THE NEW FACE OF GLOBAL RETAIL: DECODING BEAUTY CONSUMERS

IN THE DIGITAL AND SUSTAINABILITY ERA

January 2026

EXECUTIVE SUMMARY

Conducted in partnership with **Cosmetic Valley**, this report examines the strategic transformation of the global cosmetics retail landscape. The study analyzes the evolution of retail models across Europe, America, and Asia—specifically focusing on **France, Brazil, China, India, and the United States**—to understand how consumer expectations are driving innovation.

The research investigates three converging trends redefining the industry: **Social Commerce**, **Intelligent** Beauty (AI & AR), and **Sustainable** Retail Practices. Findings are supported by a quantitative survey of consumers across the five target markets, balanced by age and gender, to highlight regional and generational disparities.

This study was conducted by Alessandra Sciacovelli, Clara Lorey, and Chu-Chu Pan (ESSEC Beauty Chair students), under the supervision of Marc Mazodier (Professor of Marketing and co-holder of the ESSEC Beauty Chair).

MAJOR FINDINGS

SOCIAL COMMERCE: A REGIONAL DIVIDE

Adoption:

Social commerce is highly prevalent in **China** and **India**, where social platforms are structural to the purchasing journey. In contrast, adoption in **France** is low, driven by skepticism regarding payment security.

Drivers & Barriers:

Globally, the primary motivators are **discounts**. The universal barrier to adoption is the **fear of counterfeit products**.

Luxury Segment:

Surprisingly, consumers are frequently using social channels to purchase **luxury brands**, likely seeking value through promotional offers.

INTELLIGENT BEAUTY (AI & AR): HIGH APPEAL VS. TRUST GAPS

Consumer Sentiment:

There is a significant gap between familiarity (low) and appeal (high), with **~61% of respondents finding AI tools appealing**.

Barriers:

Adoption is hindered by a strong preference for **human advice** in **Western markets** and concerns regarding **data privacy** in **Asian markets**.

Regional Preferences:

Brazil is the **most enthusiastic** market for beauty tech. **France** remains **cautious** and human-centric, while **China** sees a split where **younger** consumers prefer **online** AI tools and **older** consumers prefer in-store tech.

SUSTAINABILITY: A SUPPLY-SIDE CHALLENGE

Readiness:
Consumer willingness to adopt **refillable packaging and green delivery is high** across most markets (averaging 4/5 likelihood), with **Brazil and India** showing the **strongest** intent. The **United States** is the notable exception, showing consistently lower adoption intent.

The "Gap":
The primary obstacle to sustainable retail is not consumer mindset but **availability and visibility**. Consumers are ready to adopt, but retail implementation lags behind demand.

SEGMENTATION ANALYSIS: CROSS-CATEGORY DRIVERS

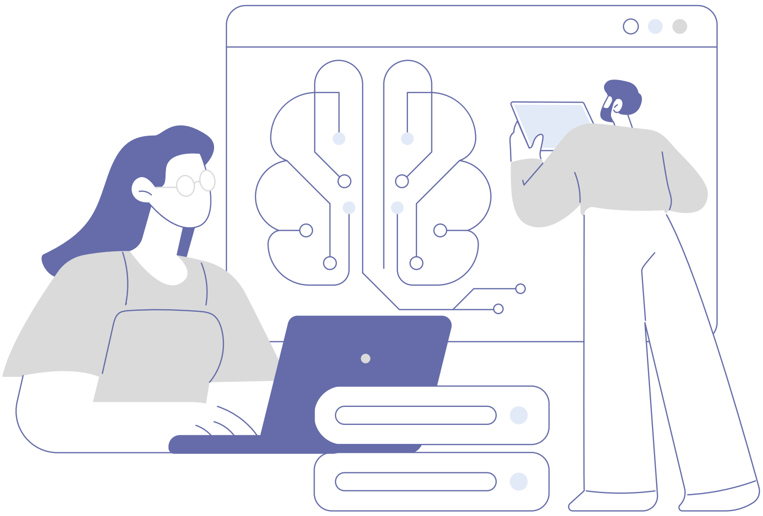
Further analysis using tree-based algorithms revealed distinct behavioral correlations that link digital engagement to retail preferences:

The «Digital Native» Ecosystem:

A strong «pro-innovation» segment exists where affinity for content drives technology adoption. Consumers who engage with influencer content are 2.3 times more likely to use AI diagnostic tools and 2.5% more likely to adopt Social Commerce (particularly in France, India, and the U.S.). Furthermore, interest in live streaming is the strongest predictor for AR adoption, increasing the likelihood of using virtual try-on tools by 4.7 times.

Sustainability Linked to Education:

There is a clear link between eco-consciousness and a desire for product mastery. Consumers open to refillable and reusable packaging showed a significantly higher interest in product application demonstrations (with a lift of 1.8 and 1.6, respectively).



STRATEGIC IMPLICATIONS

Localization is Critical:

Strategies must be tailored regionally—emphasizing mobile-first tech in Asia/Brazil while integrating human expertise with tech in France.

Operationalizing Sustainability:

Success in sustainability requires solving logistical visibility and availability issues rather than just raising awareness.

Holistic Ecosystems:

AI, Social Commerce, and Sustainability are interlinked; consumers open to one innovation (like AI) are statistically more likely to embrace others (like sustainable delivery), suggesting a «pro-innovation» consumer segment that can be targeted holistically.

Strategic Activation:

To scale AI, AR, and Social Commerce, brands should leverage influencers and live streaming as the primary vehicles. Conversely, sustainable initiatives (like refillable packaging) should be marketed alongside educational content (online demos) to effectively target the environmentally conscious consumer.

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INTRODUCTION

BACKGROUND & CONTEXT

The cosmetics industry has grown rapidly over the last decade, becoming one of the most dynamic sectors in the global economy (Statista, 2024; McKinsey & Company, 2023). More than just beauty and skincare, it now includes wellness, personal care, and technology-enhanced experiences. While creating new products remains important, the focus is now also on how and where people buy beauty products, which is evolving rapidly.

Traditional models such as department stores or pharmacies are being complemented, or in some cases, replaced, by online stores, mobile apps, subscription boxes, and immersive physical stores. At the same time, sustainability concerns, digital transformation, and consumer expectations, such as personalized experiences, transparency, convenience, and ethical values, are pushing brands to rethink their entire customer journey. (McKinsey, 2023; NielsenIQ, 2024; Statista, 2023–2024)

In this fast-moving context, retail is no longer a simple distribution channel: it has become a key area of strategic positioning and innovation capabilities. To understand where the industry is going, it is necessary to understand how retail practices are changing, and why these changes differ from one country or region to another.

BRAND PRESENTATION

This field project is conducted in partnership with Cosmetic Valley, the French beauty and cosmetics cluster based in Chartres. As a reference point for innovation in the sector, Cosmetic Valley supports research, training, and international development for many brands and professionals in the cosmetics industry.

Our field project is part of a collaboration with Cosmetic Valley to provide insights and recommendations on the future of beauty retail, especially by identifying key global trends and regional dynamics.

PROBLEM STATEMENT

Retail in the beauty industry is undergoing a deep transformation. Brands face a growing need to innovate and adapt to consumers who are more connected, more informed, and more demanding than ever before (Deloitte, 2023 ; McKinsey & Company, 2022)**.**

At the same time, companies must address sustainability challenges, integrate new technologies, and compete across multiple retail channels.

OBJECTIVES & SCOPE

The objectives of this study are to understand how consumer expectations drive innovation in the beauty sector.

It also aims to analyze the cosmetics retail ecosystem, tracing its evolution over time by identifying key and emerging players, examining changes in market share by retail typology, and highlighting the most significant retail formats and emerging technologies.

In addition, the study examines regional differences in cosmetics retailing habits and innovation, focusing on three main markets - Europe, North America and Asia - while assessing how France is positioned in this rapidly evolving landscape.

1 LITERATURE REVIEW AND THEMATIC ANALYSIS

1.1 SOCIAL COMMERCE IN THE BEAUTY INDUSTRY

Social commerce is a subset of e-commerce that involves social media and online media that supports social interaction, and user contributions to assist online buying and selling of products and services. This trend started in China, spread across South East Asia and the US, and reached Europe. Fueled by influencer-driven content, real-time engagement, and mobile-first experiences, beauty brands worldwide are increasingly turning to social commerce as a key growth channel.

By 2019, 3 years after its launch, Taobao Live had generated over 100 billion RMB in gross merchandise value (GMV) in China, underscoring the explosive growth of livestream-driven commerce. And In South East Asia, TikTok's GMV nearly quadrupled 2 years after its entry to US$16.3 billion, positioning it as a formidable competitor in the region's e-commerce sector (Momentum Works, 2024). TikTok Shop also has grown into the US's eighth-largest beauty retailer in a little over a year (NielsenIQ, 2025).

While TikTok Shop officially launched in France in 2025, major beauty brands have so far taken a cautious approach. Legacy players such as L'Oréal Paris, Sephora, and Nuxe maintain a strong presence on TikTok through brand awareness campaigns, but have yet to fully embrace TikTok Shop's native commerce features. In contrast, indie and emerging brands have been quick to leverage the platform's live shopping tools and influencer ecosystem. For example, skincare brand Blancrème has regular live streaming product demonstrations to boost in app conversion.

1.2 INTELLIGENT BEAUTY: AI, AR, AND THE FUTURE OF RETAIL

The beauty industry is rapidly embracing technology, with AI and AR powering smart devices that enable personalized experiences. Tools like AI skin diagnostics, smart cleansers, and virtual try-ons have boosted customization and convenience. Industry leaders like L'Oréal and P&G are driving this shift through strategic partnerships and acquisitions (Global Data, 2025).

The beauty tech trend emerged at the intersection of digital innovation, consumer personalization, and the maturation of e-commerce in the late 2010s. The movement was first led by global beauty giants like L'Oréal, Estée Lauder, and Shiseido, who invested in R&D labs and tech startups to digitize and personalize the beauty experience. Then, social media and influencer culture pushed consumers to expect more tailored, data-driven solutions.

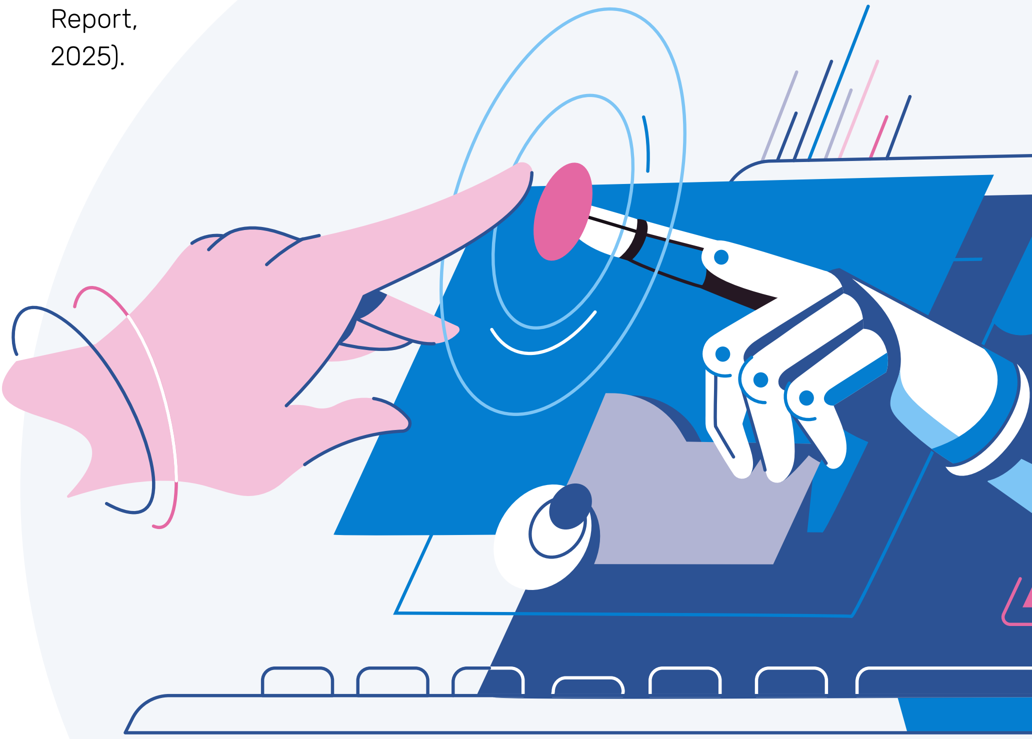
Key insights

- Customization is a primary driver behind the appeal of virtual try-on experiences for consumers.
- Over 30% of consumers globally say they're more likely to buy if they can try virtually. In Asia, MEA, and Australasia, this climbs to 40%+.
- Trust in AI beauty advice is strongest in Asia and MEA (55% in 2023).
- Gen AI could bring $9–10B in value across skincare, makeup, fragrance, and hair care. Its impact spans multiple areas of the business, including consumer insights, user experience, technology and innovation, as well as marketing and customer service (McKinsey, 2025).

Impact on Retail

- AR mirrors in stores (e.g., Sephora Virtual Artist, Charlotte Tilbury's Magic Mirror, Marionnaud's IOMA & i-diag device).
- AI-powered tools on apps/ websites offering shade matching, routine builders, and smart quizzes. Examples include WikiParfum and AirParfum by Puig, enhancing scent discovery and in-store experience with AI and olfactory tech (The Value of Beauty Report, 2025).
- Smart skincare tools (e.g., Foreo, L'Oréal Perso, HiMirror) that scan skin daily and recommend routine adjustments.

Beyond retail, digital technologies are also transforming other stages of the beauty supply chain, from R&D (e.g., Beiersdorf's skin science) to marketing and product development (e.g., L'Oréal's CREAITECH cuts content creation time by 70%), all the way to boosting manufacturing efficiency.



1.3 SUSTAINABILITY IN RETAILING: PACKAGING, DELIVERY & SUPPLY CHAIN

Sustainability in cosmetics retailing refers to the transformation of packaging, delivery and supply chain practices to reduce environmental impact. Unlike ingredient sustainability, this trend focuses on the logistical and retail ecosystem. Key areas include packaging innovation (reduction or elimination of secondary packaging, recycled or recyclable materials, refill systems), sustainable delivery methods (low-emission transport, reduced shipping footprint, reusable parcel solutions), and supply chain transparency (improved visibility of product life cycles, waste reduction and process optimisation).

Concrete initiatives include reusable and refillable systems (returnable sachets, refillable bottles, solid formats), zero waste shipping models such as Hipli in France, AI-based supply chain transparency technologies, as well as carbon neutral shipping and local sourcing. These solutions aim to reduce waste, emissions and overall environmental impact across the retail process, particularly in e-commerce, where packaging volume has increased sharply.

This trend is driven by several converging factors: rising consumer awareness linking beauty to ethics and transparency; a strong backlash against greenwashing, leading to regulatory scrutiny and demand for measurable actions; the e-commerce boom, which has significantly increased packaging waste; growing pressure from investors and retailers, illustrated by platforms and labels such as Sephora's Planet Aware; and the role of digital technologies and AI, which make sustainability more measurable and actionable across logistics and distribution.

Regional Practices and Innovations

In North America, major players integrate sustainability into omni-channel strategies, while fast commerce platforms raise concerns about excess packaging. Indiapendent prestige brands invest in immersive retail experiences that include eco-friendly practices.

In Latin America, Brazil leads with locally manufactured, low-packaging cosmetics, refill systems and local distribution, while adoption remains slower elsewhere in the region.

Europe is at the forefront of retail sustainability. In France, brands and retailers are testing reusable packaging solutions and deposit systems. In Italy and Germany, packaging innovation and Track & Trace technologies are central themes, notably at Cosmoprof Bologna.

In Asia, sustainability has traditionally focused on ingredients and manufacturing, but interest in circular economy practices is growing. South Korea and Japan are gradually integrating retail sustainability, while India sees strong growth in locally produced, minimally packaged products driven by affordability and environmental concerns.

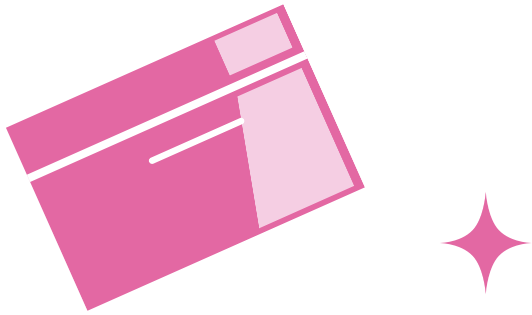
Regulatory Frameworks, Labels & Scoring Systems

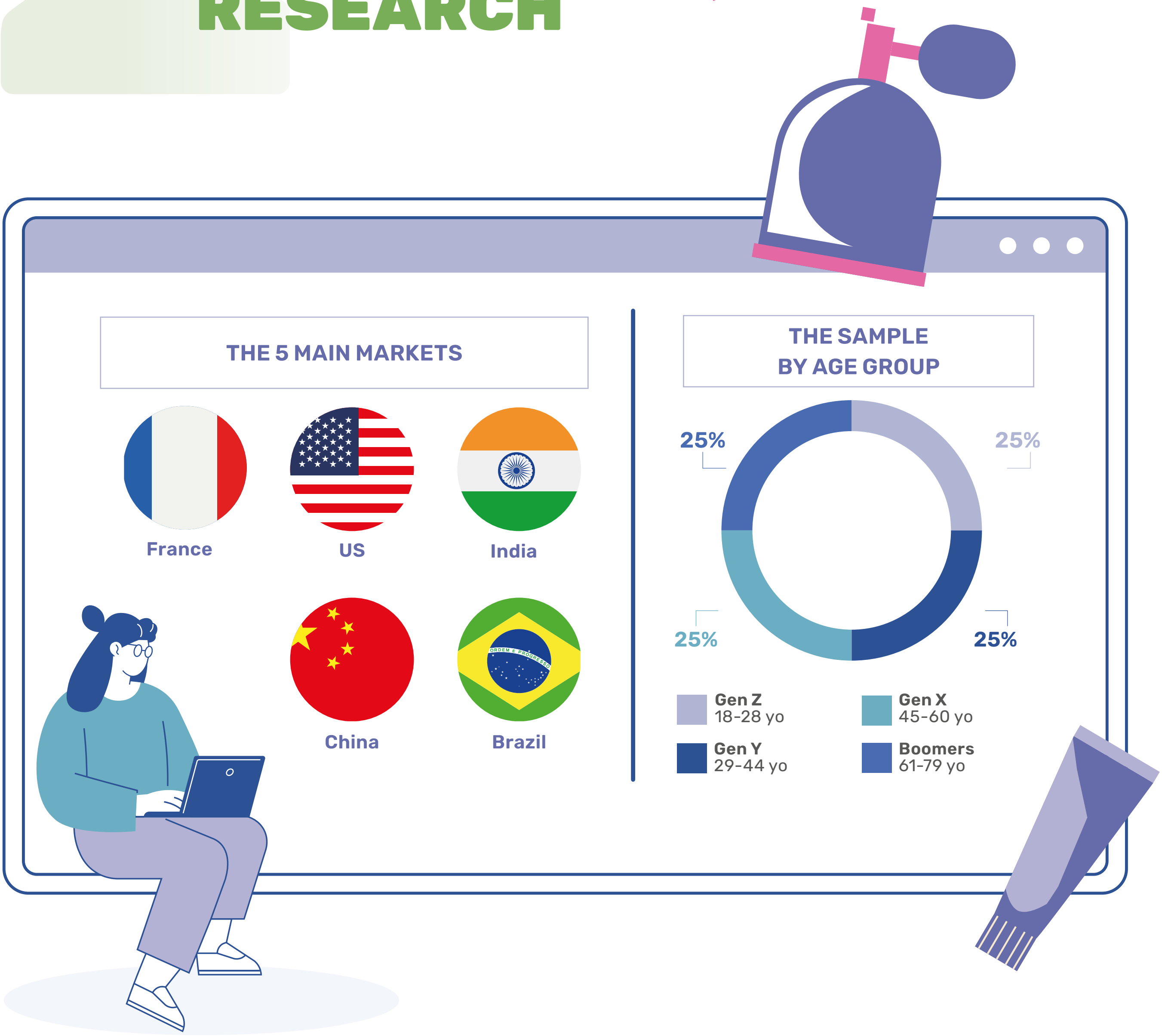
Regulatory frameworks play a central role in shaping sustainable retail practices. Europe leads with strong regulation through the European Green Deal, the Circular Economy Action Plan and Extended Producer Responsibility schemes, making brands accountable for packaging waste and lifecycle impact. In France, tools such as the Green Impact Indiax, alongside labels like Ecocert, EU Ecolabel and PlanetScore, increase transparency and influence consumer choice and shelf visibility.

In Asia, regulation is more fragmented and often complemented by industry-led initiatives. China enforces reductions in excess packaging, South Korea promotes voluntary ecolabels and green supply chain incentives, and India strengthens EPR rules for plastic packaging. Sustainability often acts as a competitive differentiator rather than a strict compliance requirement.

In the Americas, frameworks are fragmented but strengthening. The U.S. relies on state-level regulation and retailer-led initiatives, while Canada is moving toward nationwide EPR and bans on single-use plastics. In Brazil, sustainability is both a regulatory obligation and a core brand identity pillar, with refill systems, responsible sourcing and carbon-neutral logistics widely adopted.

2 FIELD RESEARCH





In order to extend our understanding of emerging retail trends in the cosmetics industry, we designed a quantitative online survey targeting cosmetics' buyers. The primary goal was to capture how these individuals experience, understand, and value three major trends currently shaping beauty retail: social commerce, beauty tech (AI and AR), and sustainability in retailing (refill systems, eco-friendly delivery, and reusable packaging).

This study examines consumer behavior in the cosmetics industry across five distinct markets: Brazil, China, France, India, and the United States.

The research relies on a balanced demographic sample with no significant differences regarding gender or age across the regions. The average percentage of women in the sample is 52.3%, and the mean age is 44.46. Age of the sample results in an even distribution of 25% across four generations: Gen Z, Millennials, Gen X, and Boomers.

3 GENERAL CONSUMER BEHAVIOURS

The survey highlights strong contrasts in cosmetics purchasing and information behaviours across regions and generations. Brazilian, Chinese and Indian consumers buy cosmetics more frequently than French and American consumers, despite similar monthly budgets, indicating a preference for lower-priced, everyday products rather than fewer premium purchases.

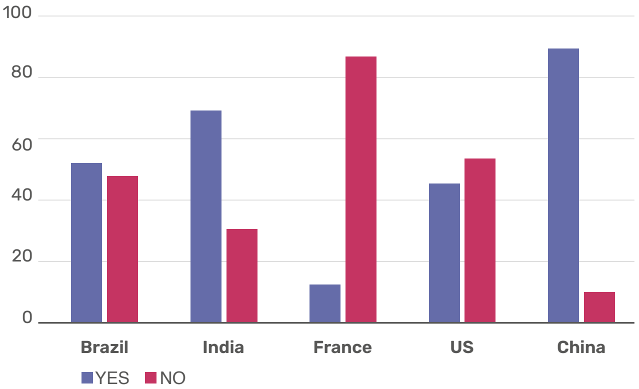
Retail channel preferences remain highly local: supermarkets and pharmacies dominate in France and Brazil, department stores play a stronger role in the U.S., while India shows the most diversified purchasing behaviour across channels. Duty-free remains marginal for all markets.

Information-seeking behaviours reveal equally sharp differences. Search engines remain the primary source of information in most Western markets, while social media platforms dominate in China and play a growing role among Gen Z globally. Across all countries, younger consumers rely heavily on social media for discovery, whereas Boomers search less frequently overall, reflecting more habitual purchasing patterns. Notably, China stands out with strong social media usage across all age groups, underlining the structural role of social platforms in the beauty purchasing journey. In Brazil and India, consumers rely heavily on search engines followed by online reviews. A distinct generational divide is evident in France and the US; while Gen Z actively searches on social media such as TikTok and Instagram, older generations (Boomers) show a sharp decline in usage for this channel, preferring instead to find on search engines and in-store visits, a behavior that is less pronounced in the Asian markets surveyed.

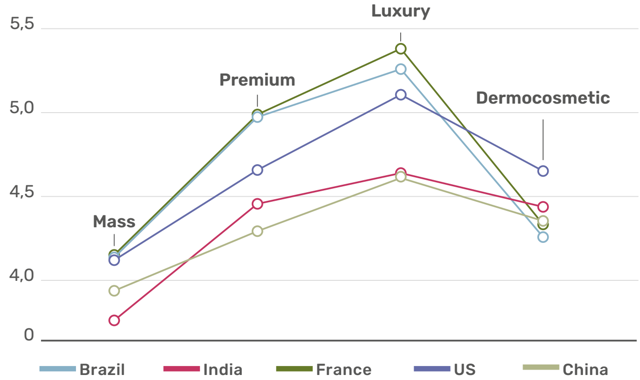
4 ABOUT SOCIAL COMMERCE

Social commerce—buying directly through social media platforms—is a growing trend, and it's particularly popular in Asia. Our survey reveals that it is most common in China and India but is less prevalent in France, where consumers are more hesitant and indicate a lower likelihood to adopt in the future.

Have you shopped for beauty product through social commerce?
(% of respondents)



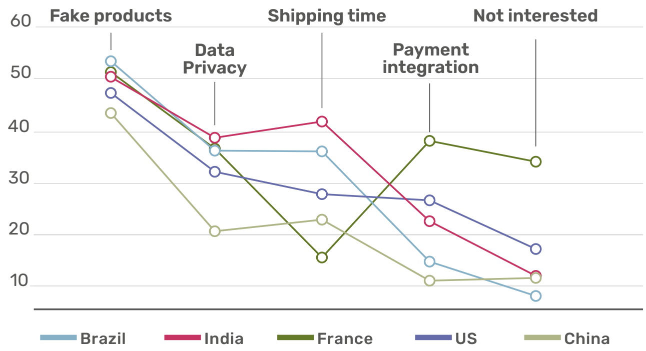
Likelihood to purchase through social commerce per beauty segment
(Average)



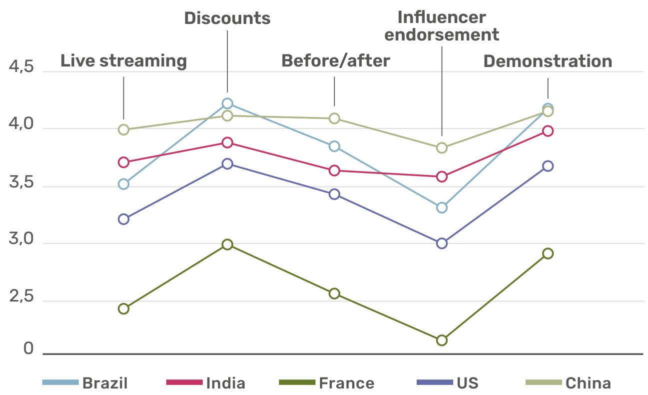
Demographically, social commerce is more popular among younger consumers and women across all five countries.
The data also suggests that consumers are used to buy luxury brands through social commerce channels across all countries. Purchase of beauty products from luxury brands on social commerce is more frequent than purchase of mass, premium, and dermocosmetic brands.

When we look into respondents' attitude towards different types of Social Media content, discounts and demonstrations on how to apply are the most attractive contents, while influencer endorsement is less favorable. The discounts' attractiveness echoes with the more frequent purchase of luxury brands through social commerce. It suggests that consumers buy more on social media to get discounts on expensive luxury products. But it raises the question whether it fits the luxury brand positioning.

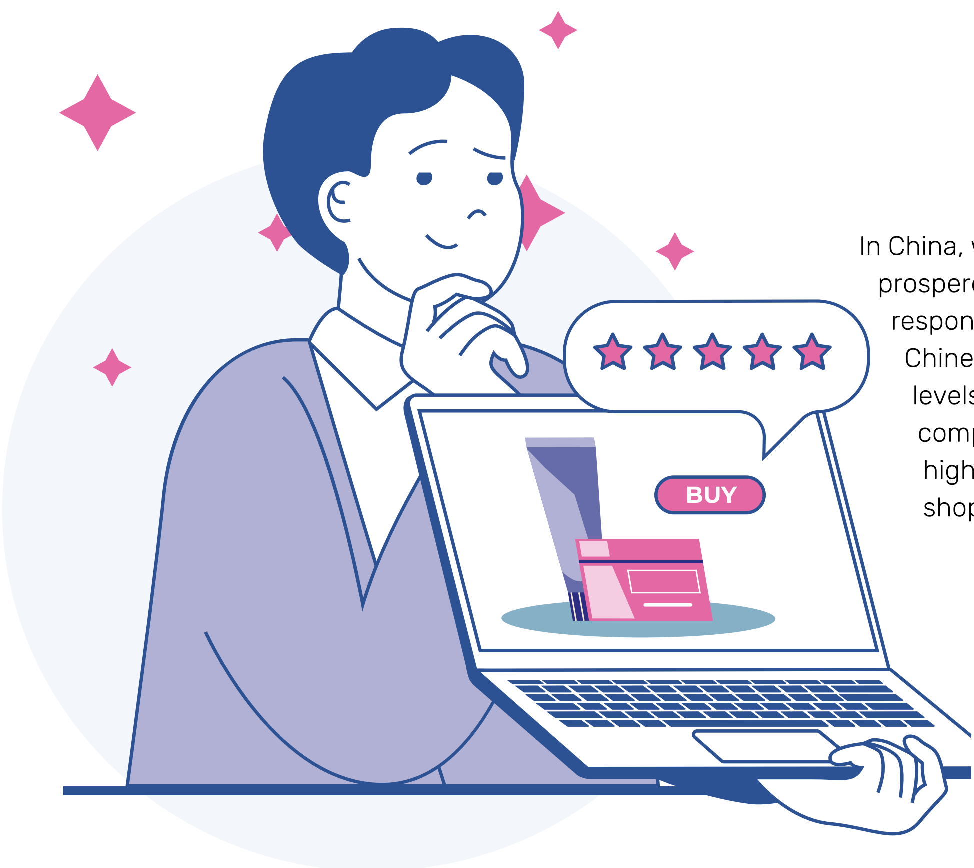
Obstacles to social commerce
(% of respondents)



Feelings towards social media content
(Average)



Despite social commerce growth, barriers to adoption remain; we asked the concerns towards social commerce and the leading concern globally is the fear of fake products. Other concerns are regional: logistics and shipping are major issues in India and Brazil, while French consumers express a specific lack of trust in payment security on these platforms. Conversely, privacy is cited as less of a concern for Chinese consumers.



In China, where social commerce is the most prosperous, more than 25% of Chinese respondents have no concern. Notably, Chinese consumers report the lowest levels of concern across all categories compared to other countries, showing high acceptance and trust of this shopping mode.

5 ABOUT INTELLIGENT BEAUTY: AI, AR, AND THE FUTURE OF RETAIL

Intelligent beauty is a rapidly growing trend, and it involves the integration of artificial intelligence (AI) and augmented reality (AR) technologies to deliver customized experiences in-store or online.

General findings:

- **AI remains relatively new to most consumers, with familiarity ranging from low to moderate.** 18.1% have never heard of it, 46.4% have heard of it but never used it, 25.4% have used it one or twice, and 10.1% use it regularly.
- **Appeal clearly exceeds familiarity** (with 61.2% of respondents finding AI tools appealing or very appealing), suggesting openness despite limited experience.
- **This positive perception is also mirrored by adoption intent,** as 58.3% reported being likely or very likely to use AI diagnostics.
- **Results for AI and AR are very similar in terms of familiarity, appeal, and adoption intention.**

Taken together, these results reveal the high potential of AI and AR technologies in beauty, despite the presence of current adoption barriers.

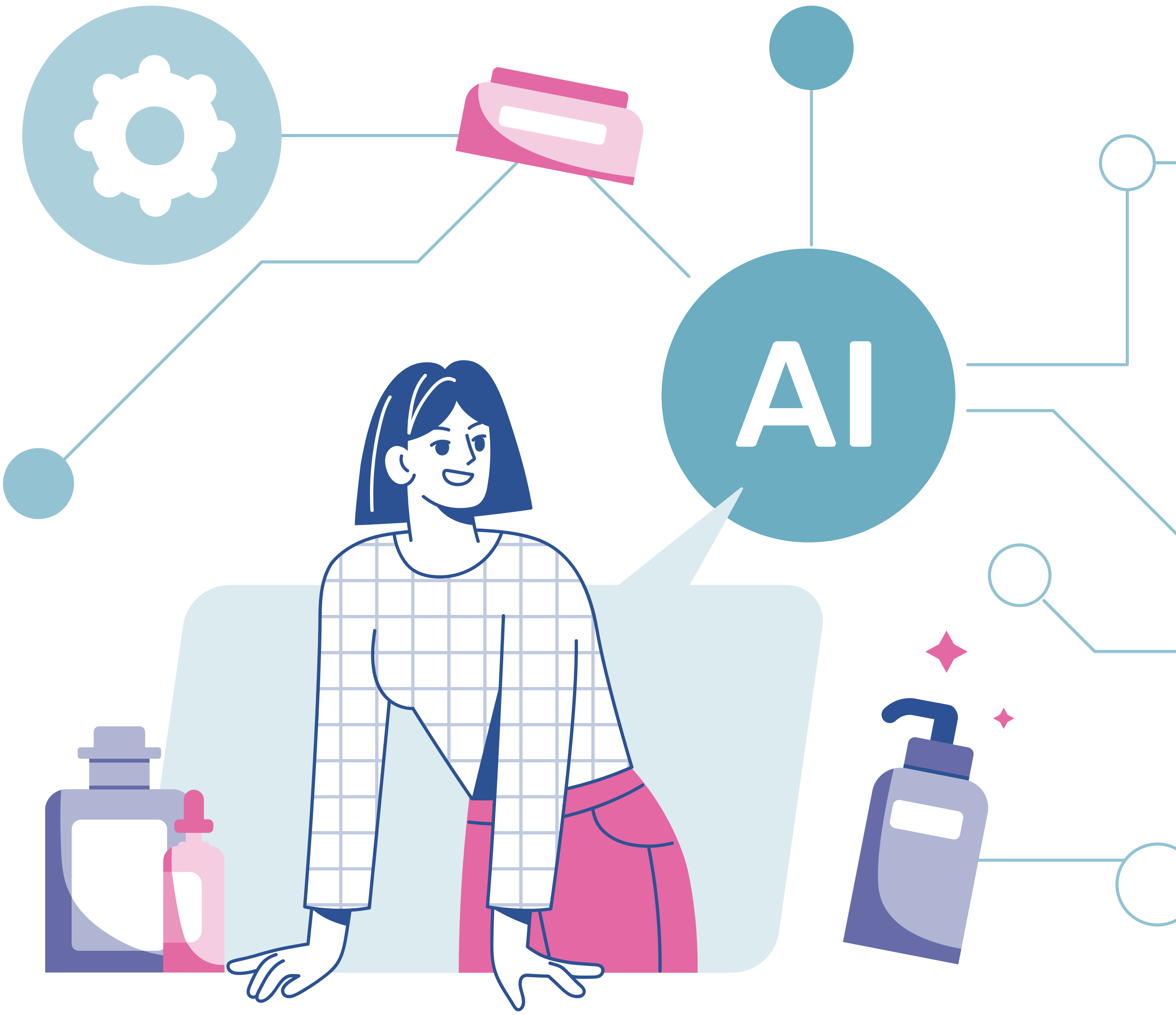
However, despite strong interest in AI, **human expertise continues to play a central role in the purchase journey,** with 48.2% of respondents preferring human advice compared to 26.4% who favor AI-based recommendations.

Overall, the main barriers to AI adoption are the preference for physically trying or choosing the products independently (37.5% respondents), concerns related to privacy and data usage (33.2%), a lack of trust (27.5%), limited familiarity with these tools (18.5%), and the AI process is perceived as too long or complicated (18.4%).

This shows that, while many barriers stem from knowledge and trust gaps, the doubts about the accuracy and reliability of AI tools remain significant. This creates opportunities for brands and retailers to educate consumers on how these tools work, how to use them effectively, and the value they can deliver in supporting purchase decisions.

Some country-level patterns can also be identified. Specifically, Brazil emerges as the most enthusiastic market for both AI and AR, while France appears to be the most cautious and human-centric. The United States falls between these two positions, with a moderate but positive attitude toward these technologies.

The following sections provide a deeper analysis of AI and AR individually, exploring demographic patterns and deriving key insights.



5.1 ARTIFICIAL INTELLIGENCE (AI)

Artificial Intelligence (AI) in beauty has various applications. It supports product recommendations by analyzing individual preferences, skin or hair needs, and past purchases. AI also powers virtual assistants and chatbots that guide consumers through product choices, both online and in-store. Additionally, AI-based diagnostics use scans or quizzes to deliver personalized, tailored advice, helping consumers make more informed decisions.

Our survey results showed that adoption and preferences for AI vary by market and age.

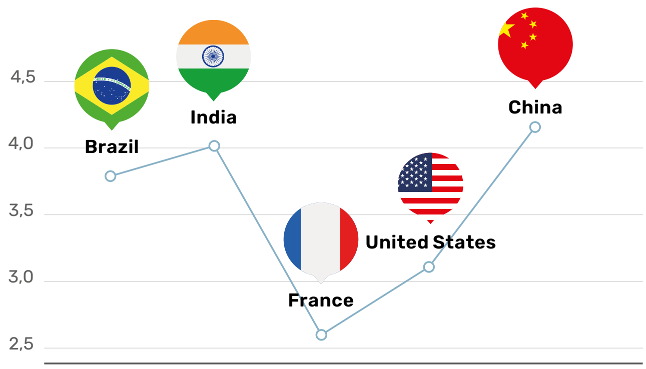
While younger consumers in India, China, and Brazil are highly receptive to AI mobile-based tools, older consumers and **French shoppers tend to favor in-store interactions**. However, overall there are indicators that appeal and likelihood to adopt are high, despite relatively low familiarity, showing strong potential.

These results show that AI personalization is gaining traction, but strategies need to account for local and generational differences to build trust and drive adoption.

From a demographic perspective, familiarity and appeal of AI-powered beauty solutions are higher in India, China, and Brazil, and, more broadly, for younger consumers, while no meaningful differences emerge by gender.

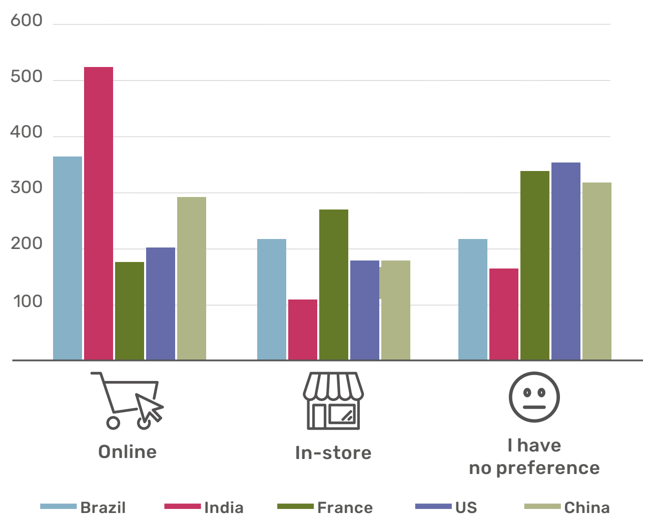
These patterns are reflected in stated likelihood to use AI solutions too. Respondents in India, China, and Brazil show the greatest willingness to utilize AI tools, with mean approaching 4 out of 5. This suggests that higher familiarity and appeal in these markets translate into a stronger intention to use AI-driven beauty solutions.

How likely are you to use AI diagnostics, personalized product recommendations, or virtual beauty assistants before buying beauty products?
(Average)



This openness to AI is further confirmed when examining the preferences for using AI tools to find suitable beauty products. Consumers in Brazil, China, and India tend to favor AI-enabled solutions online. French consumers, on the other hand, show a clear preference for in-store usage.

Do you prefer using AI tools to find suitable beauty products online or in-store
(Number of responses)



A deeper look at China reveals that the preference for online is strongly age-dependent. Younger consumers favor the use of AI solutions online, whereas older consumers lean toward in-store use, with a large share reporting no preference. A similar age-based pattern is observed in the United States, although the overall inclination toward in-store use is more moderate.

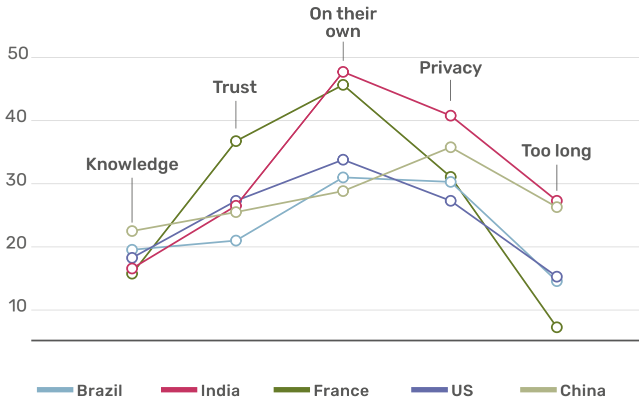
In China, the most significant interaction effect suggests that men exhibit a slightly stronger preference for online AI solutions.

When comparing AI-based advice with human assistance in beauty purchases, clear cross-country differences emerge.
If Indian consumers tend to prefer AI advice, French consumers show a strong preference for human shop assistants, while Chinese respondents, on average, do not have a clear preference. No significant variations are observed by age or gender in this dimension.

The survey also highlights several concerns related to the use of AI for personalised beauty product recommendations.

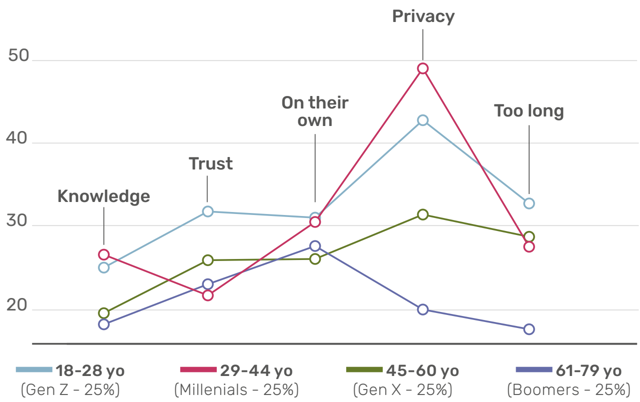
As a result, both French and Indian consumers express a stronger preference for selecting products on their own. Moreover, French respondents mention a lack of trust in AI-generated recommendations. Data privacy represents another major concern, especially among Indian and Chinese consumers, for whom the sharing of personal data constitutes a key barrier to adoption.

AI concerns
(% of repondents concerned)



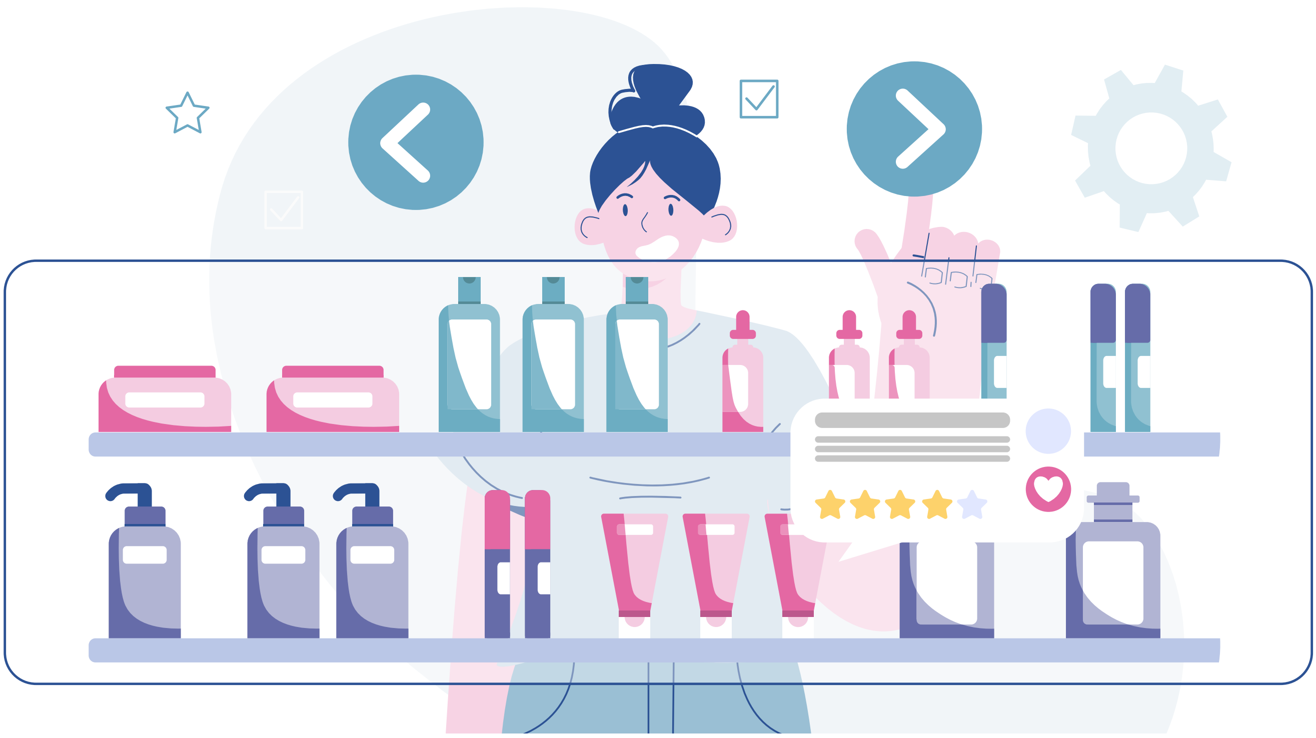
When delving into the interaction between age, gender, and AI-related concerns, it becomes apparent that older French and American consumers are especially inclined to prefer making product choices on their own, rather than relying on AI systems. In contrast, concerns about personal data sharing are more prevalent among younger consumers in China.

AI concerns in China
(% of repondents concerned)



5.2 AUGMENTED REALITY (AR)

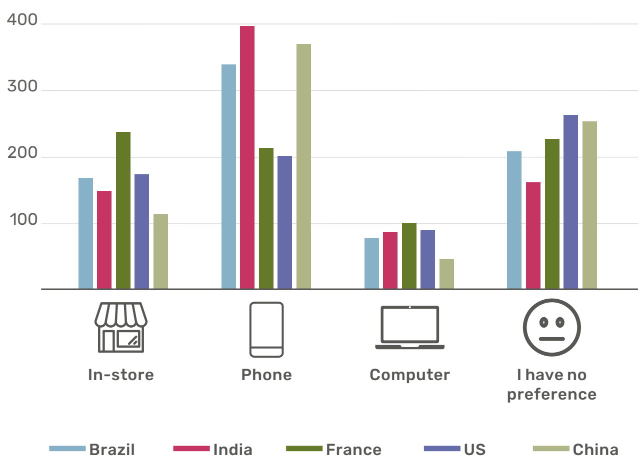
Turning to the use of augmented reality (AR) beauty tools (such as virtual try-ons, or AR mirrors), results closely mirror those observed for AI in terms of familiarity, appeal, and likelihood of use.



Once again, **French consumers appear more comfortable using the technology in-store**, whereas respondents from other countries generally prefer using AR on their smartphones.

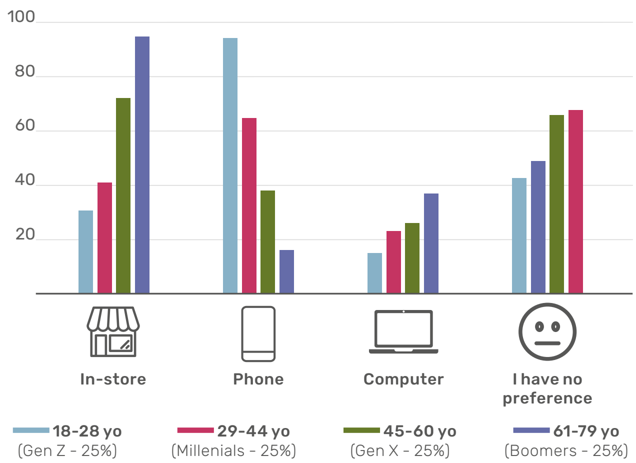
Do you prefer using AR tools for beauty products when you shop in-store, on your phone, or on your computer?
(Number of responses)

Across the 5 main markets



Do you prefer using AR tools for beauty products when you shop in-store, on your phone, or on your computer?
(Number of responses)

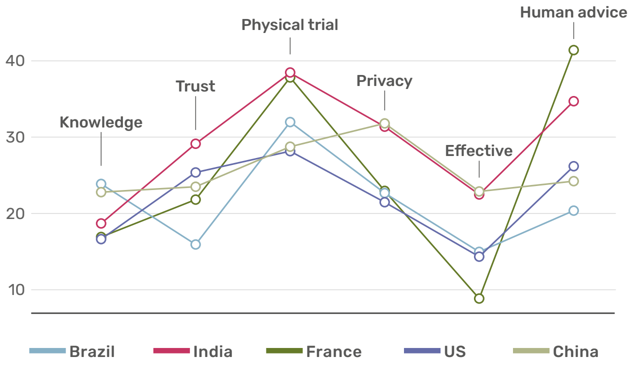
France



When analyzing AR preferences by age, a clear generational divide emerges. Younger French and American consumers show a strong preference for mobile-based AR, while older people favor in-store usage.

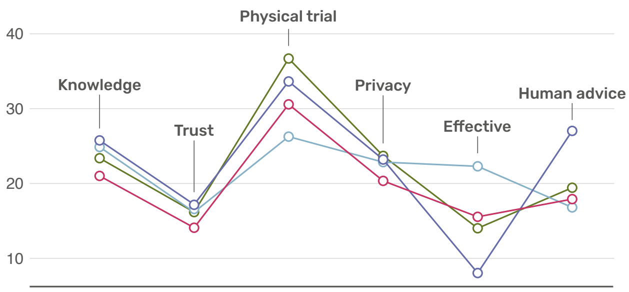
Analysis of AR-related concerns indicates that many consumers still prefer physical product trials. French and Indian respondents tend to prefer human advice, whereas concerns around personal data remain central in China and India.

AR concerns (% of respondents concerned)

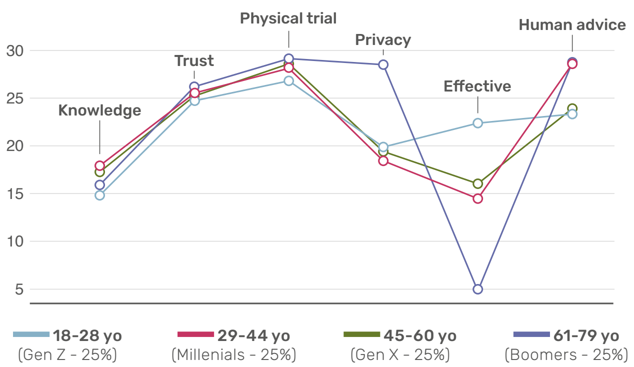


Additionally, older consumers in Brazil and the United States express skepticism about AR's ability to be effective on their skin types. This indicates that, in order to boost consumer confidence and address trust and data-privacy concerns across markets, brands and retailers must further enhance the accuracy and inclusivity of AR technology, while boosting consumer education and human support.

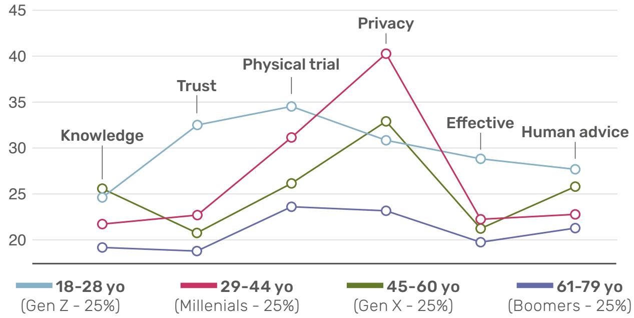
AR concerns (% of respondents concerned)
Brazil



AR concerns (% of respondents concerned)
United States



AR concerns (% of respondents concerned)
China



Finally, a notable and potentially concerning insight emerges among younger Chinese consumers, who report low trust in the accuracy and usefulness of AR applications in beauty retail.

Our findings confirm that AI and AR are increasingly shaping the beauty retail experience, with adoption and preferences varying by market, age, and trust levels. Younger consumers in India, China, and Brazil are highly receptive to digital, mobile-based tools, while older consumers and French shoppers tend to prefer in-store interactions. These insights point to clear opportunities for brands and retailers: delivering personalized, tech-enabled experiences, leveraging partnerships to accelerate innovation, enhancing in-store engagement with AR and diagnostics, and using data to better understand and serve consumers. Tailoring strategies to local markets and consumer expectations will be critical to driving adoption, building trust, and maintaining a competitive edge.

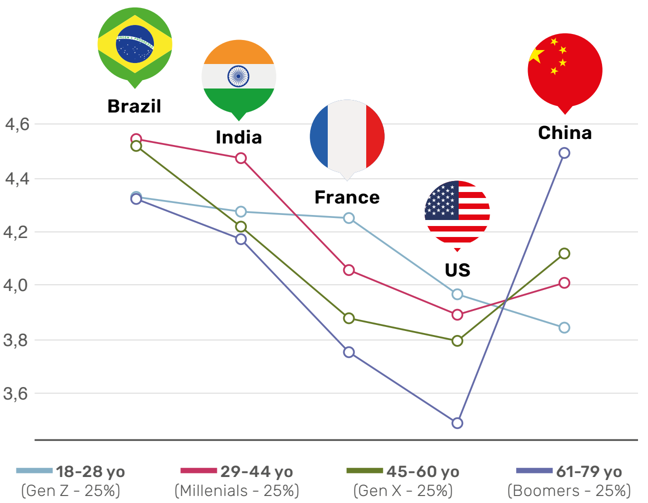
ABOUT SUSTAINABILITY IN RETAILING: PACKAGING, DELIVERY & SUPPLY CHAIN

Sustainability in retailing - covering refillable packaging, green delivery options and reusable delivery packaging - is a growing trend identified during our desk research as a key lever to reduce the environmental impact of beauty retail. Our survey confirms that consumer attitudes toward these solutions are largely consistent across innovations, suggesting that sustainability is increasingly perceived as a global evolution of the retail experience rather than a set of isolated initiatives.

Overall, Brazilian and Indian consumers emerge as the most familiar with and willing to adopt sustainable retail solutions, while American consumers consistently appear less familiar and more hesitant.

France occupies an intermediate position, with younger consumers standing out as more receptive, reinforcing the generational patterns already observed in information-seeking behaviours and confirming that sustainability adoption is closely linked to everyday retail habits.

How likely are you
to use refillable packaging in the future?
(Average)

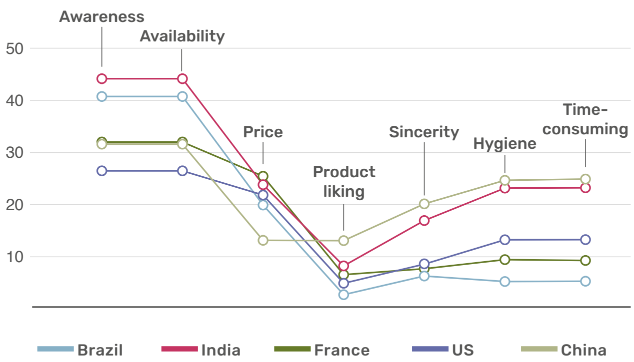


When looking specifically at refillable packaging, Brazilian and Indian respondents report higher familiarity and usage, whereas Americans are the least likely to adopt.

In France, younger consumers show greater awareness and willingness to use refill systems, highlighting refill as a generational rather than purely national phenomenon.

Importantly, resistance to refillable cosmetics is not driven by a lack of interest or trust. The main barrier reported by consumers is availability, followed by awareness of where refillable products can be found, indicating that adoption is primarily limited by retail visibility and access rather than consumer mindset.

Barries to refillable packaging *(% of respondents)*

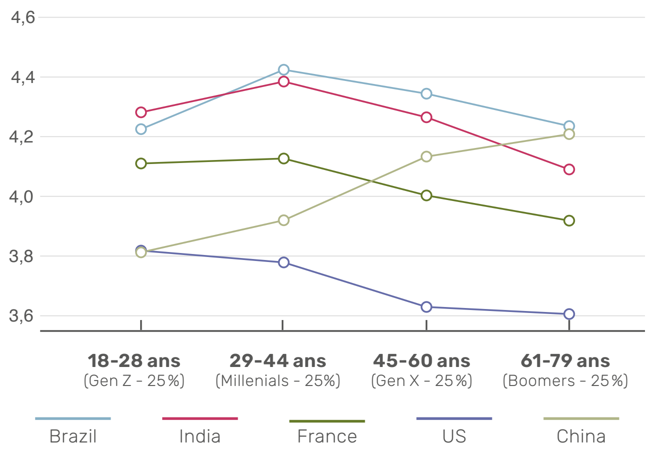


Results for green delivery options closely mirror those observed for refillable packaging across geographies, confirming a structural pattern of sustainability adoption rather than innovation-specific behaviour. By age group, both the youngest and the oldest consumers are among the most familiar with and willing to use green delivery, with the exception of the United States. This suggests that sustainable delivery resonates both with value-driven younger consumers and older consumers accustomed to slower, more deliberate delivery models.

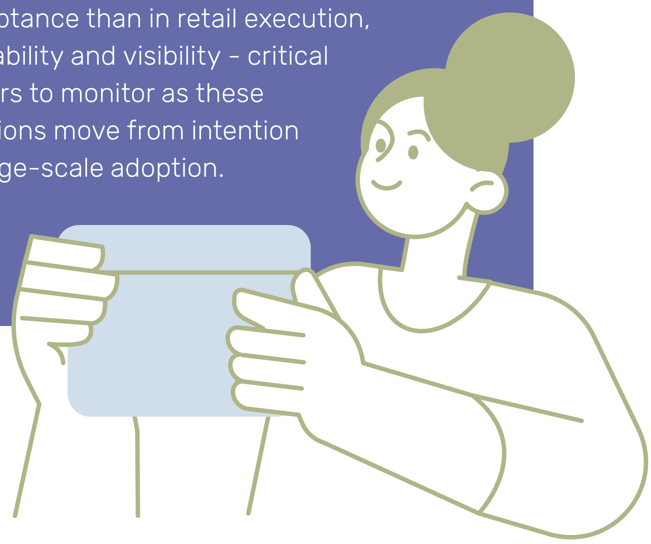
A similar dynamic is observed for reusable delivery packaging. Across most markets, younger consumers are more willing to adopt reusable delivery formats, reinforcing their openness to alternative retail models. China stands out as an exception, where older consumers report higher willingness than younger cohorts, echoing earlier findings on the strong engagement of older generations with retail innovations in this market.

When comparing the three sustainability solutions, the results remain remarkably consistent. Across most countries, the average likelihood to use refillable packaging, green delivery and reusable packaging is around 4 out of 5, indicating a generally positive attitude toward sustainable retail practices. The United States remains the main exception, with systematically lower adoption intent across all solutions.

How likely are you to use reusable delivery packaging for your next beauty order?
(Average)



Overall, these findings confirm that sustainability in retailing is no longer perceived as a niche or experimental trend, but as an expected component of the future beauty retail experience. As observed with social commerce, the key challenge lies less in consumer acceptance than in retail execution, availability and visibility - critical factors to monitor as these solutions move from intention to large-scale adoption.



7

CROSS-TREND ANALYSIS

A cross-comparison of responses revealed some interesting correlations between the trends.

The correlation between social commerce, AI, and AR appears to be particularly strong (r>.59), suggesting that digitally confident consumers tend to embrace immersive, tech-enabled shopping experiences across channels. Similarly, sustainability behaviors are strongly interlinked (r>.54).

Additionally, positive correlations between AI/AR usage and sustainable retail behaviors (refillable packaging, reusable delivery, greener delivery options; r>.34)) suggest that openness to intelligent beauty tools is part of a wider digitally engaged and innovation-oriented consumer mindset. It also suggests that openness to intelligent beauty tools goes hand in hand with acceptance of trade-offs such as slower delivery or alternative packaging formats.

Implication for retailers:
These relationships indicate that AI, AR, and social commerce should not be treated as isolated initiatives but as interconnected components of a cohesive, digitally led beauty retail ecosystem.

Consumers receptive to AI and AR represent a high-potential segment for introducing sustainability initiatives, as they are more open to broader innovation, including new formats, trade-offs, and value propositions.

Moreover, segmentation analyses by using a tree algorithm revealed further patterns across consumer behaviors. Customers who are most likely to use social commerce tend to like influencer content (i.e., they are 2.5% more likely to use social commerce), especially in France, India, and the U.S.. Similarly, consumers who are interested in slower delivery like more influencer content, because both variables are related to age.

People who like influencer content on social media are 2.3 more likely to use AI applications before purchasing cosmetics.

Consumers who like live streaming on social media are 4.7 times more likely to use AR to try cosmetics before purchasing them than consumers who do not like live streaming.

Consumers who are more likely to adopt refillable and reusable packaging are more interested in demonstrations on how to apply beauty products (i.e., lift is respectively 1.8 and 1.6).

The latter results suggest communication channels to promote the new retail initiatives. Managers should promote AI and AR tools thanks to influencers and live streaming.

Similarly, companies should leverage influencers when they promote social commerce. The results confirm that there is a segment of consumers who are digital natives and willing to embrace all the digital opportunities. To target environmentally conscious consumers who are interested in sustainable packaging, marketers should relate reusable and refillable packaging to online demonstrations on how to use cosmetics.

CONCLUSION

KEY FINDINGS

Social Commerce is favored primarily by women and younger consumers and is driven by practical content like discounts and application demos rather than influencer endorsements, with users showing interest in purchasing luxury brands. It suggests a strong driver of social commerce adoption is to find good discounts for expensive products. Despite this potential, the fear of counterfeit products remains the primary global barrier, alongside regional challenges such as logistics in India and Brazil and payment skepticism in France.

Across all surveyed markets, AI and AR tools are appealing despite moderate familiarity. Younger shoppers in Brazil, China, and India are the most receptive, preferring mobile and online use, while older consumers and French shoppers tend to favor in-store experiences. Trust, privacy, and ease of use remain key barriers, but interest and willingness to try are high, suggesting these tools could become a standard part of both online and in-store shopping.

Sustainability in retailing, through refillable packaging, green delivery and reusable shipping solutions, shows a broadly positive reception across markets. Adoption and familiarity are highest in Brazil and India, while the United States remains the most hesitant market. France occupies an intermediate position, with younger consumers significantly more receptive, confirming a strong generational effect. It is important to note that this reluctance is not motivated by mistrust or lack of interest, but by practical obstacles: limited availability and low visibility of sustainable options are the main reasons preventing their adoption.

PREDICTIONS

France's hesitation towards Social Commerce may be temporary; as established brands increasingly populate these platforms, their presence could validate the ecosystem, likely overcoming current trust issues and the "not interested" population.

Interest in intelligent beauty tools is likely to grow as consumers become more familiar with these technologies. As brands improve transparency, simplify access, and demonstrate the reliability of AI and AR recommendations, these tools are expected to become standard in both online and physical beauty retail, supporting more personalized and confident purchasing decisions.

Adoption of sustainable retail solutions is likely to accelerate as retailers improve availability and visibility. In markets such as France and the United States, broader deployment by established players could quickly normalize refillable packaging and green delivery, particularly among younger consumers already inclined to adopt these practices.

In conclusion, the future of beauty retail is not defined by technology, platforms, or sustainability revolution alone, but by how effectively brands and retailers integrate these dimensions into coherent, trustworthy and human-centered experiences. Consumers are open, curious and ready to engage but only with systems that are transparent, accessible and aligned with their values.

In this context, repeating this data collection on a yearly basis and extending it to additional markets would provide valuable long-term insight, allowing stakeholders to track evolving adoption patterns, identify emerging regional benchmarks, and better anticipate the next phase of retail transformation.

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