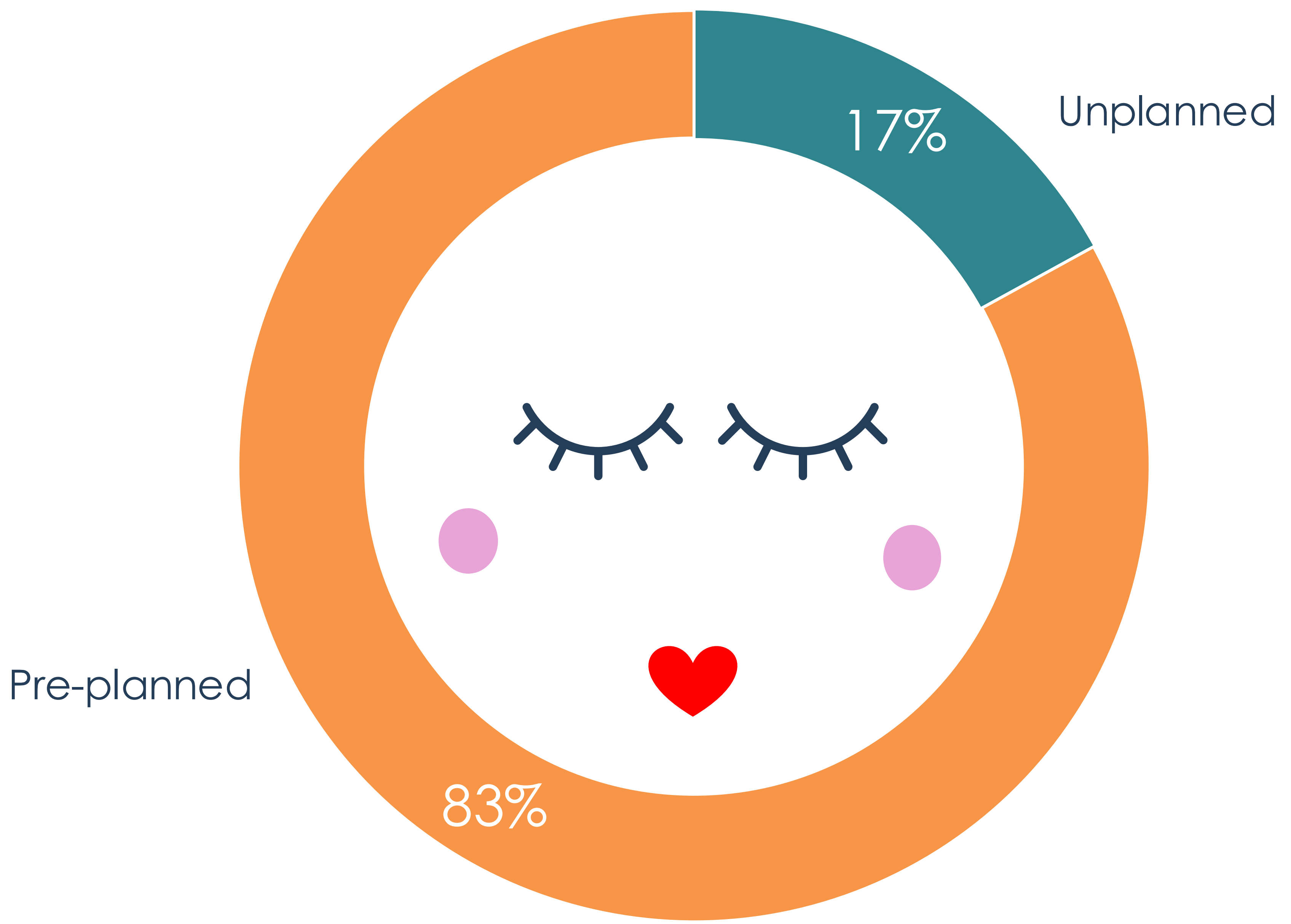
- Gen Z (54%)
- HHI $150K+ (53%)
- Impulse shop (52%)
- Parents (49%)

Q. Which of the following have you personally bought in the last month? (Select all that apply)

Base: All qualified respondents (N=1,500)

Unplanned vs. Spontaneous

Most beauty products bought are intentional, with few shoppers making spontaneous purchases in this category.



Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Purchased beauty products in the last month (n=622)

New Brands vs. Tried & True

Beauty buyers tend to stick with their preferred brands; however, a third are willing to try new beauty brands.

Pre-Planned Beauty Purchases

66%
Purchased
Go-To Brand

34%
Purchased
New Brand

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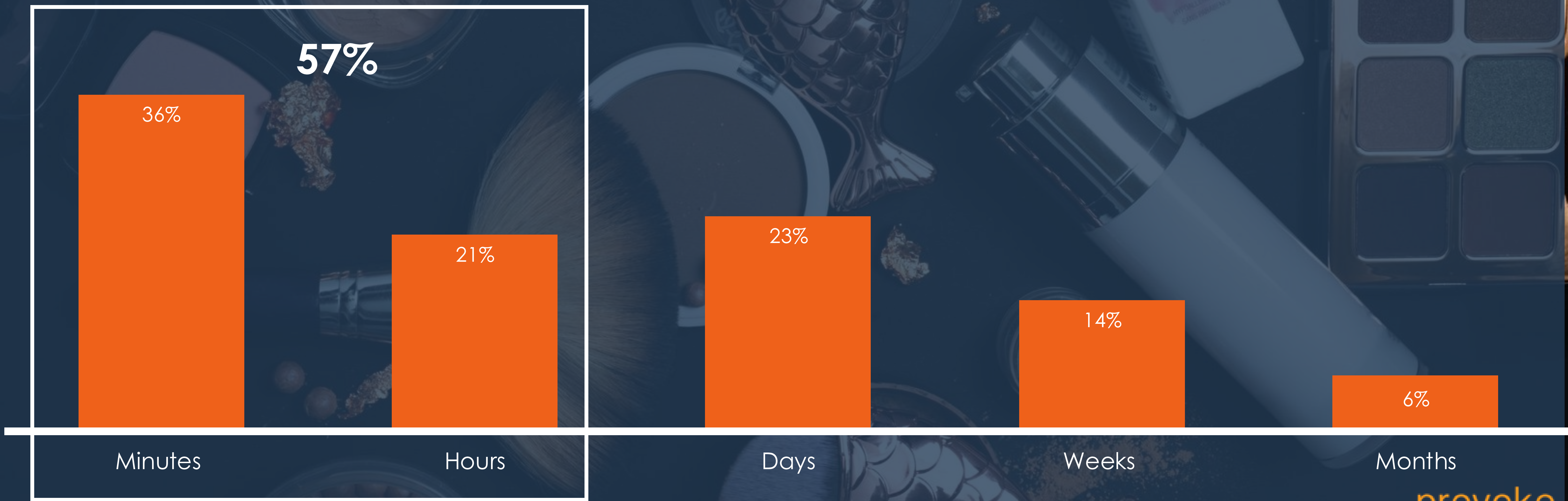
Q. Thinking of the most recent product you bought in each category, how did you decide to purchase?

Base: Planned beauty purchase (n=519)

How Long Did it Take to Purchase?

These planned purchases are often quick, as these consumers know their go-to-brands.



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Relevant Promotional Media Sources For Beauty Product Shoppers

Television and TikTok stand out as the most influential media platforms for brand promotions relevant to beauty shoppers.

Above Average

Below Average

	Index Percent
Television	20%
TikTok	12%
News publications	3%
Instagram	2%
Facebook	0%
YouTube	-1%
Radio	-2%
Magazines	-2%
Podcasts	-3%
Blogs	-3%
X (formally Twitter)	-4%
Reddit	-5%
Pinterest	-6%
Threads	-7%
Snapchat	-7%

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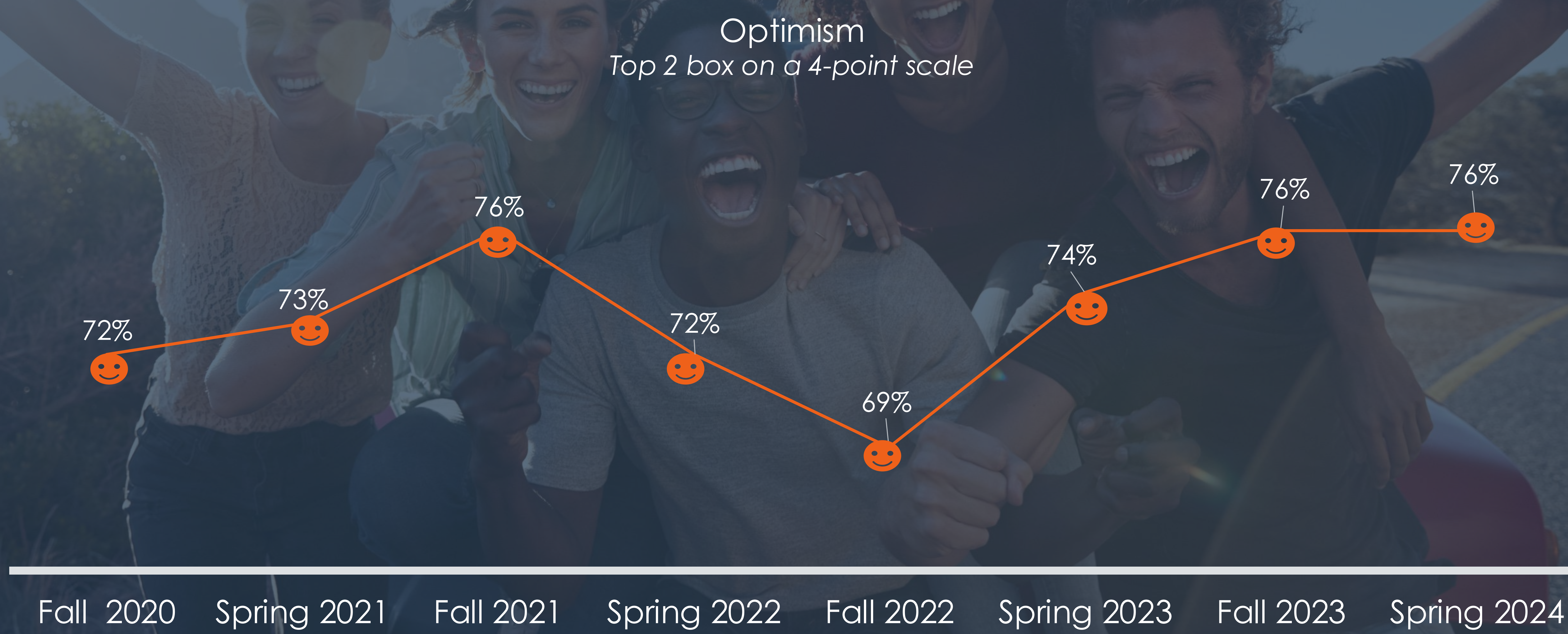
Q. Which of the following channels deliver the most and least relevant brand promotions or sales?

Base: Purchased beauty products in the last month (n=622)

How is the Economy Impacting Consumers?

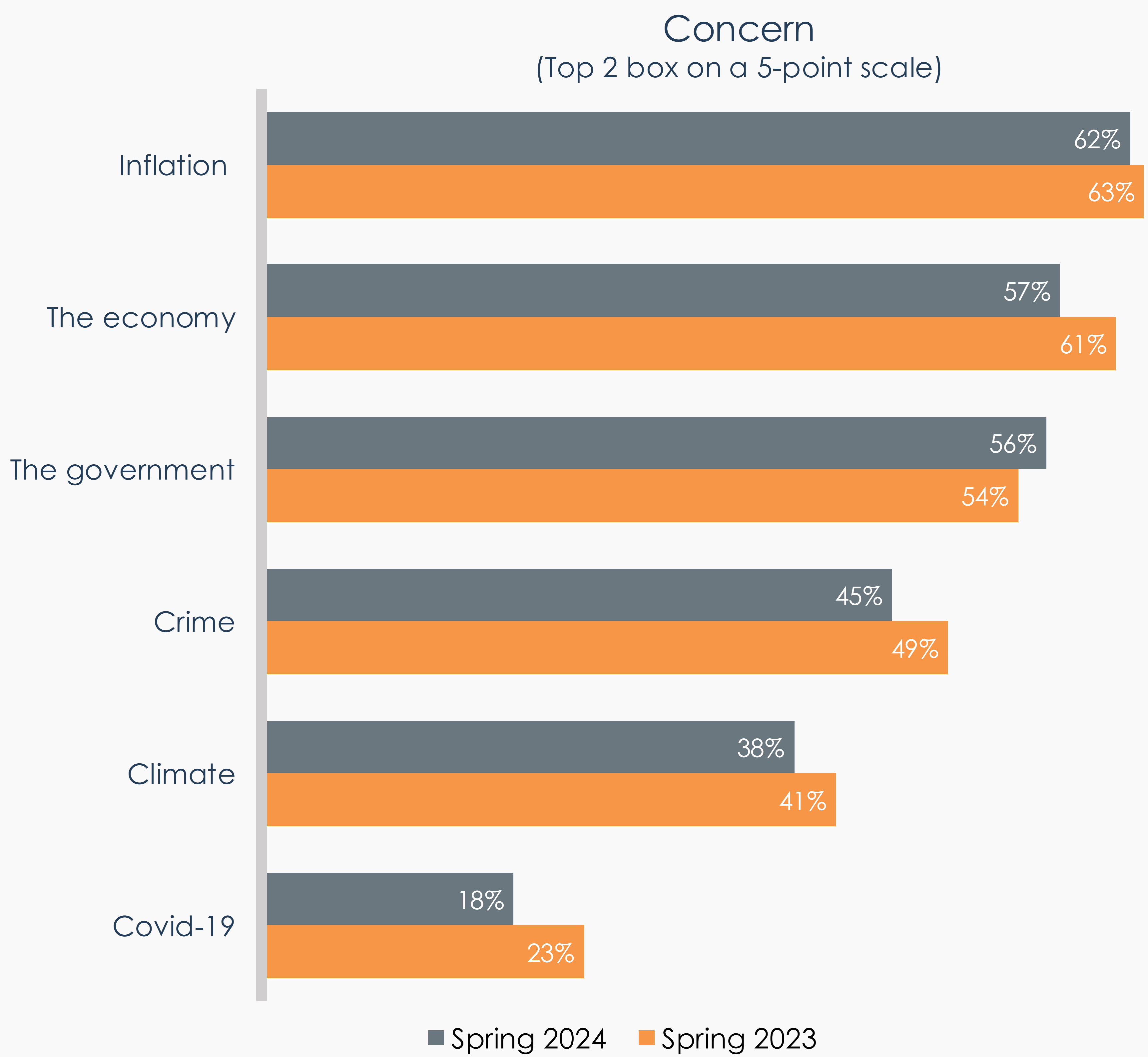
Consumer Optimism

Optimistic outlooks on the future remain high. The lowest sentiment was in Fall 2022.



Top Concerns Impacting Consumers

Inflation remains the top concern among Americans. Worries about the government have slightly increased in the last year.



Q. How concerned are you with the following areas impacting you personally?

Base: All Qualified Respondents Spring 2023 (N=1,500), Spring 2024 (N=1,500)

57%

(Top 2 box on a 5-point scale)

of Americans are concerned about the economy

Inflation is a Key Worry for Americans Regarding the Economy

"The prices of everything keeps going up while our jobs aren't paying more to keep up with the cost of living. Eventually only the higher ups will be able to afford a 'normal' lifestyle."

"I am worried about the number of people who live paycheck to paycheck managing the increasing costs for everything. Inflation is making everyday items beyond the means for many."

"Everything is so expensive and it's hard to make enough to live and pay for everything you need to. People can't save money or have money for anything extra."

"Inflation is very high, and I am worried about a recession and a hit to our portfolio. We are very close to retirement and that makes me nervous."

"I'm worried the purchasing power of my salary will go down and I won't be able to afford to never worry about going out to eat or retirement."

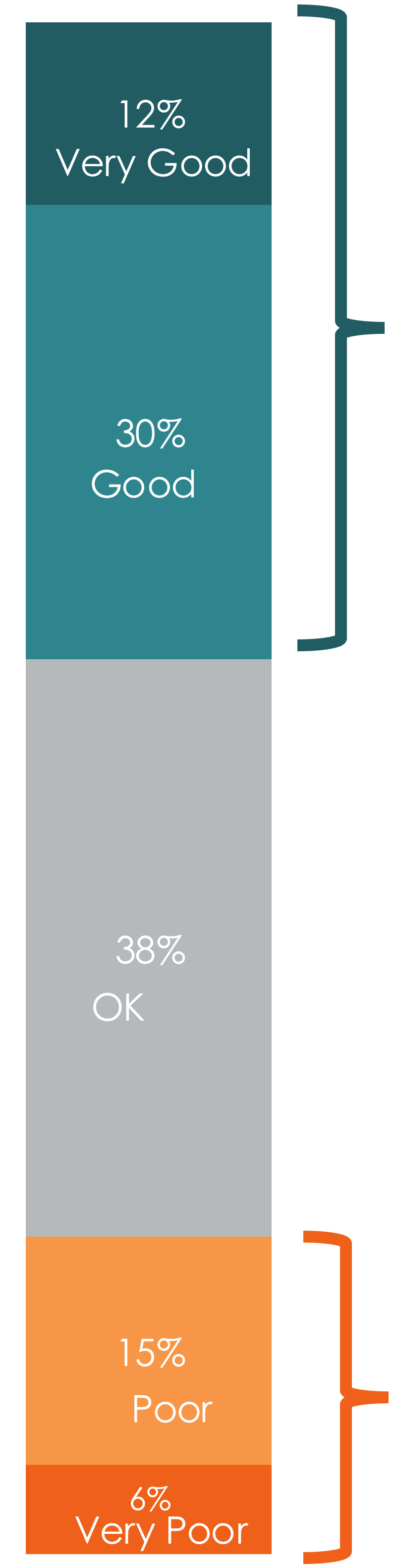
Q. How concerned are you with the following areas impacting you personally?/Why are you concerned with the economy? Base: Concerned with the economy (n=1,444)

Financial Positions

Only half of Americans are saving money. It is particularly concerning as a tenth are going further into debt.

Financial Position Comparison

One-fifth of Americans believe that they are in a bad financial situation.



36% Financially Position is Good

21% Financially Position is Poor

Americans Are Budget Conscious

Two-thirds of consumers continue to reduce their spending.

63%

+1% from Spring 2023

More Budget Conscious

Who is Significantly More Likely to Be Budget Conscious

77% Going Into Debt

71% Hispanic

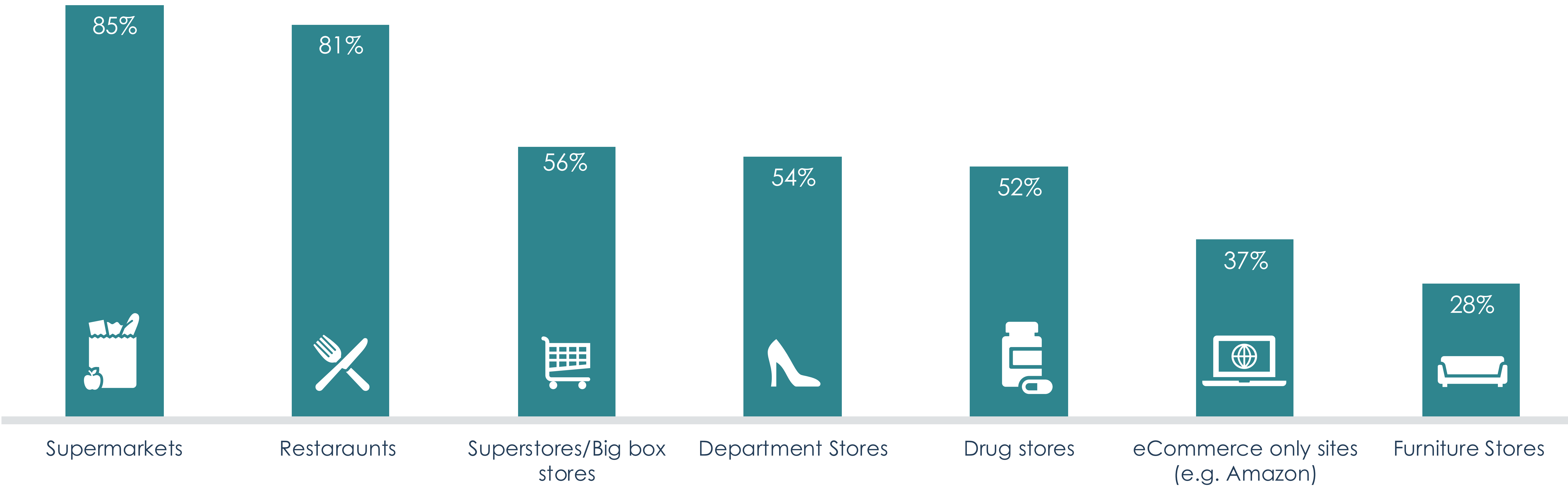
68% Republican

Q. Compared to six months ago, how budget conscious are you?

Base: All qualified respondents (N=1,500)

Inflation Impact Across Different Types of Stores

Prices have surged the most at food establishments such as supermarkets and restaurants.



provoke insights

Respondent Profile

Gender

49%
Female

50%
Male

*<1% other identity

Generation

42 years old
Median Age

Z **13%** Gen Z

X **32%** Gen X

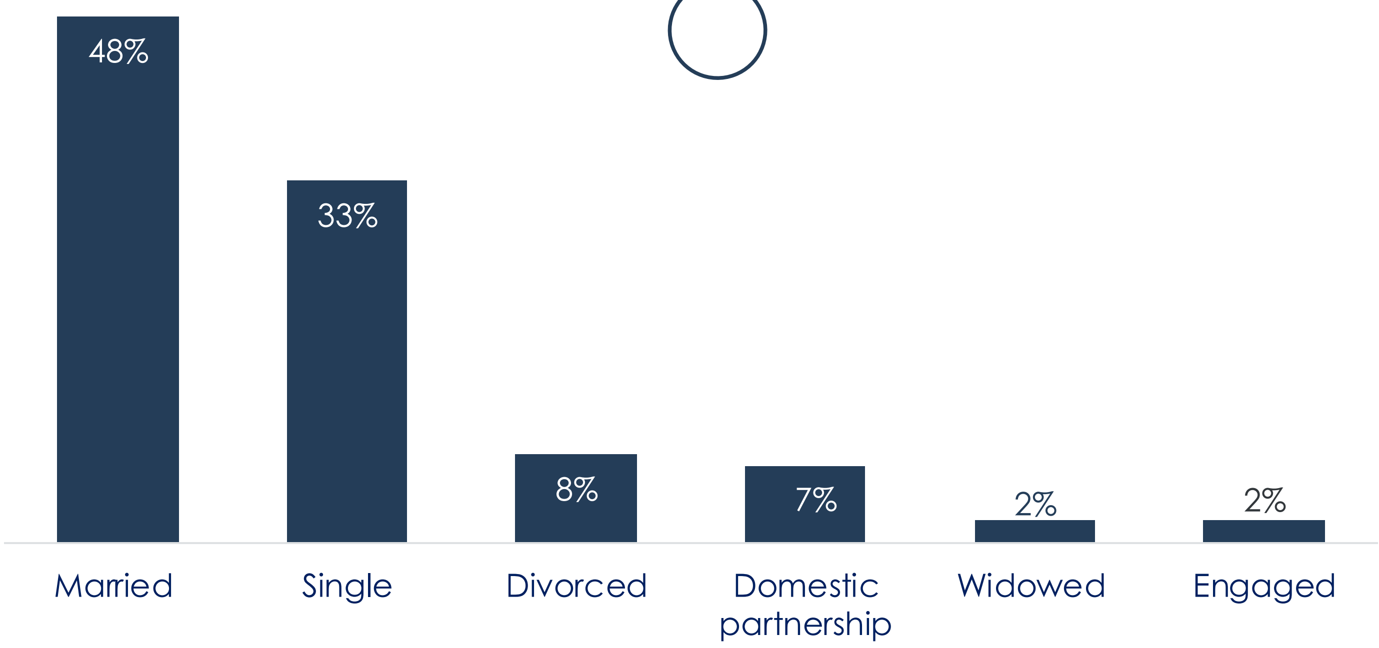
M **38%** Millennials

B **17%** Baby Boomers

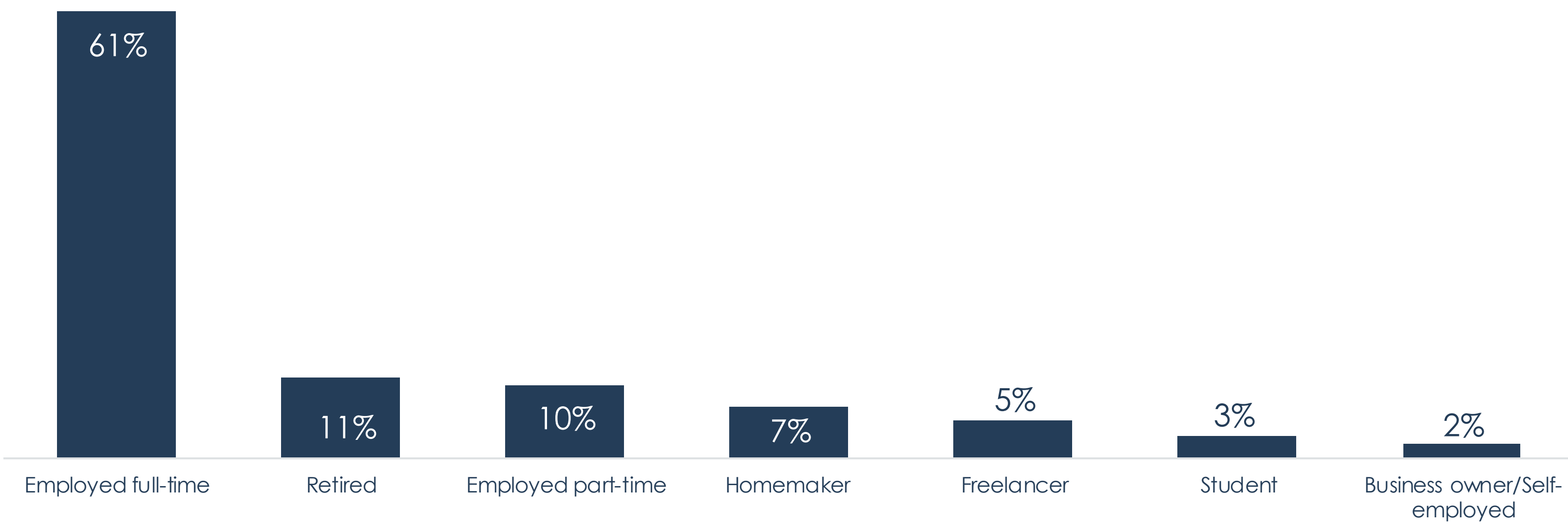
Parental Status

39%
Have children

Marriage Status

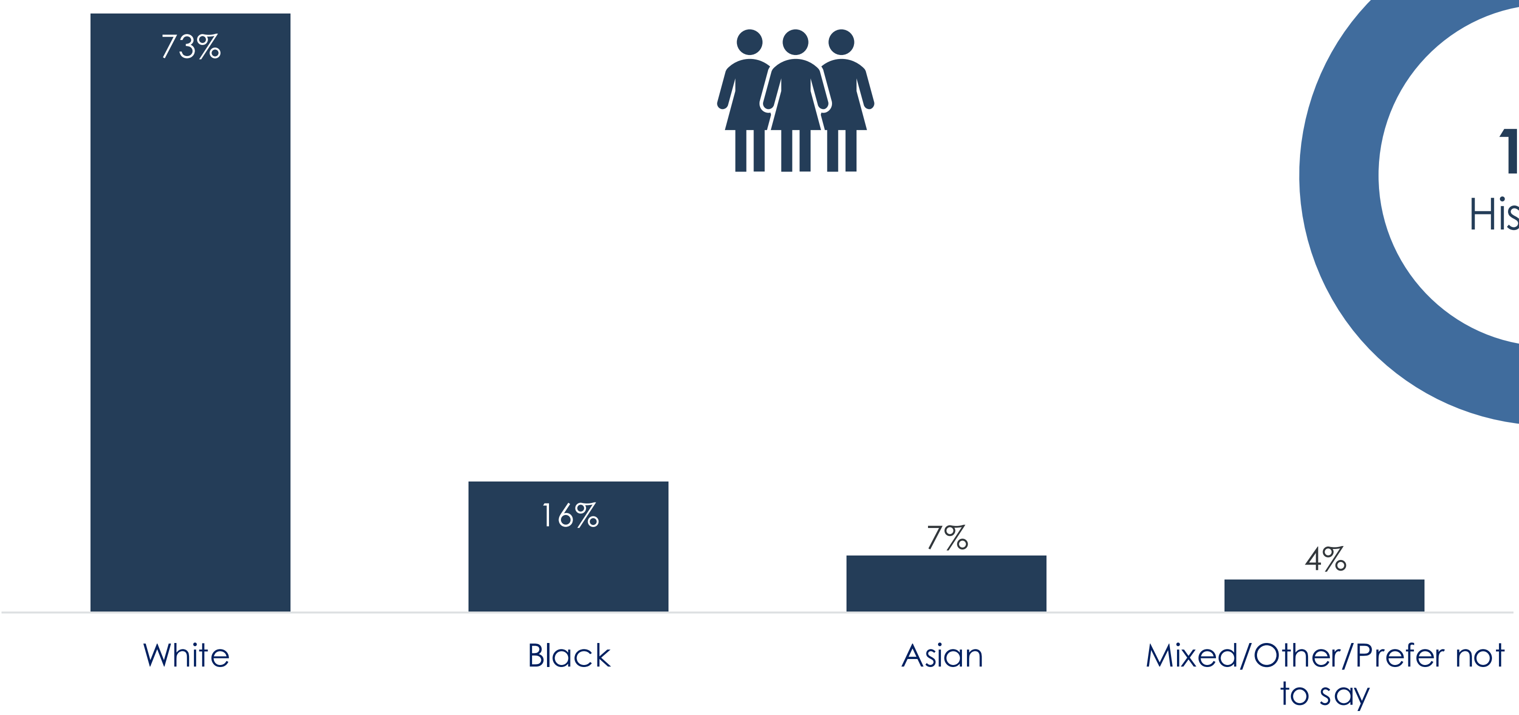


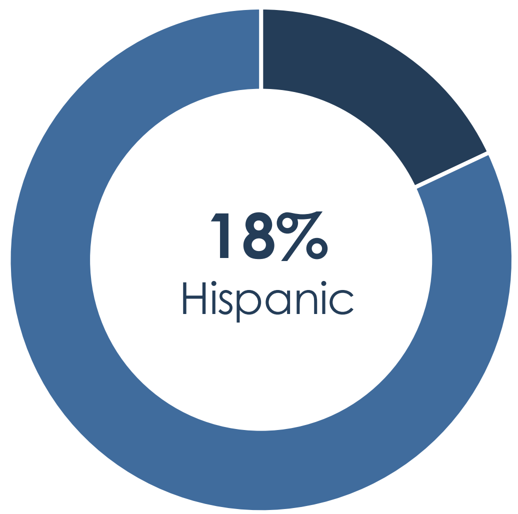
Employment Status



Respondent Profile

Ethnicity





Political Party

37% Democrat

26% Independent

30% Republican

***7%** Prefer not to say/Other

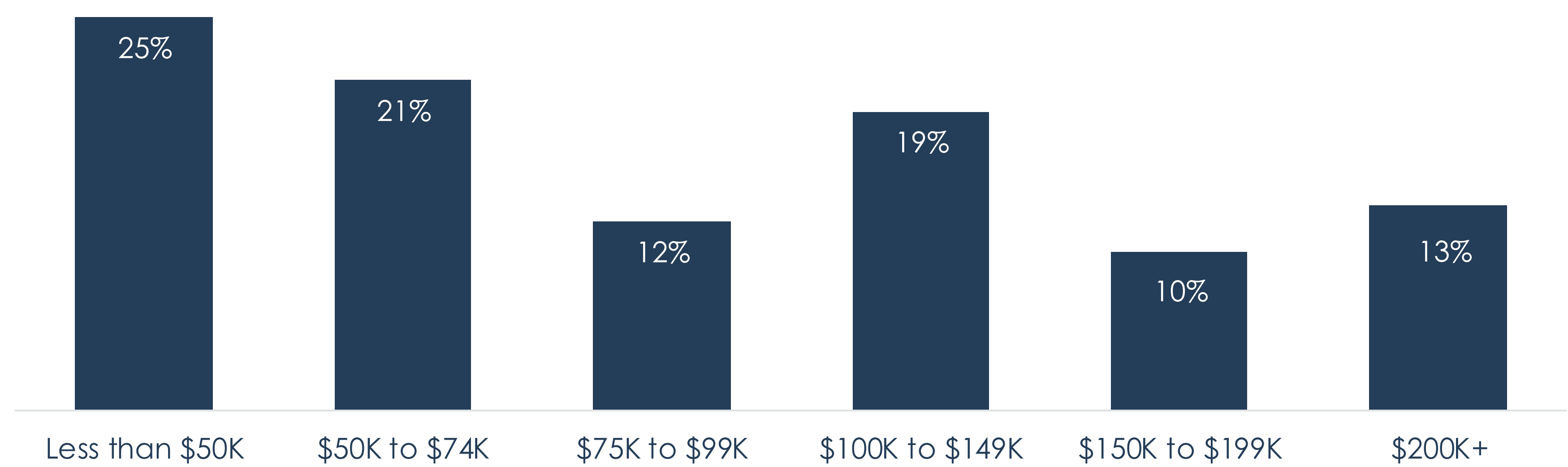
Area

26% Rural

49% Suburban

25% Urban

Household Income



Base: All qualified respondents (N=1,500)

About Provoke Insights

Provoke Insights is a full-service market research firm founded on the belief that research should better align with marketers' needs. Our mission is to empower brands by providing them with the insights they need to navigate today's ever-changing marketing landscape.

Unlike traditional market research firms, we take a more agile and innovative approach to our work. Our team is dedicated to developing initiatives that are designed to address the unique and evolving needs of today's market quickly and effectively.

What sets Provoke Insights apart from other research firms is our singular focus on branding and advertising initiatives. Our team consists of seasoned researchers who are also experienced brand and media strategists. With this expertise, we deliver actionable insights that help brands succeed in their marketing efforts.

For more information or press inquiries, reach out to info@provokeinsights.com.

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