

REPORT 01
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THE MOVE
Makeup
The Covid Effect

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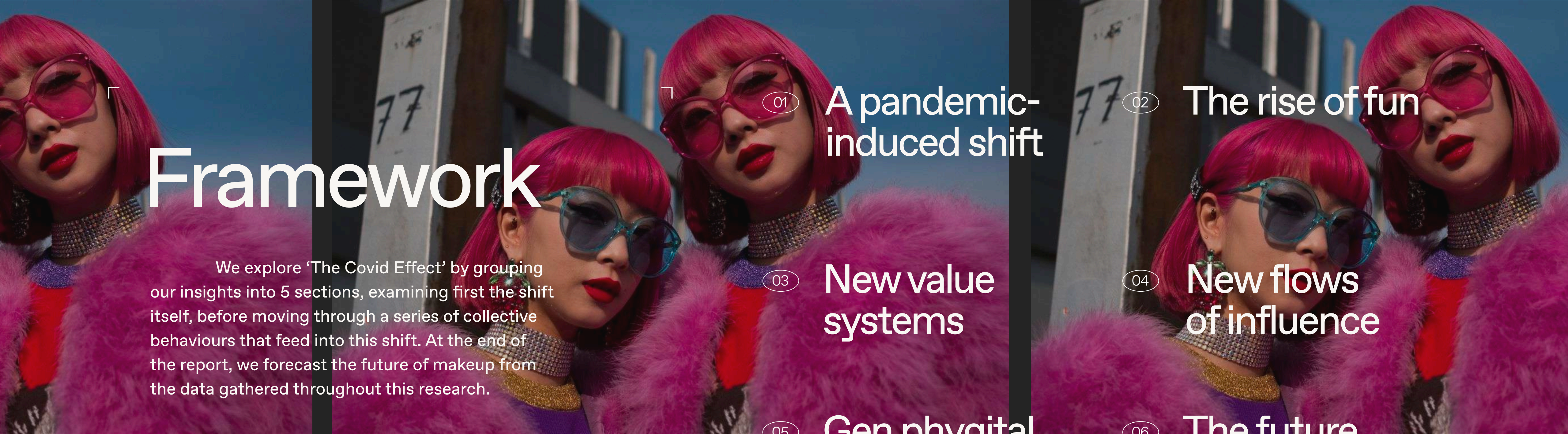
REPORT 01
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WE ARE

THE MOVE

A next-gen cultural insights platform, powered by a globally diverse, hyper engaged Gen Z community.

We are "cultural decoders"; we put an unfiltered spotlight on their voices, and offer brands a real-time source for cultural relevance and future-focused thinking.



Framework

We explore 'The Covid Effect' by grouping our insights into 5 sections, examining first the shift itself, before moving through a series of collective behaviours that feed into this shift. At the end of the report, we forecast the future of makeup from the data gathered throughout this research.

01

A pandemic-induced shift

03

New value systems

05

Gen phygital

02

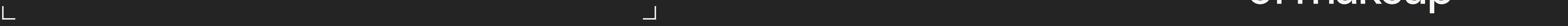
The rise of fun

04

New flows of influence

06

The future of makeup





Source: Polina Tankilevich via Pexels

As with other defining moments in history, our understanding of the world is now split; there's life before March 2020, and life after.

The Covid-19 pandemic transformed nearly every aspect of our lives. Daily routines were halted, and we were forced into long-term isolation as we conceived new ways to deal with our sudden and alien realities. Unsurprisingly, while all generations have experienced unique pressures and challenges related to the pandemic, Gen Z has been especially impacted.

As they come of age in a society that is grappling with the toxicity of institutional racism and sexism, as well as the collapse of traditional ideas regarding gender and sexuality, Gen Z is acutely aware of the world around them and how the pandemic will have deep and lasting effects on their immediate and long-term futures. But true to form – as the generation known for ripping up the rule-book – they have found small and impactful ways to take back control and find joy.

Faced with uncertainty and an unprecedented amount of free-time in the past year, Gen Z harnessed the power of makeup as a creative and self-care tool that helped visually express their complex and often conflicted states of being. This report explores the pandemic-induced paradigm shift, positioning beauty products as tools for experimental and joyful self-expression, which is part of a wider cultural movement to take ownership of the Covid narrative and experience.

Methodology

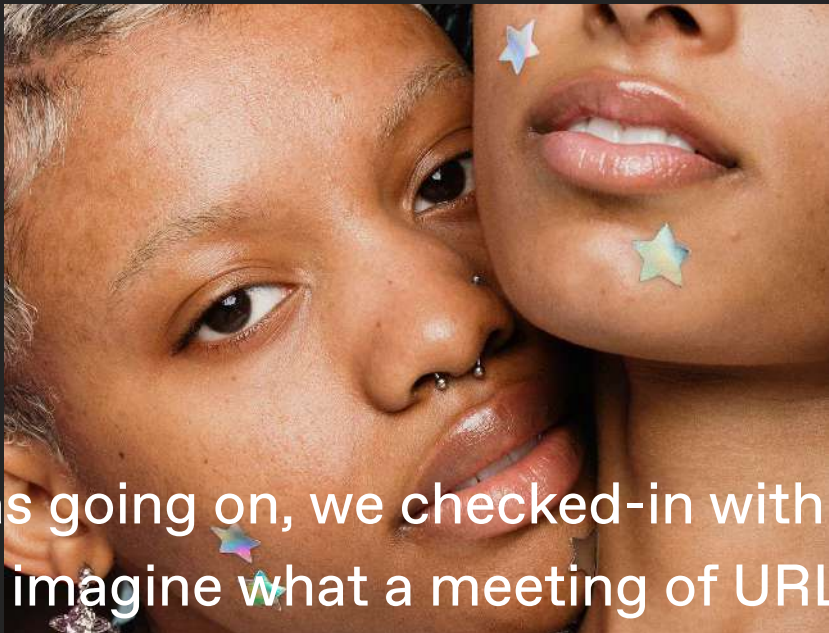
Secondary Research 01

Having closely monitored the effects of the pandemic across the past eighteen months, when we noticed a youth-driven cultural shift in makeup, we started with desk research, pulling from a variety of sources across channels and platforms to qualify our observations. We poured over articles, thought-pieces, tweets, TikToks and Instagram feeds, occasionally falling into a YouTube rabbit hole or scrolling too far down a Reddit thread.

Source: Rodnae via Pexels,
Starface Skincare and MyBeautyBrand.

Community Conversations 02

With a clearer idea of what was going on, we checked-in with our Gen Z community. To help us imagine what a meeting of URL and IRL will look like as we re-emerge into society, we conducted a survey, asking them to share how they spent their time in lockdown and what they will be carrying forward.



Community panel 03

Makeup is an incredibly personal medium, and in order to gain a more intimate and real understanding of how this shift was playing-out in culture, we pulled together a panel of thirteen beauty early-adopters and conducted a series of interviews across June and July of 2021. We explored the role that makeup plays in their lives and interrogated their online habits as a way to help us map out the future of makeup.



RYAN, 26
LONDON

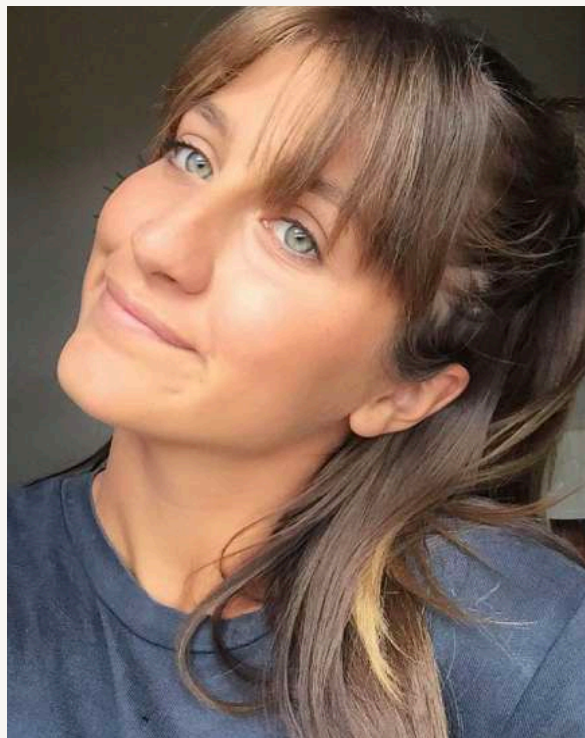
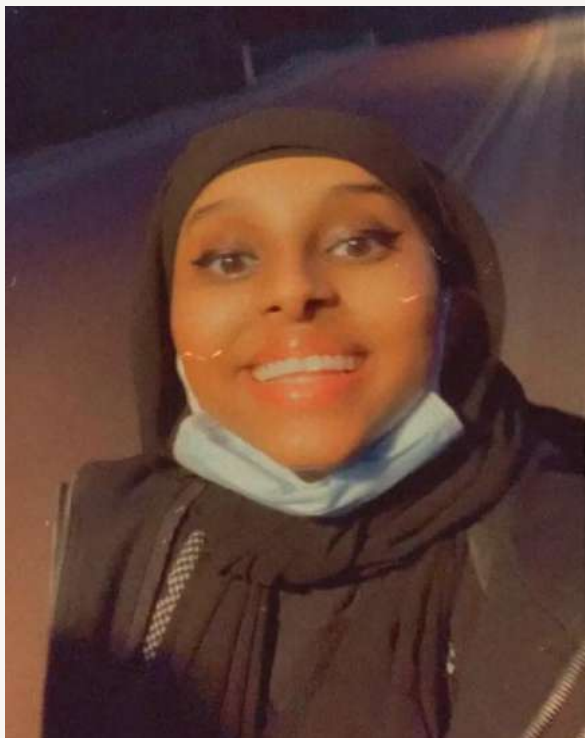
LYNN, 16
LONDON

LEAH, 20
SURREY

LIAM, 22
ESSEX

ISOBEL, 22
LONDON

GEORGINA, 23
BRIGHTON



ZAHRA, 17
LONDON

PRASIE, 19
ESSEX

GINA, 23
LEEDS

RHIANNON, 26
MANCHESTER

LIV, 21
WORCESTER

PLAMEDIEE, 19
LONDON

MEGAN, 25
MANCHESTER

Summary of findings

01	02	03	04	05	06
GEN Z IS USING MAKEUP AS A SELF-CARE TOOL TO DEAL WITH STRESS. During the uncertain times of the pandemic, Gen Z turned to makeup as a form of escapism. Free from the constraints of their everyday life, they retreated into their personal rituals, conjured up fantasies and expressed their feelings through makeup.	GEN Z IS ACTIVELY SEEKING OPPORTUNITIES FOR FUN. The pandemic was a particularly heavy time for Gen Z; they missed out on milestone life moments and were at the forefront of a global social reckoning. Post-lockdown, they are consciously adopting a more fun-led approach to life and their makeup choices reflect this.	GEN Z’S URL PERSONA IS AN EXTENSION NOT A REFLECTION OF THEIR IRL. The ‘pause’ of the pandemic has given Gen Z great time for self-reflection and time online. This combination has led to Gen Z to use their online persona as an extension of their identity to explore looks, ideas and realities that they cannot or do not want to pursue in real-life.	GEN Z IS NO LONGER CALLING ON POPULAR BRANDS TO BE MORE INCLUSIVE. Gen Z has evolved the conversation around inclusion and what it means to support a brand. They will no longer stay where they or their peers are not represented and are seeking out niche brands that have emerged to fill this gap.	GEN Z TELLS GEN Z HOW TO LOOK GOOD AND WHAT TO BUY. Gen Z is turning to their peers instead of influencers; they are teaching each other skills and exchanging information, creating a new flow of influence.	TIKTOK IS THE HOME FOR THE IMPERFECT. Gen Z has long been in search of a less formal way to engage with each other and the world. During the pandemic, when no one really had the time or willpower to look presentable, TikTok offered a space where Gen Z could come as they were and connect.

A pandemic-induced *shift*



Source: Rodnae via Pexels
Previous page source: Cottonbro via Pexels

Finding freedom in a global lockdown

Over the many Covid lockdowns, Gen Z turned to makeup for escape. Filling their boredom with experimentation, they crafted bold, expressive and unusual looks to share on social media. Feeds and timelines were buried in images of neon lids, bleached eyebrows, graphic liners, glitter freckles and a multitude of shapes and patterns, as they pushed the boundaries of makeup and ventured into new and elaborate fantasies as a way to live beyond the continued uncertainty and chaos of the pandemic.

With nowhere to go and life on pause, Gen Z was no longer limited by the watchful gaze of their peers or the everyday constraints of work/school makeup, and they took this rare opportunity to learn new skills, perfect their existing ones and challenge their comfort zone. The distance caused by the pandemic allowed a level of freedom never before experienced by this digitally native generation; when stripped of control, makeup gave Gen Z a new medium of outward self-expression to carve new identities, narratives and realities.



“Before lockdown, I was a lot more shy in how I approached my makeup; I wouldn't wear as much and would mostly do natural looks. However in lockdown, I have become more comfortable in myself and have started experimenting with what colours suit me and learning how to do different things. I am more confident now, which is a big part of makeup for me.”

ZAHARA, AGED 17
BASED IN LONDON
THE MOVE COMMUNITY

Makeup as a *mental health tool*



Source: Anna Shvets via Pixels

Makeup is definitely a self-care tool for me; when I want to pick myself up or want a little distraction I get my makeup out and see what look I land on. It's really therapeutic.

MEGAN, AGED 25.
THE MOVE COMMUNITY, 2021

The disruption and prolonged 'pause' of the pandemic pushed societies across the world into deep self-reflection. Mental health and self-care became a greater focus, with people developing routines and habits that helped make sense of their abruptly changing reality. Gen Z – a generation known for its active campaigning for open and wider discussions around mental health pre-pandemic – were notably agile in crafting and finding their own outlets.

The ritual of makeup was one such outlet where Gen Z found relief. With many young people reportedly struggling with stress and anxiety as their lives became consumed by the pandemic, the act of putting on makeup became a singular activity to focus on, providing a much needed moment of quiet and control.

For those who used makeup as a stress reliever, it was rarely about the finished look. Instead, it was the process that offered a calming single-mindedness, found in the act of sweeping a beauty blender across the face or in the intense concentration needed to perfect a winged liner. These seemingly simplistic moments proved to be a particularly powerful self-care tool.

69%

make-up users said they used makeup as a self-care tool during the pandemic.

THE MOVE COMMUNITY, 2021

65%

of Gen Z say that mental health has become more important to them because of the pandemic.

DOSOMETHING.ORG, 2020

「**‘We are seeing young people *experimenting with their look* because wearing makeup gives a sense of control, a way to be creative and is an expression of self-love in the form of pampering. Putting makeup on gives the brain a boost of feel-good neurochemicals, *especially Dopamine*.’**

DR. CATHERINE JACKSON
CLINICAL PSYCHOLOGIST AND NEUROTHERAPIST, VIA DAZED.



Creative expression ✨ equals self-care

When the need for an escape emerged, makeup served as a vehicle for just that, with Gen Z has turning to makeup as a valuable tool for creative self-expression. This shift has for some, meant finding freedom in wearing none; for others, it's meant reconsidering makeup's purpose – not as simply something to enhance or retouch, but as a way to dip into fantasy.

Planning and bringing to life new, bold makeup looks gave Gen Z a sense of newness and accomplishment when the days blurred into one another, and a sense of release and freedom when they

were confined indoors. As Wall Street Journal writer Fiorella Valdesolo wrote earlier this year, “In bleak times, a rainbow-painted eye or a swipe of blue lipstick offers its own form of release and comfort.”

88%

of Gen Z say that expressing themselves creatively has helped them to de-stress or feel less anxious during the pandemic.

VSCO SURVEY, 2020

Source: Victoria Krivchenkova for S&P

‘Skin-first, makeup second’ generation.

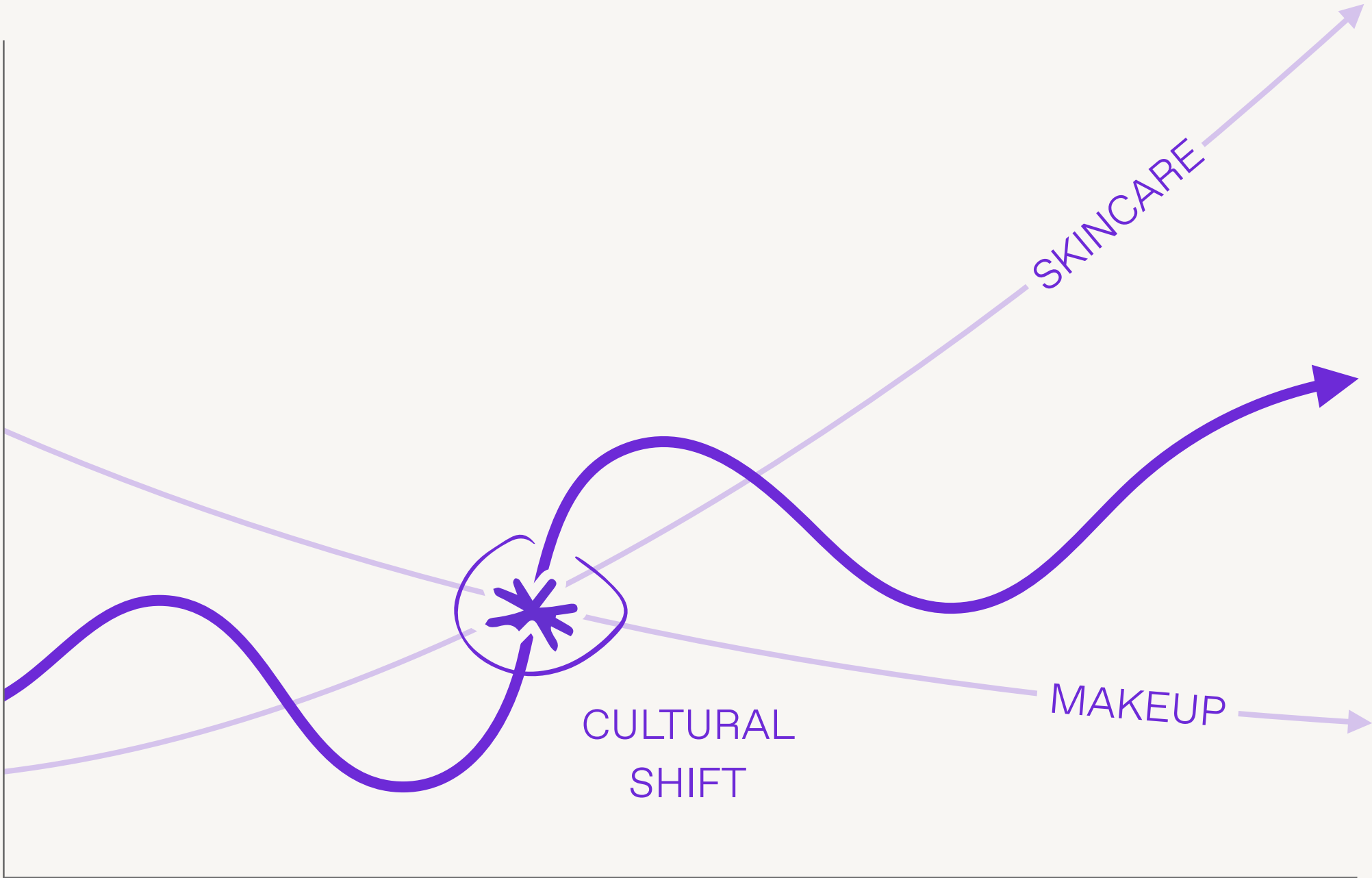
Fact: Gen Z is all about skin. In recent years, we have seen an explosion in skincare sales, skin-focused content and the rise of ‘skinfluencers’. As Gen Z embraces imperfections, a skin-first approach has left makeup sales in steady decline. This was only heightened during the pandemic, with many people taking the opportunity to allow their skin to breathe, and invest the extra time and money into quality skincare routines and products.

Interestingly, the growth in popularity of skincare has not stopped or hindered Gen Z engagement with bold and colourful makeup. The co-existence of both trends is an expression of Gen Z’s fluid approach to identity and its changing attitudes towards the concept of beauty.

35%

of female Gen Y and Z plan to wear less makeup after lockdown restrictions are lifted.

YPULSE, 2020



Brands that *get it*

TOOD

Launched mid-pandemic by Iranian Americans, TooD Beauty challenges Eurocentric beauty ideals by offering users a way of exaggerating, amplifying and playing up, rather than tamping down, natural features that have historically been stigmatised. TooD practices inclusive beauty with a distinctly rebellious and bold twist.



BYREDO

Having released its Prismic Palette Eyeshadow earlier this year and achieving immediate cult status, the 18-shade rainbow palette co-created by makeup and wearable art artist Isamaya Ffrench has given Gen Z makeup enthusiasts the ability to interchangeably dream up and wear hyper-stylised, expressive looks and ‘skins’.



GLOSSIER

As a brand built on makeup as self-care and self-acceptance, the majority of Glossier products are applied with fingertips, giving users the chance to connect with themselves and their bodies as they apply their ‘armour’ for the day. They approach makeup as a tool for accentuating natural beauty and features.



The rise of *fun*

Have fun and be socially aware: Gen Z does both. ✓✓



Defined by the circumstances of their upbringing, Gen Z has been confronted with the ills of society from as early as they can remember. Climate change, discrimination, never-ending recessions and sexual scandals have littered their formative years with apprehension and uncertainty. Although they understand the importance of engaging in social discourse both online and in real-life, Gen Z possesses a level of emotional maturity and intimate understanding of mental health that allows them to recognise the importance of balance and taking a

break. It is not contradictory or conflicting for them to highlight instances of racism, before seamlessly shifting the conversation towards finding the best cold brew in their area. Gen Z does not function in binaries. You are not either a climate change activist or an experimental makeup enthusiast; you can be a makeup enthusiast that uses makeup to create engaging content that raises awareness of climate issues. Gen Z holds space for itself to be both.

This cumulative rejection of binaries has allowed Gen Z to loudly and determinedly seek out fun and create big and small moments

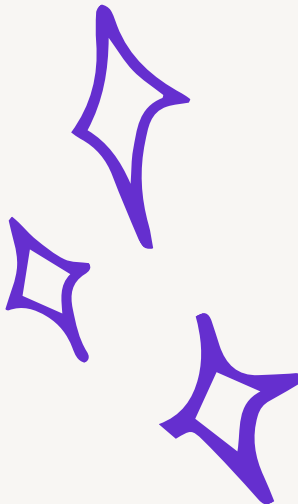
of joy. Makeup during lockdown became one such moment of joy for Gen Z, and the adoption of mood-boosting beauty served as ‘play-time’, giving them the time and space to approach makeup as a medium of self expression – and they chose to express fun. The pandemic shifted emphasis from being ‘happy with your look’ to the happiness experienced when creating and sharing your look. As a result, the act of sharing new beauty info online has never been so popular, and Gen Z see the online sharing of looks, product finds and reviews as a fun, extended part of the makeup experience.

Popular TikTok and Instagram hashtags [#postlockdownoutfits](#) and [#postlockdownlooks](#) show Gen Z preparing to re-enter society with more considered and playful expressions of self.

88%

of people are avoiding the news entirely because it has a negative effect on their mood.

VSCO SURVEY, 2020



Rethinking social media

In a time of great confusion and anxiety TikTok offered fun and Gen Z came flocking. On the hunt for laughs, the platform provided an endless scroll of video content that didn't take itself too seriously and was there for one reason – entertainment. The dressed down, 'everyone's welcome' nature of Tiktok meant that Gen Z found refuge from the day-to-day pressures of other social platforms, and with a lack of desire or energy to get Instagram-ready, TikTok offered a space where they could 'come as you are', engage via video and not be judged. With this move, Gen Z is collectively shrugging off expectations of digital perfection and embracing the messiness of life. Imperfect is okay and everyone is encouraged to be more themselves.

As we slowly emerge from lockdown, Gen Z is optimistic and looking for enjoyment. Virtual graduations, birthdays spent without friends and missed milestone celebrations means they are looking to claim back time 'stolen' by the pandemic. There has been much talk online about a roaring 2020s, but Gen Z is still anti-frivolity and excess; it will be interesting to see what 'euphoria' looks like for them.



42%

of Gen Z are seeking content described as fun!

MARKETINGDIVE, 2020

27%

of Gen Z respondents agreed that the pandemic had caused them to lower their expectations of success and enjoyment of life.

FORBES, 2020

Brands that *get it*

ABOUT-FACE

Halsey is the latest celebrity to launch a makeup line, and recognising the shift in makeup attitudes, About-Face allows makeup to break out of its ‘serious-looking’ shell, by passing on minimalist chic for bold, colourful makeup. The intentional messaging around having fun and not striving for perfection is what makes About-Face such an exciting newcomer.



STARFACE

Famous for acne patches designed to be visible – the playful, yellow star-shaped stickers defy skin-shaming – has led to photos of the patches being shared widely by users on social media. The brand has tapped into Gen Z’s desire for skin-positive, fun conversations claiming they “turn pimples into party time.”



SUPERGOOP

As the world’s first clean, feel-good, innovative SPF brand, it launched its ‘Good Morning Supergoop!’ campaign during Skin Cancer Awareness Month. The brand took a lighthearted and playful tone to tackle the serious issue; they want the world to not only wear sunscreen but to have fun doing it!



New Value systems

Beauty as a *spectrum* not a standard

Ten years ago, makeup was about covering up imperfections. For many of us, mattifying our face with layers upon layers of foundation was the literal foundation to our routine, before applying copious amounts of powders and creams to bake, cut, and highlight our face into submission. With YouTube only a click away, the ‘Kim Kardashian effect’ ushered in an era of contouring and Facetune-inspired looks that reigned over makeup and beauty.

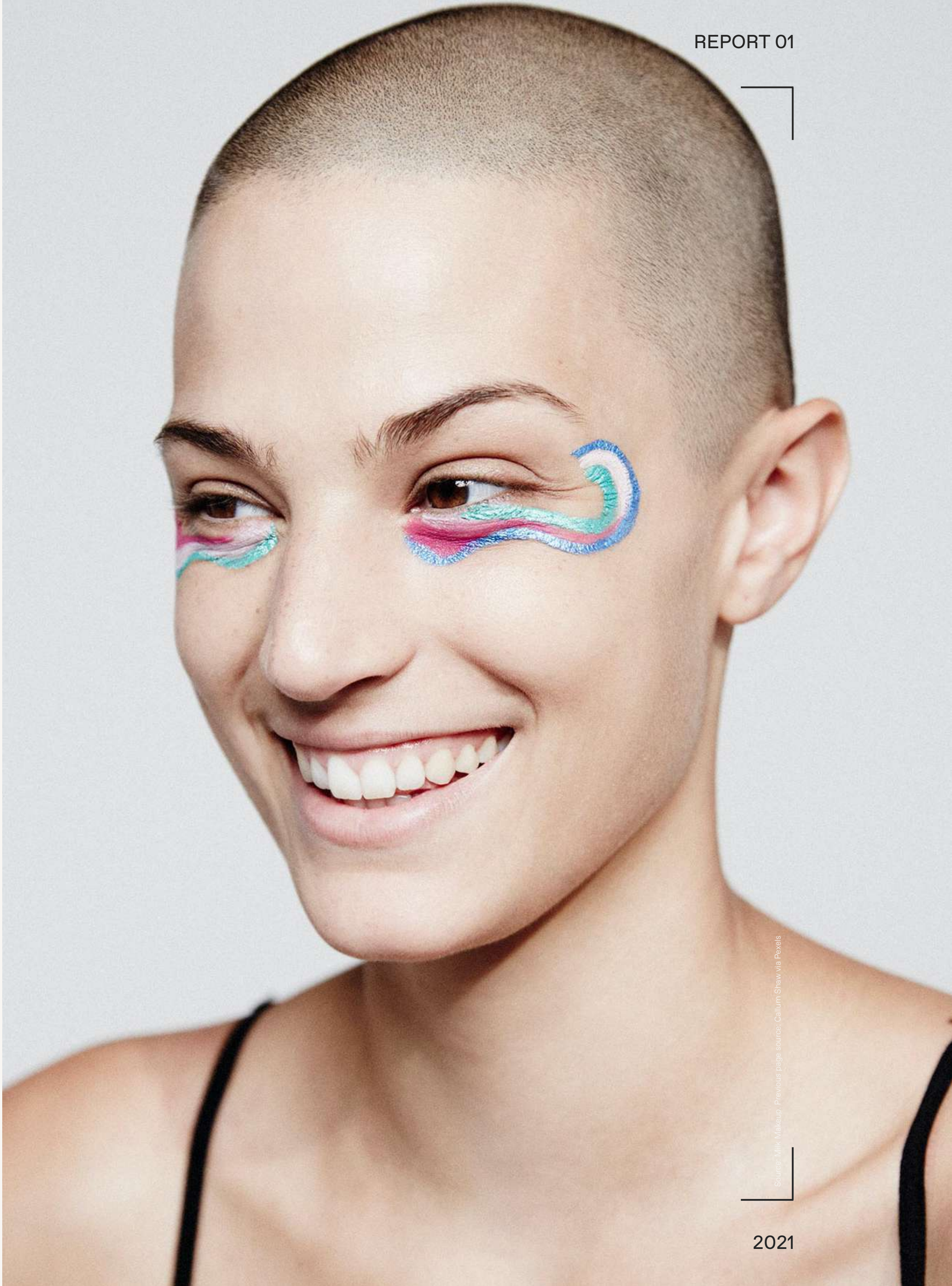
This was a time where perceived ‘perfection’ and hyper-controlled self-image was in, and imperfections were out. Fast-forward to today, and beauty is being pushed in refreshing new direction.

Gen Z is rewriting the definition of beauty in the industry by demanding racial and gender inclusion, more sustainable systems and creating new, anti-aspirational codes of expression. The desire to be flawless is no longer the driving motivator, and brands must reconsider the way they communicate beauty as attitudes and priorities shift.

73%

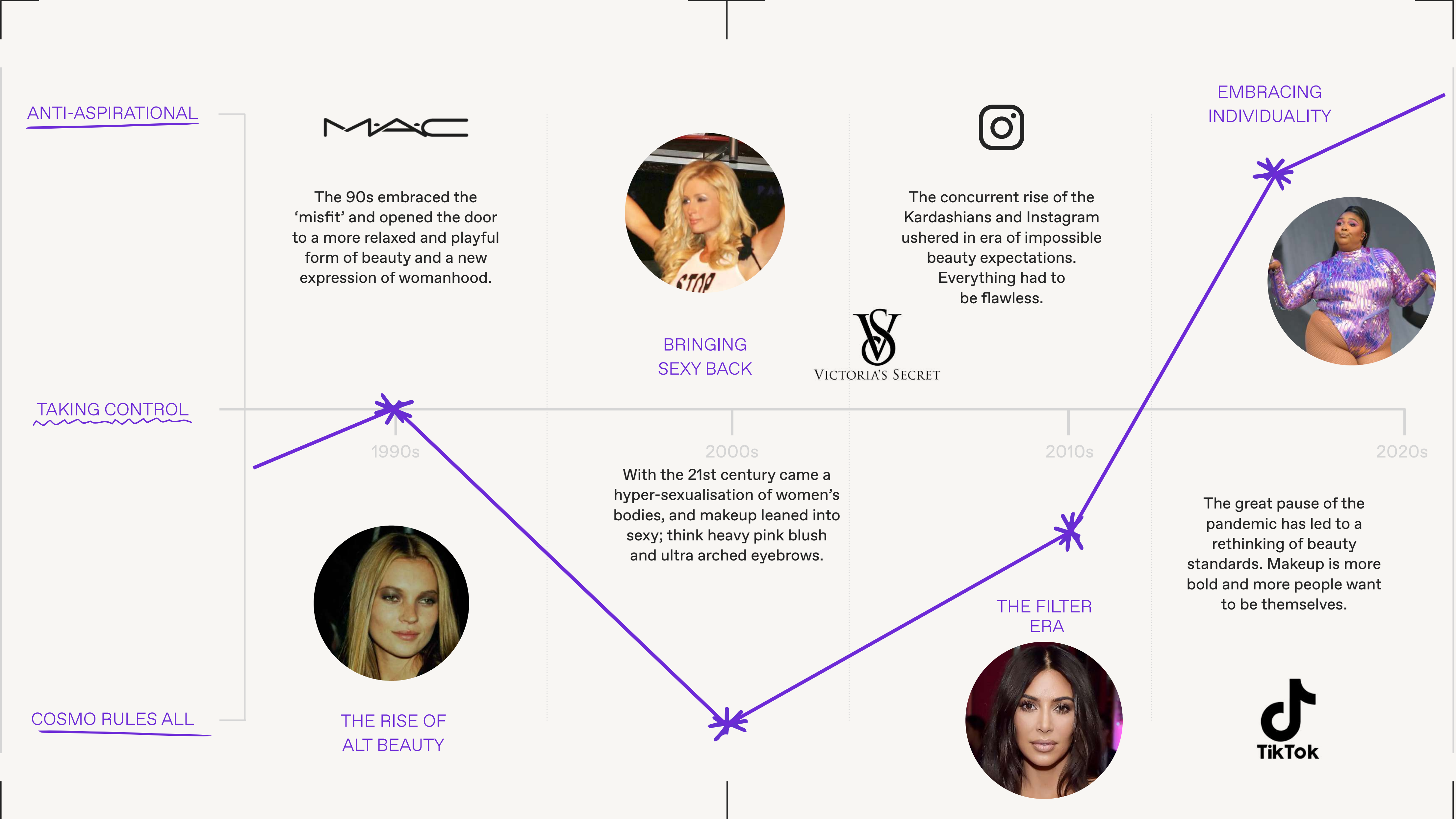
Of make-up users said they believe that beauty standards have changed for the better.

THE MOVE COMMUNITY, 2021



Source: The Move Makeup. Previous page source: Callum Shaw via Pexels

BEAUTY MESSAGING



ANTI-ASPIRATIONAL

MAC

The 90s embraced the 'misfit' and opened the door to a more relaxed and playful form of beauty and a new expression of womanhood.



BRINGING SEXY BACK



VICTORIA'S SECRET



The concurrent rise of the Kardashians and Instagram ushered in era of impossible beauty expectations. Everything had to be flawless.



EMBRACING INDIVIDUALITY



The great pause of the pandemic has led to a rethinking of beauty standards. Makeup is more bold and more people want to be themselves.

TAKING CONTROL

1990s

2000s

2010s

2020s

With the 21st century came a hyper-sexualisation of women's bodies, and makeup leaned into sexy; think heavy pink blush and ultra arched eyebrows.

THE FILTER ERA



COSMO RULES ALL

THE RISE OF ALT BEAUTY



“Makeup makes me feel elevated; I don’t use it to correct flaws like I used to. Now I use it to strengthen my outfit or portray how I feel on the inside that day. Makeup to me is just an *outside representation of what I feel on the inside.*”

LIAM, AGED 22
BASED IN ESSEX
THE MOVE COMMUNITY

Expression over perfection

A key difference between Gen Z and Millennials – they aren’t looking to fit in, but are earnestly trying to be different; Gen Z is searching for ways to challenge the status quo. Although largely a generation driven by aesthetics and creating ‘looks’, Gen Z rejects the ‘flawless’ aesthetic, with Instagram’s staged, time-perfected images no longer offering the same appeal. Instead, they’re pursuing the grit and authenticity of reality, or the creativity and self-expression of an extreme fantasy; they do not particularly gravitate towards the airbrushed middle ground.

Gen Z has come of age in the disinformation era; they are constantly bombarded with new content and are distrusting of information they cannot verify quickly. If reality is being depicted, they want to see a true reflection of normal life. They want acne scars on a skincare campaign, and crooked teeth in a lipstick ad. They want brands to reflect the reality of their own flaws and imperfections.

The rejection of perfection and impossible beauty standards has only been exacerbated by the pandemic. As the makeup industry looks to the future, we can expect its evolving language to focus on expression over perfection.

Downloads of
Facetune fell by
75%
from the app’s
peak in 2017.

INSIDER, JUN 2020

70%

of respondents across
nine countries say the
word ‘normal’ on beauty
packaging has a negative
effect on people.

MARKETINGDIVE, 2020

80%

of Gen Z globally say beauty
is about confidence and
not appearance.

DAZED MEDIA, 2020

“Since the media and makeup industries set the standards for beauty for women, we adhere to them without question. But, by being able to take a pause, we are creating a blank slate. *We can opt how to define beauty for ourselves, versus it being fed to us.* **This time period is similar to a detox.**”

DR TRICIA WOLANIN
US BASED CLINICAL PSYCHOLOGIST
I-D, 2021





Source: Anna Shvets via Pexels

41%

of Gen Z identify as neutral
on the spectrum of
masculinity and femininity.

VICE, 2020

Gen Z recognise that the binary definitions of gender are a social construct; a concept that's actively perpetuated and propped up by institutions and public law. Society has always assumed that those questioning their gender identity were 'confused', but for Gen Z it's the other way round. They are just waiting for the rest of the world (including brands) to catch up.

Despite efforts from larger brands like MAC and Fenty Beauty, makeup is still a very gendered industry. From language to imagery, makeup needs to rethink its approach to gender; it's not about including more cis-men, but challenging the very construct itself.

As a concept, 'gender neutrality' is too vague for many young people who don't conform to the conventional binary. Gender-neutral beauty content on social media has dropped by 9% from mid-2020 to mid-2021, while searches for more specific terms like 'transgender' and 'non-binary beauty' are up by 50%. Gen Z is looking for clear opinions and strong positions, not gestures of inclusion and pandering.

Canvas8, 2021

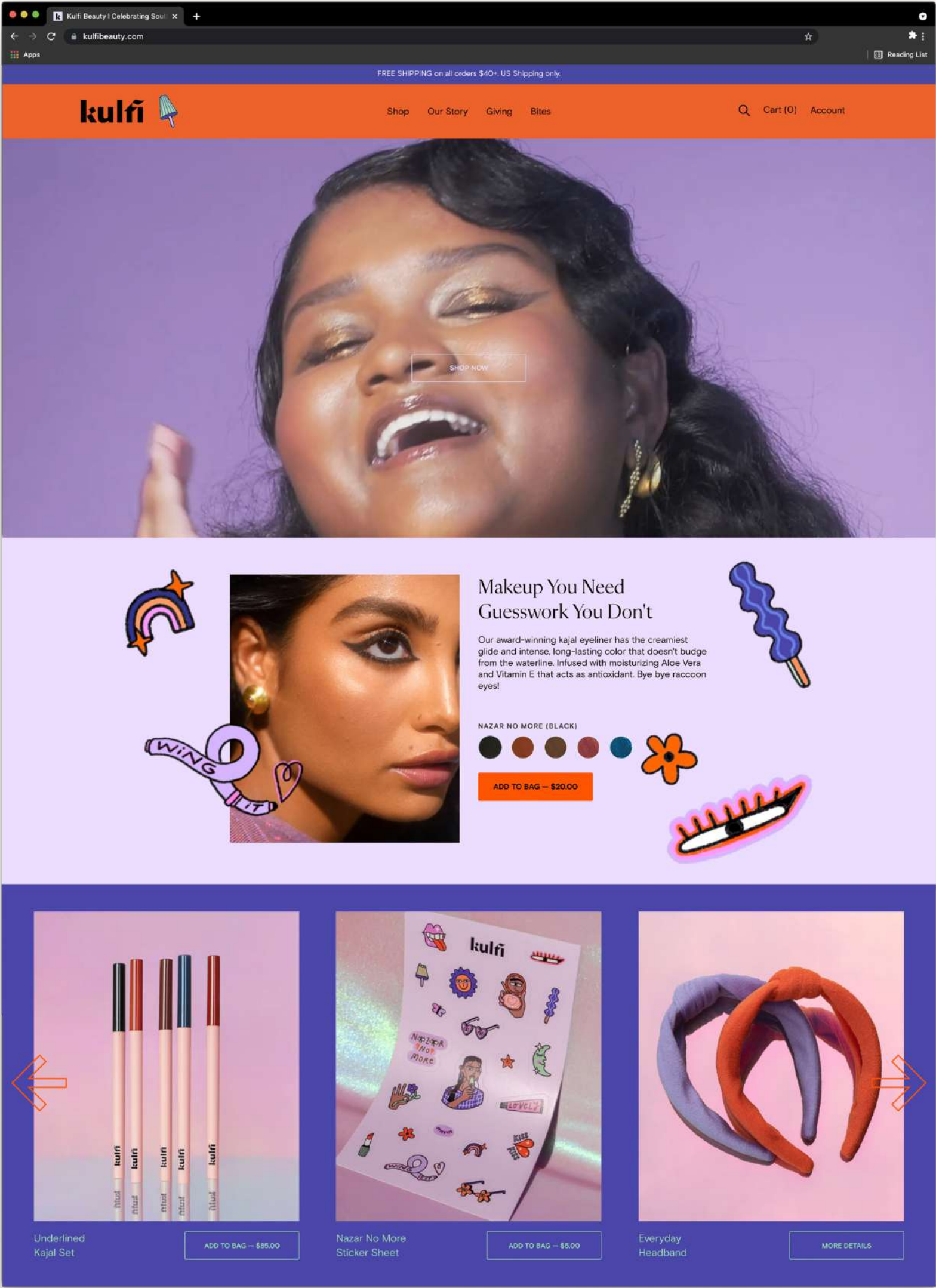
Beyond binaries

The importance of *niche* beauty brands

Calls for the beauty industry to be more inclusive of different skin tones are years in the making, but until recently, have largely been ignored. However, with the murder of George Floyd at the height of the pandemic, dialogue around racial discrimination was pushed to the forefront, with Gen Z leading the charge. Conversation moved beyond the call for diversity, to calling out brands that were complicit in the problem, and rejecting those who were not committing to active change.

The global protests created a mass-learning moment, in which Gen Z actively sought to educate themselves on racial issues, before applying this new perspective to the world around them. A natural question arose; if a brand is actively excluding darker-skinned people, is this a brand worth supporting, and what is my alternative?

Enter the rise of the niche beauty brand, who emerged to fill the gap left open by their mainstream counterparts, and who loudly and specifically service Asian and Black communities. Brands like Uoma beauty and Kulfi Beauty are not only providing beauty-lovers of colour with products that work, but offer a community that celebrates them.



Brands that *get it*

FLUIDE BEAUTY

The brand proclaimed at its genesis that 'makeup is for everyone', rejecting the gendered nature of the makeup and has worked since to make sure this is the case. Their makeup ranges are conceived from a queer perspective, for a queer community, but of course everyone else is invited to the party. They also donate 5% of sales to LGBTQ health and advocacy organisations.



MILK MAKEUP

Centred around self-expression, inclusivity and collaboration, Milk makeup is cruelty free and 100% vegan, and its innovative products challenge the perceptions of everyday beauty, from a holographic stick to colour chinks. The products challenge users to be more creative and expressive. Milk Makeup's ethos is very clear – the brand for is everyone and perfection is not welcomed here.



TOPICALS

Founded by Olamide Olowe, 23, and Claudia Teng, 24, they identified an unmet need in the market and set out to create a skincare brand that gives people with hyperpigmentation and eczema (largely people of colour) fresh, new options. In the process, they have taken on the battle of normalising 'bad' skin, by reframing how we understand and approach skincare.



New flows of influence

I'm sick of the braggers, the blaggers and the hashtaggers.
Sick of the takers and the 'no-filter' fakers. I'm sick of the fads.
I'm sick of the ads and the wouldn't be famous if it wasn't for your dads.
Sick of Snapchat and apps for this and that. Sick of the G's and the look
at me's and the check how sexy I can be's. Sick of the scammers and
the fake tanners and the 'No makeup, makeup' Instagrammers.
Sick of the endless scroll and the friendless troll. Sick of the hype.
Sick of the likes. Sick of sponsored content and the constant nonsense.
Sick of the feed. Sick of the greed. Sick of the game. Sick of the same.

MYBEAUTYBRAND,
MANIFESTO

Peerfluence

Over the course of the pandemic, we saw the dismantling of traditional celebrity and influencer structures. Via social media, the world watched in disbelief as reality stars, celebrities and popular Instagram influencers indulged in holidays and global travel without a care for restrictions or Covid protocols, lifting a veil on the growing gap between celebrity, influencers and their wider audience, and confirming (in many cases) that these once aspirational figures were in fact out of touch and unrelatable. The almost immediate backlash from Gen Z demonstrated a desire to connect through shared values, interests and beliefs in a genuine way. For most, this now means turning to each other.

‘Peerfluence’ describes the act of being influenced by members of your peer group, and for Gen Z, this group extends beyond the people they know IRL. Online relationships, whether it’s in the form of followers or the wider online network, exist almost exclusively on a particular forum or social platform, but they arguably have the most influential pull for Gen Z.

These peer groups extend globally, yet offer a clear direction for Gen Z when it comes to trends, as well as a level of transparency as they share the more intimate aspects of their day-to-day lives, which allows for trust to build organically. Simply look at any Gen Z Instagram or TikTok feed and you’ll find an endless scroll of tutorial videos on everything from dancing and makeup, to cooking and DIY.

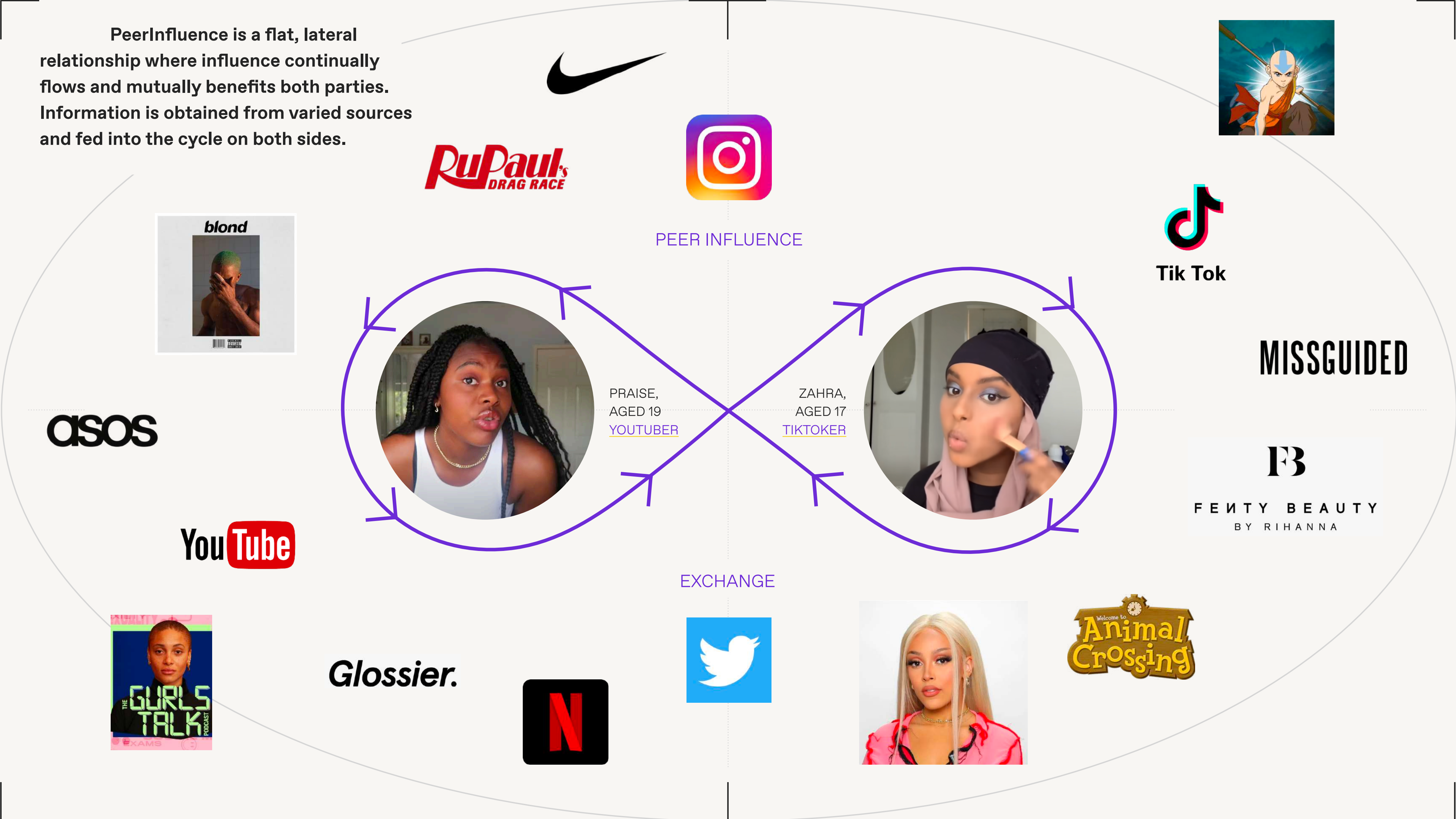
89%

Of makeup users said they seek beauty advice from their friends of peers first.

OLAPIC AND CITE RESEARCH, 2019



PeerInfluence is a flat, lateral relationship where influence continually flows and mutually benefits both parties. Information is obtained from varied sources and fed into the cycle on both sides.



Gen Z’s social platforms equal a *lateral exchange* of influence

Deciem’s *The Ordinary* saw a staggering **426%** sales spike of its AHA 30% + BHA 2% Peeling Solution after receiving rave reviews from TikTok’s acne-positive teen community.

ELLE, 2021

More and more, Gen Z want to hear from people who look and speak like them; by turning to their digital communities, information sharing and exchanging has become the expected norm, with the rise of platforms like TikTok and Pinterest marking a key shift in online behaviour. The large abandonment of YouTube as the number-one source and platform for online makeup content also illustrates Gen Z’s desire for impromptu, real-time content. This more diverse, lateral exchange of information and influence not only allows more space for different voices, experiences and outputs, but offers everyone the opportunity to be an ‘influencer’ to a certain extent.

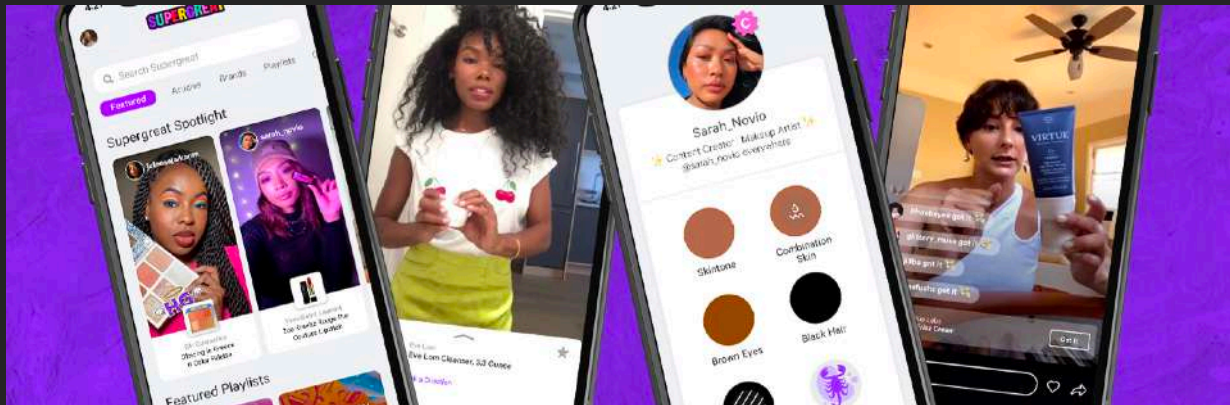
TikTok in particular offers something notably different to other platforms; it offers community. The algorithm-led platform connects you with content based on what you frequently engage with, and unlike other social media platforms, TikTok does not curate a feed around who you follow or what they’ve posted – it’s completely centred around user behaviour. As a result, TikTok stretches to every corner of culture, giving every community, subculture and movement a space to own.



Brands that *get it*

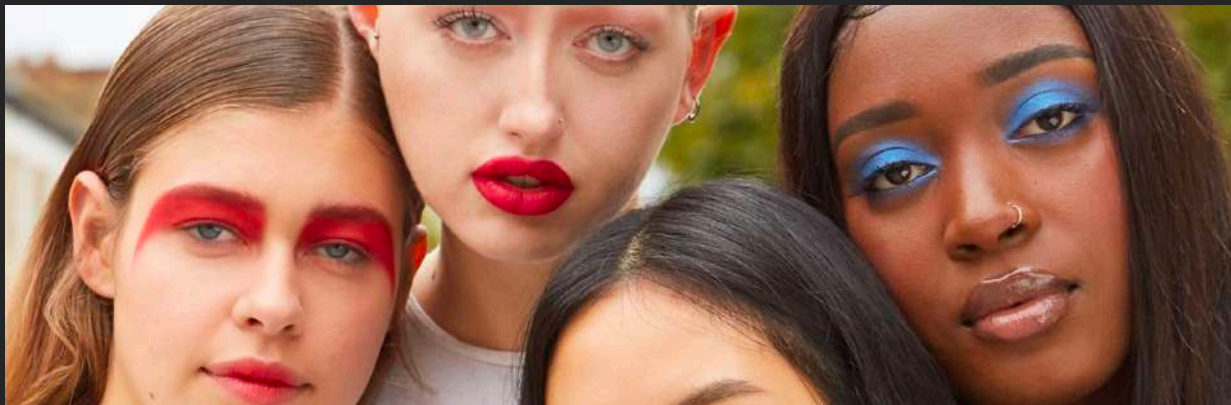
SUPERGREAT

A filter-free video review platform that allows everyone to be an expert. The app hosts live streams of people testing and evaluating beauty products, and although celebrities and big influencer names have been featured on the app, it's the everyday consumers placing their faith in fellow consumers who have pushed the platform into the spotlight during the pandemic.



MY BEAUTY BRAND

A platform that has been tapping into Gen Z's desire for peer-review through user-generated content, enabling customers to set up a store on the site and post photos of their makeup looks. Visitors can see the products used (whether they're from MyBeautyBrand or not), and if a sale is made through the page, the page's creator earns commission. It has been described as 'the Avon for Gen Z'.



IL MAKIAGE

A brand that allows customers to shop by talent. Gen Z can find an influencer that looks and feels most like them and shop their look. Although this is not a complete steer away from the traditional influencer mechanic, it does recognise the need for a more tailored influencer experience.



Gen *Phygital*

Navigating Gen Z's <integrated reality>

As the generation of connectivity, Gen Z lives in a world of constant conversation. Like the rest of us, they exist both on and offline, but unlike us, they don't see a fundamental distinction between the two. Instead, they exist in an integrated reality where the digital and real world are extensions of their overall life, and they are growing and learning to navigate both with equal importance.



60/62

Gen Z / Millennials think how you yourself online is more important than how you present yourself in-person.

SQUARESPACE

55%

are more comfortable connecting with people online than in-person.

US - COMMON-SENSE MEDIA, 2018

Makeup: a key tool in *the phygital* experience

For many Gen Z, an online presence allows them to present the world with a version of themselves that they may not fully embrace in reality, and makeup is often the tool used to express this personal identity online.

Gen Z makeup enthusiasts have given themselves licence to push the boundary between fantasy and reality, and as result, can spend hours planning and perfecting a fabulously complicated fantasy makeup look exclusively for capturing content and embracing their digital persona.

55%

of Gen Z find social apps and the internet a more creative space than what they experience in real-life.

JWT INTELLIGENCE, 2019

In recent years, digital identities and sub youth-cultures that centre around makeup and aesthetics have emerged. The e-girl digital subculture, initially an ironic aesthetic that took a stand against misogyny in gaming, has grown into a viral Tiktok community that invites girls and boys to play with mix of anime and Y2K aesthetics. Importantly, this digital subculture exists almost exclusively online. As a result, Gen Z is on the hunt for products that translate on-camera for their online selves, and brands should not shy away from tapping into these fantasies.



Gaming ‘skins’ as a new creative outlet

Gaming is now popular culture. The introduction of internet/online games in the 2000s meant that Gen Z has consistently enjoyed a connected gaming experience. Although the average gaming population skews more male and white in the UK and USA, Gen Z has been making a push to shake up gaming culture and create a more fun and inclusive environment.

Beauty and makeup are just one example of how Gen Z is doing this. Although not the main object of the experience, avatar customisation is a major feature of gaming, with each player given the creative freedom to build their avatar’s entire look, either as a reflection of themselves, or as something more imaginative. Unlike AR filters,

‘skins’ in gaming have come a long way to offer extensive customisation, with gamers able to create character skins and avatars that stretch both imagination and reality. During lockdown, this served as an escape from the real-life limitations of the pandemic, offering a space to immerse in beauty-led self-expression through game. As a result, the fantasy created in these virtual worlds has become a fixed feature in people’s day-to-day, and beauty brands should be taking advantage of this interesting new normal.



49%

of American women aged between 18 and 29 play video games.

PEW RESEARCH CENTER, 2017

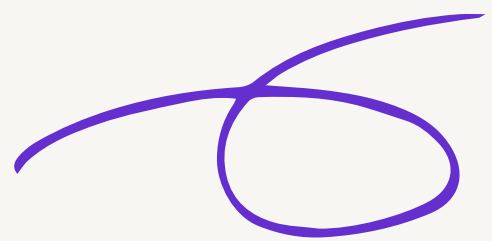
46%

Increase in Gez-Z video game usage since March 2020.

NIELSEN

“Gaming is a virtual, customisable world similar to beauty where you can escape into your own personal, approachable armour. *Both worlds can help you live your best authentic life, which, if you so please, can include a red lip, tiny heart-shaped tattoos, and a visit to a bamboo meditation forest.*”

ROMERO JENNINGS,
MAKEUP ARTISTRY AT MAC COSMETICS



Brands that *get it*

TATCHA

Teaming up with Animal Crossing, the brand created a pop-up island (Tatchaland) to celebrate the launch of its Rice Wash cleanser. It gave players a chance to learn more about the product through virtual wellness experiences like a spa, tea house, and meditation in a bamboo forest.



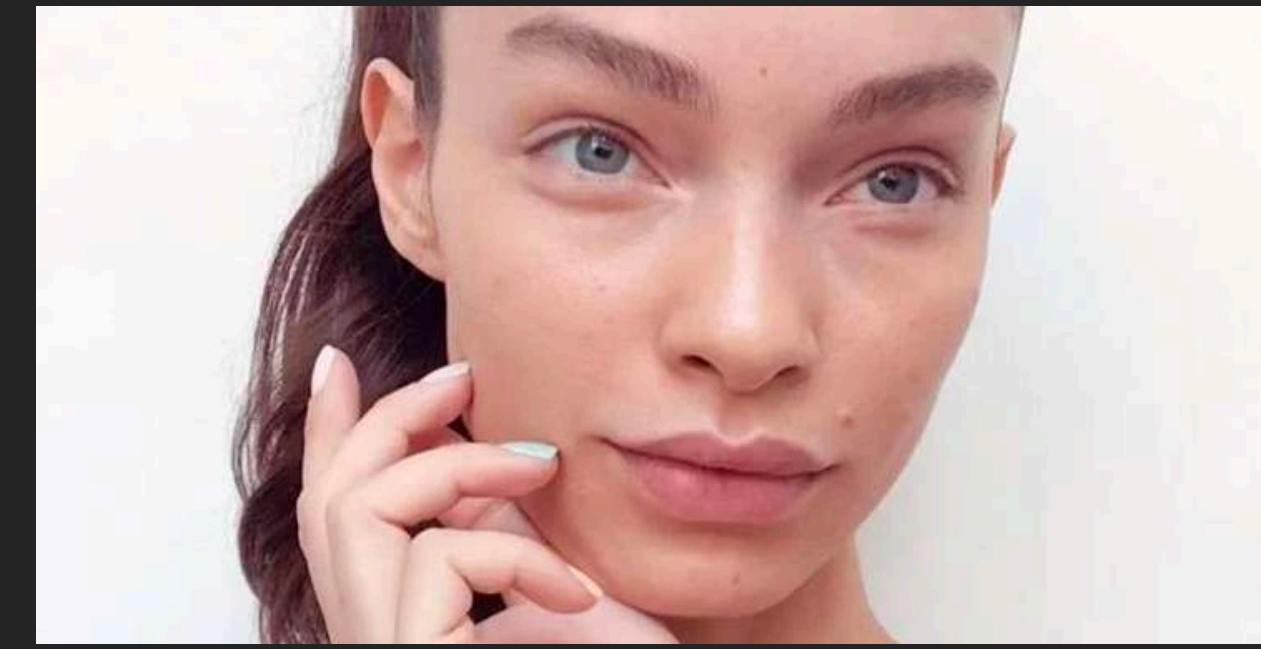
MAC MAKEUP

Mac partnered with Chinese mobile game, *Honour of Kings*, to launch a full range makeup collection inspired by the popular game. The range allowed users to transform themselves into their favourite characters and bring a piece of their virtual selves to life.



L'OREAL

Dropped their first line of virtual-only makeup products late 2020. The virtual makeup products are for use on Zoom, Snapchat, Instagram and Google Duo, tapping into Gen Z and Millennials desire for more playful virtual makeup tools.



The Future of Makeup

As we entered the second half of 2021, we asked our Move community to share what was exciting them most about makeup right now, and where they think it's going in the next 5 years. From there we analysed and debated the data, and have forecast the future of makeup in six key takeaways.

01

The future of makeup is *co-creation*

Gen Z is in the driving seat; they do not believe brands completely understand them or that brands can be left to do the right thing, so Gen Z want a say. Brands need to find a way to achieve a constant, open dialogue with Gen Z consumers, hear what they have to say, and most importantly, act on it.

02

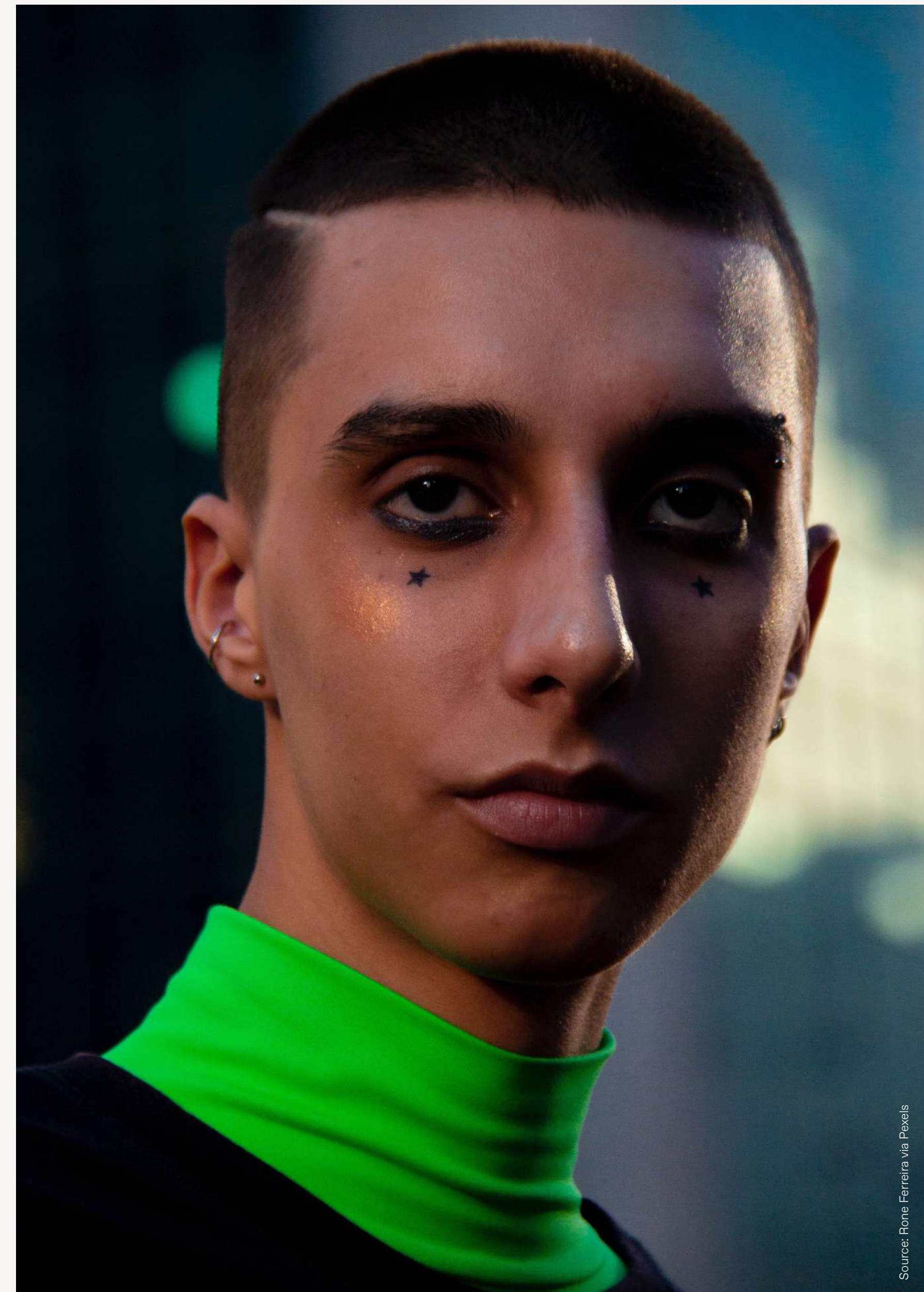
The future of makeup is *real*

Now more than ever, Gen Z is gravitating towards reality. Lockdown allowed for a level of pause and self-reflection that this generation has never experienced, and they are coming out of the pandemic and reentering society with a re-organised list of what's important, with perfection nowhere to be found.



"We are moving away from featurism and colourism, and as well as desexualising femininity, we are going down a more androgynous fantasy route and *I'm excited to see where we end up.*"

LIAM, 22, ESSEX
THE MOVE COMMUNITY



03

The future of makeup is *fun*

Misunderstood as a serious group, Gen Z is incredibly optimistic. Looking to the future, they are actively searching for fun opportunities and are interested more than ever in IRL experiences. For them, fun is not exclusive to a night out or a festival; fun is an attitude, an approach, and a state of being.

04

The future of makeup is *community*

Makeup has evolved into a communal practice. New flows of influence means that peers are in regular back and forth with one another, sharing information and exchanging ideas both on and offline. Community networks will only continue to take up substantial real-estate in the beauty and makeup space, so brands need to learn how to engage them – quickly.



Source: Sarimanexie via Instagram

“I think the future of makeup is exciting; changes are happening and we are in the middle of a change. When you go on Instagram, beauty looks are now so different and out there, they are not rooted in reality and I think this is going to spill over into the mainstream and we will see this on TV and throughout media.”

GEORGINA, 23, BRIGHTON
THE MOVE COMMUNITY

05

The future of makeup is *fantasy*

Gen Z will continue to use makeup as a tool to enhance and express their identities, and as the definition of beauty becomes increasingly fluid, expression of fantasy through makeup will move into the mainstream, allowing Gen Z to look beyond the temporary and seek out semi-permanent and/or longer lasting products.

06

The future of makeup is *transparency*

As a generation of researchers, Gen Z habitually comb through product reviews across online forums before making a purchase; but this behaviour is not sustainable. Fatigue will push Gen Z to demand quick and digestible modes of verifying whether a product is right for them, and brands need to adopt a higher level transparency by facilitating easy access to authentic reviews of their products.

Want to dig deeper or have a chat?

Contact

themove@weareimpero.com

Follow us

 @weareimpero

Researched and written by
Zuhur Mohamed

Edited by
Melissa McWhirter

Designed by
James Parkinson
Paolo Ciccarelli

Managed by
Emma Girvan

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