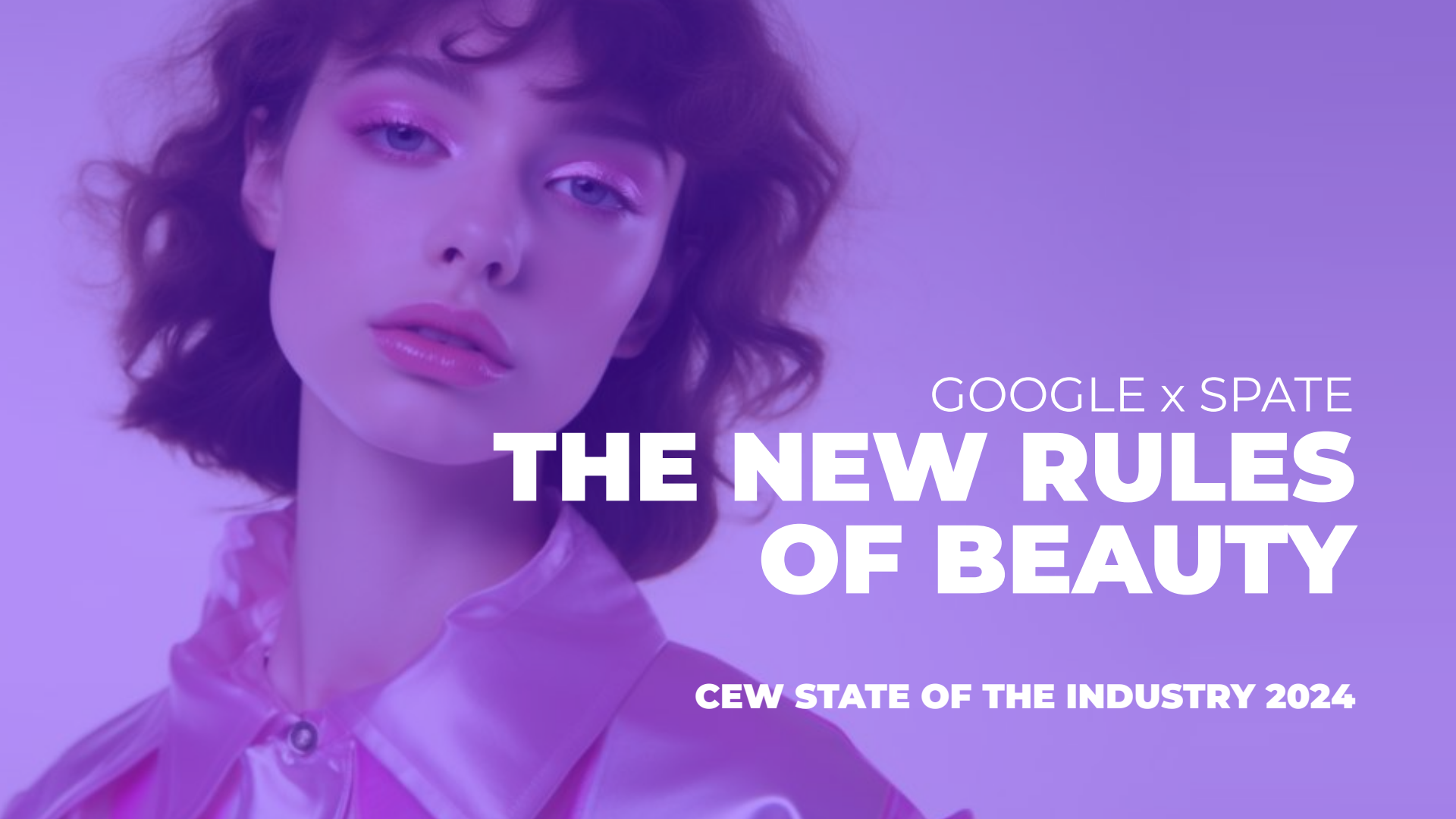


GOOGLE x SPATE

THE NEW RULES OF BEAUTY

CEW STATE OF THE INDUSTRY 2024

2023 BEAUTY TRENDS SURPRISED US...



SKINCARE



HAIRCARE



MAKE UP



FRAGRANCE

Source: US Google internal search data Q3 '23

2023 BEAUTY TRENDS SURPRISED US...



HAIRCARE



SKINCARE



FRAGRANCE

Source: IN Google internal search data Q3 '23

2024 TRENDING CLAIMS

Claims per category ranked by increase in average monthly search volume:

SKINCARE

Trend	Increase ↓
spf	**+63.8K**
advanced	**+22.2K**
instant	**+15.0K**
oil free	**+9.9K**
safe	**+9.0K**
naturally	**+7.5K**
skin [barrier] repair	**+6.5K**
derma recommended	**+6.3K**
balancing	**+5.5K**
bronzing	**+4.0K**

Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending November 2023 vs the 12 months prior (US).

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derma recommended	**+6.3K**
balancing	**+5.5K**
bronzing	**+4.0K**

HAIR

Trend	Increase ↓
modern [hair styles]	**+47.7K**
low maintenance	**+45.6K**
textured	**+22.8K**
detangling	**+10.1K**
easy	**+9.5K**
[gray] blending	**+9.1K**
volumizing	**+8.8K**
clarifying	**+8.6K**
strengthening	**+7.3K**
hydrating	**+6.5K**

Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending November 2023 vs the 12 months prior (US).

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clarifying	**+8.6K**
strengthening	**+7.3K**
hydrating	**+6.5K**

MAKEUP

Trend	Increase ↓
setting	**+98.3K**
glow	**+50.8K**
spf	**+11.8K**
luminous	**+11.4K**
plump	**+10.1K**
clear	**+9.4K**
dewy	**+4.5K**
moisturizing	**+3.8K**
weightless	**+3.6K**
blurring	**+3.1K**

Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending November 2023 vs the 12 months prior (US).

2024 TRENDING INGREDIENTS

Ingredients per category ranked by increase in average monthly search volume:

SKINCARE

Trend	Increase ↓
vitamin c	**+121.2K**
hyaluronic acid	**+74.9K**
tretinoin	**+53.9K**
glycolic acid	**+50.0K**
niacinamide	**+47.5K**
salicylic acid	**+32.3K**
snail mucin	**+27.2K**
peptide	**+22.3K**
coconut oil	**+20.9K**
ceramide	**+17.8K**

Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending December 2023 vs the 12 months prior (US).

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snail mucin	**+27.2K**
peptide	**+22.3K**
coconut oil	**+20.9K**
ceramide	**+17.8K**

HAIR

Trend	Increase ↓
rosemary oil	**+44.3K**
sea salt	**+33.1K**
castor oil	**+26.4K**
coconut oil	**+20.0K**
ketoconazole	**+10.5K**
tea tree oil	**+6.6K**
minoxidil	**+6.5K**
olive oil	**+5.8K**
mint	**+4.6K**
finasteride	**+4.3K**

Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending December 2023 vs the 12 months prior (US).

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minoxidil	**+6.5K**
olive oil	**+5.8K**
mint	**+4.6K**
finasteride	**+4.3K**

FRAGRANCE

Trend	Increase ↓
vanilla	**+51.2K**
pheromone	**+50.2K**
coconut	**+8.3K**
musk oil	**+6.2K**
orange	**+5.9K**
strawberry	**+5.8K**
amber oil	**+5.6K**
ginger	**+3.9K**
vetiver	**+3.8K**
sandalwood	**+3.5K**

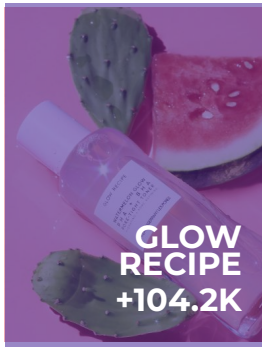
Source: Google Search data, average monthly search volume increase, comparing the past 12 months ending December 2023 vs the 12 months prior (US).

TOP TRENDING SKIN CARE BRANDS



LA ROCHE POSAY
+205.6K
increase in avg monthly searches









Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).











UP-AND-COMING SKIN CARE BRANDS

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

TOP TRENDING: KOREA

MEDICUBE

+103.7K

INCREASE IN SEARCHES IN SOUTH KOREA FOR THE BRAND MEDICUBE (메디큐브)



TOP TRENDING HAIR BRANDS



AMIKA
+251.3K
increase in avg monthly searches



KÉRASTASE
+94.1K



MIELLE ORGANICS
+87.0K

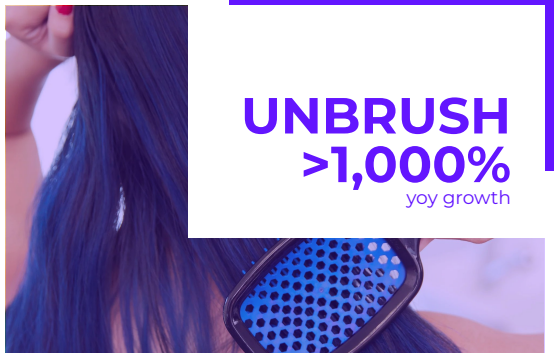


K18
+85.0K

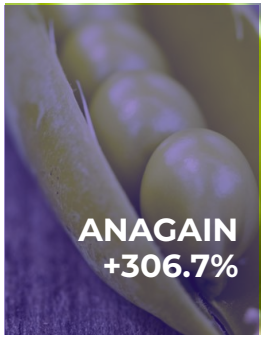


OUAI
+71.5K

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).











UP-AND-COMING HAIR BRANDS

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

TOP TRENDING: KOREA

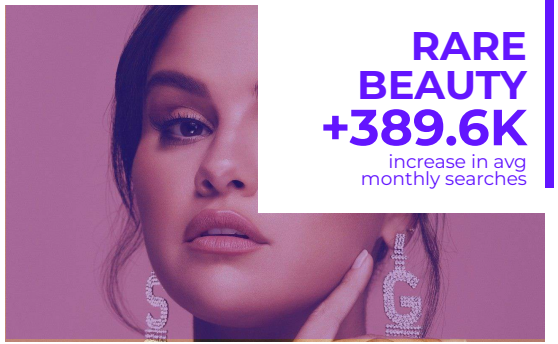
ASHROLEN

+5.3K

INCREASE IN SEARCHES IN SOUTH KOREA FOR THE BRAND ASHROLEN (애쉬로렌)

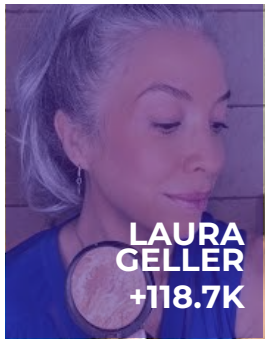


TOP TRENDING MAKEUP BRANDS



RARE BEAUTY
+389.6K
increase in avg monthly searches







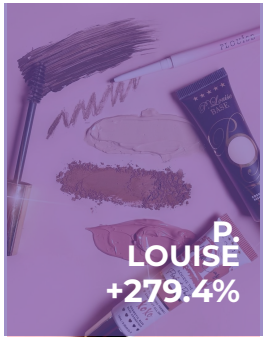


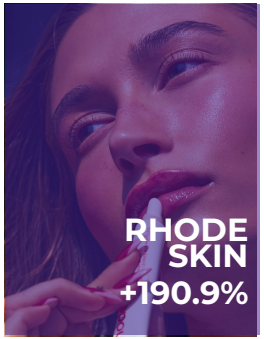
Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).



TYPOLOGY
>1,000%
yoy growth









UP-AND-COMING MAKEUP BRANDS

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

TOP TRENDING: KOREA

OBGE

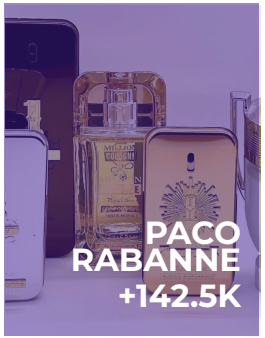
+16.8K

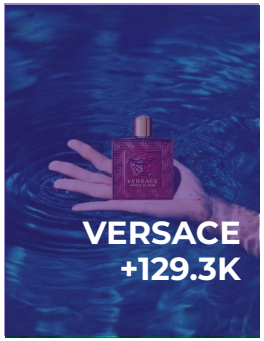
INCREASE IN SEARCHES IN SOUTH KOREA FOR THE BRAND OBGE (오브제파운데이션)



TOP TRENDING FRAGRANCE BRANDS











Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).











UP-AND-COMING FRAGRANCE BRANDS

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

2024: THE NEW RULES OF BEAUTY



MAKE IT SEEM “NATURAL”



SET THE VIBE



TWEAK THE TREND



MAKE IT MINI

2024: THE NEW RULES OF BEAUTY



MAKE IT SEEM “NATURAL”

WE WANT THICK HAIR IN 2024



MINOXIDIL
+17.7%
year on year growth



KETO CONAZOLE
+16.3%
year on year growth



NUTRAFOL
+25%
year on year growth



DUTASTERIDE
+27.5%
year on year growth

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

BUT NOT ALL CHEMICALS ARE CREATED EQUAL...







WITHOUT BENZENE
+106.9%
year on year growth

WITHOUT HYDROGEN PEROXIDE
+54.2%
year on year growth

WITHOUT SODIUM LAURYL SULFATE
+30.4%
year on year growth

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

2024: THE NEW RULES OF BEAUTY

MAKE IT SEEM “NATURAL”

DON’T SHY AWAY FROM INGREDIENTS THAT WORK

DON’T TRY TO HIDE THE INGREDIENTS THAT HARM

2024: THE NEW RULES OF BEAUTY



SET THE VIBE

TOMATO GIRL

49.6M

VIDEO VIEWS
ON TIKTOK

+1,344%

GROWTH IN SEARCHES
YEAR OVER YEAR









MOB WIFE

16.9M

VIDEO VIEWS
ON TIKTOK

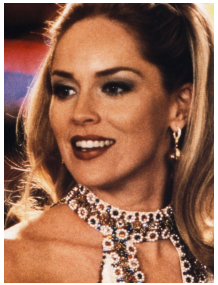
+176.8%

GROWTH IN SEARCHES
YEAR OVER YEAR









LATTE MAKEUP

110.5M

VIDEO VIEWS
ON TIKTOK

+350.3%

GROWTH IN SEARCHES
YEAR OVER YEAR



BARBIE MAKEUP

153.5M
VIDEO VIEWS
ON TIKTOK

+163.6%
GROWTH IN SEARCHES
YEAR OVER YEAR



2024: THE NEW RULES OF BEAUTY

SET THE VIBE

VIBE > PRODUCT

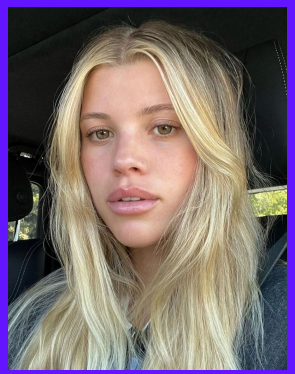
POSITION YOURSELF ALONGSIDE ALL THE VIBES

2024: THE NEW RULES OF BEAUTY

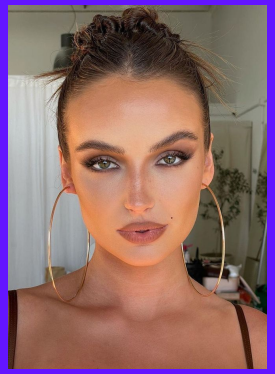


TWEAK THE TREND

WHAT DO THESE TRENDS HAVE IN COMMON?



SCANDI HAIRLINE
+353.1%
year on year growth



LATTE MAKEUP
+350.3%
year on year growth



MID FACE LIFT
+71.3%
year on year growth



CUB CUT
+25.1%
year on year growth

Source: Google Search data, increase in average monthly search volume and year-over-year growth comparing the past 12 months ending December 2023 vs the 12 months prior (US).

MONEY PIECE —
BLONDE STREAKS ON BROWN HAIR



SCANDI HAIRLINE —
MONEY PIECE BUT ON BLONDE HAIR (BABY HAIRS)



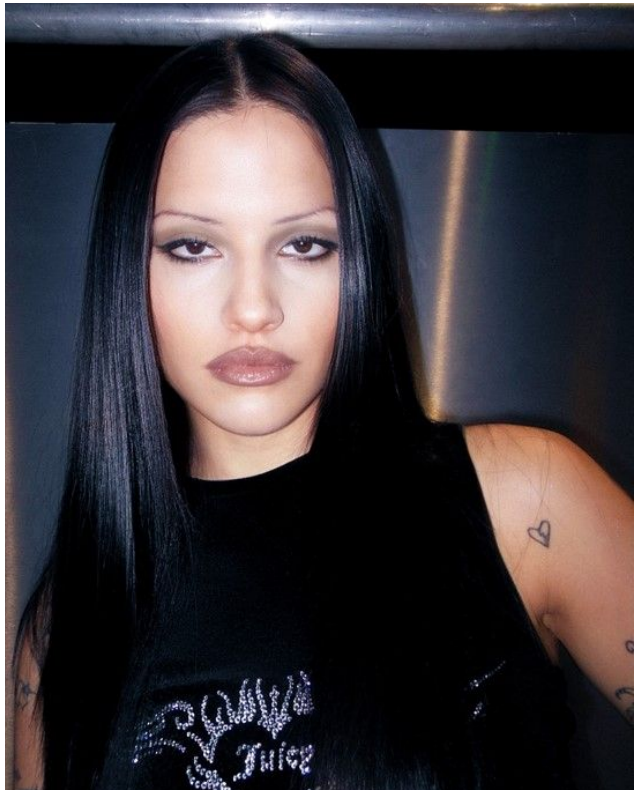
WOLF CUT —
LONG SHAGGY CUT



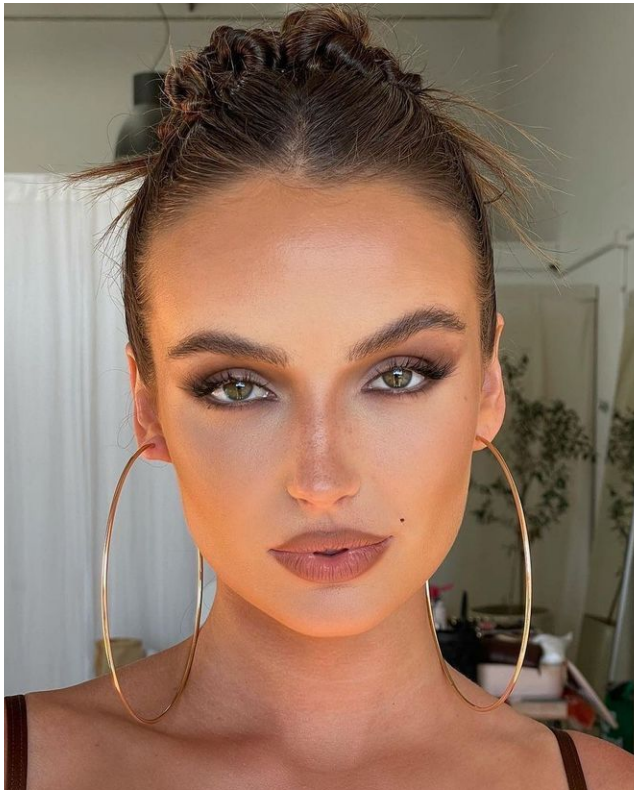
CUB CUT —
WOLF CUT BUT SHORTER



90s MAKEUP —
BROWN LIPSTICKS, LINER, DRAMATIC EYES



LATTE MAKEUP —
90s MAKEUP BUT GLOWIER



FACE LIFT —
COSMETIC PROCEDURE TO REDUCE SAGGING



MID FACE LIFT —
FACE LIFT BUT FOCUSED ON MIDDLE OF FACE



2024: THE NEW RULES OF BEAUTY

TWEAK THE TREND

ITERATE ON TRENDS TO LAUNCH FAST AND OFTEN

USE NEW LANGUAGE TO CAPTURE ATTENTION

2024: THE NEW RULES OF BEAUTY



MAKE IT MINI

#MINI ACROSS TIKTOK BEAUTY



#PERFUME
38.8M
video views



#LIPSTICK
36.8M
video views



#BEAUTY BLENDER
29.9M
video views



#LIPBALM
26.9M
video views

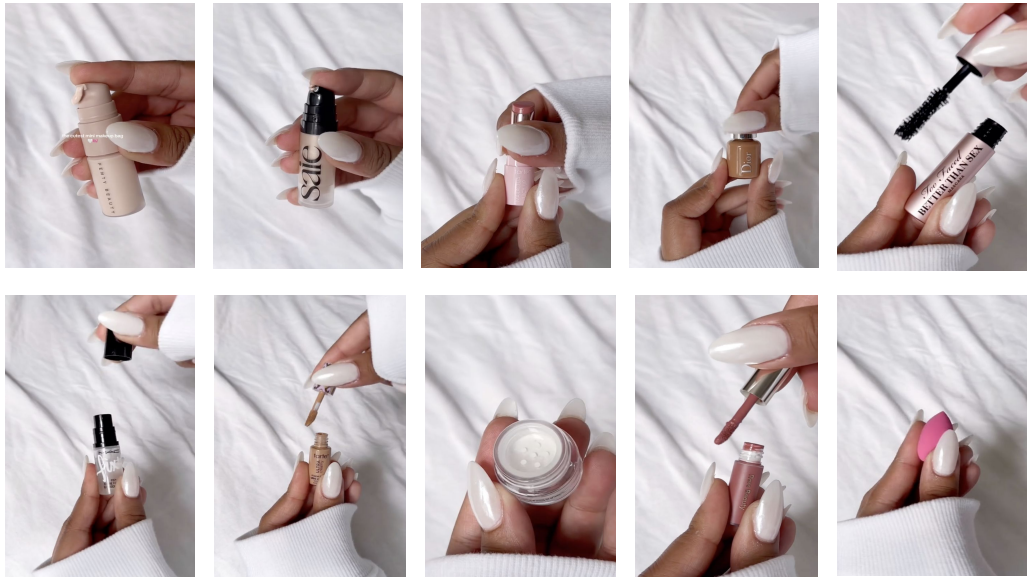
Source: TikTok Hashtag Data: Total views of videos with the included hashtags: all time views, US - Week of Jan 28, 2024

#MINI + RETAILERS

33.5M

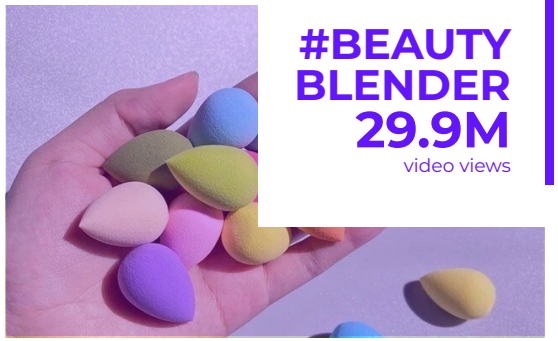
TIKTOK VIDEO VIEWS
FOR #SEPHORA
ALONGSIDE #MINI

#TARGET 22.3M VIEWS
#AMAZON 19.4M VIEWS
#SHEIN 14.4M VIEWS

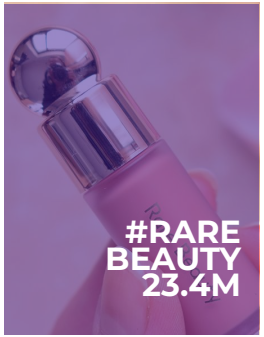


Source: TikTok Hashtag Data: Total views of videos with the included hashtags: all time views, US - Week of Jan 28, 2024

TOP BRANDS ALONGSIDE #MINI ON TIKTOK



#BEAUTY BLENDER
29.9M
video views









Source: TikTok Hashtag Data: Total views of videos with the included hashtags: all time views, US - Week of Jan 28, 2024



+29.1%

YEAR ON YEAR GROWTH



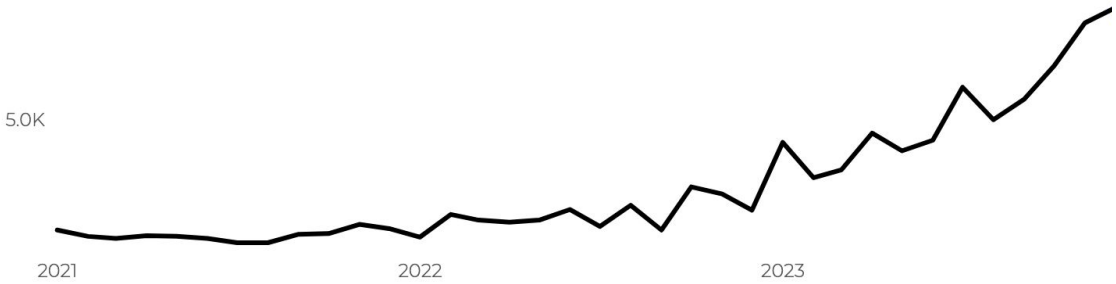
Source: Google Search data, avg search volume for last 12 months ending December 2023.



PREPPY SKINCARE

+374.2%

YEAR ON YEAR GROWTH



Source: Google Search data, avg search volume for last 12 months ending December 2023.

2024: THE NEW RULES OF BEAUTY

MAKE IT MINI

PACKAGING > INGREDIENTS

TURN YOUR PRODUCTS INTO CUTE COLLECTABLES TO PROMOTE DISCOVERY

2024: THE NEW RULES OF BEAUTY

MAKE IT SEEM "NATURAL"

DON'T SHY AWAY FROM INGREDIENTS THAT WORK

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SET THE VIBE

VIBE > PRODUCT

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PACKAGING > INGREDIENTS

TURN YOUR PRODUCTS INTO CUTE COLLECTABLES TO PROMOTE DISCOVERY

SPATE: MACHINE INTELLIGENCE FOR THE BEAUTY INDUSTRY.

What's The Next Big Trend?

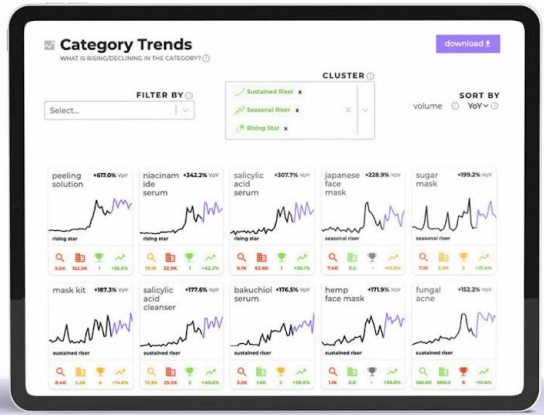
20+ billion signals in beauty and wellness to spot and predict which trends are here to stay.

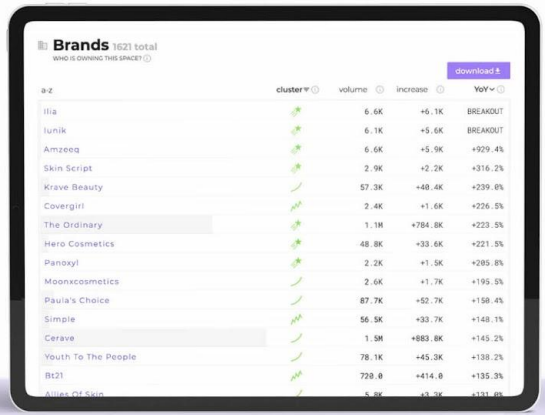
Which brands are owning the space?

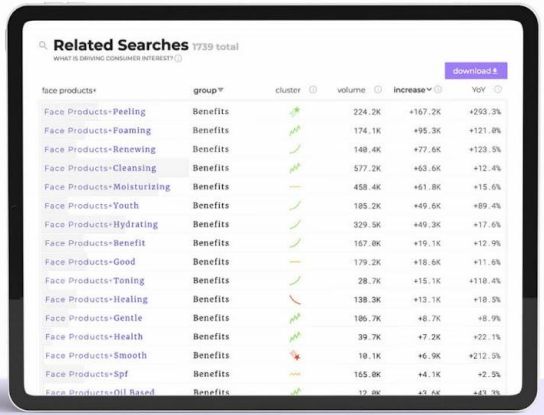
Measure level of competition within a space. Compare consumer interest across brands, including DTC.

How To Position A Product?

Contextual data to identify consumer needs (claims, concerns, ingredients) for messaging.







BOOK YOUR FREE 1:1 SESSION WITH A SPATE EXPERT

