Beauty Glow Up: Trends, Products, and Brands That Are Having a Moment

Geo: U.S.
Time Frame: April - October 2021
2021: The Year of the Glow-Up
Online Engagement by a U.S. Beauty Audience

Keyword Engagement by Volume:

<table>
<thead>
<tr>
<th>Term</th>
<th>Engagement Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glow</td>
<td>7.6x the average engagement volume</td>
</tr>
<tr>
<td>Radiant</td>
<td>5.8x the average engagement volume</td>
</tr>
<tr>
<td>Dewy</td>
<td>4.1x the average engagement volume</td>
</tr>
<tr>
<td>Matte</td>
<td>2.5x the average engagement volume</td>
</tr>
</tbody>
</table>

Top Ingredients by Percent Share of Engagement (%):

<table>
<thead>
<tr>
<th>Ingredient</th>
<th>Engagement Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collagen</td>
<td>22%</td>
</tr>
<tr>
<td>Hyaluronic Acid</td>
<td>15%</td>
</tr>
<tr>
<td>Retinol</td>
<td>7%</td>
</tr>
<tr>
<td>Lactic Acid</td>
<td>7%</td>
</tr>
<tr>
<td>AHAs &amp; BHAs</td>
<td>7%</td>
</tr>
<tr>
<td>Tea Tree Oil</td>
<td>6%</td>
</tr>
<tr>
<td>Algae</td>
<td>5%</td>
</tr>
<tr>
<td>Vitamin C</td>
<td>5%</td>
</tr>
<tr>
<td>CBD</td>
<td>4%</td>
</tr>
<tr>
<td>Squalene</td>
<td>4%</td>
</tr>
<tr>
<td>Ascorbic Acid</td>
<td>4%</td>
</tr>
<tr>
<td>Beeswax</td>
<td>4%</td>
</tr>
<tr>
<td>Niacinamide</td>
<td>3%</td>
</tr>
<tr>
<td>Vitamin E, Resveratrol, Panthenol</td>
<td>2%</td>
</tr>
</tbody>
</table>
Consumers Are Reaching for Affordable Beauty Discovery

Online Engagement by a U.S. Beauty Audience

Retailer Market Share for New Beauty Discovery (%):

- Target: 26%
- Walmart: 20%
- Ulta: 12%
- Sephora: 9%
- CVS: 16%
- Walgreens: 13%
- Macy’s: 1%
- Nordstrom: 3%

Top Beauty Subscription Boxes by Percent Share (%):

- Allure Beauty Box: 36%
- FabFitFun: 31%
- Ipsy: 22%
- BoxyCharm: 6%
- Birchbox: 5%

This year, Target & Ulta debuted Ulta shop-in-shops inside Target stores

Online engagement is measured by searches, clicks, & shares | Geo: U.S | Time Frame: April - October 2021
Skin Enhancing Makeup Stands Out
Online Engagement by a U.S. Makeup Audience

Top Searched & Shared Products:
by Percent Share of Engagement

- Foundations: 61%
- Palettes: 13%
- Primers: 11%
- Mascara: 6%
- Eyebrow Products: 5%
- Concealers: 5%

Fastest Growing Brands:
by Average Month-Over-Month Growth

- It Cosmetics: +184%
- Huda Beauty: +109%
- Fenty Beauty: +104%
- Maybelline: +101%
- Bite Beauty: +84%
- Ilia Beauty: +77%
- Morphe: +72%
- Rare Beauty: +70%
- Charlotte Tilbury: +61%
- Il Makiage: +57%

Online engagement is measured by searches, clicks, & shares | Geo: U.S | Time Frame: April - October 2021
Makeup Trends
Online Engagement by a U.S. Makeup Audience

Average Week-Over-Week Engagement Growth (%):

- Blush Draping: 41%
- Glassy Lip Gloss: 37%
- Bronze & Copper Tones: 22%
- Refillable Products: 19%
- Embellishments: 16%
- Burgundy Lips: 10%

Online engagement is measured by searches, clicks, & shares | Geo: U.S | Time Frame: April - October 2021
Skincare Favorites Go Beyond the Basics
Online Engagement by a U.S. Skincare Audience

Top Searched & Shared Products:
by Percent Share of Engagement

- Sunscreens: 32%
- Serums: 22%
- Cleansers: 20%
- Moisturizers: 17%
- Exfoliators: 7%
- Eye Creams: 2%

Fastest Growing Brands:
by Average Month-Over-Month Growth

- Kylie Skin: +67%
- Tatcha: +47%
- First Aid Beauty: +44%
- Fenty Skin: +34%
- Starface: +30%
- Glow Recipe: +24%
- Sunday Riley: +24%
- The Ordinary: +23%
- REN Skincare: +18%
- Supergoop!: +15%

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Skincare Trends
Online Engagement by a U.S. Skincare Audience

Average Week-Over-Week Engagement Growth (%):

- Pimple Patches: ▲ 37%
- Microbiome-Friendly & Probiotic Skincare: ▲ 14%
- Moisturizing Hand Sanitizer: ▲ 11%
- Double Cleansing: ▲ 10%
- Skin Supplements: ▲ 8%
- Skinamalism: ▲ 4%

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Hair Trends
Online Engagement by a U.S. Haircare Audience

Average Week-Over-Week Engagement Growth (%):

- **Face Framing Highlights**: 65%
- **Blunt Bobs & Lobs**: 58%
- **Soft Bangs**: 37%
- **Auburn Tones**: 19%
- **Headbands**: 10%
- **Rich Brunettes**: 6%

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Thank You