**Streetbees**

Special Report

Diversity and its role in the beauty industry

July 2020

There may have been a global pandemic devastating the world for most of 2020, but it's by far not the only important thing happening - it's also been a monumental year when it comes to the discussion and implementation of diversity and inclusion. The Black Lives Matter protests that started in June will hopefully go down in history as when change really began - after all, despite a distinct reduction in media coverage, they are continuing to this day all around the world.

Of course, diversity and inclusion doesn't just cover race - in fact, 3 in 10 of our bees in UK, US, India, Indonesia and Brazil have experienced discrimination against them based on their gender idemtity, race and/or sexuality. This goes up to 39% for the LGBTQIA+ community, and gets close to 80% for non-white consumers.
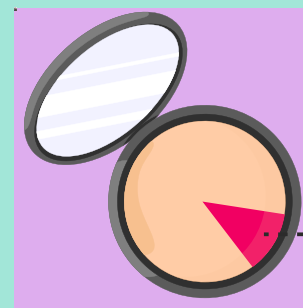
14%
of people have felt discriminated against by a beauty/personal care brand

77%

of non-white Brits have experienced discrimination against them

The most common way our bees have been discriminated against is that they have been made to believe something about them is 'wrong' - their hair, skin colour or sexual orientation. And this discrimination occurs across all stages of life, from within the family, to at school, to at work, and comes in many forms - showing the true depth of the problem. It is ingrained in our society - not just in the UK and US but around the world.

Our bees also mention being followed in shops because of their skin colour, to being kept waiting for a table at a restaurant because of their sexual orientation, and more. Brands - well, everyone needs to listen to these personal experiences and learn from them, to build a better, safer and more accepting environment.

For change to really start - we must listen, acknowledge, understand (as best we can) and learn from individual's experiences. Not just as brands, but as people.

When it comes to discrimination in the beauty industry specifically - over half (56%) of discrimination from a beauty brand is related to race e.g. people of colour not being represented in ads, and the second most common is in relation to age (15%).

> "
> **This brand made me feel like having thick hair is the worse type of hair you can have they made me feel like I should have Caucasian hair to feel beautiful this broke my heart & has taken over 15 years to feel comfortable with what I have.**
>
> **Female, 34, US**

> "
> **I think that in the past I took care of myself more because of social pressure, now I like to take care of myself and that goes beyond the physical issue, but rather for the sake of health.**
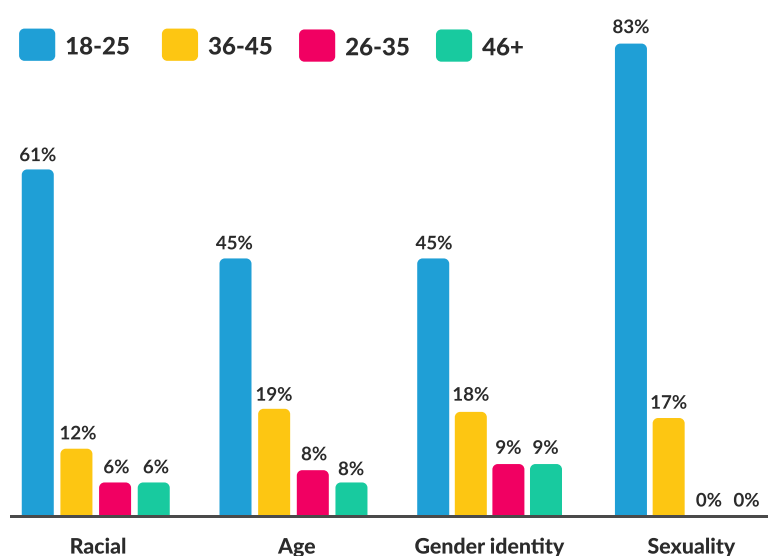>
> **Female, 28, Brazil**

> "
> **With the current acceptance and empowerment of black people in society, I started to accept myself and leave my hair away from the smooth pattern and went back to my original roots.**
>
> **Female, 24, US**

Younger consumers are more likely to say they've felt discriminated against - is this because Gen Z are more vocal about inequalities? Has social media created a platform for younger consumers to be less afraid to speak out, while simultaneously being more vulnerable to the pressures of beauty standards?

Aged 45+

Although only 8% of 45+ have felt discriminated against, **83%** of them say it was related to race

WHAT TYPE OF DISCRIMINATION DID YOU EXPERIENCE?

Legend: 18-25 | 36-45 | 26-35 | 46+

|	18-25	36-45	26-35	46+
Racial	61%	12%	6%	6%
Age	45%	19%	8%	8%
Gender identity	45%	18%	9%	9%
Sexuality	83%	17%	0%	0%

Half (47%) of those who have felt discriminated against at some point by personal care brands have changed their behaviour in response to recent activism regarding racial/gender identy/sexuality discrimination, compared to just 10% of those who haven't experienced this. People's experiences with brands really do impact their engagement and loyalty to them - with the most common change being that consumers will shift to buying products from companies that promote inclusion and a desire to be part of change.

HAVE YOU EVER FELT DISCRIMINATED AGAINST BY A BEAUTY/CARE BRAND?

Legend: Yes | No

Group	Yes	No
All	14%	86%
18-25	20%	80%
26-35	11%	89%
36-45	11%	89%
46+	8%	92%
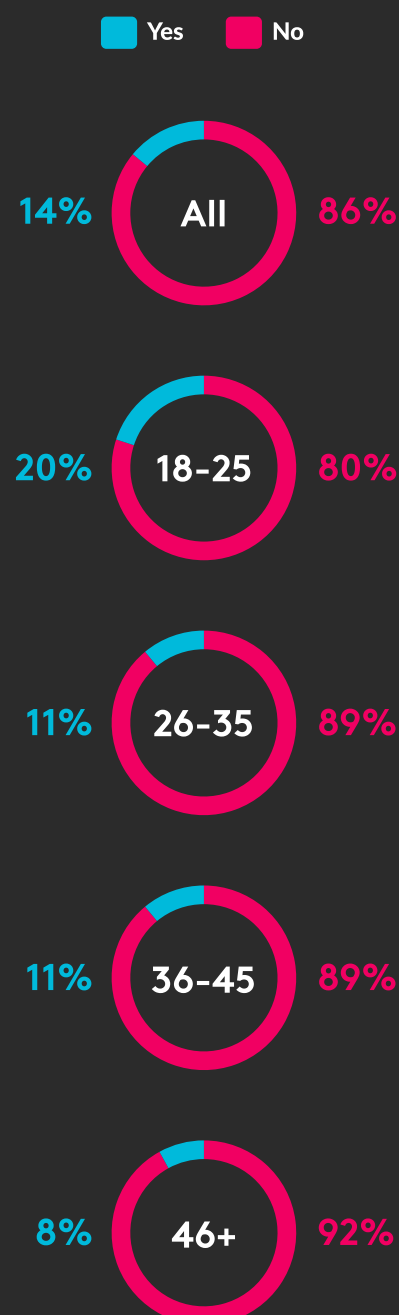
WHAT CAN BEAUTY AND SKIN CARE BRANDS DO BETTER TO ADDRESS THE TOPIC OF DIVERSITY / INCLUSION ACCORDING TO YOU?

1. Increase diversity through images/commercials
2. Increase diversity through product line
3. Increase diversity through affordability
4. Increase diversity through messaging on products/in commercials

> " Most high street brands in this country focus towards fair skinned women. BB creams only have "fair" or "tan", I can't find a nude lipstick that looks good on me and finding a foundation that perfectly matches my skin tone is also a struggle. They have got better with the years but there are still times when I have to choose "tan" as my colour even though I am much darker.
>
> **Female, 32, UK**

Having greater representation in advertising and imagery is seen as the number one thing that brands can do to better address diversity and inclusion - but it goes beyond this. Consumers also want greater diversity in the products brands create, as well as making them more affordable. For example, there's no point using an African-American woman in a haircare campaign if the product wouldn't actually work on her hair…

Although, a surprising 9% of consumers believe that brands don't need to do anything to increase diversity…

> " It is not exactly about discrimination, but I think it is absurd how some brands make two different products for genders, both of which have the same effectiveness and functionality, the only difference being that products called "feminine" are more expensive precisely because they are the focus of the market
>
> **Male, 22, Brazil**

A controversial topic

While the thousands of people continue to march for Blac Lives Matter, the global market size for skin lightening products continues to grow - currently estimated to be as big as $8bn and could reach almost $14bn by 2025. That's an increase of 75% in just five years.

These products are popular all around the world, particularly in the Middle East, Asia, Africa and South America. Yet despite the high demand and growth, brands face increasing backlash over the sale and promotion of such items.

This highlights a very important question: do these products have a place in modern society, and can brands achieve or even advocate for proper change while continuing to sell them?

Western countries like the US and UK have a far smaller coverage of this category - but this is no doubt linked to the fact that it's more common for people here to have lighter skin to begin with. However, even 3-5% is still a significant market size - and one that's shouldn't be ignored.

% WHO USE SKIN WHITENING PRODUCTS

UK
3%

US
5%

INDIA
29%

INDONESIA
48%
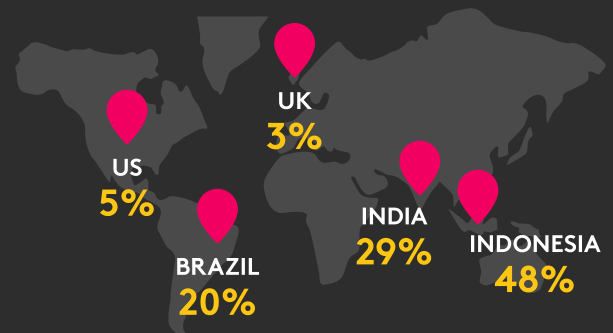
BRAZIL
20%

% WHO USE SKIN WHITENING PRODUCTS BY AGE

18-35
33%

36-45
31%

46+
29%
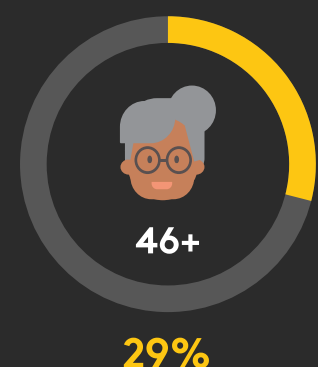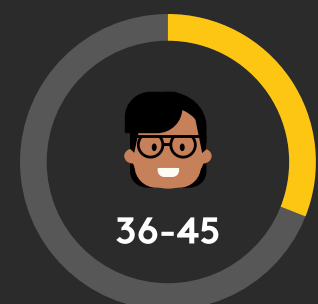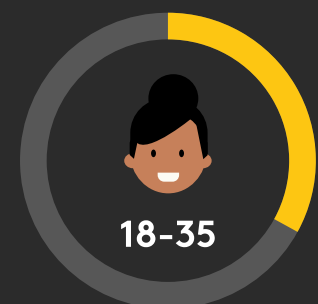
Looking at markets with highest penetration - Indonesia, India and Brazil - the usage is pretty consistent across all age groups, with younger consumers actually using them slightly more than their older counterparts. While the difference between 33% and 29% isn't huge, it does suggest that as these beauty standards are forced upon women at a young age, younger consumers are more susceptible.

In 2018, celebrity Blac Chyna was heavily criticised for promoting a skin bleaching cream across her social media channels, including Instagram. Many famous Bollywood stars have also been used as the faces of these products - including Priyanka Chopra and Aishwarya Rai - due to their massive popularity in Asia.

A number of global brands have shifted their strategy on the products - most commonly choosing to reassess the language used to promote them, rather than close the lines altogether. Why? Because quite frankly, the demand is still there.

However, with discretionary spending going due to the global pandemic and financial insecurity on the rise, will consumers in these markets continue to buy these products?

> "
> My skin care routine has changed as now I have more time to look after my skin. I have added a few things to my skin care routine like I get up in the morning, wash my face and apply lemon juice on my face because it's a natural bleaching agent and also gets rid of pigmentation.
>
> **Male, 55, India**

> "
> Now I'm at home more, I have more time to care of my body and face and while filling my spare time I wear a homemade mask and face lightening mask.
>
> **Female, 25, Indonesia**

> "
> Since I have more time because of the lockdown I take care of my skin much more than I did before. I wash my face more often now moisturize it more often too. I use a lot of homemade remedies for my skin now like OT me and fruit face packs… aloe vera gel from my garden… fresh lime juice for my face as a natural bleach.
>
> **Female, 59, India**

During lockdown, a key trend we saw across the beauty and skincare category was that consumers were experimenting more with home-made variants of their favourite products. This includes skin whitening. So spend is reducing, while the demand remains - this doesn't just cause problems for brands, but also raises a safety concern over consumers' use of chemicals/ingredients to achieve the desired effect.

When you compare Brazil, India and Indonesia to the US, consumers are far more likely to have altered their beauty and skincare routines due to the pandemic, with 'doing treatments at home' a leading change in India and Indonesia.

So why do consumers use these products? It goes beyond simply having paler skin - the impact of Westernised standards are far more embedded in our ideals of beauty. Conversations with our bees reveal the reasons are to have a 'clear complexion', 'bright/radiant/glowing skin', and 'to look/feel attractive'. The sad fact of the matter is that the entire world has been programmed to believe that caucasian skin is associated with beauty, and the further a skin type/colour is from that, the less beautiful it is.

> " I would like to watch advertisements that do not set any kind of beauty standard for society like only skinny models or ones with fair skin. I would not like to see such advertisements and magazines anymore because this is not inclusive. Also women from particular age groups aren't shown or advertised in the industry, I would love to see all kind of people not only women included
>
> **Female, 23, India**

> " I'd like to know what steps brands are taking to offer different shades and styles of makeup directed to different types of people. People going through transition are going to need different primers, foundation and concealers than people who aren't, and it also shouldn't be difficult to find a foundation, concealer, or lip color to match your skin tone
>
> **Female, 29, US**

What do consumers want from brands?

We all know that many beauty and personal care brands have been moving in the right direction in recent years - to be more inclusive and promote a woman's choice to be confident as she is.

There are lots of examples of companies creating campaigns and initiatives to improve the industry, for example Gucci Beauty recently announced model Ellie Goldstein, who has Down's syndrome, as its newest face. Procter and Gamble partnered with publishing giant Hearst on 'Project Body Love', a campaign to change the language of body confidence for UK women and girls.

Dove joined forces with Getty to create the world's largest photographic stock library created by women and non-binary individuals; and Unilever's Dove helped make THE CROWN Act a reality in California, New York, and New Jersey, prohibiting employers and schools from enforcing purportedly "race neutral" grooming policies restricting natural hair styles.

Ellie Goldstein

Dove and Getty create diverse image stock library

Brands are seen as the fourth most influential type of organisation when it comes to discrimination, after governments, schools and religion. Every institution holds a certain level of power - none of which is insignificant if it can benefit people's lives. Partnerships are one of the best ways to leverage existing audiences while pulling resources - it's rare for any one brand/business/institution to make change alone.

What brands need to prioritise moving forward is that they don't just talk the talk, but they walk the walk. It's not enough to support initiatives and create purpose-driven advertising if they're not reflected in the products themselves. Consumers can spot authenticity, and they aren't shy in calling you out on it - brand values, messaging and behaviour must all be aligned to reinforce trust with your consumers.

"

I want to see all the aspects of a product/brand that are related to combating any and all types of prejudice (racism and sexism, for example), as the person is beautiful the way they are, regardless of skin color and hair type.

Male, 20, Brazil

Governments
56%

Schools
50%

Religion
47%

Brands/businesses
41%

Streetbees

Streetbees helps the world's leading brands grow
by building an Always ON connection with consumers.

OBSERVE THE MOMENT OF TRUTH

Real life behaviour captured at the moment a consumer makes a decision. Never rely on claims.

GET CLOSE TO CONSUMERS AT SCALE

Access rich data with photos and videos from millions of demographically representative consumers.

AI DRIVEN GROWTH

Streetbees identifies hidden growth opportunities by applying AI to millions of real life observations from real consumers.

3.4 Million
BEES

2.2 Billion
DATA POINTS

189+
COUNTRIES

MARKET LEADING BRANDS USE STREETBEES TO UNLOCK GROWTH

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