



provoke
insights

Beauty & Skincare:
The Loyalty Breakdown
Consumer Trends Research Report

Summer 2026

Background & Objectives

Provoke Insights is a leader in research focused on branding, advertising, media, and content marketing strategies. Our biannual study uncovers how consumer attitudes and behaviors are evolving across a range of industries and specialties.

Now in its twelfth wave, this nationally representative study reveals what drives their decisions.

The research is organized into 15 industry-specific reports that are easy to read and designed to provide quick, actionable insights. This report focuses on the beauty and skincare category, highlighting shifting habits, evolving consumer priorities, and the role loyalty plays in the purchase decisions.



Methodology

Provoke Insights conducted a 15-minute online survey among 1,500 Americans aged 21 to 65 in March 2026.

To ensure a representative sample of the U.S. population, Census data was used to inform a stratified random sampling approach, balancing key demographics such as household income, age, gender, geography, ethnicity, and presence of children in the household.

With this sample size, the results have a maximum margin of error of $\pm 2.5\%$ at a 95% confidence level.

Statistical significance testing was conducted at the 95% confidence level, with differences between subgroups highlighted in callout boxes within the graphs.



Key Findings

Skincare and Beauty Consumers Are Highly Engaged, Lifestyle-Oriented Shoppers

Skincare and beauty purchasers are not passive consumers. They are more likely to view shopping as an enjoyable experience, consider themselves trendsetters, and actively seek out products that enhance their personal routines. Compared to non-purchasers, they are significantly more likely to enjoy browsing store aisles and discovering new products, suggesting they view shopping as a form of exploration rather than a transactional task.

This engagement extends beyond retail behavior into their everyday lifestyles. Skincare purchasers over-index on self-care, yoga, fitness activities, crafting, and creative pursuits, while beauty purchasers are more likely to participate in social activities such as dining out, traveling, attending concerts, and nightlife experiences. Together, these behaviors suggest that consumers are more likely to engage in activities related to wellness, personal interests, and experiences.

For brands, this means skincare and beauty products should be positioned as part of a broader lifestyle rather than standalone purchases. Consumers are looking for products that fit into their routines, help them express their identity, and support their overall well-being.

Discovery Matters, But Trust Ultimately Drives Decisions

Despite enjoying exploration and product discovery, skincare and beauty consumers rely heavily on trusted cues when making purchase decisions. As categories with a high number of product option, consumers face an enormous number of options and often struggle to differentiate between products. To simplify decision-making, shoppers turn first to recognized brands and customer reviews rather than advertising, promotions, or packaging.

This dynamic creates an interesting tension within the category. Consumers enjoy experimenting with new products and consider themselves open to trends and innovation, yet they seek reassurance before committing to a purchase. Reviews, ratings, and established brand equity serve as important shortcuts that reduce uncertainty and build confidence.

This highlights the importance of balancing innovation with credibility. Launching new products is important, but success depends on clearly communicating benefits, generating positive reviews, and maintaining a strong reputation that helps consumers navigate an increasingly crowded marketplace.

Loyalty Is Earned Through Quality and Performance, Not Marketing

Beauty and skincare consumers demonstrate above-average brand loyalty compared to many other product categories, but their loyalty is rooted in product performance rather than emotional branding alone. Quality is by far the strongest driver of loyalty, followed by value, positive experiences, trust, and products that consistently meet consumers' needs.

At the same time, consumers are willing to switch brands when they discover products that offer better performance, superior ingredients, or meaningful new benefits. This suggests that loyalty in beauty and skincare is conditional. Consumers remain loyal when products continue to deliver results, but they are not afraid to explore alternatives if another brand appears to better address their needs.

The same principle applies when consumers decide to leave a brand. Declines in quality and price increases are the primary reasons shoppers break ties with brands they once trusted. This reinforces the idea that loyalty must be continuously earned through product excellence and consistent value delivery rather than relying solely on brand heritage or awareness.

Beauty and Skincare Remain Resilient Despite Economic Pressures

Both skincare and beauty purchases have remained remarkably stable over the past several years, suggesting that personal care products continue to maintain a consistent role in consumer purchasing behavior. Even as inflation has affected spending behavior across many retail categories, consumers continue to maintain engagement with beauty and skincare, suggesting these purchases remain a priority within household budgets.

This resilience may partly reflect the fact that consumers often associate these products with self-care, confidence, and personal expression. Skincare supports wellness and self-care, while beauty products facilitate self-expression and confidence. These emotional and lifestyle benefits help sustain demand even during periods of economic uncertainty.

Additionally, consumers are beginning to report fewer noticeable price increases across retail channels compared to a year ago. As inflationary pressures ease, beauty and skincare brands may benefit from a more favorable consumer environment where shoppers feel less constrained by rising costs and more willing to invest in products that enhance their daily routines and personal well-being.

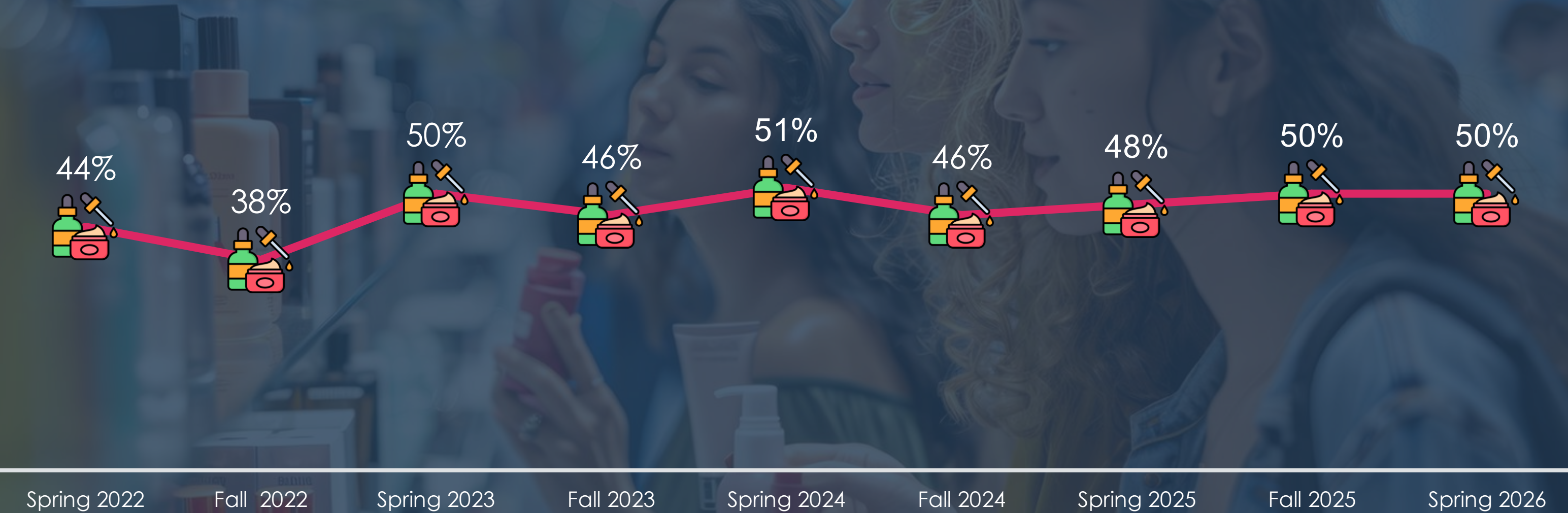
Detailed Findings

Skincare Trends



Skincare Purchases

Skincare purchasing has remained consistently strong over time, demonstrating sustained consumer engagement and reinforcing skincare as a routine part of many consumers' personal care habits rather than a passing trend.



Skincare Purchasers

Skincare purchasing is most prevalent among parents, women, Hispanic consumers, Gen Z, and urban residents.



Who is Significantly More Likely to Purchase Skincare



Parents

61%



Female

60%



Hispanic

59%



Gen Z

57%



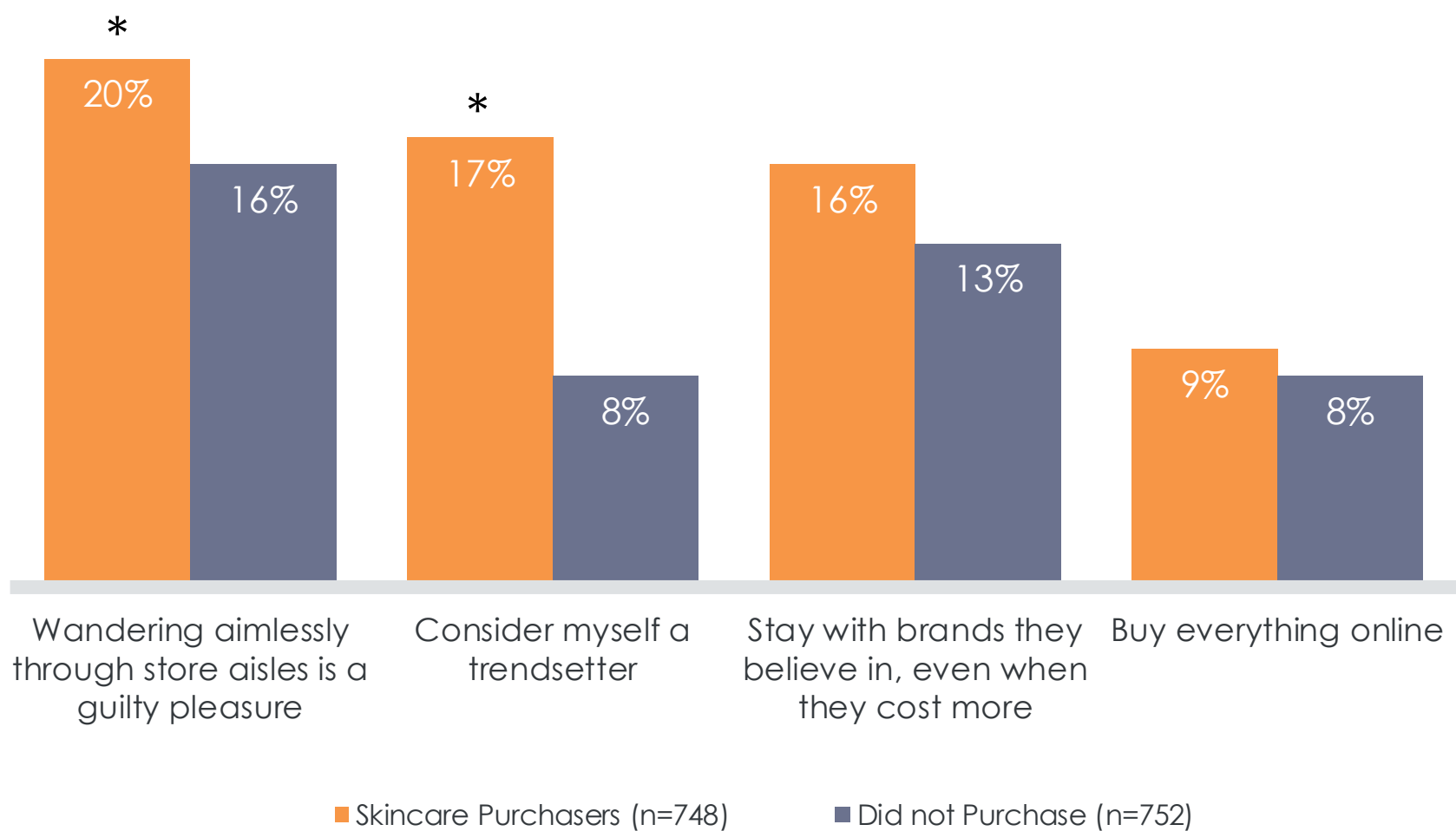
Urban

55%

Skincare Shopper Habits

Recent skincare purchasers are more likely to enjoy shopping, browse for new products, and engage with trends.

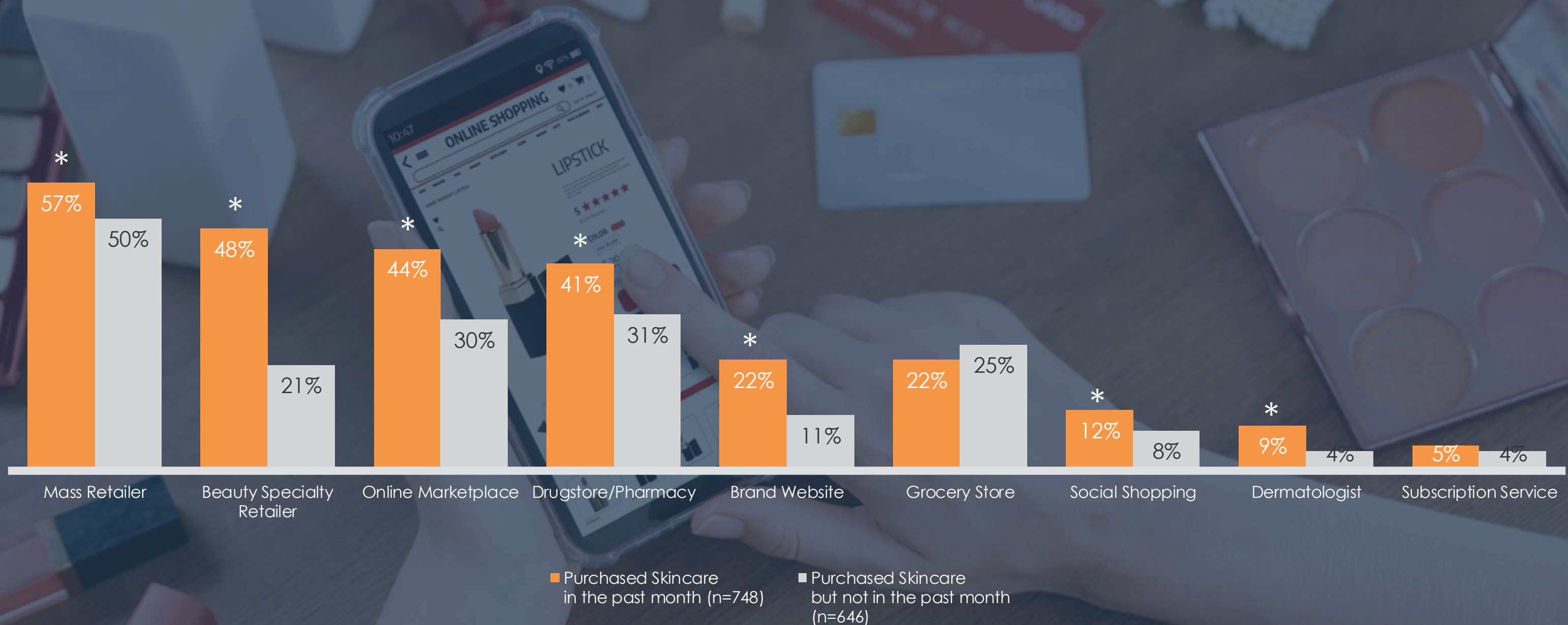
Top 2 on a 7-Point Agree Scale



*indicates significant differences

Skincare Purchase Channels

While mass retailers remain the most common purchase channel, recent skincare purchasers are significantly more likely to shop through beauty specialty retailers, online marketplaces, brand websites, and social commerce, reflecting a highly engaged and digitally connected shopper.



*indicates significant differences

Skincare Purchase Channels by Generation

The skincare purchase journey becomes increasingly digital with younger generations. Gen Z and Millennials stand out for its use of online marketplaces, beauty specialty retailers, and social shopping, while Boomers continue to favor trusted, traditional retail channels

	Gen Z (n=92)	Millennials (n=541)	Gen X (n=440)	Boomers (n=164)
Mass Retailer	49%	57%	52%	53%
Beauty Specialty Retailer	40%	39%	32%	23%
Online Marketplace	43%	39%	36%	30%
Drugstore/Pharmacy	37%	37%	35%	41%
Brand Website	20%	20%	15%	8%
Grocery Store	25%	25%	21%	22%
Social Shopping	19%	13%	4%	1%
Dermatologist	12%	8%	5%	3%
Subscription Service	7%	6%	4%	1%

Reasons for Switching Skincare Brands

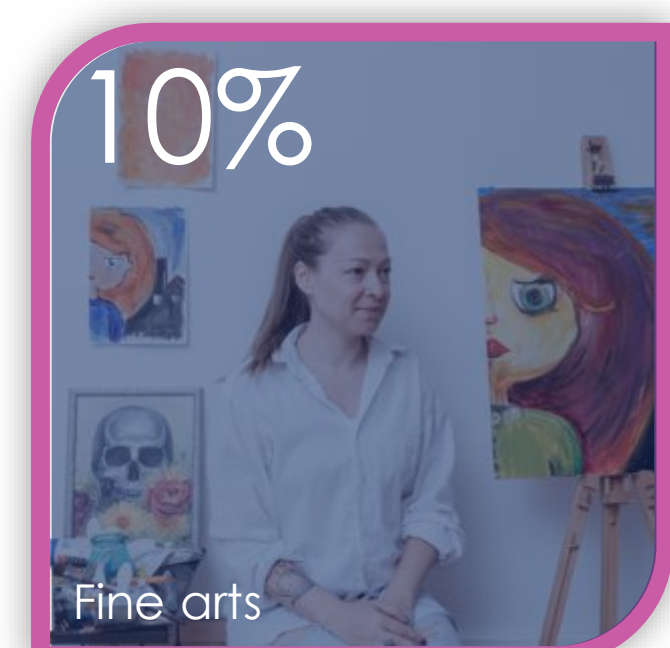
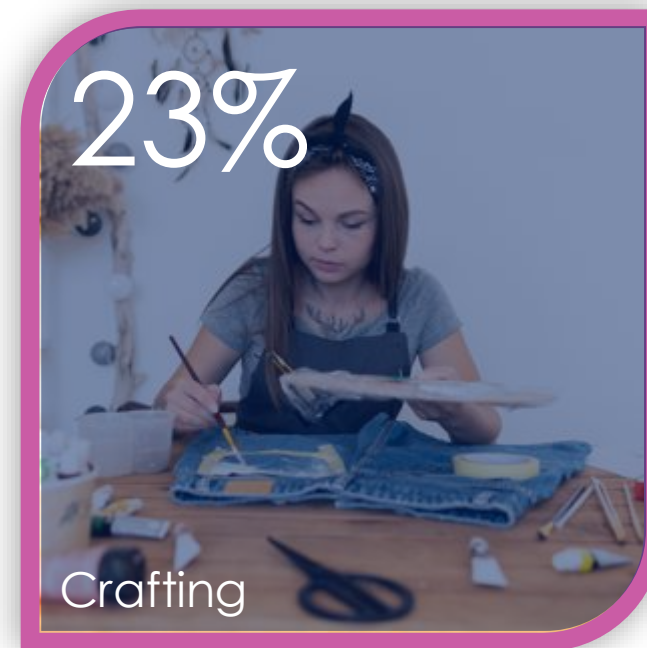
Skincare purchasers are primarily motivated to switch brands when they believe another product will deliver better results, with product performance and ingredients outweighing factors such as packaging, sustainability, or brand reputation.



*indicates significant differences

Skincare Purchasers Value Self-Expression

Skincare purchasers are not only invested in looking their best, but also in expressing themselves through wellness, creativity, and lifestyle activities that enhance their overall sense of self.

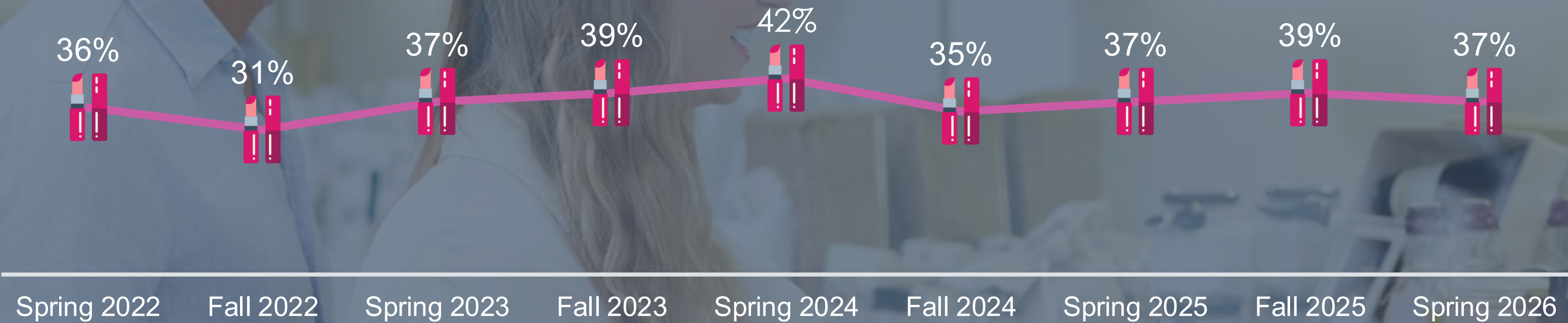




Beauty Trends

Beauty Product Purchases

Beauty product purchasing has remained steady over time, demonstrating sustained consumer demand and reinforcing beauty products as an established part of consumers' personal care routines.



Beauty Product Purchasers

Over a third of consumers are buying beauty products in the last month with women, Millennials, Hispanic consumers, and urban residents leading category engagement.



Who is Significantly More Likely to Purchase Beauty Products



Female

53%



Parent

49%



Hispanic

48%



Urban

43%



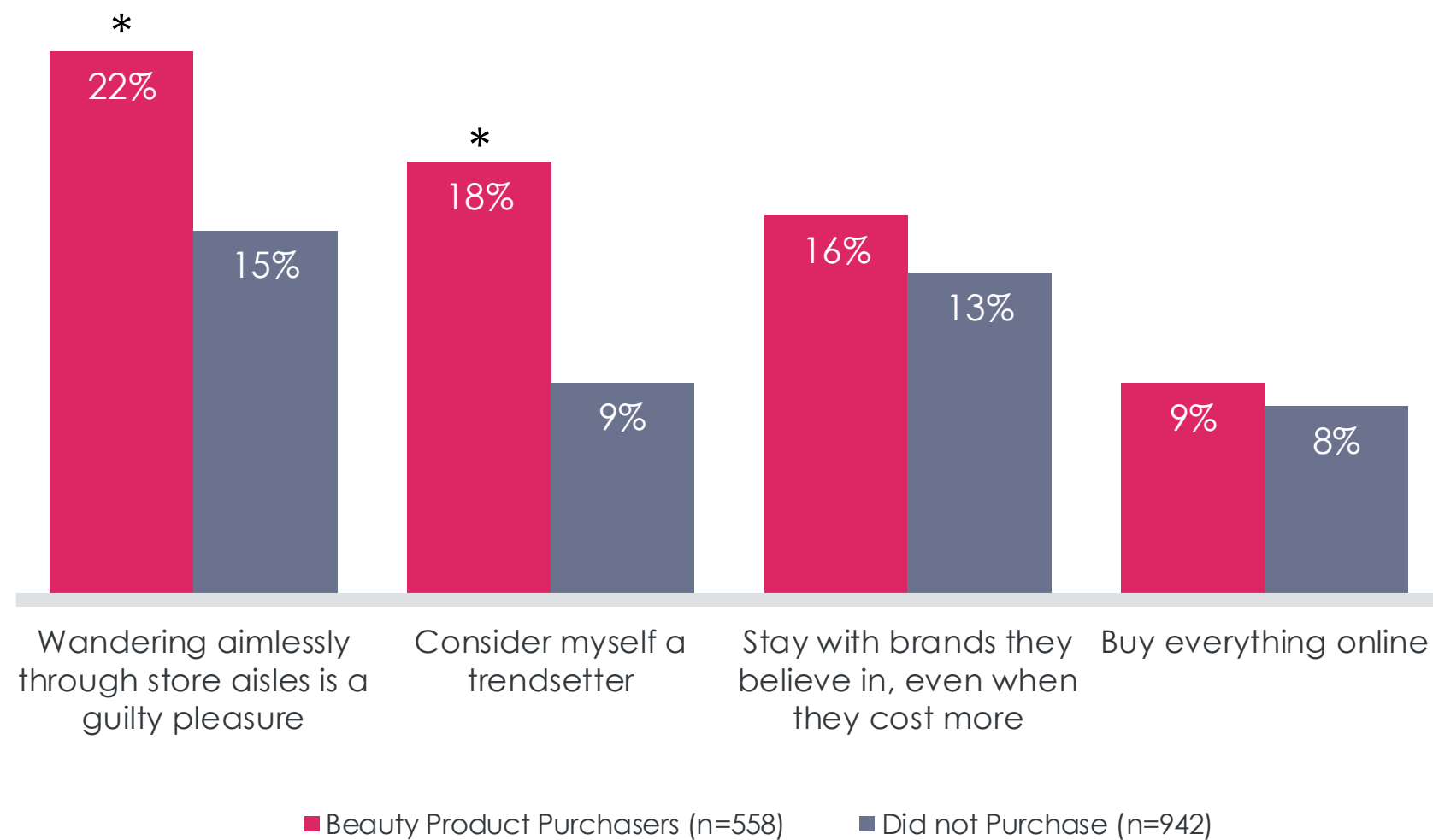
Millennials

42%

Beauty Products Shopper Habits

Beauty product purchasers are more engaged with the shopping experience and more likely to identify as trendsetters.

Top 2 on a 7-Point Agree Scale

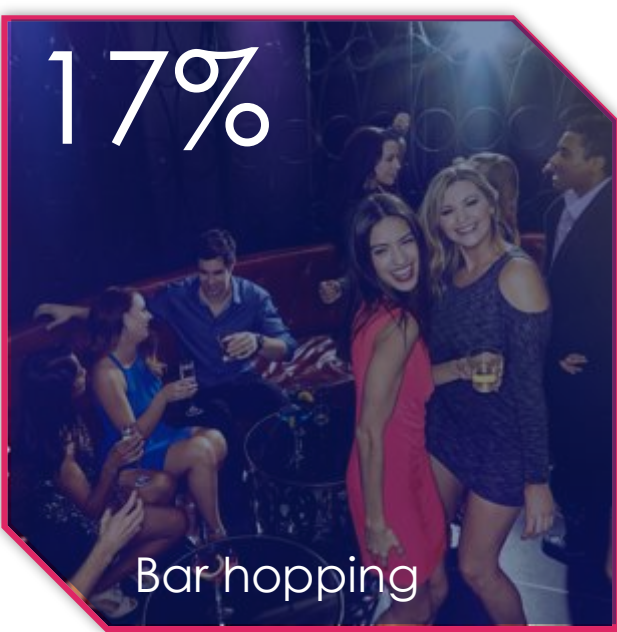
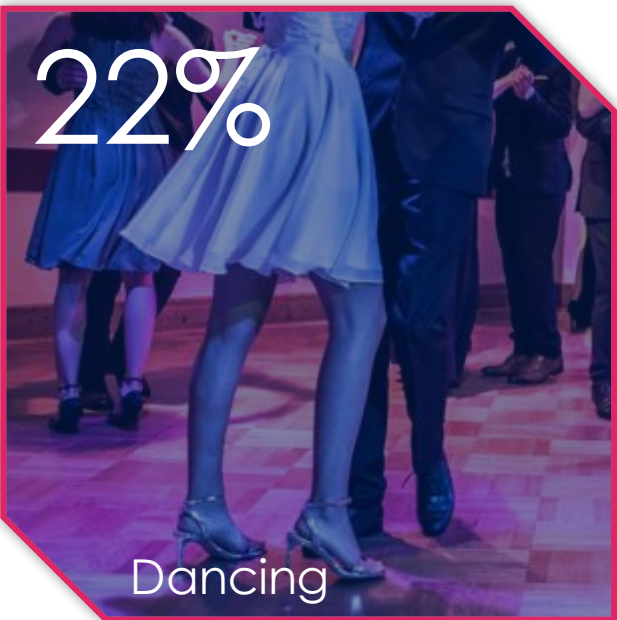
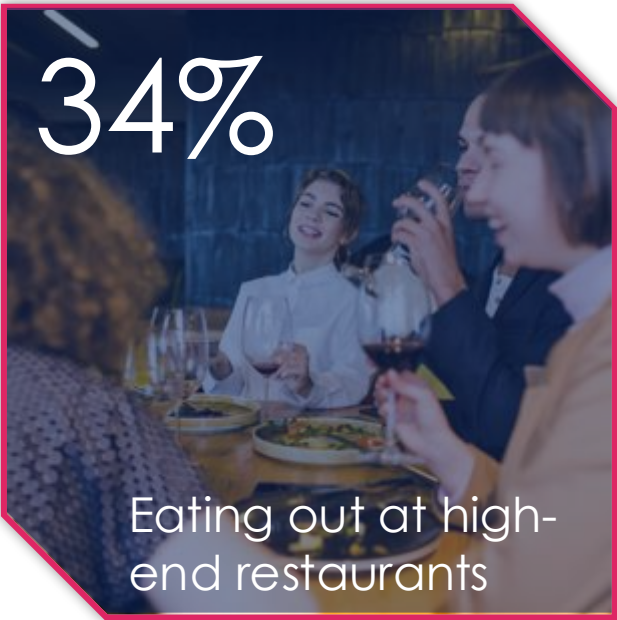


*indicates significant differences



Beauty Purchasers Have Busy Social Lives

Beauty purchasers are more likely to participate in social and experiential activities, including travel, dining, concerts, and nightlife.

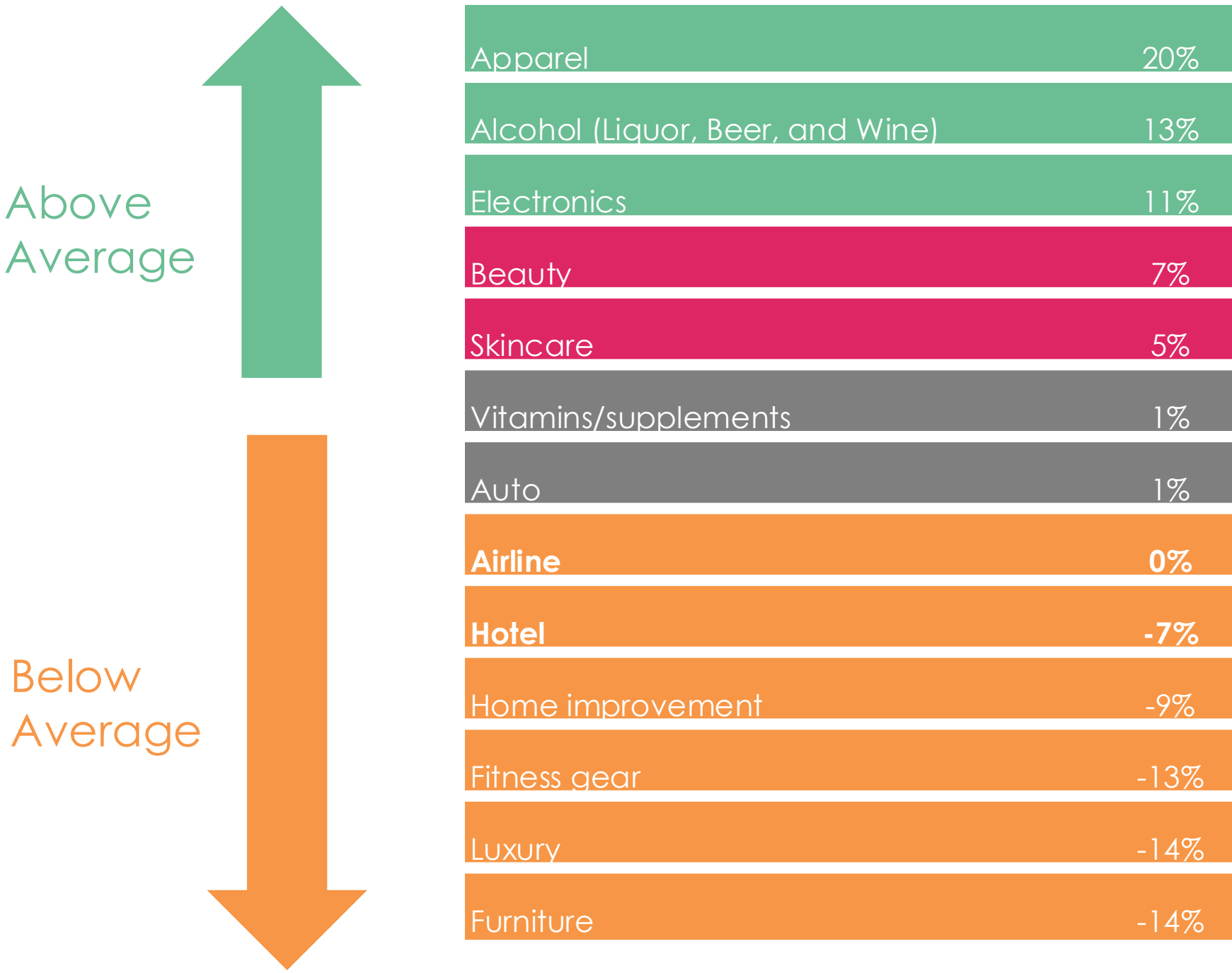


A woman with long blonde hair, wearing a white turtleneck sweater and blue jeans, stands in a cosmetics store. She is looking at a large, multi-tiered display of lipsticks. The display is filled with numerous lipstick tubes in various shades of red, pink, and orange. Another person's hand is visible, pointing at one of the lipstick tubes. The background shows more shelves stocked with various cosmetic products. The overall scene illustrates the concept of brand loyalty and purchase overload.

Brand Loyalty and Purchase Overload

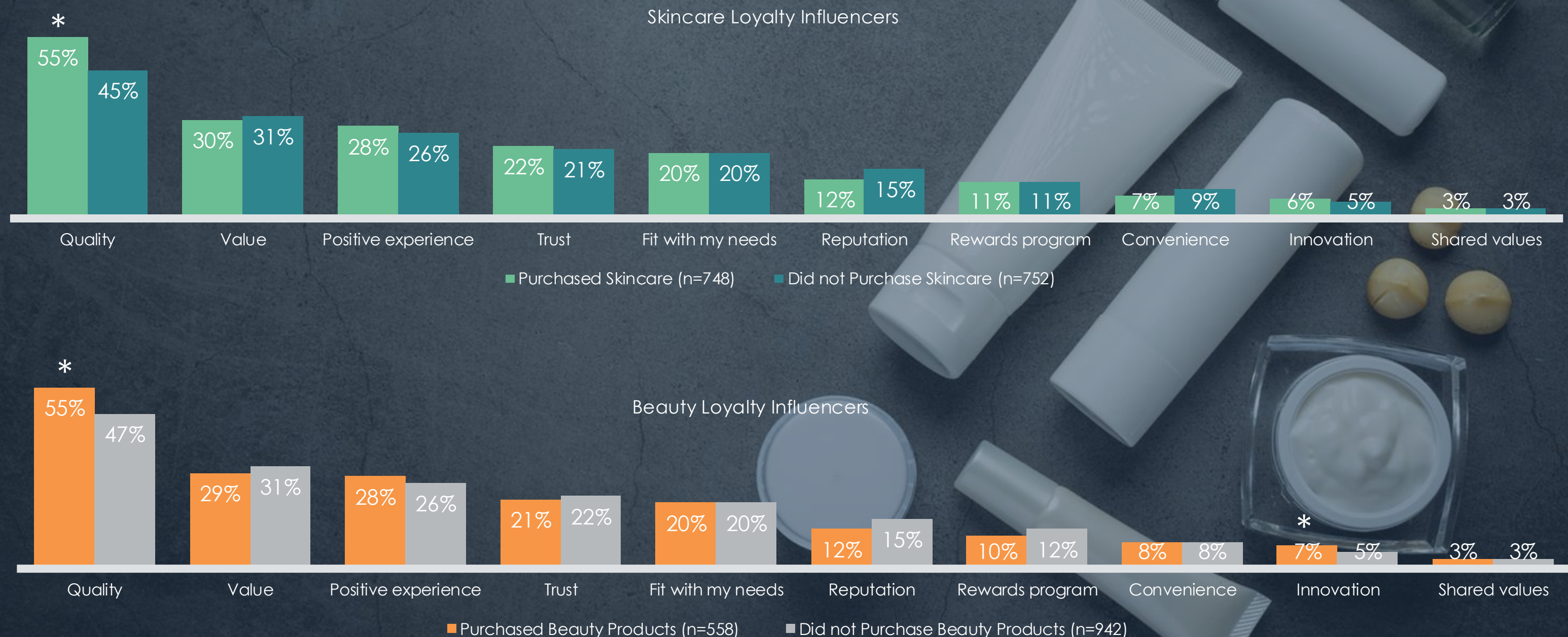
Brand Loyalty Index

Beauty and skincare show moderate levels of brand loyalty relative to other categories, balancing established preferences with openness to alternatives.



What Drives Loyalty to Skincare and Beauty Brands

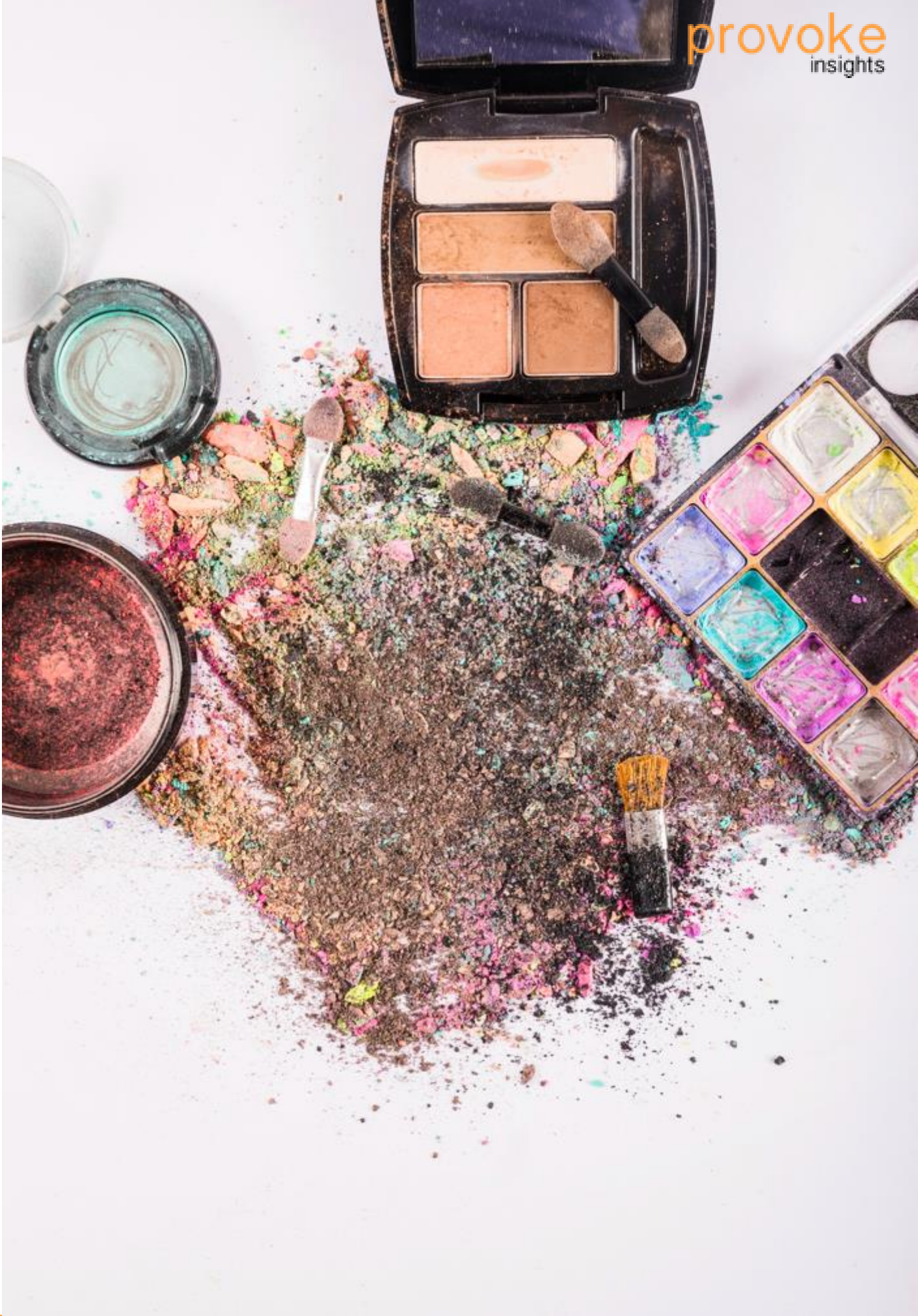
Although skincare and beauty consumers are willing to explore new products, their loyalty is ultimately driven by brands that consistently deliver quality, value, and results that fit their needs.



Reasons Skincare & Beauty Products Shoppers Break Up With Brands

Skincare and beauty shoppers are most likely to leave brands when product quality declines or prices increase, reinforcing that loyalty is earned through consistently delivering value and performance.

	Purchased Skincare (n=748)	Purchased Beauty Products (n=558)
Decline in quality	47%	46%
Price increases	33%	32%
A bad personal experience	22%	23%
Availability issues	14%	14%
Poor customer service	12%	14%
Values misalignment	10%	9%
Too many product changes	9%	9%
Negative news	9%	8%
Convenience issues	7%	6%
Worried about receiving counterfeit	5%	6%
Promotions from competitors	4%	4%
Found a generic brand/dupe	4%	4%
Spokesperson feels inauthentic	3%	3%



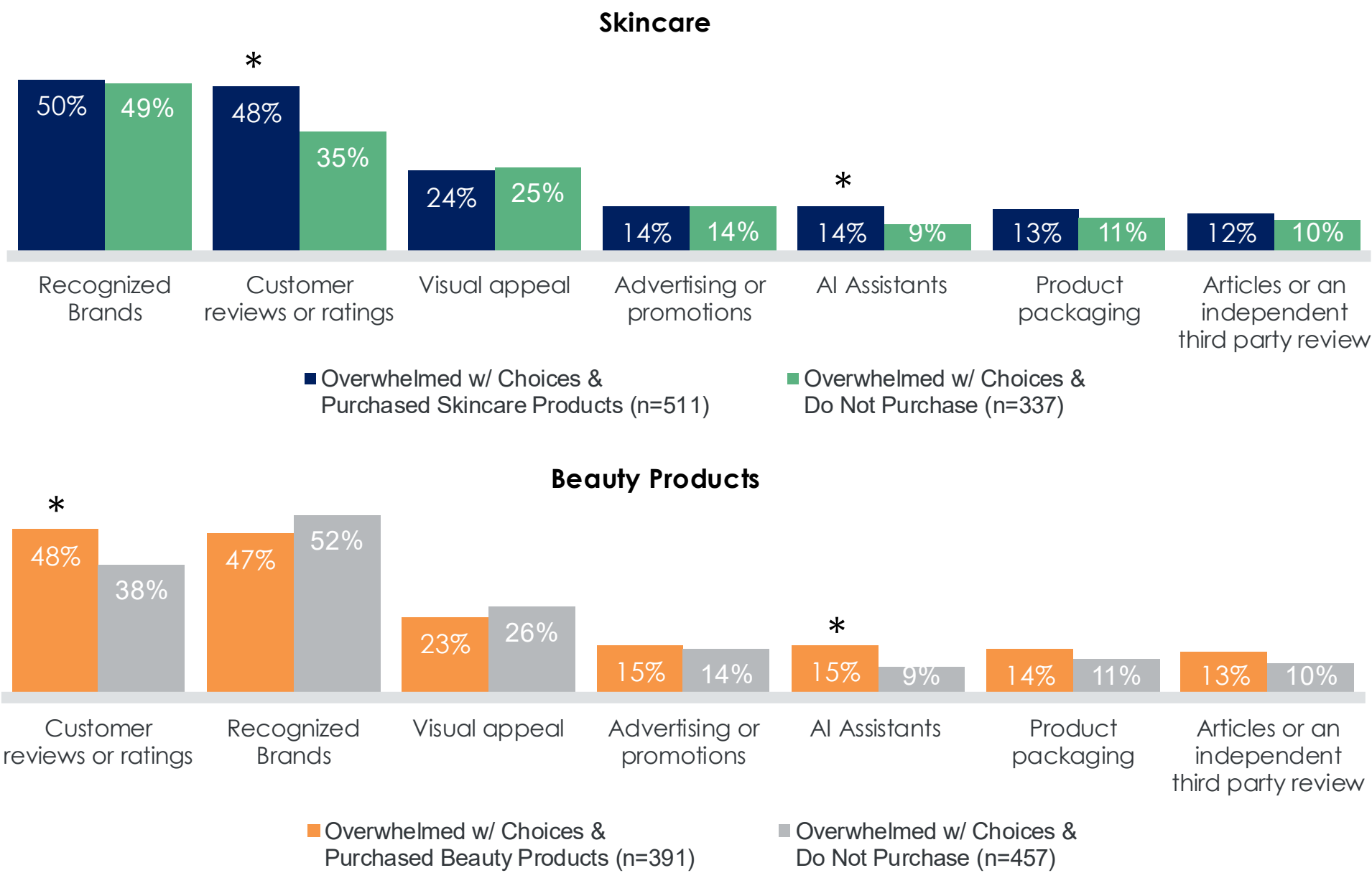
Overwhelmed Shopping

Skincare and beauty products are the most overwhelming shopping categories for consumers, emphasizing the high volume of choice shoppers face when navigating beauty and skincare purchases.



How Consumers Navigate Choice Overload

When faced with an overwhelming number of choices, skincare and beauty shoppers simplify decisions by turning to trusted brands and customer reviews, making credibility and social proof more influential than advertising or promotions.



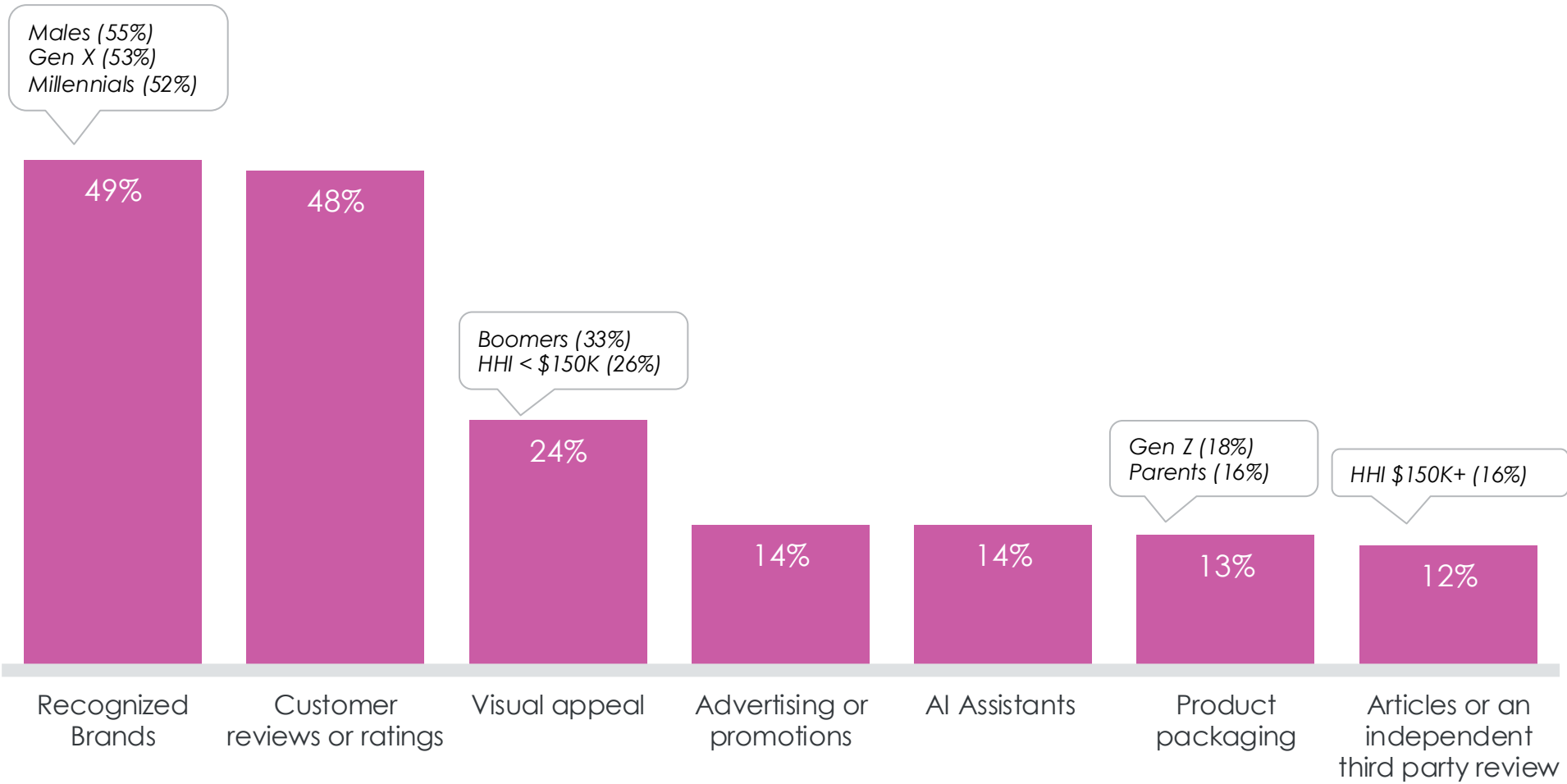
*indicates significant differences



Q. When you feel overwhelmed by too many product choices, which of the following helps you decide what to buy? (Select up two reasons)

How Consumers Navigate Choice Overload

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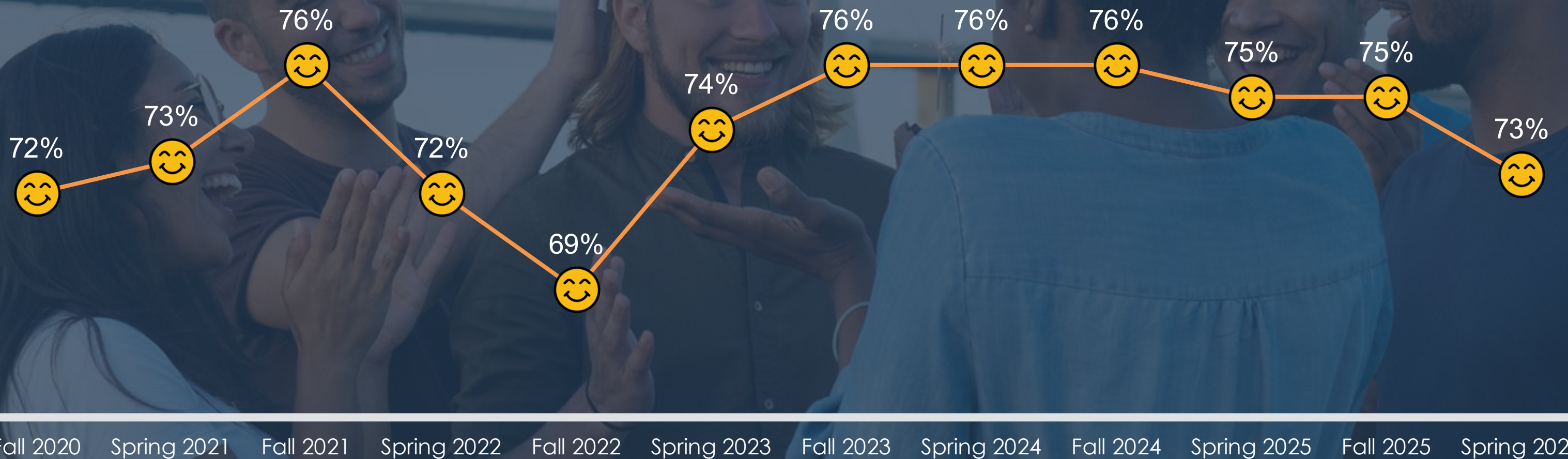
Optimism, Finances, & The Economy



Consumer Optimism

Overall, Americans experienced a slight dip in optimism for the future.

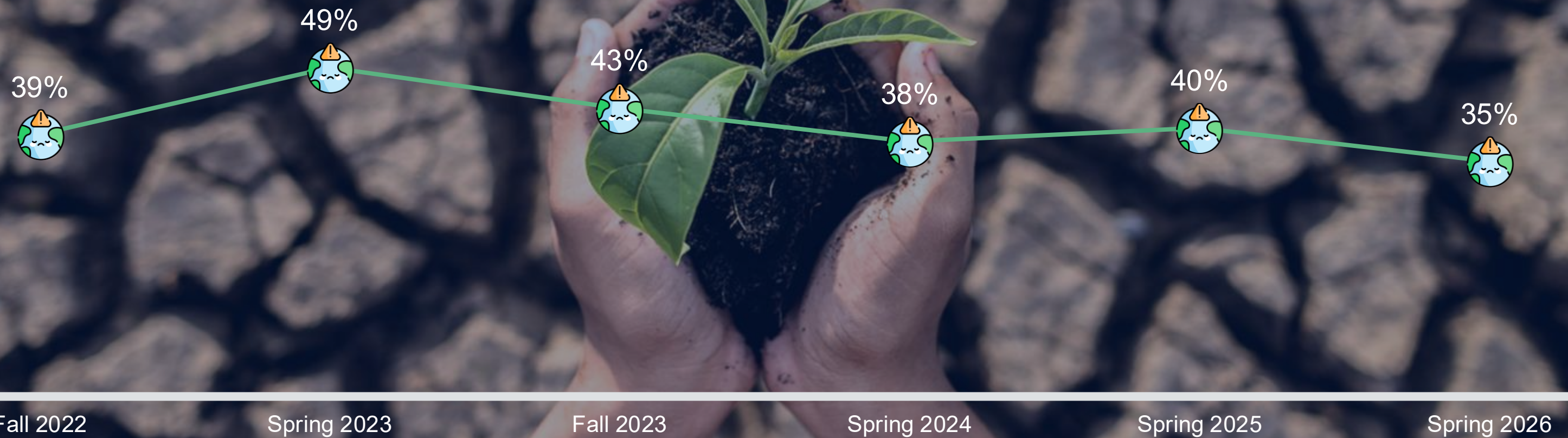
Optimism
Top 2 box on a 4-point scale



Climate Concerns

Concern about climate has declined overall since its peak in Spring 2023, with only modest fluctuations in recent periods.

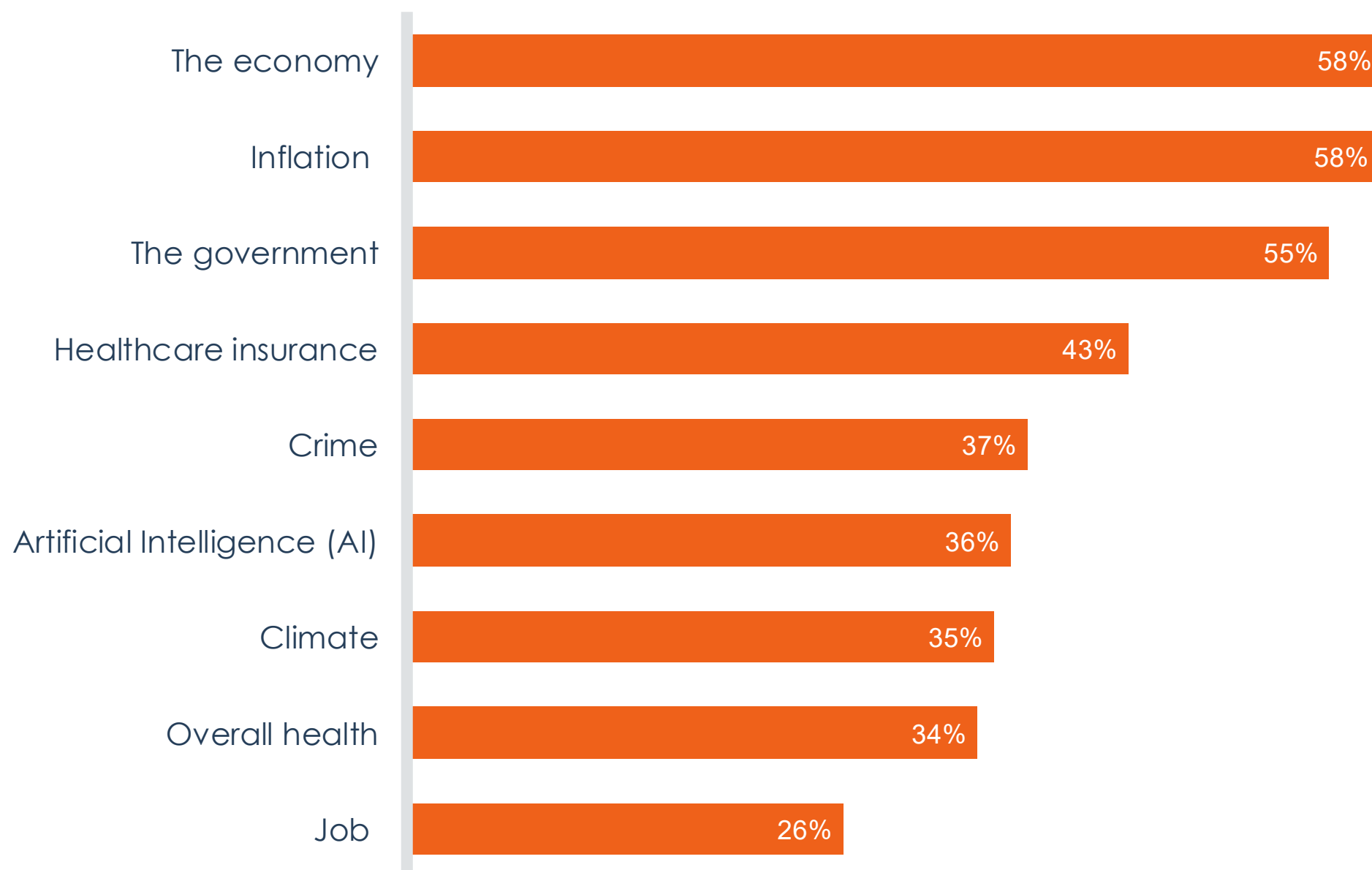
Concern on Climate
Top 2 box on a 5-point scale



Top Concerns Impacting Consumers

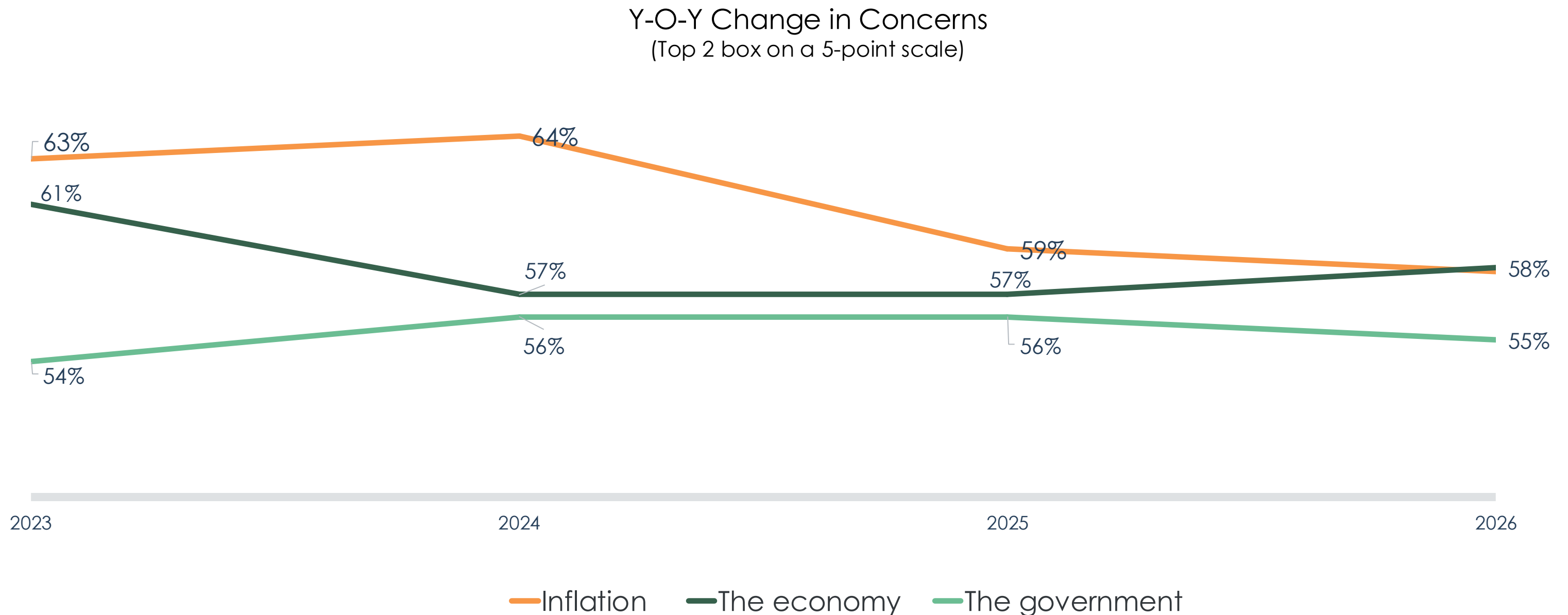
Economic concerns dominate, with the economy, inflation, and government leading, while healthcare remains a key personal worry and emerging issues like AI and climate follow behind.

Concern
(Top 2 box on a 5-point scale)



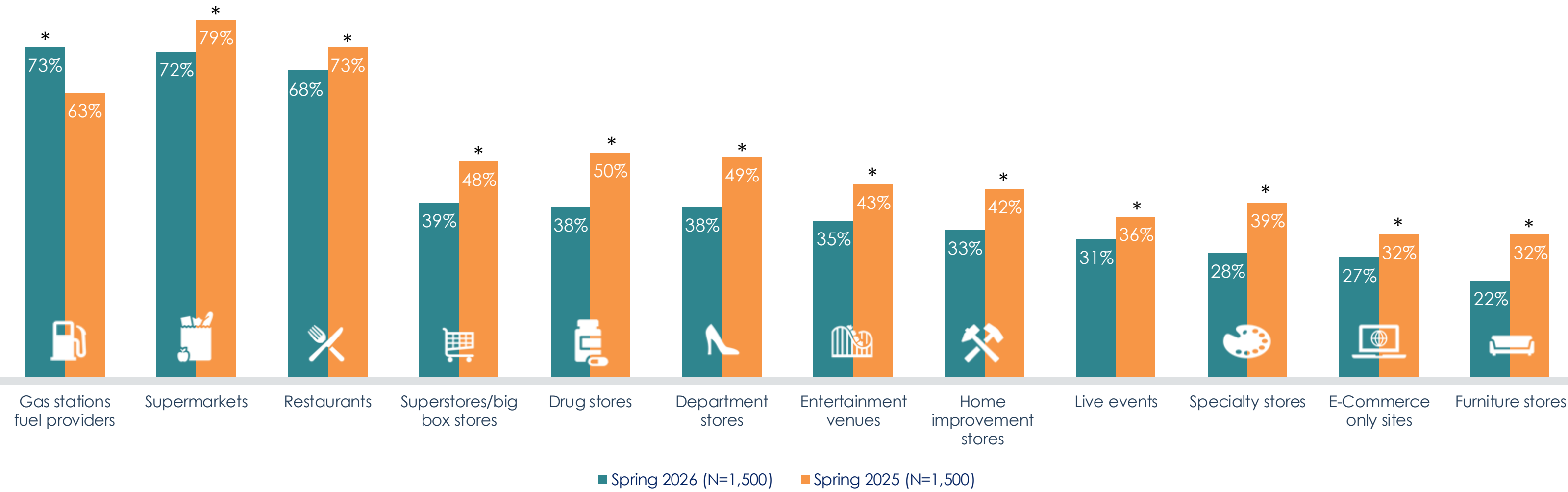
Top Concerns Impacting Consumers

Since 2023, American consumer concerns are still dominated by inflation and the economy, though both fell slightly over the years while concern on the government remains unchanged.



Inflation Impact Across Different Types of Stores

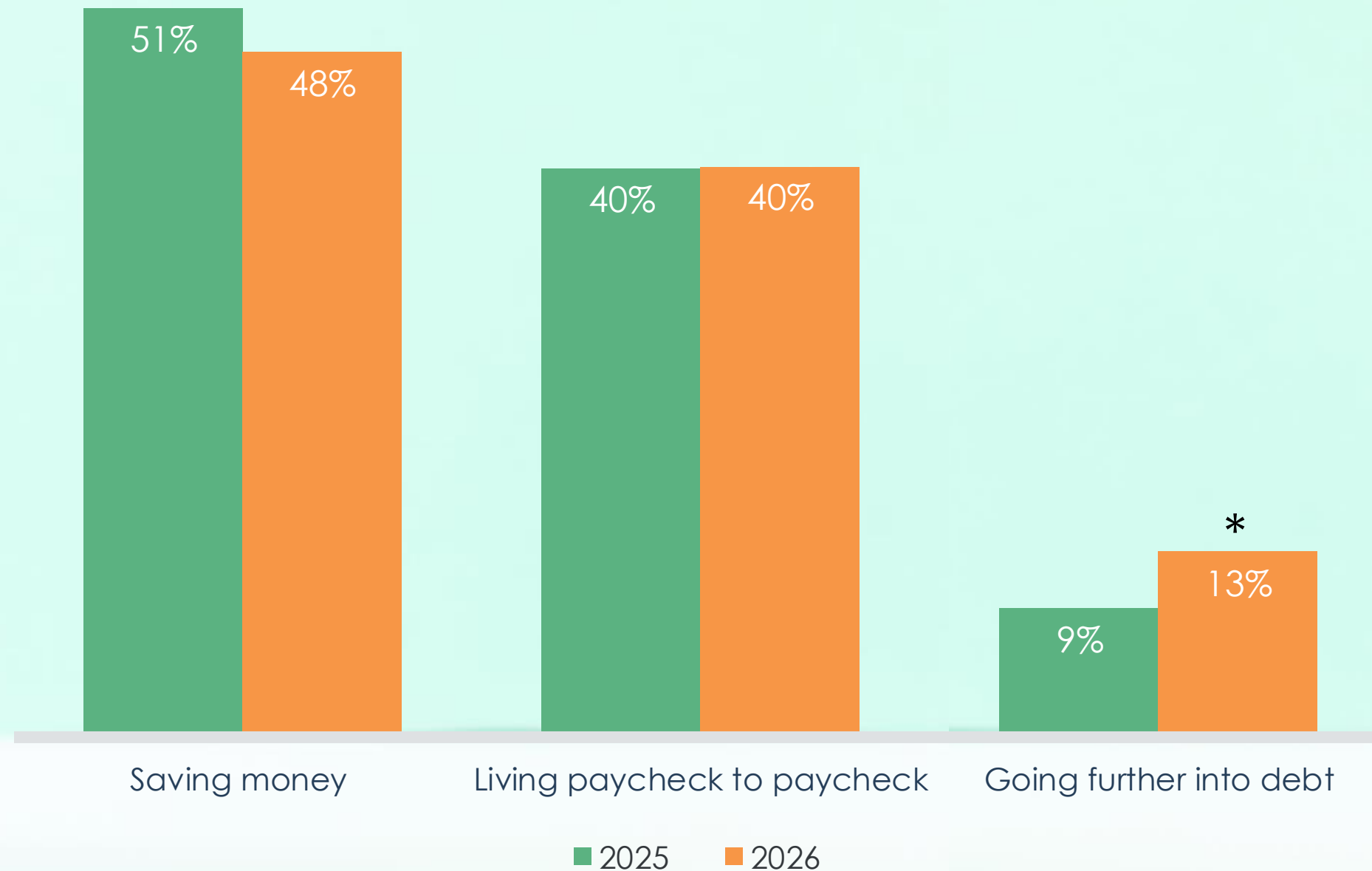
Reduced reports of price increases may create a more favorable environment for discretionary categories such as skincare and beauty.



*Indicates significant differences

Financial Positions

Consumers are increasingly financially strained, with significantly more consumers going into debt this year.

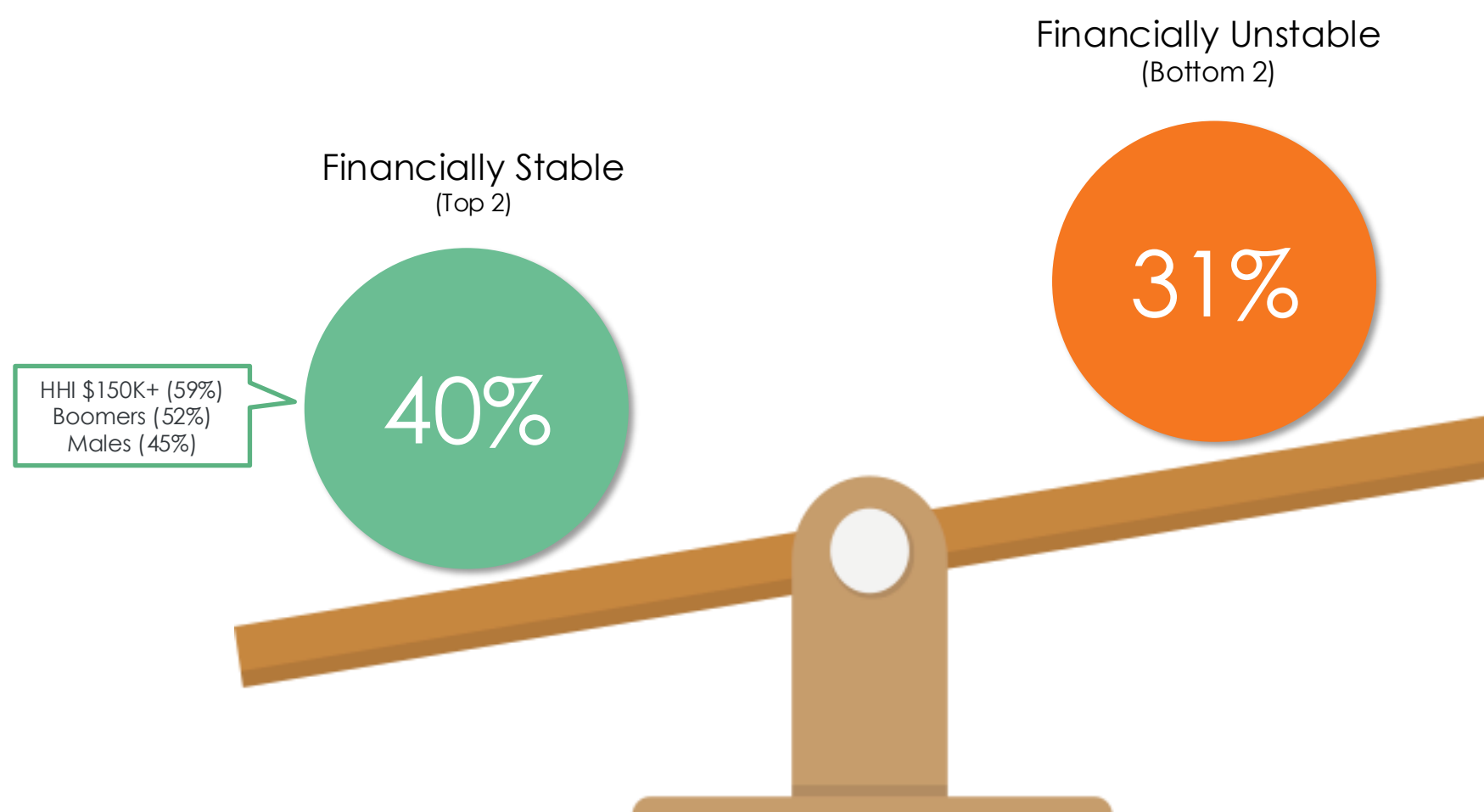


*Indicates significant differences

Future Financial Stability

Consumers are only modestly optimistic about their future financial stability, with a substantial share still feeling unstable. Confidence is notably stronger among higher-income households and older consumers.

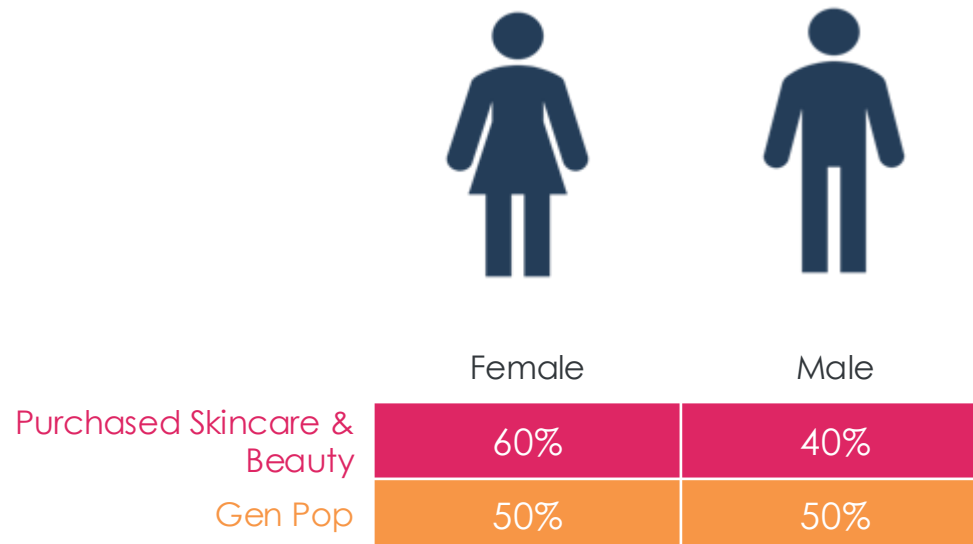
Financial Stability in the Future



Respondent Profile

Skincare & Beauty Purchaser Profile

Gender



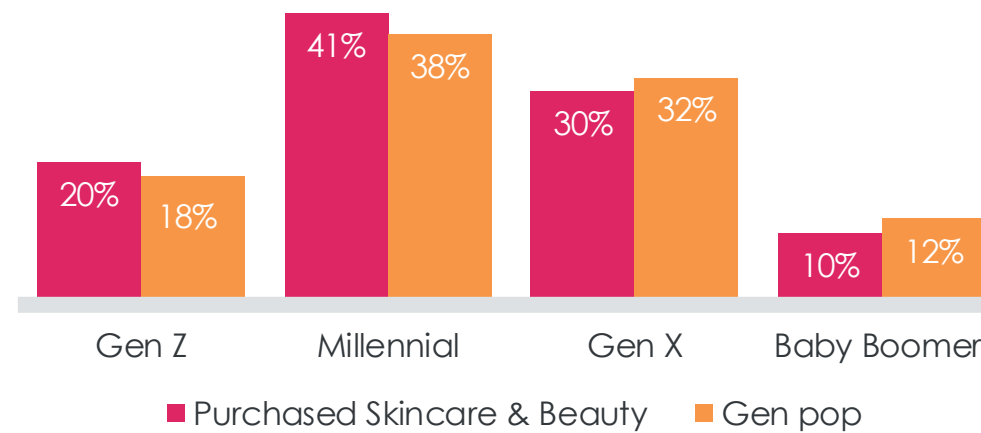
41 years old
Median Age



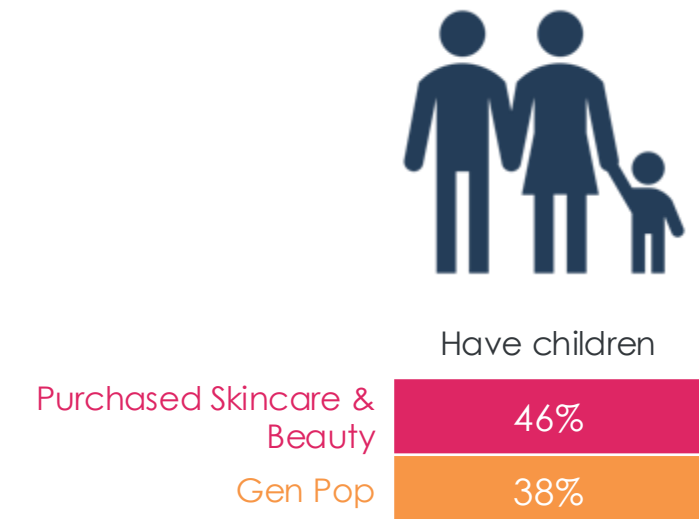
43 years old
Median Age



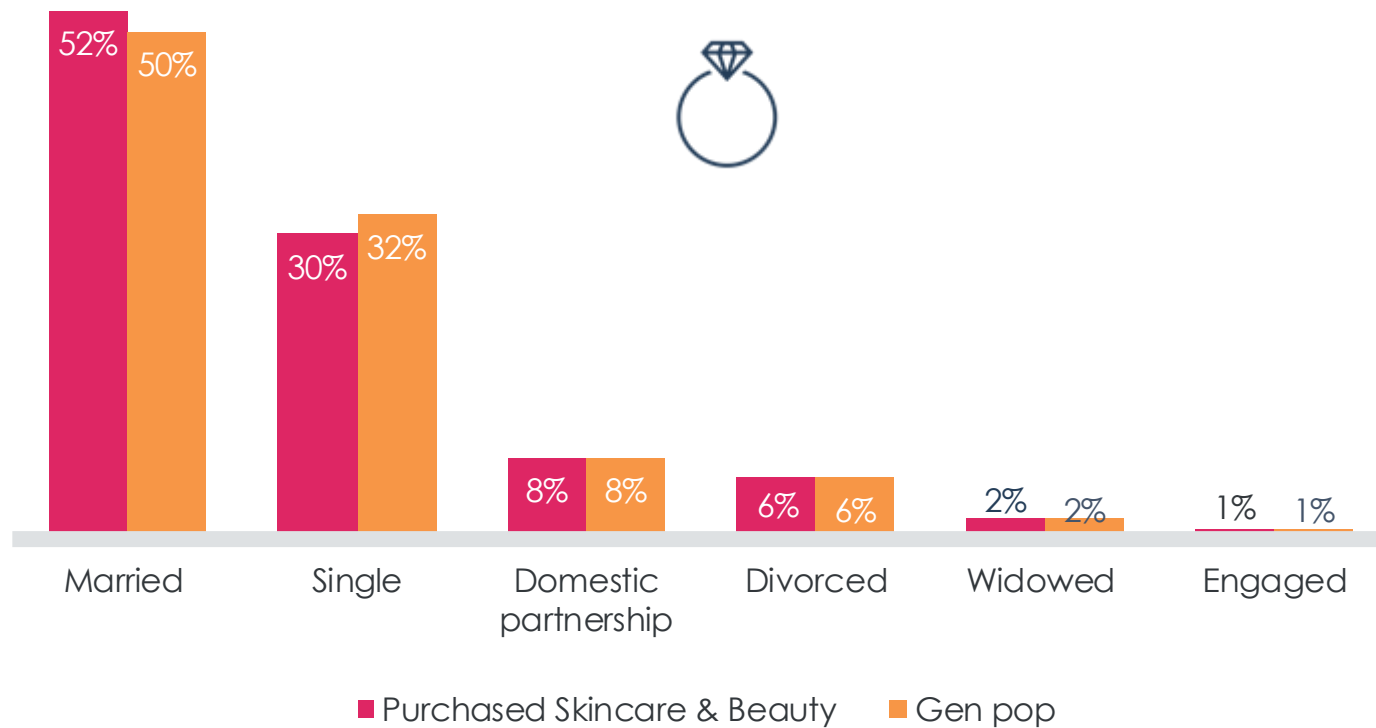
Generation



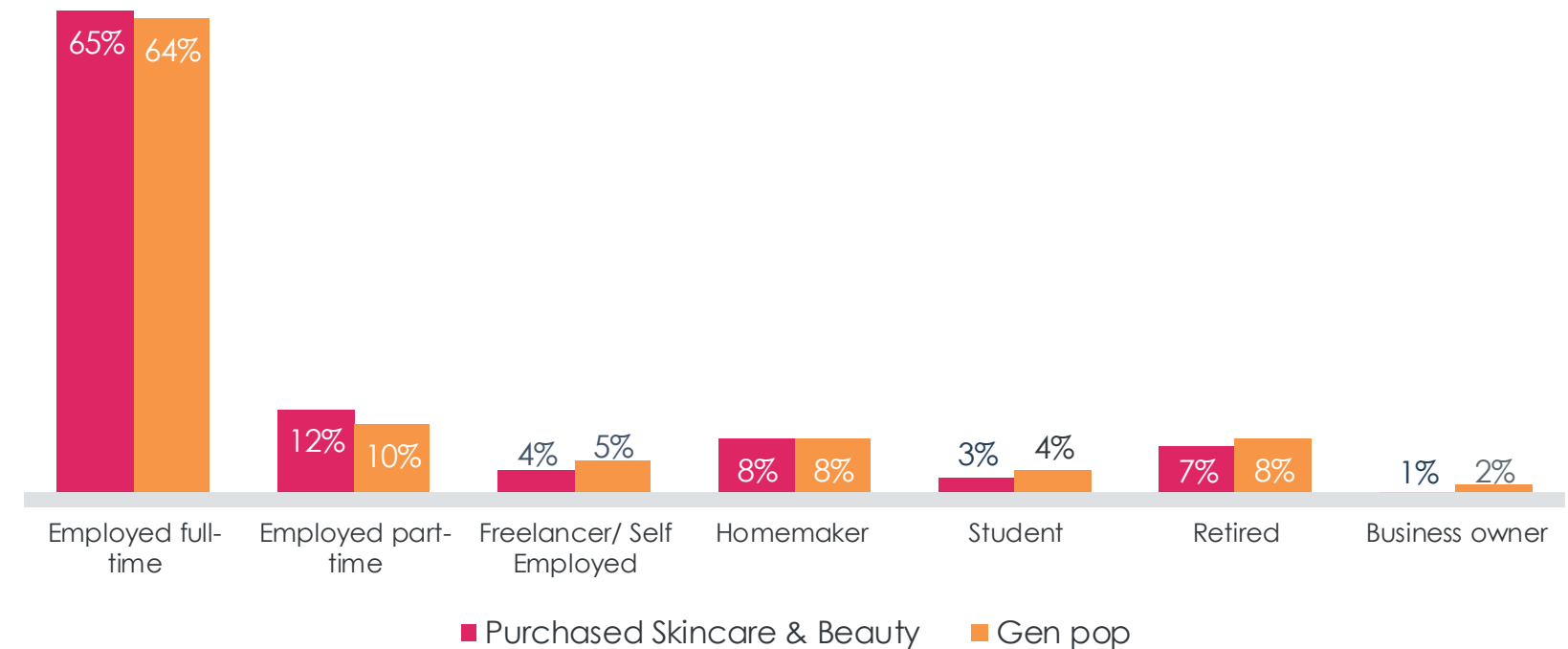
Children Under the Age of 18



Marriage Status

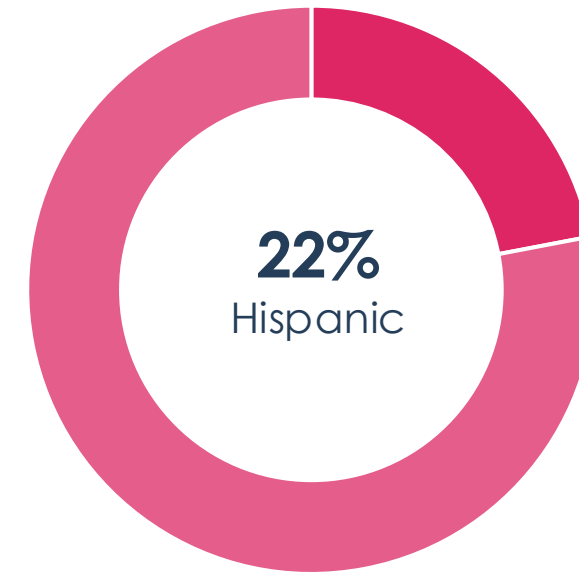
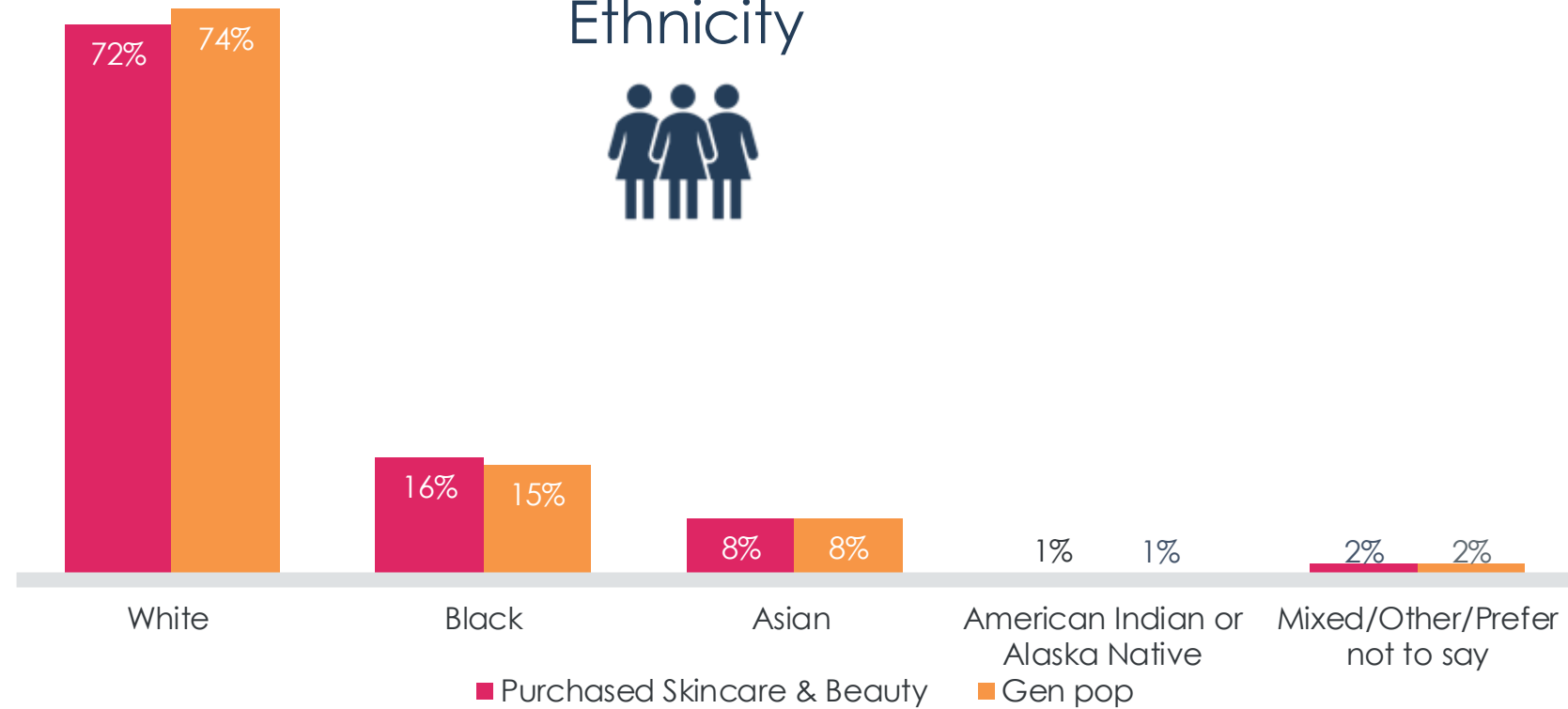


Employment Status

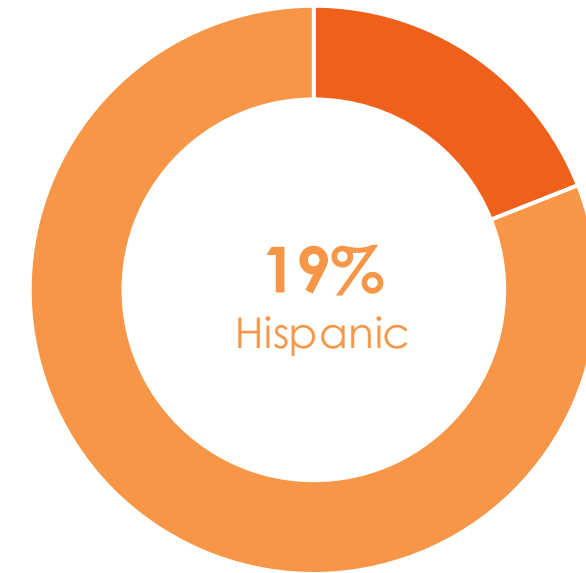


Skincare & Beauty Purchaser Profile

Ethnicity



Purchased Skincare & Beauty



Gen pop

Area



Rural

Suburban

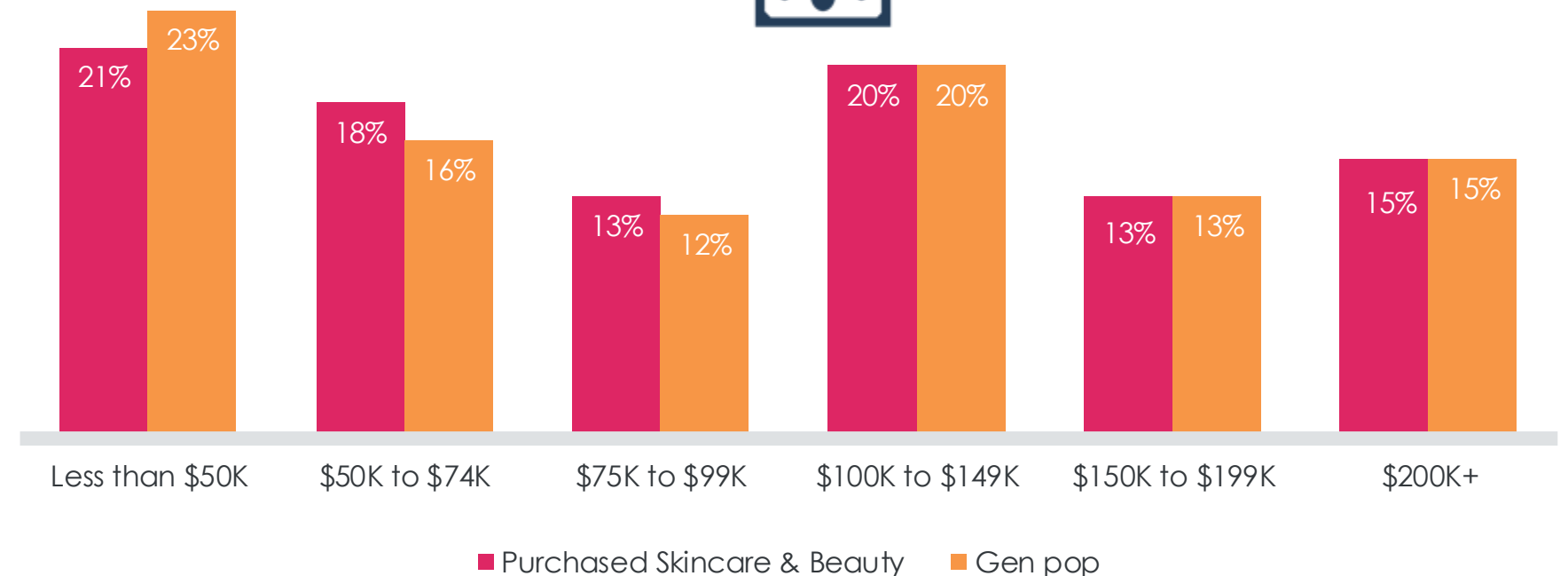
Urban

Purchased Skincare & Beauty

Gen Pop

21%	49%	30%
24%	50%	26%

Household Income



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.

We partner directly with brands to design and execute custom research initiatives that inform critical marketing and business decisions. Unlike traditional market research firms, we take a more agile and innovative approach to our work. Our team is dedicated to developing initiatives that 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, tailored insights that help brands succeed in their marketing efforts.

Our trends reports are designed to showcase our thinking and approach, and to spark conversations with brands looking for deeper, customized research.

For more information or to discuss a potential engagement, reach out to info@provokeinsights.com.

