



SPATE

DECEMBER 2023

2023: YEAR IN REVIEW



2023: YEAR IN REVIEW

2023 has had its share of beauty changes, both positive and negative. Consumers across the United States demonstrated renewed enthusiasm for specific at-home devices — ie, red light therapy options from Celluma — while lockdown-era favorites like eyeliner stamps failed to live up to their former hype.

However, this year, one thing is for sure: Consumers continue toward beauty enlightenment. Consumers are seeking effective treatments and specific aesthetics with the requirement of care and support for their complexion and strands. Brands in the beauty space must heed this idea and ensure they don't sacrifice hair or skin health, for example, in the name of a look. All this and more is addressed in the 2023: Year in Review report.

Want more updates on future beauty trends? [Start your free trial today](#), and be among the first to hear about our upcoming **2024 Predicted Trends Report**.

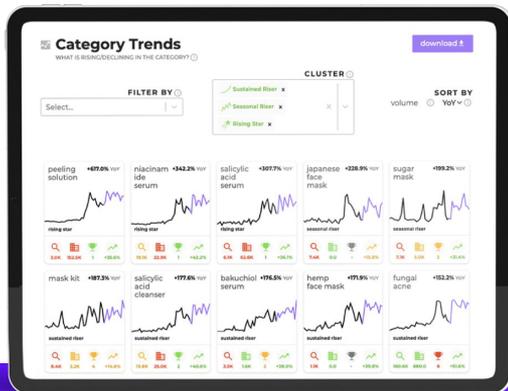
Thank you,

Olivier and Yarden, co-founders of Spate

WHY SPATE?

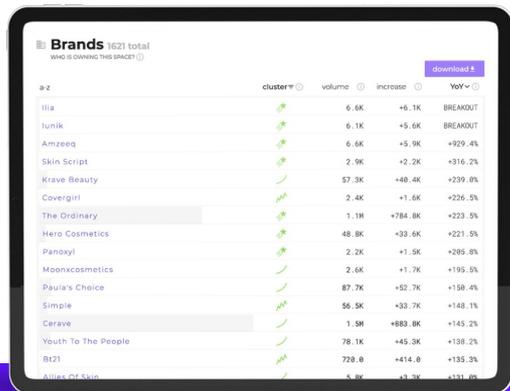
WHAT'S THE NEXT BIG TREND?

+20B search signals and +40M million TikTok videos across the Globe to spot and predict which trends are here to stay



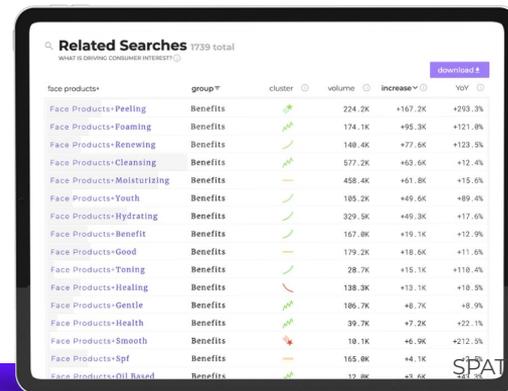
WHICH BRANDS ARE OWNING THE SPACE?

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.



SPATE DATA: Find Your Match

MARKETS LIVE ON THE SPATE DASHBOARD



US



UK



FRANCE



KOREA



JAPAN

CATEGORIES



SEARCH &
TIKTOK DATA



BEAUTY



PERSONAL CARE



WELLNESS



FOOD &
BEVERAGE
(US)



THE METRICS: DATA TRANSLATION

- *Predicted YOY:*
Predicted 12 months vs. actual 12 months growth rate
- *YOY:*
Year-Over-Year growth rate comparing the latest 12 months vs. previous 12 months growth rate
- *Volume:*
Monthly search volume averaged over the last 12 months
- *Increase:*
The difference in the average search volume of the past 12 months and the average of the previous 12 months

2023 PREDICTED TRENDS

Trends per category ranked by predicted growth:

SKINCARE

Trend	Predicted YOY ↓
morpheus8	+47.3%
sunscreen stick	+35.2%
diamond glow facial	+31.4%
peptide moisturizer	+30.7%
prp eye rejuvenation	+28.8%
red light therapy	+25.4%
powder sunscreen	+24.8%
skin barrier	+23.9%
spf tinted moisturizer	+23.6%
ice roller	+23.0%

HAIR

Trend	Predicted YOY ↓
hair tinsel	+45.0%
v part wig	+37.1%
travel hair dryer	+30.0%
hair claw	+27.5%
gray blending	+25.3%
scalp serum	+24.4%
velcro rollers	+23.5%
hair bonding	+22.5%
smoothing balm	+21.6%
styling foam	+20.7%

MAKEUP

Trend	Predicted YOY ↓
cat eye lashes	+36.8%
body glitter spray	+31.1%
liquid blush	+31.1%
tubing mascara	+27.6%
rhinestone makeup	+26.2%
contour palette	+26.6%
mature skin makeup	+22.4%
cream contour	+22.3%
blush stick	+21.1%
eyeliner stamp	+20.1%

2023: SPATE PREDICTIONS

Based on 12-month predicted YoY growth from November 2022 data, trends in **green** are those that Spate correctly predicted and those in **red** didn't meet expectations. YoY growth data shown below is from October 2023.

SKINCARE: 9 of 10 predictions

Trend	YOY ↓
red light therapy	39.3%
skin barrier	32.5%
diamond glow facial	26.6%
sunscreen stick	25.1%
peptide moisturizer	23.4%
morpheus8	22.2%
spf tinted moisturizer	17.3%
prp eye rejuvenation	8.5%
powder sunscreen	6.2%
ice roller*	-7.4%

HAIR: 9 of 10 predictions

Trend	YOY ↓
travel hair dryer	39.5%
hair bonding	26.9%
gray blending	22.1%
scalp serum	15.7%
smoothing balm	13.2%
hair tinsel	8.6%
styling foam	7.5%
hair claw	6.7%
velcro rollers	5.5%
v part wig*	-16.7%

MAKEUP: 5 of 10 predictions

Trend	YOY ↓
tubing mascara	40.5%
blush stick	28.2%
liquid blush	21.7%
mature skin makeup	19.5%
cat eye lashes	15.0%
contour palette*	-12.1%
eyeliner stamp	-12.2%
cream contour*	-14.9%
body glitter spray*	-23.5%
rhinestone makeup*	-30.4%

Source: Google Search data, year-over-year growth comparing the past 12 months ending October 2023 vs the 12 months prior (US); *Despite current negative YoY growth due to a spike in interest from the previous year, these trends are still trending upward overall.

2023: SPATE REFLECTIONS

Looking at November 2022 predicted 12-month YoY growth versus October 2023 current YoY growth, makeup and hair trends excelled with a majority of predictions coming true, while skincare failed to meet the mark:

SKINCARE: 9 of 10

In 2023, consumer skincare trends highlighted a balanced emphasis on treatment and protection. The concept of skin barrier health, which has become a guiding star for many skincare routines in recent years, remains a key focus and drives significant growth. The sustained interest in skin barrier health, amidst the growth of specialized treatments such as the DiamondGlow facial and Morpheus8 microneedling with radiofrequency, underscores the ongoing consumer commitment to skin maintenance at an expert level. Brands can launch new products and reinvigorate old SKUs with this mission in mind, whether the products exfoliate, cleanse, treat, hydrate, or moisturize.

HAIR: 9 of 10

Skincare was not the only category in 2023 where consumers prioritized holistic health and care. Top hair trends of 2023 — including scalp serums and hair bonding — show how consumers achieve healthy hair from follicle to shaft without skipping a beat. This also doubles down on the ongoing skinification of the hair category. Age appreciation is also increasingly coming into play, with gray blending remaining one of the top hair trends this year. Brands can further emphasize the importance of color-specific care through products that make silver strands sparkle while keeping the vibrance of other colors from black to brown to blonde to red. As for hair maintenance, consider ways to enhance consumers' care and styling routines beyond the basics.

MAKEUP: 5 of 10

Though predictions in the makeup category may have failed to meet expectations in some ways, it's important to note that most of the declining year-over-year trends still demonstrate a positive trajectory over the last couple of years. What's especially noteworthy in makeup is that format is a crucial consumer focus. Sticks and liquids emerge as the winners from 2023, so it makes sense that the contour palette and eyeliner stamp fell short. Sustained interest in mature skin makeup reminds brands that aging isn't necessarily something to be treated but something to gracefully emphasize with specialized techniques and products. Plan product development and marketing strategies accordingly.

2023 TRENDS SPOTLIGHT



SKINCARE



HAIR CARE



MAKEUP

2023 TRENDS SPOTLIGHT



SKINCARE



HAIR CARE



MAKEUP



SKINCARE TREND SPOTLIGHT

RED LIGHT THERAPY

HOW BIG IS THIS TREND

Very High Volume
221.2K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Very High Competition
36.3K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders

WILL IT LAST?

Very Likely

STATS:

+39.3%

YEAR-OVER-YEAR
GROWTH

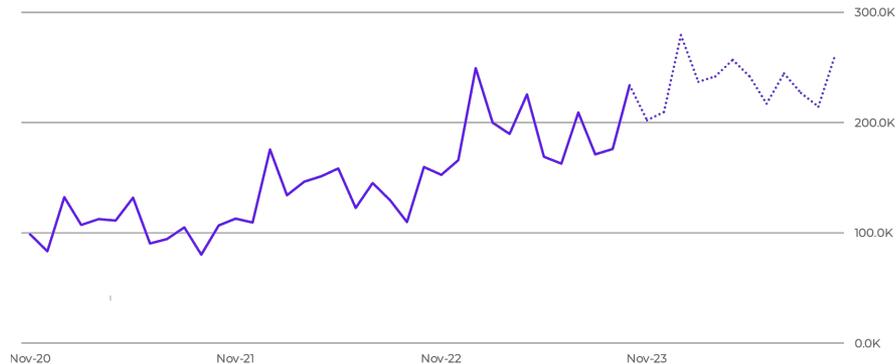
RELATED SEARCHES:

Brand	Volume↓
celluma	16.1K
revive light therapy	12.6K
planet fitness	4.6K

Concern	Volume↓
wrinkle	520
aging	470
pain	1.7K
acne	1.7K

SPATE POV

At-home skincare devices experienced a significant increase in interest at the beginning of the pandemic-era lockdowns years ago. Since that time, consumer interest in these devices and the treatments they provide has varied, with a few notable exceptions. Red light therapy, in particular, continues to gain traction. Consumers are looking for at-home devices from brands like Celluma and gyms that provide this service, such as Planet Fitness. The range of concerns these consumers aim to address includes everything from superficial aging issues to deeper, below-the-skin pain. Brands should consider developing red light therapy devices or creating products that complement them.



2022 TRENDS SPOTLIGHT



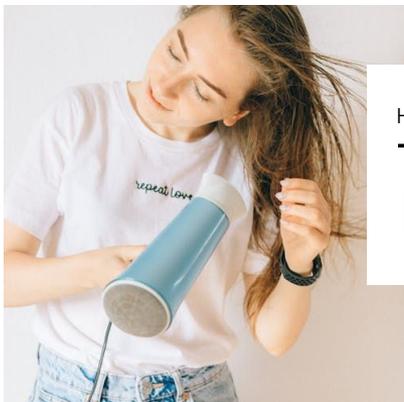
SKINCARE



HAIR CARE



MAKEUP



HAIR CARE TREND SPOTLIGHT

TRAVEL HAIR DRYER



STATS:

+39.5%

YEAR-OVER-YEAR
GROWTH

RELATED SEARCHES:

Brands	Volume↕
dyson	1.3K
babylisspro	1.2K
revlon	1.0K

Product Format	Volume↕
diffuser	1.3K
case	950
compact [size]	460

SPATE POV

With a renewed interest in travel, consumers are looking for ways to bring their at-home hair styling tools, specifically travel hair dryers, on the go. This market is highly competitive, with brands like Dyson and BaBylissPRO dominating branded searches. Interestingly, consumers are not searching for a travel-sized version of the Dyson hair dryer; instead, they are looking for a travel case for the full-sized model. This suggests that while compact size and light weight are essential — as indicated by searches for compact and weight — consumers will make room in their bags for their favorite tools. Searches for travel diffusers are also notable, meaning that brands with hair dryers should also consider the portability of their attachments to meet consumer needs.

Concern	Volume↕
weight	140

HOW BIG IS THIS TREND

High Volume

19.7K average monthly searches

HOW COMPETITIVE IS THE SPACE?

High Competition

7.7K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders

WILL IT LAST?

Very Likely

2022 TRENDS SPOTLIGHT



SKINCARE



HAIR CARE

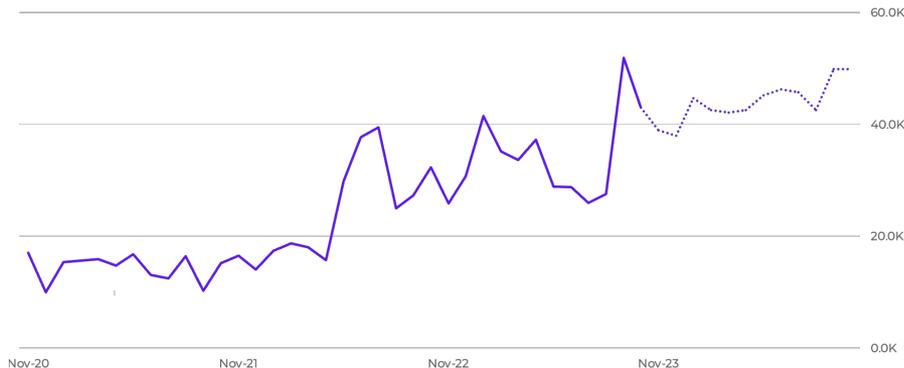


MAKEUP



MAKEUP TREND SPOTLIGHT

TUBING MASCARA



STATS:

+40.5%

YEAR-OVER-YEAR
GROWTH

RELATED SEARCHES:

Brands	Volume+
blinc	5.6K
tarte cosmetics	4.6K
milani cosmetics	3.1K

Questions	Volume+
best	5.4K
what is	5.3K
vs	260

Retailers	Volume+
ulta	860
sephora	330
target	170

HOW BIG IS THIS TREND

High Volume
39.4K average monthly searches

HOW COMPETITIVE IS THE SPACE?

Very High Competition
18.8K average brand searches

WHO OWNS THE MARKET SHARE?

Few Market Leaders

WILL IT LAST?

Very Likely

SPATE POV

Tubing mascara is a type of mascara that creates small tubes around each eyelash, giving the appearance of longer, fuller lashes. Consumers are showing increased love of this format, and for good reason. Many top tubing formulas are gentle, water-resistant, and easy to remove. This trend is quite competitive, with brands like Blinc, Tarte, and Milani seeking significant monthly searches. There is still room for education around this trend, with consumers asking *what is* tubing mascara. Retailer searches reveal the importance of broad distribution for brands playing in this space. There's a continued opportunity for new and existing brands to innovate and educate, positioning themselves as leaders in this burgeoning market.

TOP INCREASE BRANDS OF 2023

These brands drove the most significant positive change in average monthly search volume this year:

SKINCARE

Rank	Brand	Increase ↓
1	la roche-posay	224.2K
2	cerave	160.3K
3	paula's choice	109.2K
4	glow recipe	104.5K
5	drunk elephant	96.2K
6	beauty of joseon	52.3K
7	cetaphil	51.9K
8	dior beauty	51.2K
9	rare beauty	50.9K
10	cosrx	46.0K

HAIR

Rank	Brand	Increase ↓
1	k18 biomimetic	73.6K
2	ouai	60.7K
3	shark	53.1K
4	gisou	33.5K
5	not your mother's	31.6K
6	kérastase	30.6K
7	nutrafol	30.4K
8	color wow	26.5K
9	redken	22.4K
10	the beachwaver	21.4K

MAKEUP

Rank	Brand	Increase ↓
1	rare beauty	369.5K
2	elf cosmetics	215.0K
3	fenty beauty	180.1K
4	tarte cosmetics	137.3K
5	laura geller	52.6K
6	makeup by mario	49.2K
7	haus laboratories	48.5K
8	dior beauty	48.2K
9	glossier	43.5K
10	revlon	41.4K

TOP GROWTH BRANDS OF 2023

These brands drove the most significant year-over-year growth (YoY) this year:

SKINCARE

Rank	Brand	YoY ↓
1	numbuzin	532.9%
2	torriden	366.1%
3	instantly ageless	336.1%
4	daxxify	303.6%
5	tocobo	249.8%
6	futurewise	243.0%
7	kose	239.7%
8	bubble skin care	205.7%
9	lumiera	180.3%
10	byoma	154.8%

HAIR

Rank	Brand	YoY ↓
1	unbrush	1099.4%
2	curldaze	215.8%
3	necessaire	155.3%
4	hers	149.0%
5	zuvi	136.0%
6	milkyway	133.5%
7	dae hair	102.9%
8	aromatica	84.9%
9	gisou	81.1%
10	trelluxe	77.4%

MAKEUP

Rank	Brand	YoY ↓
1	typology	1415.8%
2	sacheu beauty	619.3%
3	olaplex [eyelash serum]	436.6%
4	palladio beauty	247.6%
5	summer fridays	197.4%
6	luxe cosmetics	181.0%
7	fiera cosmetics	162.4%
8	bk beauty	162.4%
9	dibs beauty	133.7%
10	caliray	122.2%

SPATE POV

In this comprehensive analysis of the forecasted trends for 2023, Spate offers insights into both anticipated and surprising developments. Spate first evaluates these trends as data experts, drawing from an enriched database that now includes TikTok and additional international markets. With deep expertise in the beauty sector, Spate also adds human understanding to a vast data set.

Looking back at the past year and the upcoming months, several key themes have emerged, providing a clearer picture of the current beauty consumer landscape. As we venture into 2024, brands should take into account the following insights:

Format is critical. Across each category, the importance of product format is evident. In skincare, consumers crave convenient sunscreen sticks and powders. In hair, they turn to travel hair dryers and smoothing balms to achieve the look they want where they want — ie, on vacation. In makeup, contour palettes and eyeliner stamps did not meet expectations, but consumers continue to crave blushes in liquid and stick formats. Whether developing new products or promoting existing ones, keep the format in mind as a key selling point.

Maintain focus on care and holistic health. Consumers toggle between targeted in-office treatments and protective, repairing at-home products in skincare. The hair category sees growing interest in serums and balms to achieve healthy scalp and strands with a polished finish. Brands should remember that consumers seek particular looks but are no longer willing to accept certain downsides with so many skin-restoring, hair-helping options on the market to soothe their worries. Brands should consider this when developing new treatments, particularly how they can help consumers achieve results without sacrificing health and comfort.

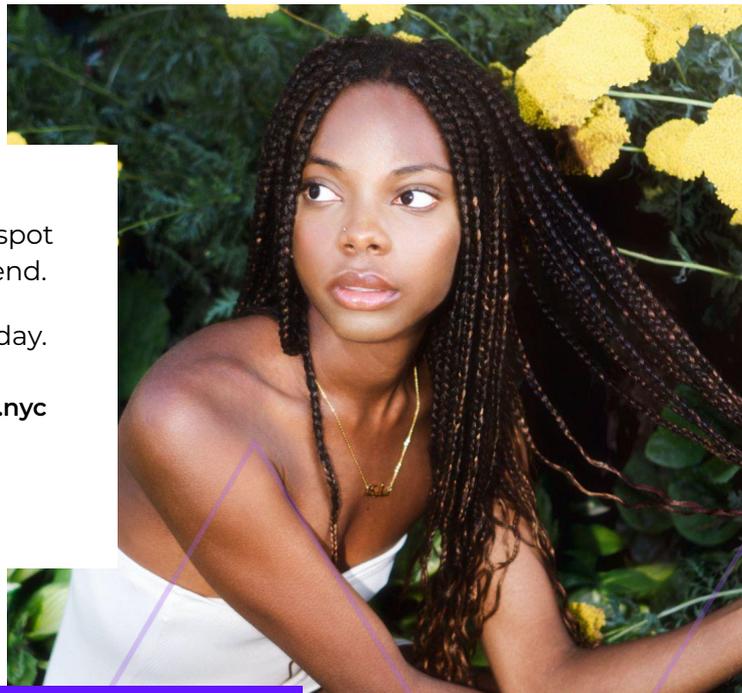
Brand success is possible across all categories with the right strategy. Looking at the top brands from 2023, it's nearly impossible to detect a common thread that led them all to success. However, what's essential to note is that success is possible across various categories with the right messaging and focus. Brands should explore winners in their sectors to understand what strategies they can replicate across their brands for success in 2024 and beyond.

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the next big trend.

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SPATE



HEALTH STATS EXPLAINED



HOW BIG IS THIS TREND

This metric assesses the size of a trend using monthly Search Volume relative to its category.

"Very High Volume" trends are well established trends among consumers.

"High Volume" trends are those with high consumer awareness.

"Medium Volume" trends are fairly well known by consumers.

"Low Volume" trends have low consumer awareness.

"Very Low Volume" trends represent emerging niche opportunities.



HOW COMPETITIVE IS THE SPACE?

This metric assesses how much of organic search are brands-related. It represents the top of mind brands that consumers search alongside a trend.

"Very Low / No Competition" indicates there are little to no brand searches alongside a trend.

"Low Competition" indicates that there are a few brand searches alongside a trend.

"Medium Competition" indicates that there are some brand searches alongside a trend.

"High Competition" indicates that there are several brand searches alongside a trend.

"Very High Competition" indicates there are many brand searches.



WHO OWNS THE MARKET SHARE?

This metric assesses the presence or lack thereof of a market leader.

"Very Few Market Leaders" indicates a market in which very few brands own >80% of the share.

"Few Market Leaders" indicates a market in which a few brands are in high competition.

"Several Market Leaders" indicates a market in which there are several brands in competition.

"Many Market Leaders" indicates a market for which there are many brands in competition but no clear winners.

"No Market Leaders" indicates a market for which there is either fierce competition or an emerging market with no distinct players.



WILL IT LAST?

This metric assesses the likelihood that a trend will continue to grow within the next 12 months.

"Very Likely" indicates a >90% confidence that a trend is predicted to grow.

"Likely" indicates with strong confidence that a trend is predicted to grow.

"Uncertain" indicates an equal likelihood that a trend is predicted to grow or decline.

"Unlikely" indicates with strong confidence that a trend is predicted to decline.

"Very Unlikely" indicates a >90% confidence that a trend is predicted to decline.