

**John Lewis Beauty Bets Report 2020/21 Key Highlights Fact Sheet**

**2020 KEY STATS:**

- Multifunctional serums **+168%**
- Lip balm or tint **+122%**
- Tinted moisturisers **+81%**
- Bronzers **+147%**
- Products including Vitamin C **+248%**
- Skincare, body & hair products **+234%**
- Since Masks were made to be essential inside public places, Mascara has been **+58%**, eye make up **+19%**, and eyebrow make up **+34%**
- Searches for candles up **+182%** and reed diffusers up a whopping **+1017%**
- In 2020, **John Lewis saw customers spending an average of 6.2% more per beauty item, with visit value also increasing by 6.6%** as customers invested in more premium products.
- John Lewis customers have **recycled over 175,000 products diverted from landfill via our BeautyCycle scheme.**
- *All stats year on year increases*

**2020 BEST SELLERS:**

- **Olaplex**, which is renowned for its repairing formulas, has been a runaway success with over 4,000 bottles sold (*or enough to fill 5.2 bathtubs sold*) to date.
- **Chanel's iconic Soleil cream bronzer** has been one of our biggest selling products in the make-up category in 2020, with enough sold to fill 17,000 2.55 bags.
- We have sold enough **Aesop Resurrection Aromatique Hand Wash**, 500ml, to fill 285 bathroom sinks.
- **Creed Aventus Eau de Parfum**, which retails for £280 for 100ml continues to be our best selling fragrance this year.
- **Estée Lauder's Advanced Night Repair Synchronized Multi-Recovery Complex**, which has been reformulated to include exclusive Chronolux™ Power Signal Technology, has shown strong performance since it launched in September, with a +34% increase in sales.
- Since Launching out Beauty Tech hub online, the **MZ Skin Light-Therapy Golden Facial Treatment Device FiveColoured Light Treatment**, £385 continues to be our best seller.
- The **John Lewis Beauty Advent Calendar 2020** has been the fastest selling yet and a sell out success.
- The **my John Lewis Discovery Beauty Box** sold out in 6 hours.
- **Dermaflash Luxe Anti-ageing Exfoliating & Peach Fuzz Removal device and the Anatome Menosupport + Renewal supplement** are among our best sellers for products that speak to the menopause.
- **Jo Malone's** signature Lime, Basil & Mandarin diffuser.

## **2021 KEY TREND PREDICTIONS:**

### **1. Beauty Goes 360**

Beauty will become a totally holistic experience as wellbeing becomes permanently part of the beauty journey. **Every product will need to make you both look good and feel good** - we call this the 360 beauty experience. Products that promote and support inner beauty, sleep and relaxation will be key, our new wellness concept will support customers with this.

### **2. Make up Bags Get Smaller**

2020 has seen a re-evaluation of priorities in beauty; with many of us leading more of an at home lifestyle, we saw overly complex make-up become less of a focus as customers chose to allocate 'me time' to extended skincare routines instead. **Cosmetic bags will contain smart kits featuring hardworking essentials:** a light base or tinted moisturiser, lip balm or tint (which are already soaring at +122%), a glow-giving cheek product, lengthening, natural-look mascara. We will see both **cult and established brands launching an expanded offering of multi-purpose products** to aid customers in their quest for a more streamlined approach that cuts down on packing wastage but also encourages healthy skin. Think multifunctional serums (already up +168%), moisturisers that also prime and offer SPF, bases with key ingredients such as Vitamin C, lip/skincare hybrids and two-in-one eyeshadow/ highlighting sticks.

### **3. Menopause Becomes Mainstream**

Historically a little-spoken-about topic, **the next 12 months will see menopause brought into the spotlight as conversation around it significantly increases and negative connotations are shaken off.** A key concern within our beauty customers, this will be an area of focus for John Lewis as we make our beauty offering a place of positive community and conversation.

### **4. We'll Wake Up to Hair Wellness**

Our haircare routines used to consist of a simple shampoo and condition, perhaps with a Sunday evening hair mask thrown in for good measure. However, this is set to be dialled up as hair wellness becomes a key trend over the next 12 months. Launched into John Lewis in August, salon-led brand **Olaplex, which is renowned for its repairing formulas, has been a runaway success with over 4,000 bottles sold (or enough to**

**fill 5.2 bathtubs sold) to date.** As part of this movement we will also see scalp scrubs, serums and deep cleansers, which shift product build-up and promote stronger and healthy looking hair become integral to our weekly haircare routine. These will include ingredients typically used in skincare, such as hyaluronic acid, as we begin to consider the scalp as an extension of our face.

## 5. The Unfiltered Face

While the trend for 'flawless' complexions that appear as poreless and smooth as an Instagram filter has dominated the past few years, 2021 will see an about change as we move towards a more natural look. **Skin takes centre stage as full-face makeup declines, and we celebrate individual characteristics and 'imperfections'.** Speaking to a customer desire for quicker, low-maintenance WFH (Work from Home) make-up routines, this also taps into a wider cultural mood for inclusivity and diversity. **We will also see formulas develop to include skin benefitting ingredients to enhance the appearance of a natural complexion.** Estée Lauder is leading the charge in this area with the new Futurist Hydra Rescue Moisturising Make-up, which features probiotic technology, ion-charged water complex and chia-seed extract to hydrate, plump and even skin tone. In addition, **the pristine Insta-brow will be replaced by a fluffier, bushier look.** Having seen strong sales since launch, we are backing Benefit Brow Microfiling Pen – which mimics natural hair growth to create the illusion of full, natural brows – to be a big seller for 2021.

## 6. Home Fragrance Zoning Will Boom

With our homes having become not just our living spaces but also our offices, gyms, schools and restaurants, never has it been more important to make them feel as comfortable and desirable as possible. It is for this reason home fragrances are going to be an important category into next year and beyond. Taking inspiration from the idea of a perfume wardrobe, **we're seeing fragrance zoning emerge as a trend to create moments and moods throughout the at-home day:** a refreshing peppermint spray in the morning, an energising citrus candle post lunch, a relaxing lavender scent for evening. John Lewis has seen online searches for candles up +182% YOY and reed diffusers up a whopping +1017% YOY.

## 7. The Age of Discovery, Education and Experimentation

During this past year, we have all likely spent more time looking at our faces on a screen than ever before and as we zoomed our way through the day, interest in beauty increased. **Throughout our Virtual Beauty Events, our customers have told us that the more screen time they've had, the more time they've had to educate and experiment too - we predict this will continue but in new forms.** The

joy of the beauty hall lies in the ability to discover new brands, trial out textures, test colours and sample scents to find your next beauty favourite. However, current restrictions in shops have meant that the traditional mode of testing is, in many cases, no longer possible. As such the beauty industry is having to adapt, and for 2021 we will see this done through beauty boxes, discovery sets, travel miniatures and virtual eventing.

**Presenting customers with a curated edit of products, and at a lower price point than full sized versions offers a personalised and risk-free way to test.** We have already seen this idea prove popular; the Discovery Beauty Box, which included 14 skin, hair and body products when my John Lewis members spent £100 on beauty online, sold out in six hours when it launched earlier this year. We have also experienced a record year for the John Lewis Beauty Advent calendar. Launched on the 1st October, and offering over £375 worth of product for £150, it has been our fastest selling in history

### 8. Buy Fewer, Buy Better

Buy fewer, buy better will be the beauty mantra for 2021. **Customers will purchase a reduced amount of products, however those they do add to their baskets will have a higher price point as they reach for premium quality products that last and perform.** In 2020, John Lewis saw customers spending an average of 6.2% more per beauty item, with visit value also increasing by 6.6% as customers invested in more premium products. We've already seen a huge uptake of our BeautyCycle recycling scheme which launched in 2019, and allows customers to dispose of their beauty packaging in a planet-friendly way. Since launching the scheme **John Lewis customers have recycled over 175,000 products diverted from landfill.** We are also seeing a mood for self-gifting pervade as customers reach for a pick-me-up purchase that has luxe-factor but is still attainable. While a Chanel handbag might be out of reach for many, a Chanel bronzer, at £40, is far more accessible - **Chanel's iconic Soleil cream bronzer has been one of our biggest selling products in the make-up category in 2020, with enough sold to fill 17,000 2.55 bags.**

### 9. Skincare Gets Serious

Over the next 12 months, **we will see powerful and proven performative skincare dominate as customers increasingly reach for high-performing products from both heritage and discovery brands that offer visible results.** Ingredients will be at the forefront as customers become experts - Vitamin A and C will be on their minds and they will expect results. This is down to a combination of factors: less trips to the facialist means customers are seeking ways to get professional results at home, an increase in online education via social media and virtual masterclasses are also enabling the customer to use powerful

active ingredients and innovative technology with confidence. This is a trend we have seen gain momentum in 2020 with products including vitamin C seeing a huge uplift at +248%.

## 10. The Rise Of The Everyday Ritual

The everyday gets made extra-special over the next 12 months, as **bath – and shower – time is transformed into a pampering self-care ritual**. Luxurious soaps, shower creams, scrubs and lotions will replace basics as customers look for achievable ways to indulge and unwind. For many, the increased normality of staying in has seen customers lean towards their own at-home rituals for skin care routines and create at-home spa experience as **skincare, body & hair products increased +234% vs last year during lockdown**. We've also seen a **huge surge in customer demand for bath and body gift sets** from brands including Diptyque, Le Labo, Molton Brown, Rituals and L'Occitane. Offering a full bathing kit, they allow the customer to experience an end-to-end ritual at home without having to spend on full-sized products.

### **BIG BET PRODUCTS FOR 2021:**

- Plant-based supplements will boom in 2021 to support beauty from within as well as offering skin benefits such as hydration and elasticity. We are backing cult Australian brand **The Beauty Chef** as a bestseller over the next 12 months
- Having seen strong sales since launch, we are backing **Benefit Brow Microfiling Pen** – which mimics natural hair growth to create the illusion of full, natural brows – to be a big seller for 2021
- Sleep sprays will play a particularly important role in the next 12 months with **calming formulas from Neom and This Works** predicted to continue to be best sellers.
- We've seen an uptick in demand for products designed to calm and relax, including **Aromatherapy Associates which has seen huge growth in 2020 - we are backing their Ultimate Moments Collection** as one of 2021's biggest sellers.
- **Multi Purpose Products** including moisturisers that also prime and offer SPF, bases with key ingredients such as Vitamin C, lip/skincare hybrids and two-in-one eyeshadow/ highlighting sticks.
- With mask wearing likely to be essential for the months ahead, we also predict that customers will turn to **bases that include skincare benefits to support with 'Maskne'** and other side effects.
- Highlighters, blushers and bronzers from brands such as **Hourglass, NARS and Charlotte Tilbury**
- Products that include **CBD** in customer friendly formats
- **Bath and body gift sets** from brands including Diptyque, Le Labo, Molton Brown, Rituals and L'Occitane
- **Scalp scrubs, serums and deep cleansers** from Aveda and Olaplex