

2019

STELLA
RISING

BEAUTY ON AMAZON

How women search,
discover, and buy

stellarising.com

CONTENTS

PART ONE

About the Report	3
How Women Shop for Beauty on Amazon	4
Experiencing Beauty Beyond the Store	5
Why Amazon?	5

PART TWO

Beauty Research Begins with Amazon	6
Finding Beauty	7
Buying Beauty	8
5 Star Beauty Standards	9
What's Your Amazon Beauty Strategy?	10
About Stella Rising	11



INTRODUCTION

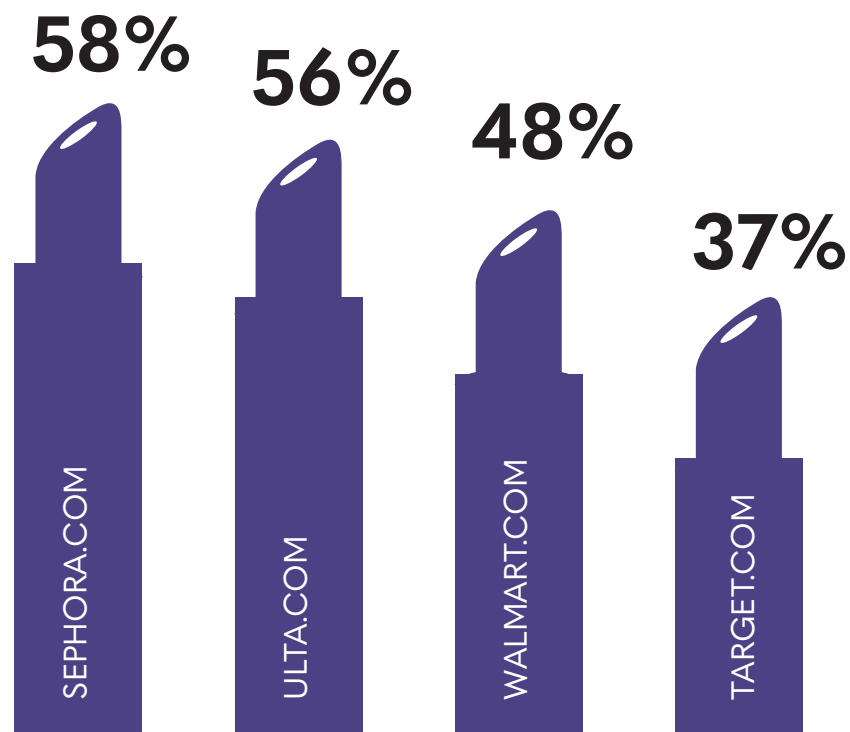
Way back in 2016, many in the beauty industry doubted Amazon's ability to fully engage women within the beauty category. Analysts deemed the beauty space "un-Amazonable" because it lacked those satisfying in-store experiences that beauty consumers crave—those wonderful moments of discovery and experimentation.

But never underestimate the "Amazon effect."



75%

of women shop for
beauty on Amazon



Just three years later, the online shopping platform has emerged as not only a beauty destination, but a clear leader in the industry; today, 75% of women shop for beauty on Amazon, with a double-digit lead over specialty retailer or big box dot coms.

HOW WOMEN SHOP FOR BEAUTY ON AMAZON

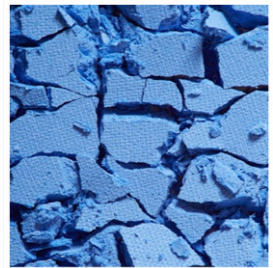
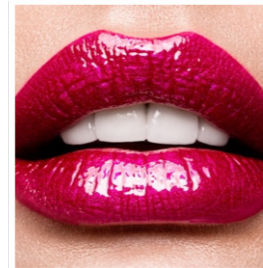
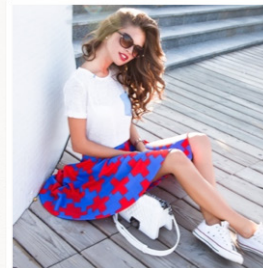
To understand how women discover, interact with, and purchase beauty on Amazon, we surveyed 2,706 women using Glimmer, our proprietary social community, in October 2018. Our How Women Shop Beauty Report covers the full range of retail and e-comm shopping behaviors, from specialty beauty to brand websites.

Here, we're focused on how women shop Amazon for beauty, learn more or get the full report by contacting **Marlea Clark**, EVP Marketing & Insights, mclark@stellarising.com, 203-256-4174.

ABOUT GLIMMER

Glimmer is our proprietary community of 20,000 members, grassroots influencers who love to share their opinions and thoughts, fueling first-party qualitative insights in real time, from real women.

GLIMMER 



Through this engaged community, **Stella Rising** is able to garner exclusive and informative insights on the consumer with unique and informative activations and studies.

With our finger on the pulse of what women want from brands, we can immediately identify trends and patterns to inform successful strategies for **rising star brands**.

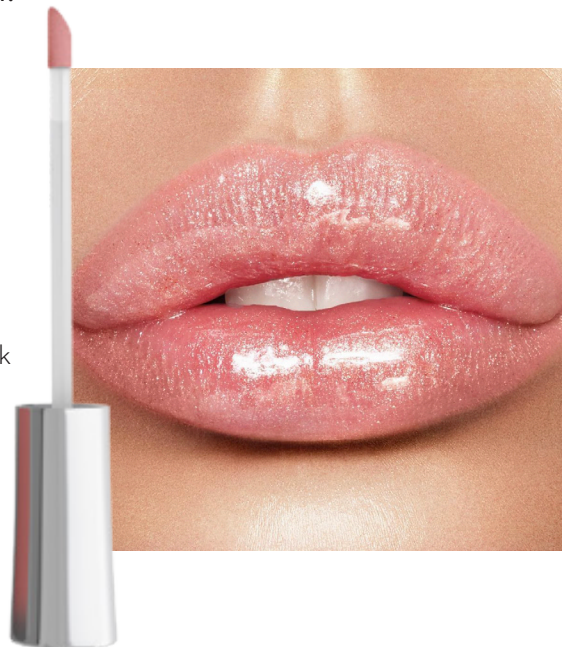
EXPERIENCING BEAUTY BEYOND THE STORE

Beauty has always been an experience-first category, with product sampling and trial playing a critical role in the consumer's path to purchase. For this reason, imagining an immersive beauty experience happening outside of a store wasn't always simple. However, the beauty consumer is both curious and action-oriented; nearly $\frac{3}{4}$ of women love learning about the latest beauty trends and actively seek information about them. With only 7% reporting a preference to stick to their usual products, the playing field is wide open for discovery, which happens frequently on Amazon.

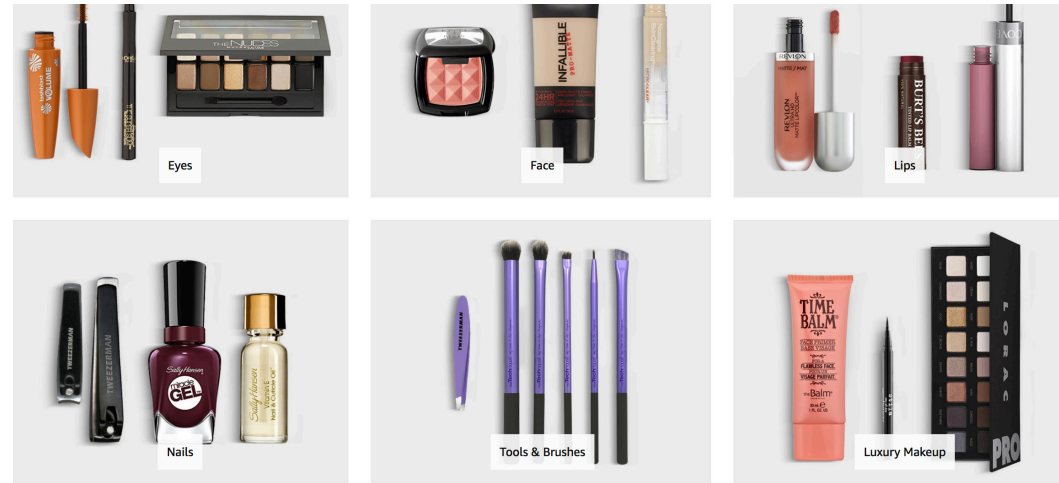
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3/4

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For more trends and analysis, visit
stellarising.com



WHY AMAZON?

While three in four women we surveyed shop for beauty on Amazon, 86% buy beauty products in-store, online, and wherever they might find them. When asked why she chooses Amazon over a physical brand store, convenience, price, and variety all jump to the top of her list.

When buying beauty solely online, what makes her press Buy Now on Amazon instead of that brand's website? Nearly half list fast and free shipping as the top reasons, with reviews and a wider selection of products next on her list of importance.

WHY NOT AMAZON?

Women tend to shop for beauty products in-store due to

Best prices on products

- Walmart
- Dollar Stores
- Target
- Drug Stores

Product sampling & testing

- Ulta
- Department Stores
- Sephora

When women are researching beauty online, they list Amazon as the

#1

source, surpassing store websites, brand websites, and social media

BEAUTY RESEARCH BEGINS WITH AMAZON

Price, convenience, and variety are simply the entry points to buying beauty on Amazon—the gateway to the entire path to purchase.

When women are researching beauty online, they list Amazon as the #1 source, surpassing store websites, brand websites, and social media. This signals the core element Amazon provides in the overall path to purchase: search and discovery.

More women search by category (e.g., face mask, lip gloss) than by brand, making it more important than ever to have an Amazon strategy that will allow your products stand out in the beauty space, especially if you're an indie or lesser-known brand.

When researching beauty products online, where does she look?

57%	Amazon
55%	Store websites (e.g., Sephora.com)
53%	Brand websites
47%	Brand-sponsored social media accounts



The top five ways women search for beauty products on Amazon:

1. Search by product category (face masks, lip gloss, brow tint)
2. Search by brand
3. Use navigation bar to get to a specific brand
4. Happen to see beauty products pop up under recommended products
5. Go to a brand's store page and browse

FINDING BEAUTY

We asked women about finding beauty on Amazon. When starting a search on Amazon, what does she find helpful? Product reviews, descriptions, pictures, videos, and coupons—in that order.

Clearly, content—everything on the page from descriptions and details to photos and reviews—immediately satisfies the beauty consumer's desire to discover. Brands should have a robust store page that offers a higher education through detailed titles, descriptions, how-to tutorials, benefits, and optimized images and video.



Content is king for

Product Discovery

on Amazon

2018
2017

Which type of information is helpful when researching beauty products?

PRODUCT REVIEWS



PRODUCT SPECIFICATIONS/ DESCRIPTIONS



PICTURES SHOWING PRODUCT USE



VIDEOS SHOWING PRODUCT USE



ONLINE COUPONS





When you find a product you're interested in,
what is your next step?

78% read product reviews

62% read product descriptions

49% look at product pictures

40% read the ingredients

34% watch product information videos

BUYING BEAUTY

Not only does content help her discover, it convinces her to purchase. After she finds an interesting product, the beauty consumer fact-checks through product reviews, descriptions, ingredients, pictures, and videos—almost identical to the content that helps jumpstart her search.

Content in a brand's store is especially important for beauty due to ingredient-based trends like clean beauty, vegan beauty, free-from claims, and natural and organic products. Consumers make significant demands, and they seek confirmation. Brands must view and treat everything on the product page like content that serves a purpose – it's what the consumer is looking for.



Content is king for

Influencing Purchase

on Amazon



5-STAR BEAUTY STANDARDS



Considering the important role that reviews play in the path to purchase, it is critical for brands to remember that reviews are content, too. If other beauty enthusiasts on the platform are reviewing products realistically and sharing experiences through photos and videos, the consumer is more likely to be engaged with the product page and add the item to her cart. On Amazon, reviews can easily make or break a beauty purchase.

The core factors influencing purchase demonstrate why having a strong Amazon strategy is so critical. From start to finish, or in this case, from product listing to reviews, everything associated with a brand must be kept under a watchful eye.



★★★★★ HAY to YAYEEEE!

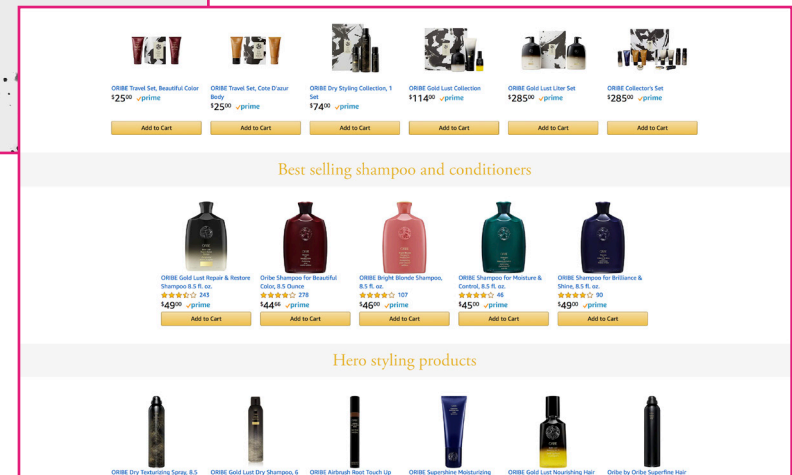
August 23, 2017

Verified Purchase

I have frizzy-curly hair that I thought NOTHING could tame—until now! Prior to finding Orbe Shampoo for Medium, my hair felt and looked like straw! It was so bad I even considered chemical straightening! But before going to that extreme, I decided to visit a high end salon to see if they could help; best decision ever!! My stylist used the Orbe Shampoo and matching Orbe Conditioner on my hair. After blow drying my hair, it was so silky smooth that she didn't even need to use a flat iron. And I couldn't stop smelling it (ps, I was sniffing my hair), because the scent of the Shampoo, is so wonderful. Mmmmmmm... so milkie. In a nutshell, Orbe Shampoo for Medium has taken my hair from 10/10 to 10/11.

I strongly recommend you also try the matching Orbe Conditioner, to get the full effect.

By routinely viewing their own store pages through the lens of the customer and keeping up with the competition, brands will have a greater sense of what the beauty consumer is looking for. Invoke action by bringing a real and unique experience to the Amazon beauty shopper.



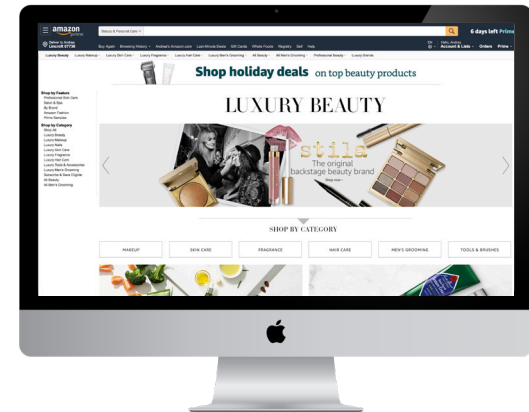
WHAT'S YOUR AMAZON BEAUTY STRATEGY?



Increasingly, beauty brands are leveraging a hybrid strategy on Amazon, selling as both Vendors and Sellers, often on a different portion of the catalog. There are pros and cons to both approaches, weigh them carefully to determine the best strategy for your business needs.

RINA YASHAYEVA, VP Marketplace Strategy, Stella Rising

There are multiple ways to sell on Amazon



amazon
vendor central

(1P)

open to

- **MASS** Beauty
- **LUXURY** Beauty
- **PROFESSIONAL** Beauty

amazon
seller central

(3P)

FBA

Fulfilled by Amazon

FBM

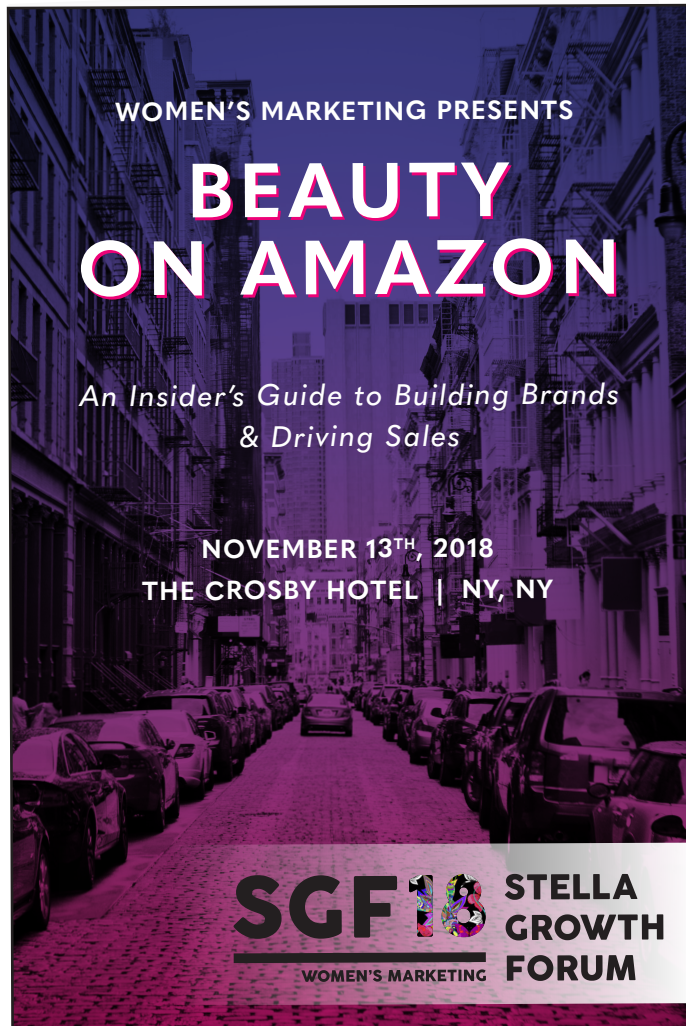
Fulfilled by Merchant

open to

- **MASS** Beauty

HYBRID STRATEGY

selling as both
Vendor & Seller



STELLA RISING

Stella Rising connects spirited, high-growth brands with consumers who will love them—and drives business results. We're a leader in building effective end-to-end Amazon strategies that help brands win. Connect with us to drive results on Amazon and throughout the consumer landscape, or to attend our next Stella Growth Forum.

www.stellarising.com

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SOURCES:

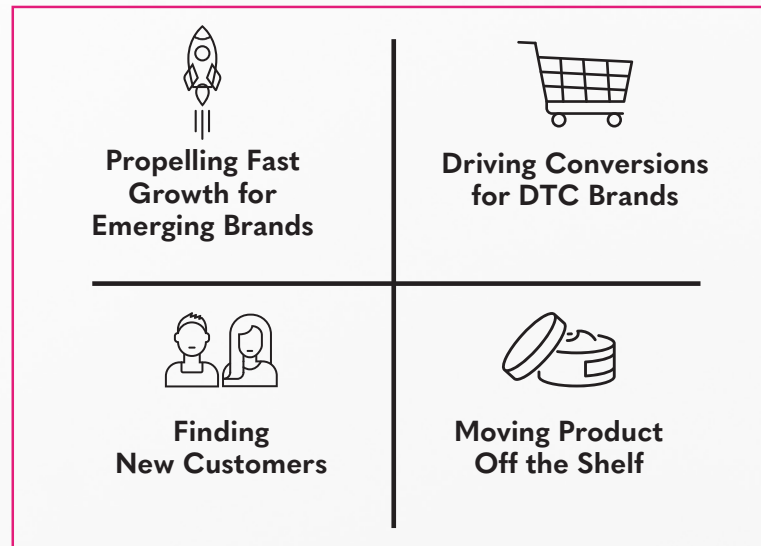
Glimmer Community Survey 2018: How Women Shop Beauty; Images: Amazon.com

CONTACT

Stella Rising is the agency for rising star brands. We connect brands to the consumers who will love them through a broad portfolio of online and offline services, including retail and e-commerce strategies, social and digital media, Amazon, and highly effective brand communication strategies.



PROBLEMS WE SOLVE



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