



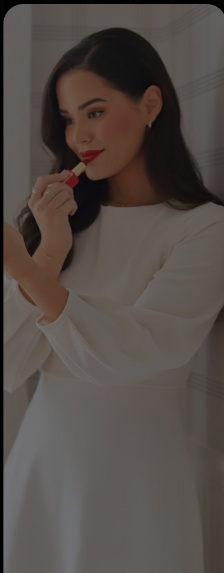
LTK INSIGHTS

#GRWM: LTK's Beauty Consumer Study

How Creators drive consumer trends
Insights from LTK's National Beauty Study



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Speakers



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LTK - @heynasreen

Agenda

- 1 *Get personal. Scale faster.* The LTK community.
- 2 Emergence of community marketing
- 3 How trends are shaping the beauty industry and Creators' impact

Get personal. Scale faster.

LTK is the **community** where Creators run their businesses and personally share their campaigns with each other and consumers, creating virality with **40M** avid shoppers who amplify reach **2X**, scaling brand awareness and sales faster.



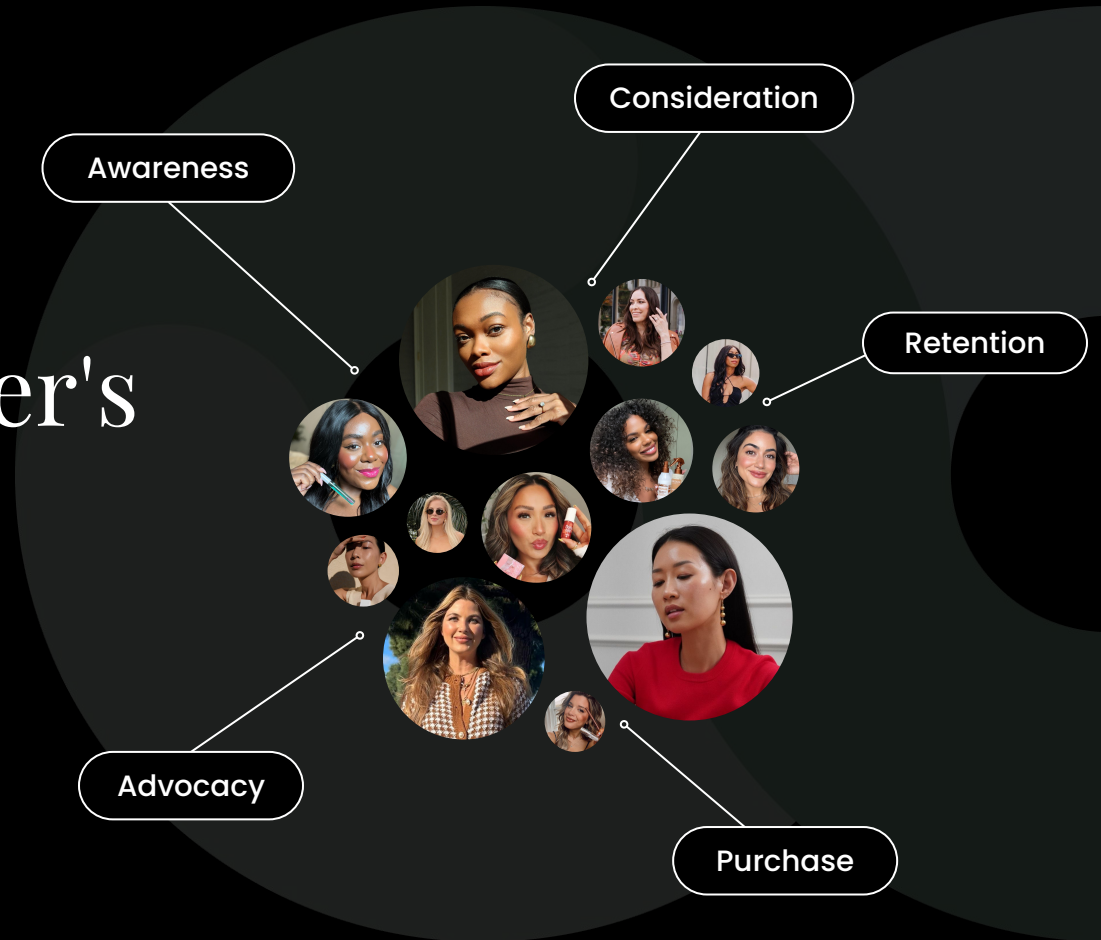
The *emergence* of community marketing

The widespread proliferation of content across constantly emerging platforms disrupted traditional media consumption. Consumers now expect a community.



Creators are at the *core* of a buyer's beauty journey

Creators lean into viral consumer consumption trends, quickly driving towards desired aesthetics, creating an emotional connection with their communities.



LTK SHOPPER

Study *methodology*

This report summarizes key findings related to LTK's Beauty Shopper Study conducted in December 2023, as well as the LTK Brand Decision Maker Study conducted in August 2023.

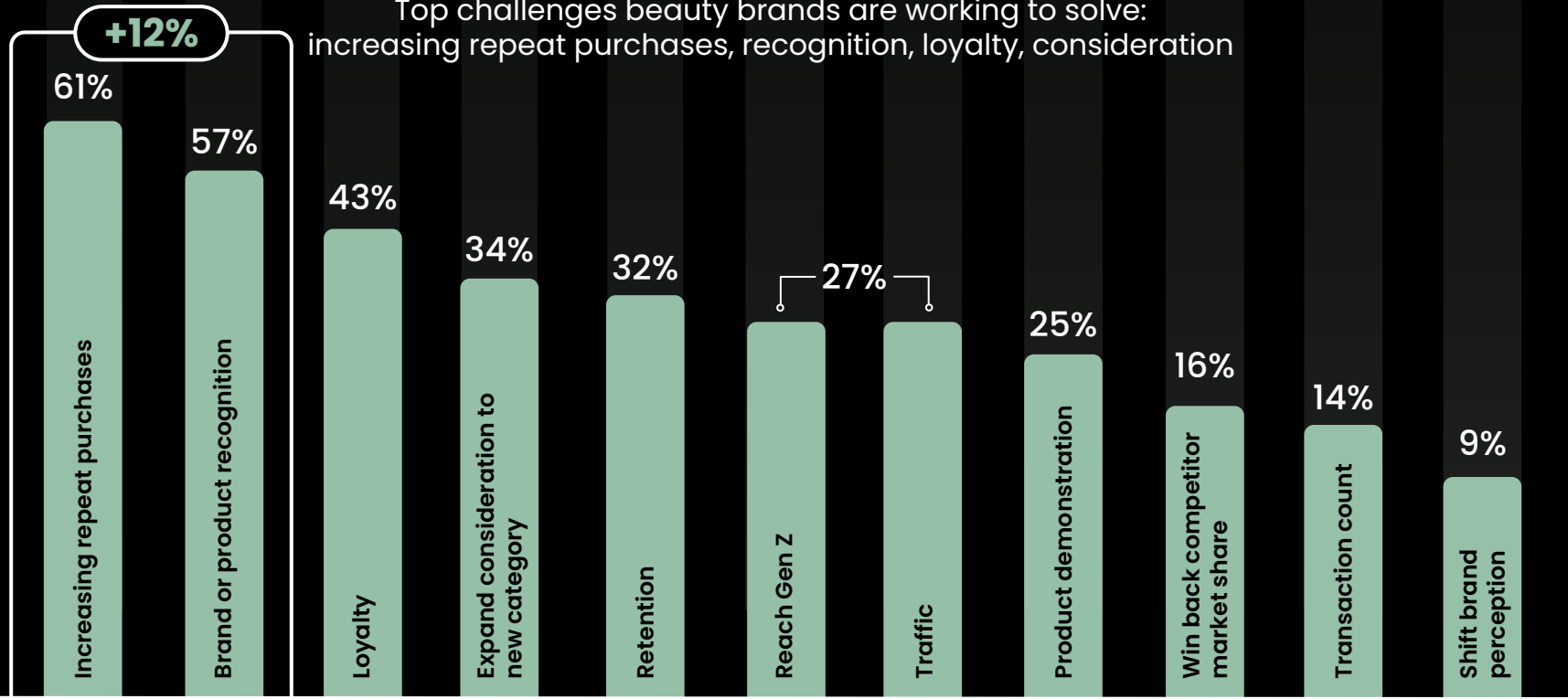
Methodology

LTK's Beauty Shopper Study was conducted December 2023 with 1,312 participants, reflective of US population with 97% confidence.

The Brand Decision Maker Study was conducted in partnership with Northwestern University's Retail Analytics Council, canvassing 164 brand decision makers in the US, from large (\$1B+ in sales) to medium (<\$1B in annual sales).

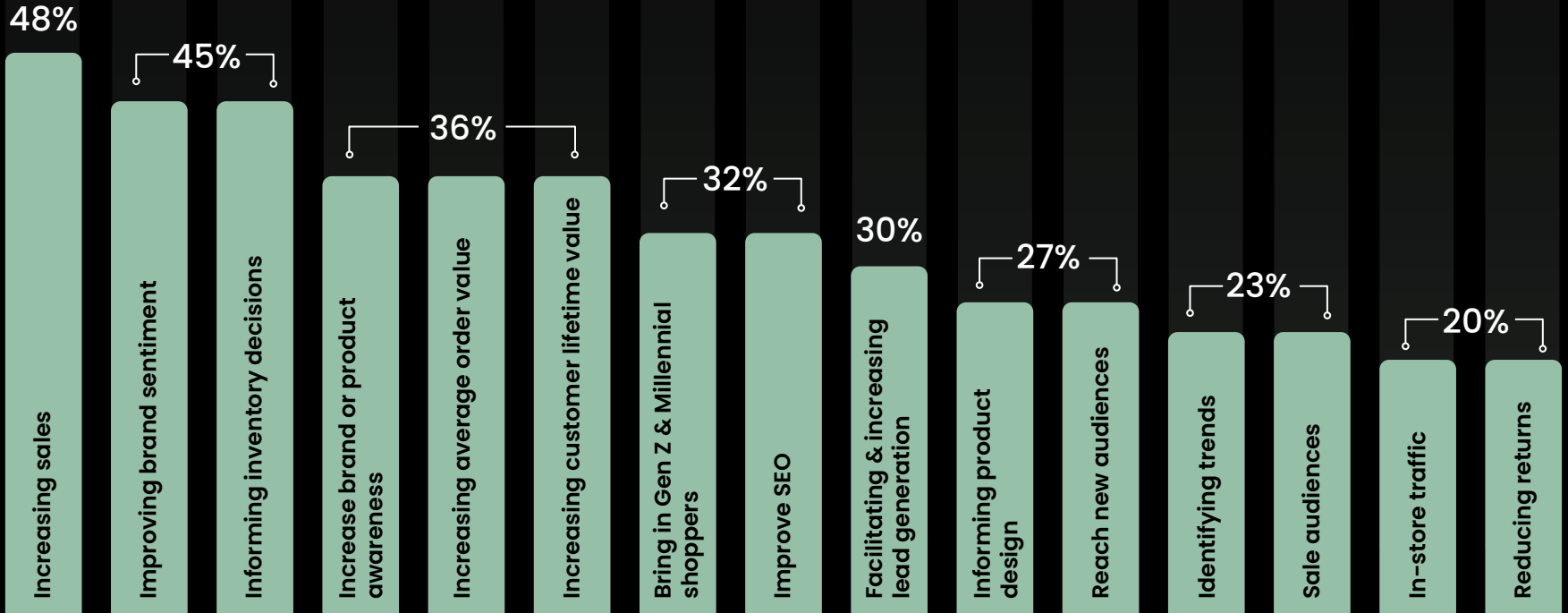
Repeat purchases *and* product recognition

Top challenges beauty brands are working to solve:
increasing repeat purchases, recognition, loyalty, consideration



Creator is *full-funnel* strategy

Beauty brands top Creator focus:
sales, sentiment, inventory decisions, awareness, avg. order



91%

of beauty brands anticipate increasing Creator budgets for marketing strategy in 2024.



LTK TRENDING

Viral *beauty* routines

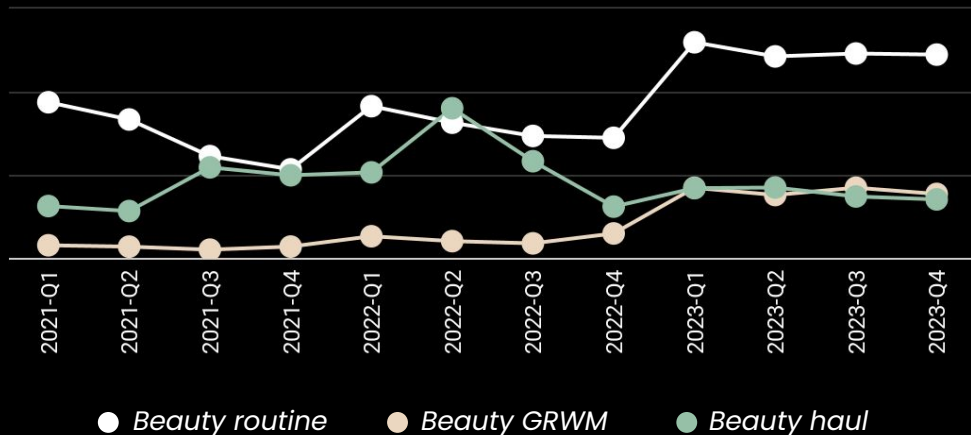
Consumers discover beauty through Creators, who influence their routines and purchase cross-category.



@taylortrazer, @blylynicole, @mushigotacurvy, @gigglecloud, @hollyebeeccawhite, @hbebestbeauty01, @karenbachini, @demiadamandis, @jenncycipolletti

Beauty routines trending above GRWM and hauls

Quarterly LTK beauty posts
Categorized based on captions



6X

beauty GRWM
content since 2021

1.7X

beauty routine
content since 2021

37%

video content for
routine & GRWM
categories

LTK community *drives* beauty cross-category

2023

Beauty category combinations ranked by # of LTK posts

01 Makeup & skincare

02 Makeup, skincare, & hair

03 Makeup & hair

Majority multi-cat

Majority Creator beauty links are on posts with multiple beauty categories.

12%
more GMV

LTK posts linking to makeup, skincare, & hair drove **more GMV** than posts with 1 category.



Discovery to doorstep cross- category



Most Loved
Product Award
Winners



ULTA
Drunk Elephant
D-Bronzi Sunshine
Drops



SEPHORA
Summer Fridays
Lip Butter Balm



KIEHL'S
Ultra Facial
Cream

@Avonnasunshine_@kalee_rogers_@pinesonapalms3_@lindsaysobota

Consumers view a variety of beauty and personal care *content*



Professional hair consultations & styling

Hair care routines

Hair

At-home hair coloring
Hair styling



Self-tanning routine

Skincare routine
Shower routine

Skincare

Get un-ready with me



Wellness/
self-care routine

Other

Personal grooming routine

Nail content
Vitamin routine



Professional makeup sessions

Makeup

Makeup "get ready with me" (GRWM)



Creators *influence* new shopping behaviors

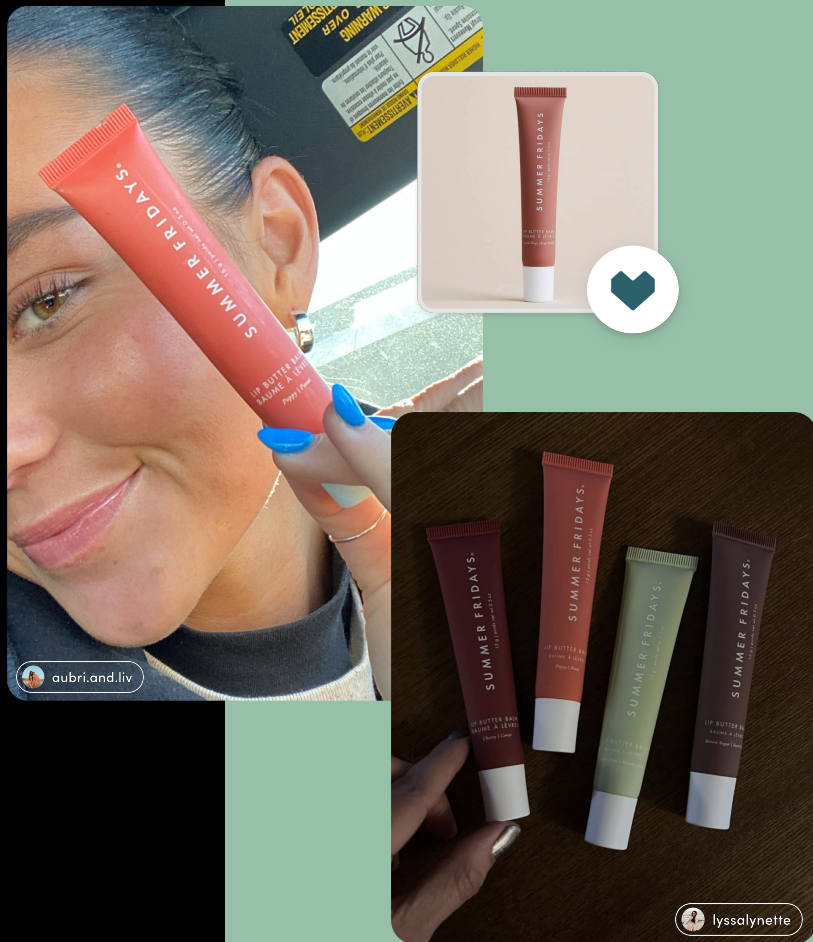
84%

of **beauty consumers** say they are more likely to try a brand or product after seeing a Creator post.

32%

beauty lift compared to all categories

LTK's Beauty Shopper Study



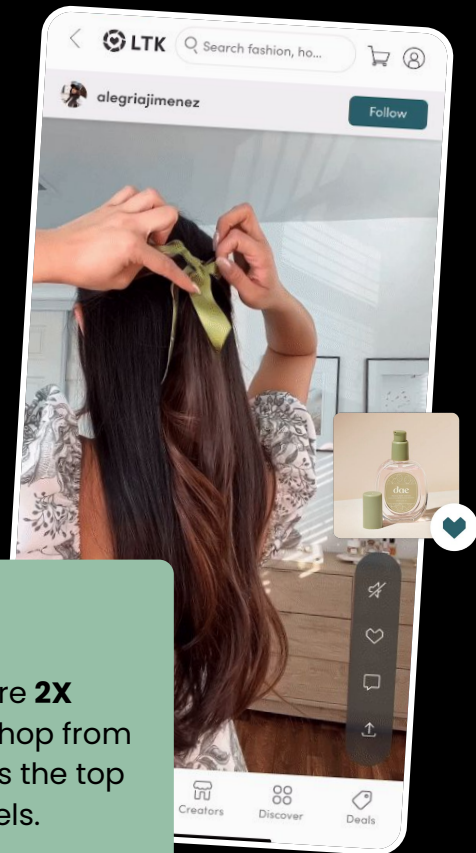
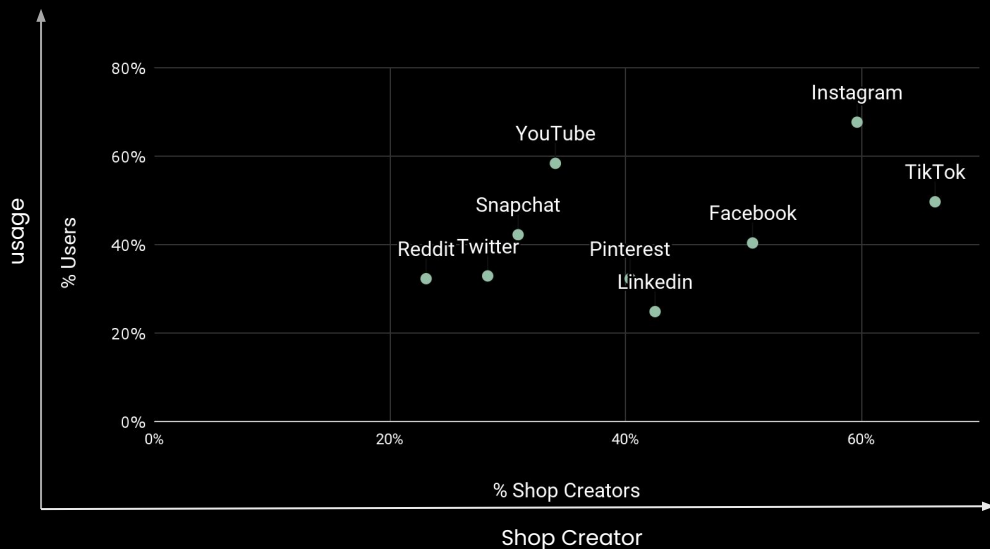
aubri.and.liv

lyssalynette

Social media used and where shop Creator differs

GEN Z

Social media used and where shop Creator differs



KEY INSIGHT

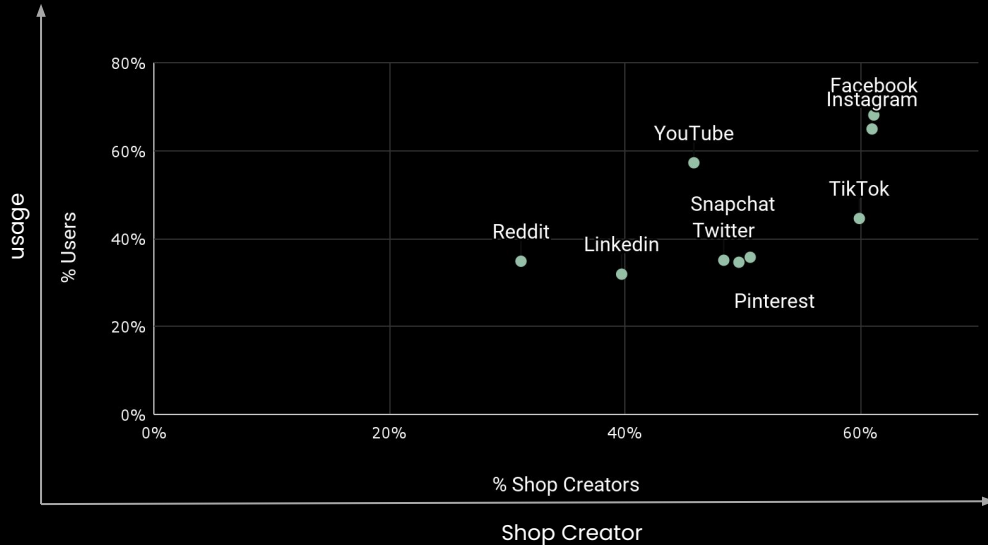
LTK shoppers are **2X** more likely to shop from Creators across the top 5 social channels.

@alegrajimenez

Social media used and where shop Creator differs

MILLENNIALS

Social media used and where shop Creator differs



@caraloren

Both Consumer & Creator Interest in Beauty Up YoY

Beauty intent continues to grow

Creator beauty mentions **up 14% YoY**

Skincare leading search growth

Consumer searches per beauty category



Skincare

+21% YoY



Hair

+5% YoY



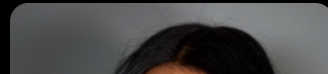
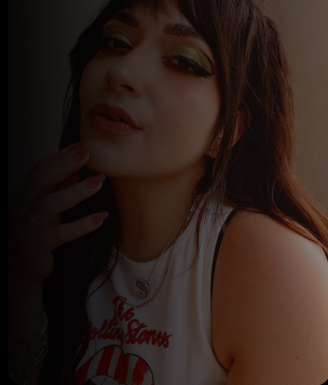
Makeup

+13% YoY

LTK TRENDING

Aesthetic

Creators accelerate trends and
beauty has a place in all trends.



Micro Trends

Mob Wife



Little Treat



Quiet Luxury



Barbiecore



Grandmillennial

Clean Girl



Coquette Aesthetic



Cool Girl



Tomato-Girl Summer



Cowboy Core



LTK TRENDING

“Mob wife” is having a moment

“Mob wife” surges in LTK shopper search in January

Daily “Mob Wife” LTK searches



+41%

traffic on lip gloss
LTK post links

+37%

traffic on lipstick
LTK post links

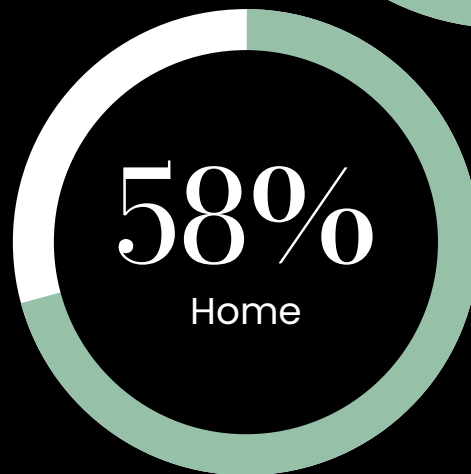
+16%

traffic on lip liner
LTK post links



LTK beauty shoppers *purchase* across other categories

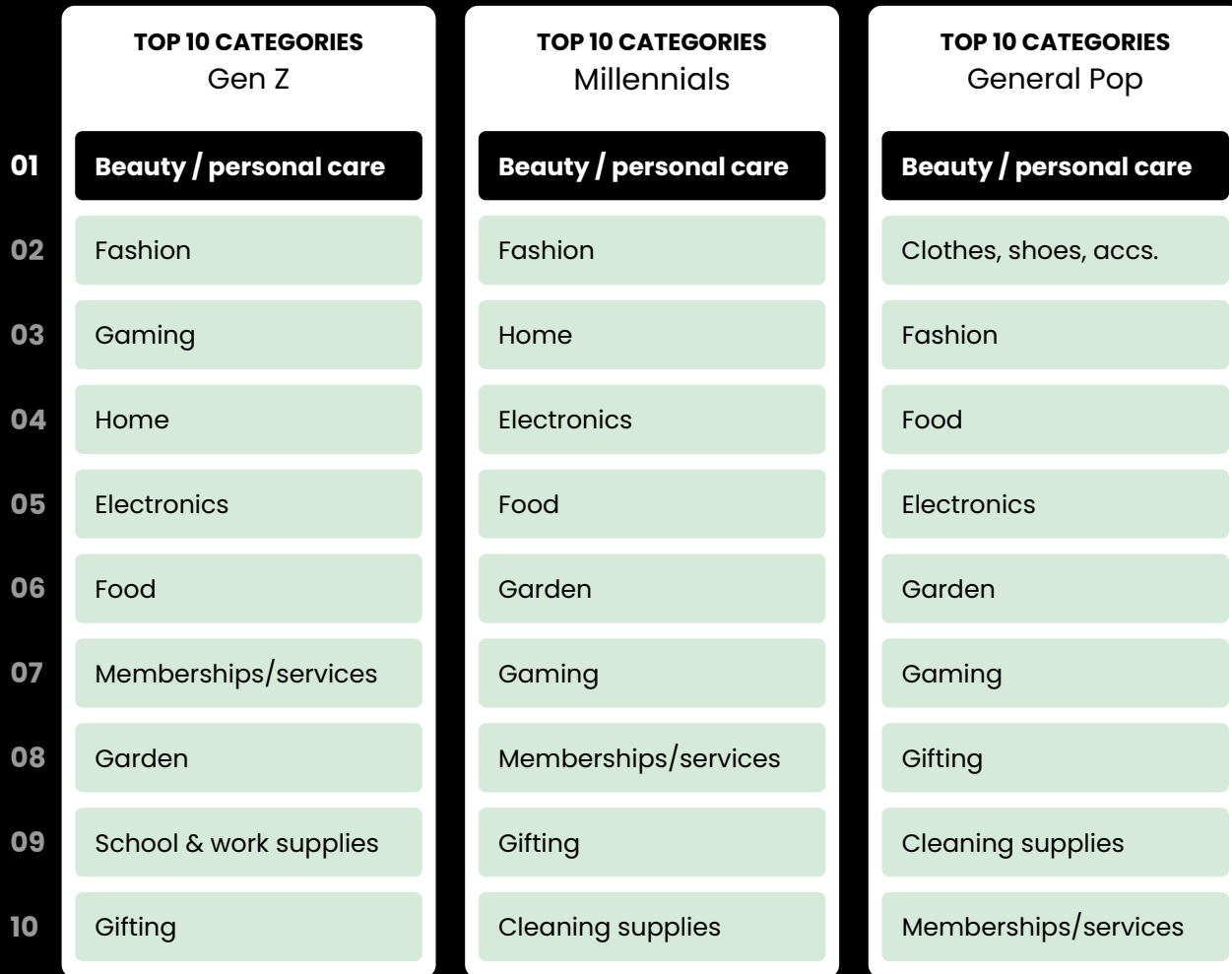
Showing opportunity for beauty to participate
in more consumer trends



Beauty is #1 top-shopped category from Creator

Top-shopped categories from Creators by generation.

LTK's Beauty Shopper Study



Beauty content is *both* educational and relatable

Top reasons people like beauty & personal care content:

01

Learning techniques

02

Learning about products and brands

03

Products used by people who look like me

04

It's entertaining!

05

Creators share skin conditions I can relate to

06

Creators showcase diversity in beauty

07

Storytelling

08

Feels like I'm with a friend

09

The conversation & community in the comments

Creators lean into *trends* happening NOW

TRENDS HAPPENING NOW



Self tanner searches up **49%**



Festival searches up **41%**



Old Money searches up **24%**

(2 weeks over 2 weeks: 2/8/24 - 2/21/24 compared to 2/22/24 - 3/6/24)

LTK TRENDING

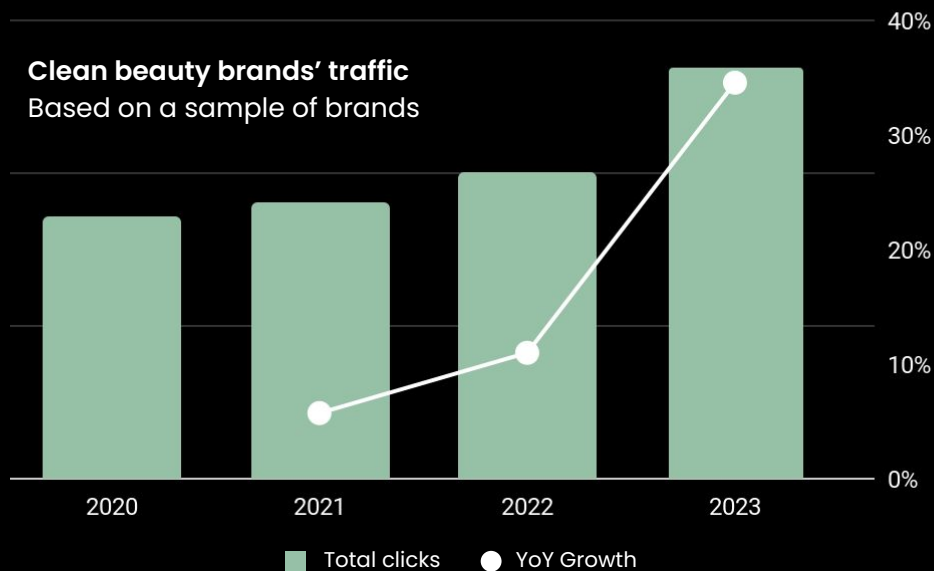
Emotional *resonance*

Creators emotionally connect with their communities through authentic storytelling and trust-building over time.



Clean beauty *surges* among consumers

Clean beauty brands' traffic
Based on a sample of brands



+55%

YoY "Clean beauty"
Posts

+53%

YoY "Clean beauty"
LTK searches

*2023 vs. 2022



Video *conveys* emotion

It highlights not just the brand
or product, but the story.

89%

of those who shop
beauty through Creator,
watch Creator **video**
content

77%

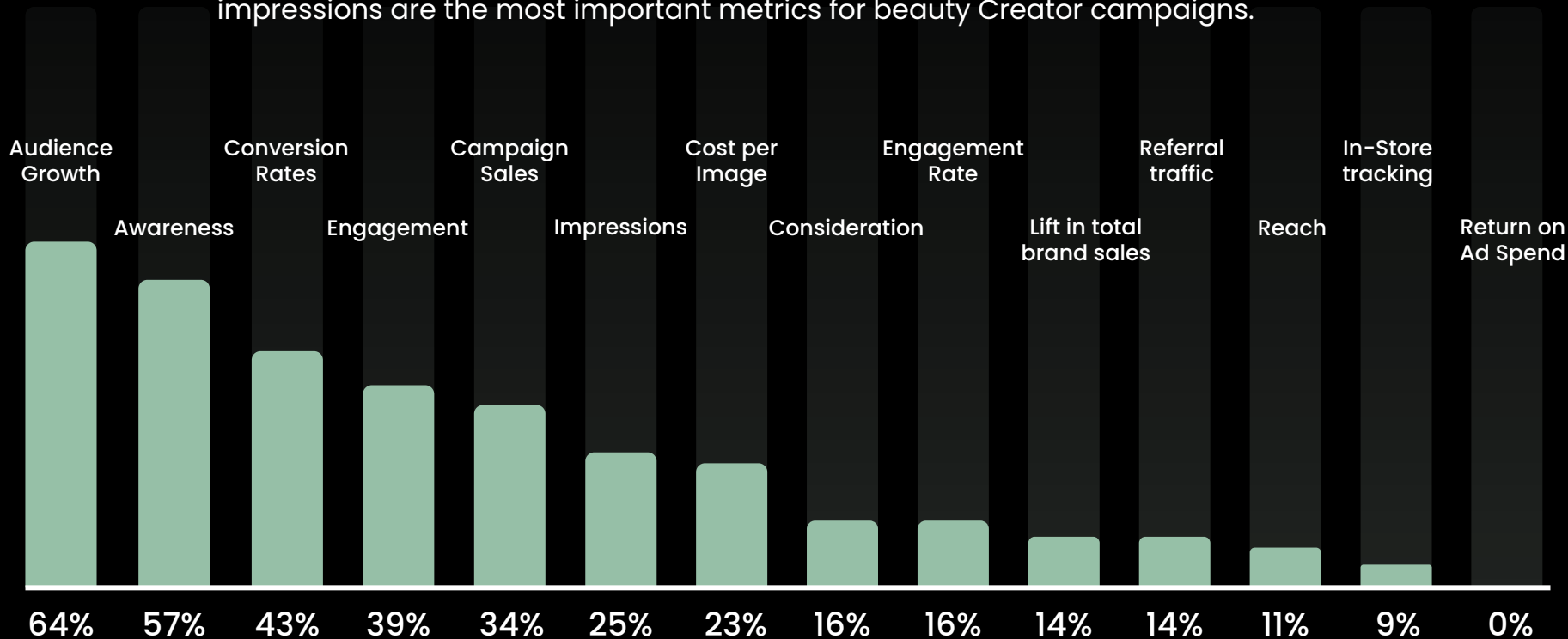
of Gen Z prefer
video

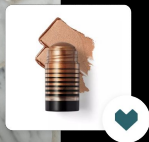
67%

of consumers
prefer video

Brands experience *full-funnel* success

Audience growth, awareness, conversion rates, engagement, campaign sales, and impressions are the most important metrics for beauty Creator campaigns.





Beauty links on the LTK App see 9% higher conversion than other product categories



@Msnewslady, @victoriayn, @laurenhornstyle

LTK INSIGHTS

Beautiful year *ahead*

Creators help brands navigate the ever-changing consumer landscape and emotionally connect your brand with consumers.

01

Viral beauty routines

Consumers discover beauty through Creators, who influence their routines and purchase cross-category.

02

Aesthetic

Creators drive consumers to quickly participate in trends, and beauty has a place in all trends.

03

Emotional resonance

Creators emotionally connect with their communities through authentic storytelling and trust-building over time.



Thank you

