



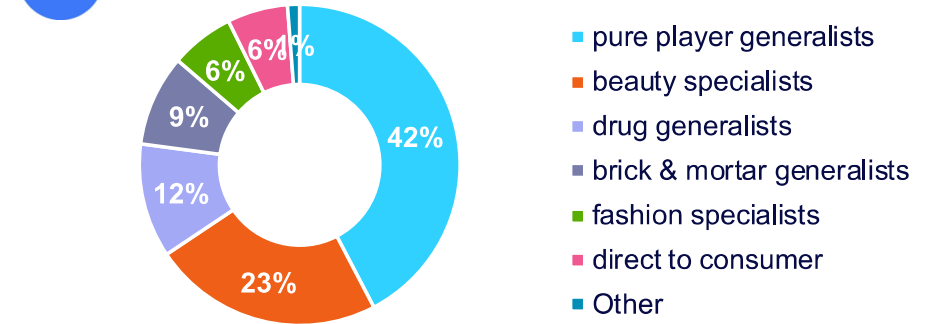
# The Beauty E-commerce Landscape

## Top 10 E-commerce beauty merchants

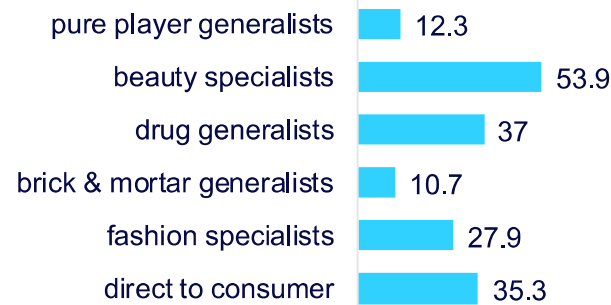
Ranked on value MAT 9th April 2023

- amazon
- LOOKFANTASTIC
- Boots
- ebay
- ASOS
- cult BEAUTY
- JOHN LEWIS & PARTNERS
- SEPHORA
- BEAUTY PIE™
- TikTok

## Value share of E-commerce beauty merchant types



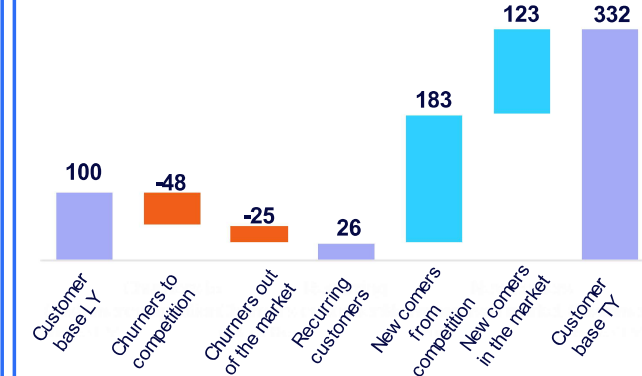
## Average order size £



## Shopper age

	pure player generalists	beauty specialists	drug generalists	brick & mortar generalists	fashion specialists	direct to consumer	Other
Market	42.3%	23.2%	11.5%	9.2%	6.4%	6.1%	1.3%
Gen. B - [-1959]	55.5%	11.4%	14.9%	10.5%	2.6%	3.9%	1.2%
Gen. X - [1960-1979]	44.7%	20.3%	12.7%	11.1%	5.0%	5.2%	1.0%
Gen. Y - [1980-1994]	39.6%	25.8%	10.6%	9.1%	7.0%	6.4%	1.5%
Gen. Z - [1995-]	41.5%	24.4%	10.9%	6.0%	8.2%	7.4%	1.6%

## Evolution of TikTok beauty shoppers (YTD 2023 vs YAGO)



Source : Foxintelligence by NIQ, UK calibrated Beauty E-commerce read - MAT data to 9th April 2023