



10

BEAUTY
BETS

JOHN LEWIS
& PARTNERS



WELCOME

John Lewis presents...
10 beauty bets for the year ahead.

Welcome to the inaugural John Lewis Beauty Bets, our report outlining the 10 key trend predictions across skincare, make-up, hair, fragrance and wellness for the next 12 months. We have combined detailed customer insight with the opinions from our team of expert beauty buyers to predict our big bets - trends that will shape beauty movements, bring new brands to the forefront and, most importantly, will be on our customers' minds.

But, before we look forward, a quick reflection on the present...

It's something of an understatement to say that 2020 has been a big year for beauty. In light of the global pandemic, we've seen customer behaviours alter, unexpected trends arise and innovation come to the forefront to cater to our shifting lifestyle.

Over the past decade we have established ourselves as the trusted destination for all things beauty. We have over 40 stores and a thriving online business, stocking 190 brands from well known powerhouses to emerging labels.

Dedicated to showcasing newness and innovation, as well as championing the brands we know our customers love, 2020 saw the introduction of 27 brands to our roster, including Kate Somerville and Sunday Riley, and the launch of two specialist hubs: the Tech Shop and the Wellness Edit - all responding to the changing needs and lifestyles of our customers.

As the world went online we hosted our first ever Virtual My John Lewis Beauty Weekend in July. Featuring a stellar line up of industry experts and 17 masterclasses, tickets sold out in 24 hours. Our second Virtual Beauty Weekend of 2020 took place in October and saw over 7,000 tickets sold.

We were also proud to relaunch the BeautyCycle scheme earlier in the year, making us the first UK retailer to launch a recycling initiative on a national scale. Offering £5 back for every five empties recycled, it's been hugely popular with more than 15,000 customers recycling with us, saving over 75,000 products from landfill - as we work together to put sustainability at the forefront.

Though the wider world may look a little uncertain over the next 12 months, what we can guarantee are many more exciting and innovative developments for John Lewis beauty.

Without further ado, here are our 10 bets for the year ahead as predicted by the John Lewis team of expert beauty buyers. Amelia Kendrick, buyer for Emerging Beauty, Joe Coggrave, buyer for Skincare and Fragrance and Laurie Cilberto, buyer for Make-up.

We hope you find the report useful and insightful for both yourself and your readers.

Thank you for all your support this year and wishing you a happy and healthy 2021 as we look to the future.

**THE JOHN LEWIS
COMMUNICATIONS TEAM**





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, inner and outer beauty combined. We believe our customers will prioritise three key areas in 2021:

INNER BEAUTY

Inner Beauty: Forecast to currently be worth £494 million (Mintel), we are seeing a significant increase in interest for beauty supplements as customers reach for ways to address inside-out wellbeing. 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.

SLEEP AIDS

Sleep has become a primary wellness concern with 1 in 4 of us having found getting those precious 8 hours even more challenging than normal during lockdown (Economic and Social Research Council). Earlier this year we launched a number of brands in our new [online wellness concept](#) to support sleep and predict they are set to remain popular as we move into the next 12 months. Sleep sprays will play a particularly important role with calming formulas from Neom and This Works predicted to continue to be best sellers.

RELAX AND DE-STRESS

Once taboo, the importance of taking a step back to de-stress and unwind has come to the forefront as the wider discussion around self-care continues to open up. With many elements of life feeling uncertain as we head towards the new year, we know these will remain key wellbeing concerns for customers. 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. With self-care and relaxation properties, we will also see CBD products become more accessible with new formulations being introduced across our product ranges. Though CBD is already prevalent within the UK market, 2020 has been the year we've seen customers feel ready to embrace the trend in earnest. We have introduced brands including Plant People, Flora + Bast and Wildflower who all offer CBD in customer friendly formats for relief on the go.

2021 will see John Lewis become a destination for this full holistic beauty journey. [Our online wellness concept](#), will continue to become a hub for specialist products and expertise. As an integral part of this, we have partnered exclusively with New York-based wellness specialists Standard Dose on a curated collection of carefully vetted plant-based products. We have already launched with cult brands including Hora, Nature of Things and The Good Patch - and have many more to come.



'As we move into the new year, beauty takes on an increasingly holistic approach. With the pandemic ensuring physical and mental health will continue to be main priorities in 2021, we are seeing the consumer demand more from their beauty products; not only must they make you look good, they need to make you feel good too - It's about the 360 experience.'

AMELIA KENDRICK

Beauty Buyer for Emerging Beauty



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. One in five British women spend longer on their skincare routine since the beginning of lockdown (Mintel), and with social plans continuing to be limited, we predict that a considered approach to make-up will continue into 2021.

This new mood for minimalism, coupled with an ongoing strong customer desire to reduce waste, will see cosmetic bags 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 and lengthening, natural-look mascara. Expansive tool sets will be replaced by a considered edit of do-it-all brushes or cushions, and we'll see more finger-tip application giving a softer finish.

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. 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 multi-functional 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. Nars' Multiple, Charlotte Tilbury Colour Chameleon and Bobbi Brown Pot Rouge are already strong performers, and we have some very exciting new launches that play to this space coming over the next 12 months.





3

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.

We have already seen great strides into this trend thanks to a host of platforms, books and celebrities raising awareness around menopause from Gwyneth Paltrow to Meg Mathews MegsMenopause platform and Sam Baker's The Shift.

In response to this, we anticipate the menopause beauty market will significantly grow, offering products to address wellness and cosmetic concerns; think wellness-boosting supplements, cooling sprays and facial hair removers.

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.

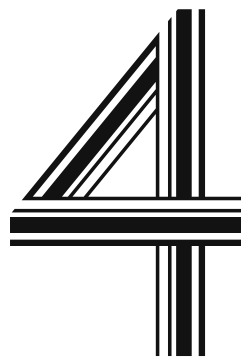
We have already seen products speaking to the menopause prove popular such as the Dermaflash Luxe Anti-ageing Exfoliating & Peach Fuzz Removal device and the Anatomē Menosupport + Renewal supplement, which have been among our best sellers. We have also hosted two virtual beauty masterclasses based around the topic of menopause, which saw incredible attendance and has continued to be one of our most requested virtual event topics.



MENOPAUSE BECOMES MAINSTREAM

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.



Already an established movement in the US, we are seeing the idea of hair wellness grow within the UK market as signs of damaged hair, such as thinning and brittle texture, are increasingly linked to the appearance of ageing. As one of our customers' biggest haircare concerns, we are seeing demand for products that thicken and replenish the hair, restoring its natural bounce and glow. 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.



4,000⁺

Olaplex 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.

As well as introducing new products to our offering, we predict continued strong sales of Aveda which, famous for a healthy scalp ethos, have boomed over the past year.

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 make-up 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.

Lightweight bases offering a fresh, sheer finish will become make-up bag staples. This year we’ve already seen a strong demand for tinted moisturisers, with online sales up by +81%. Laura Mercier’s signature Tinted Moisturiser is our best seller, having sold a whopping 550,000ml this year.

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.

Laura Mercier is also playing to this space with the Pure Canvas Primer collection which is infused with ingredients including vitamin C and E, olive oil extract and microalgae to improve the look of skin over time.

To complement this natural look, we will also see subtle glow-enhancers prove popular. We predict strong sales of highlighters, blushers and bronzers from brands such as Hourglass, NARS and Charlotte Tilbury. Throughout lockdown, bronzers proved popular with sales +147%.

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.

5

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.



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.'

JOE COGGRAVE

Beauty Buyer for Skincare and Fragrance



From living room sprays to desk-top candles and bedside diffusers, customers have been reaching for ways to fill their homes with elevating scent. The UK home fragrance market saw a boom at the beginning of lockdown with UK sales of room fresheners up 37% YOY (NPD). John Lewis has seen this trend continue with online searches for candles up +182% YOY and reed diffusers up +1017% YOY.

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 and a relaxing lavender scent for evening.

Key players in this category for us are Diptyque, Le Labo and Jo Malone – the latter's signature Lime, Basil & Mandarin diffuser has been particularly popular with customers and continues to be a bestseller. We also expect Neom to have a very good season thanks to its range of mood-focused diffusers, sprays and candles.

1,017%+

reed diffusers up
+1017% YOY



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.

With a shift from physical to virtual eventing in 2020, we've seen customers across the UK join masterclasses and talks to educate themselves on all things beauty and giving them access to leading industry experts. For 2021, we expect interest in this area to boom as customers seek to deepen their beauty knowledge and continue to want to try and test at home. As part of our future John Lewis Virtual Beauty Series events we are introducing discovery boxes with masterclasses so that customers can follow along and experience the products first hand.

We will also see this mechanism for discovery encourage customers to test out new and niche brands, expanding their beauty repertoire beyond tried and tested favourites. We have identified emerging brands as a key area of growth within the beauty market over the past 18 months, and will be incorporating them into the heart of the John Lewis beauty offering. We have already seen huge success with the launch of Sunday Riley and expect Kate Somerville, which launched at the beginning of October, to follow suit.

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.

This is down to two customer ethos working in tandem, the first being a sustainable mindset. As the awareness of the impact excess consumption has on the planet continues to rise (thanks in part to documentaries such as David Attenborough's *A Life on Our Planet*) we are seeing a strong customer desire to purchase more responsibly. This has been a massive movement within the fashion industry and is now tipping into beauty.

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 to divert them from landfill.

Secondly, we are 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.'

LAURIE CILBERTO

Beauty Buyer for Make Up

Within skincare, we have seen strong sales of products from premium brands including Sisley, Elemis and Estee Lauder. One of our best performing products is Sisley's Sisleya L'Integral Anti-Ageing Eye And Lip Contour Cream, 15ml, which retails for a not insignificant £150. Introduced to the John Lewis line-up in the first half of 2020, Sunday Riley's cult C.E.O. Glow Vitamin C and Turmeric face oil, which retails for £68 for 35ml, has been a bestseller since March.

We are also seeing this trend within the perfume category. Creed Aventus Eau de Parfum, which retails for £280 for 100ml continues to be our bestseller this year. In addition, we have seen sales of Maison Francis Kurkdjian fragrances (£40-£630) soar over the last six months. As customers reach for investment perfumes with all-day lasting power, we predict 2021's best performing fragrances will continue to be at the premium end of the price spectrum.

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.

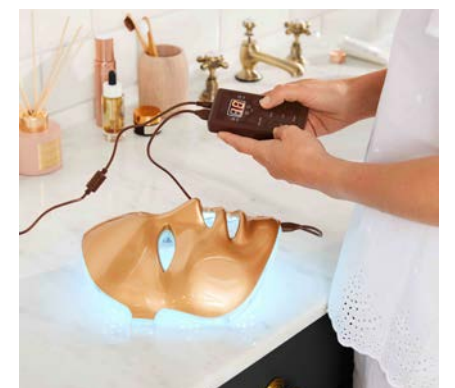


This is down to a combination of factors; customers are seeking ways to get professional results at home and an increase in online education is enabling the customer to use powerful active ingredients and innovative technology with confidence.

This is a trend we have seen gain momentum in 2020 with products including vitamin C seeing a huge uplift at +248%. Sales of technical brand Sunday Riley have exceeded our forecast since it was launched in February with the C.E.O Vitamin C and Turmeric Glow serum proving particularly popular. We are predicting similar success levels for Kate Somerville, which was introduced into our skincare roster in October. Catering to this demand, we will also be expanding our offering of Dr-led and performance skincare this autumn.

We will also see traditional brands that play to the space continue to prove popular, particularly our big three: Clarins, Clinique and Estée Lauder. These brands saw a significant uptick during lockdown as customers reached for those tried and tested products they know deliver. 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 YOY. Clarins' iconic Double Serum has gained momentum over the last six months; we sold an average of five bottles every hour from 1st April - 1st October. We expect Clinique's newly formulated Moisture Surge, which launched in September to be a big hitter.

The biggest development we will see in the trend is the boom in skincare gadgets. From anti-ageing LED masks to sculpting devices, customers are buying into innovative technology to enhance their at-home routines. Harnessing this desire, we launched the dedicated [Beauty Tech hub](#) over the summer to great success. Our current bestseller is the MZ Skin Light-Therapy Golden Facial Treatment Device Five-Coloured Light Treatment, £385. We predict this area will be particularly big for the Christmas gifting period.



The UK skincare market is booming - by 2024 it is estimated to be worth £18.47 billion, with an average yearly growth of 5.2% between 2019-2024 (Mordor Intelligence). With an estimated 30% market share in 2020 (NPD), this sector is particularly strong for John Lewis.



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 experiences as skincare, body & hair products increased +234% vs last year during lockdown.

A movement that began in lockdown, we have seen bath and body brands that play to the idea of enhancing daily rituals resonate with the customer. Launched online in May, Aesop has rapidly become a best-selling brand, exceeding our forecasted sales. We have sold enough Resurrection Aromatique Hand Wash, 500ml, to fill 285 bathroom sinks.

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. We are backing these as popular gifting and self-gifting options over the Christmas period, and predict they will remain a customer favourite into the new year.

10



234%⁺
skincare, body & hair
products increased
+234% vs last year
during lockdown.

CONTACT

For more information and
imagery please contact:

Leah White

Communications Officer, Fashion & Beauty
leah.white@johnlewis.co.uk

Emma Moran

Senior Communications Manager, Fashion & Beauty
emma.moran@johnlewis.co.uk

0207 592 6058

Follow us on Instagram
[@johnlewisandpartnerspr](https://www.instagram.com/johnlewisandpartnerspr)