COLLAGE

Engage Consumers across Key Life Stages



Personal Care

Winter 2025

Collage Group Life Stage Survey 2024

Fielded October 2024 | 18-78 unweighted survey sample breakdown, n=4,013

Race/Ethnicity	
Hispanic	933
Black	725
Asian	415
White	1,888

Gender	
Woman	1,992
Man	1,991
Non-binary / other	30

Generation	
Gen Z	590
Millennial	1,244
Gen X	955
Boomer	1,224

Hispanic Identity	
U.S. Leaning *(Acculturated)*	265
Bicultural	386
Heritage Leaning *(Unacculturated)*	282

LGBTQ+	
LGBTQ+	435
Non-LGBTQ+	3,578

NOTE: Data present in this report is weighted to be nationally representative of Race/Ethnicity, Hispanic Identity, Age, Gender, and Sexuality.

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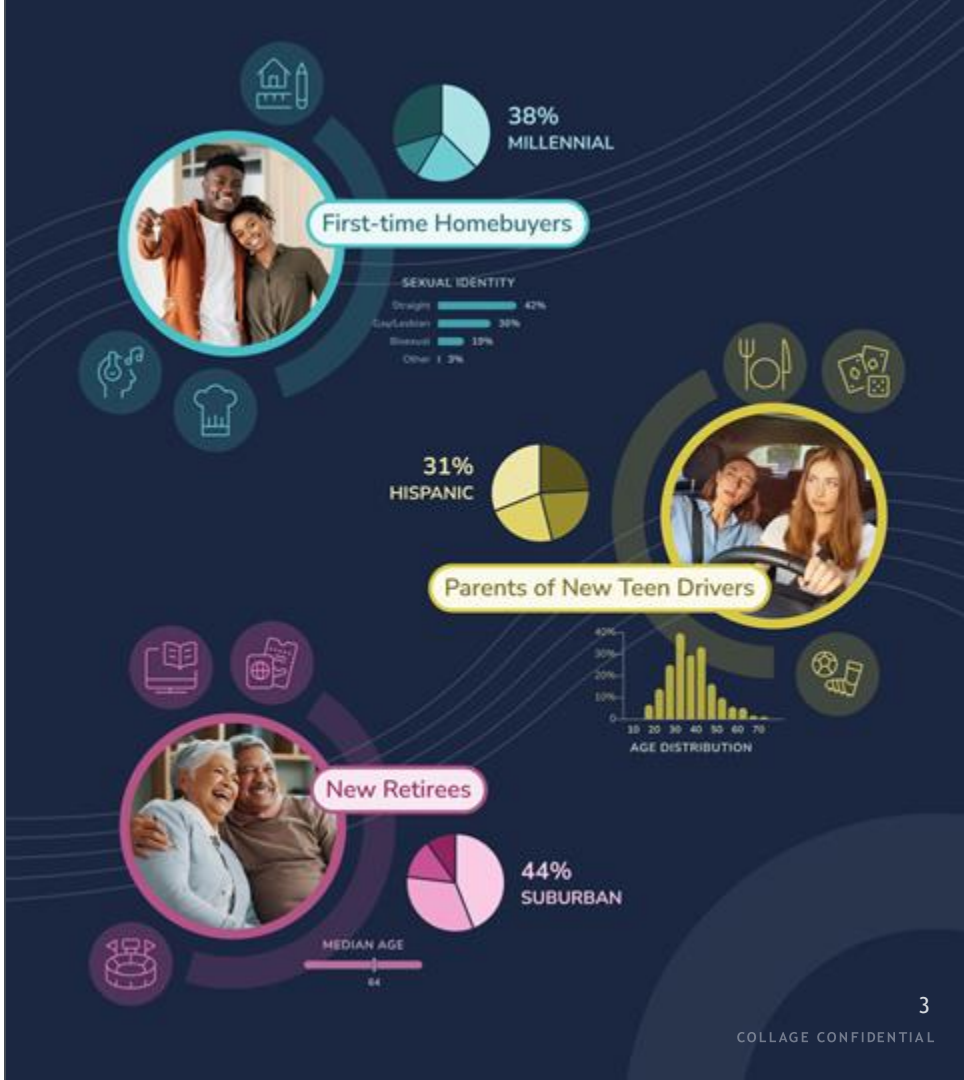
Introducing Life Stage Audiences from Collage

Gain insight into cultural similarities and differences for consumers going through life-changing events, such as becoming **First-time Parents, New Home Buyers, Parents of Teen Drivers, Grad School Graduate, or New Retirees.**

Combine life stage and cultural insights to create impactful audience segments and uncover deeper connections that drive consumer behavior and preferences.

Engage consumers during life transitions and pivotal point of entry moments by aligning your messaging with their circumstances, enhancing campaign relevance and timing for greater engagement.

Coming soon to Audience Profiles!



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Life Stage Audiences: Personal Care*

This report profiles life stages highly relevant to the Personal Care brands

1 **Attending college**

2 **Having a child**



Personal care* refers to consumer goods including cosmetics, body and skin care, hair care, oral care, and fragrances.

* The full list of available Life Stage Audiences, many of which are applicable to Personal Care brands, is included at the end of the deck.

The Big Picture

Going to college and having children are turning points in consumers' personal care journeys



Personal care helps Gen Z confidently navigate college life.

As Gen Z adjust to new-found independence, self-care becomes a grounding priority. At the same time, they strive to build inner confidence in a world of constant digital comparison.

Parents turn to personal care as respite from the daily grind.

Hispanics and Millennials, who are most likely to be new parents, seek a balanced routine that fits their responsibilities, aligns with their values, and helps maintain their sense of self.

1

Attending College



Gen Z are most likely to be college students today

Consumers who have **attended college** in the last 6 months:

Indicates a focus segment for this report

	Segment	Diff. from Total Pop.
1	Gen Z	+17pp
2	Asian	+4pp
3	LGBTQ+	+4pp



Source: Collage Group Life Stages October 2024 (18-78), weighted data
Single Select grid. Original question, “Which statements describe your experience with the following personal life events?”
Options included “I have done this in the last 6 months,” “I will do this in the next 6 months,” and “Neither”
Note: demographic data reflects survey sample

Gen Z spans teens to young adults and is the most diverse American generation to date



Key Gen Z Demographics:

13-28 Age range in 2025
(Birth years 1997-2012)

51/49 Multicultural to White ratio[1]
(vs. <50% Multicultural of all older generations)

1 in 3 LGBTQ+ identity prevalence[2]
(over twice the rate of the Total Pop.)

Source: [1] Collage Group Custom Market Profiler; American Community Survey; 2023 1-Year Data
[2] Collage Group America Now Survey, August 2024 (13-78 population), weighted data

College life presents a completely new challenge for Pressured Gen Z looking to establish their newly independent selves

2025 GEN Z GROUP TRAITS:

PRESSURED

COLLECTIVE INDIVIDUALITY



College life shifts Gen Z's personal care needs towards convenience, affordability, and self-care while they navigate the stresses of shared living spaces and digital influence.

Brands that provide **multi-functional**, **budget-friendly**, and **confidence-boosting** products connect best with college students.

Source: Collage Group Cultural Traits Survey, December 2024 (13-79)

Consumers attending college hold three personal care priorities:

1. Build independence and adjust to living on their own
2. Ease the stress of college through self-care
3. Boost self-confidence in social interactions online and IRL

Monthly subscriptions fit seamlessly into their busy college lifestyle

This streamlines their personal care routine and eliminates the burden of constant restocking

College life is fast-paced and **unpredictable**, with students balancing classes, part-time jobs, and social activities.

Having essential items delivered regularly ensures they never run out of necessities, **reducing stress** and last-minute store runs.

% interested in having a subscription for the following products:

	Total	Gen Z
Shampoo/conditioner	38%	46% ▲
Deodorant	36%	42% ▲
Makeup	16%	20% ▲

Source: Collage Group Category Essentials Spring 2024 (18-78), weighted data; Multiselect answer options
Original question: Are you interested in having a subscription where products of your choice are automatically mailed to you periodically for any of the following?
▲▼ Significantly over/under Total. Confidence level 95%

Grooming, skin care, and beauty routines are part of self-care for Gen Z

These routines offer them a sense of control and relaxation amid the challenges of college life

74% of Gen Z say they consider grooming to be a part of their **personal wellness**. [1]

57%▲ of Gen Z say they **wish they understood more** about different types of skin care products. [2]

"Skincare is a non-negotiable part of my daily routine because I've seen the benefits it's had for me both mentally and physically. Not only have I gotten a major confidence boost from the appearance of my skin, but **I've found my skincare routine to be a relaxing and important part of my daily life** during the craziness of college."

—KIMBERLIN TREVINO
STUDENT WRITER, HER CAMPUS



Source: [1] Collage Group Category Essentials Fall 2024 (18-78), weighted data, % agree, strongly agree
[2] Collage Group Category Essentials Spring 2024 (18-78), weighted data, % agree, strongly agree
Her Campus
▲▼ Significantly over/under Total. Confidence level 95%

Gen Z seeks confidence and freedom, looking for opportunities, relationships, and brands that empower self-expression without judgment

"I often feel like I'm "not good enough" [1]



*Which of the following are your **top aspirations** right now?* [2]

	Total	Gen Z
Be **more confident** in my own abilities	22%	31% ▲
Have a more exciting life	15%	24% ▲
Have **more freedom** in my life	16%	21% ▲

Source: Collage Group Cultural Traits Survey, December 2024 (13-79), weighted data;
[1] % agree, strongly agree
[2] Multiselect answer options
▲▼ Significantly over/under Total. Confidence level 95%

College students use fragrance products as a daily confidence booster

This helps meet new people, make a strong first impression, and make friends

56%▲

of Gen Z usually wears fragrance products **whenever they leave home.**[1]

compared to 49% Total

What are the main reasons you wear fragrance products? [2]

		Gen Z
#1	To feel clean	48%
#2	To feel confident	41%
#3	To have a “signature scent”	39%▲

Source: Collage Group Category Essentials Fall 2024 (18-78 respondents who use fragrance products), weighted data

[1] Multiselect answer option

[2] Multiselect, max. 3; Top 3 for Gen Z

▲▼ Significantly over/under Total. Confidence level 95%

They value personal care advice from those who are transparent about their flaws, embrace natural beauty, and reject unrealistic beauty standards

This approach boosts their confidence, helping them embrace their true selves

Which of the following things do you value when getting information and/or recommendation on makeup and other beauty products from someone you don't know personally (e.g., a store employee, influencer, beauty guru, etc.)?

	Total	Gen Z	Millennial	Gen X	Boomer
The person is about my age	35%	33%	32%	39%	36%
The person is considered authentic	32%	37%	35%	32%	25% ▼
The person doesn't try to hide their physical flaws	27%	38% ▲	29%	27%	16% ▼
The person is considered stylish/fashionable	25%	30%	31% ▲	23%	16% ▼
The person is of the same gender as me	24%	27%	24%	22%	23%
The person is of the same race or ethnicity as me	20%	24%	19%	19%	18%
I rarely or never get recommendations or advice on this	29%	19% ▼	24% ▼	29%	44% ▲

Source: Collage Group Category Essentials Spring 2024 (18-78 respondents who use makeup), weighted data
Multiselect
▲▼ Significantly over/under Total. Confidence level 95%

Recognize and counteract the ramped-up Pressure of social media on Gen Z

CVS reminds Gen Z that what they may idealize online isn't always real.

In a world where filters are plentiful and influencers curate "perfect" lifestyles, it can be easy to feel the pressure of comparison weighing on one's mental health.

CVS speaks to Gen Z's **Pressured** group trait by recognizing the negative impact social media has on self-image. Their ongoing "Beauty Unaltered" campaign champions transparency and authenticity. This **message** simultaneously connects to Gen Z's **value** of individuality.



CVS, "5 Years of CVS Beauty Mark"

HALO EFFECTS

CVS's campaign also connects strongly with **Women**, whose mental health and self-image is especially affected by social media.

Source: CVS

2

Having a Child



Hispanics and Millennials are most likely to have recently become parents

Consumers who have **had a child** in the last 6 months:

Indicates a focus segment for this report

	Segment	Diff. from Total Pop.
1	Hispanic	+5pp
2	Gen Z	+4pp
3	Millennials	+3pp



Source: Collage Group Life Stages October 2024 (18-78), weighted data
Single Select grid. Original question, “Which statements describe your experience with the following personal life events?”
Options included “I have done this in the last 6 months,” “I will do this in the next 6 months,” and “Neither”
Note: demographic data reflects survey sample

Millennials and Hispanics are young and focused on family

Key Hispanic Demographics:

- **44%** Gen Z or Younger [1]
  (Skew significantly younger than other races)
- **65.1MM** U.S. population size [1]
- **13%** Live in a multigenerational household [1]
  (Tied for most among racial groups)

Key Millennial Demographics:

- **29-45** Age range in 2025
  (Birth years 1980-1996)
- **77.1MM** U.S. population size [2]
  (Largest generation)
- **~37MM** Parents of kids under 18 [3]
  (Close to half of the generation are parents)

Source: [1] American Community Survey 2023 1-Year Data
[2] U.S. Census Bureau, Population Division, Release Date: June 2024; Annual Estimates of the Resident Population by Single Year of Age, Population Estimate as of July 1, 2023. "National Population by Characteristics: 2020-2024", December 2024.
[3] U.S. Census Bureau, Current Population Survey, 2023 Annual Social and Economic Supplement, "America's Families and Living Arrangements: 2023", November 2023.

Key Group Traits that shape new Hispanic and Millennial parents' personal care preferences and purchase decisions

Hispanics

Millennials

ENGAGED



Open-minded activists supporting causes they care about

TRAIL-BLAZING



Resilient innovators forging new paths toward change

CONNECTION-SEEKING



Expressive community-builders seeking a true connection

RELENTLESS



Courageous innovators living out their personalized purpose

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Source: Collage 2025

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New parents share three personal care priorities:

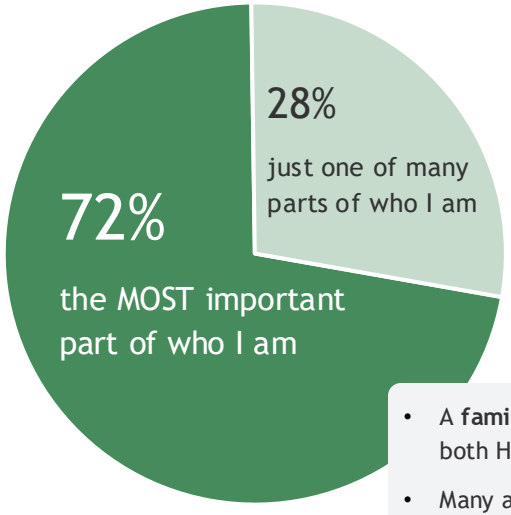
1. Develop efficient routines to fit into the daily demands of parenting
2. Choose responsible products for the sake of future generations
3. Maintain a unique personal style after becoming a parent

Driven by their family-first mindset, many Millennials and Hispanics buy personal care products for their spouses and kids

I purchase personal care products for…[1]

	Total	Millennial	Hispanic
My spouse, partner	33%	39%▲	38%▲
My kid(s)	23%	40%▲	36%▲

Being a parent is… [2]



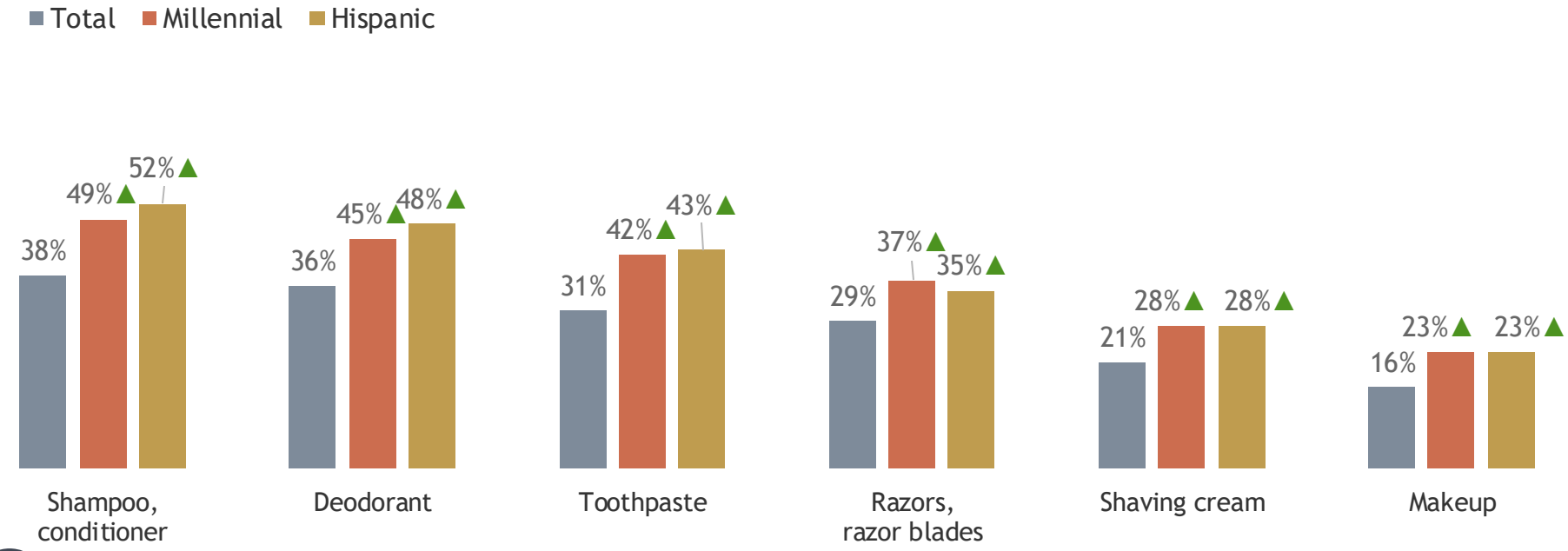
- A **family-first identity** is salient for both Hispanics and Millennials.
- Many are also caregivers or live in multigenerational households.

Sources: [1] Collage Group Category Essentials Spring 2024 (18-78), respondents who shop for personal care products, weighted data; Multiselect
[2] Collage Group Parents & Kids Cultural Education Survey, May 2023 (18-77 parents with kids under 18); weighted data; Forced choice
▲▼ Significantly over/under Total. Confidence level 95%

Subscriptions are a convenience lifeline for busy and active parents

Both Millennials and Hispanics embrace a subscription-based personal care routine

Are you interested in having a subscription for any of the following products:



Source: Collage Group Category Essentials Spring 2024 (18-78), weighted data; Multiselect
Option not shown: Tampons/pads/panty liners
▲▼ Significantly over/under Total. Confidence level 95%

Scrappy Millennials bravely and confidently take grooming into their own hands — for the sake of beauty and self-care

Who does the following types of services for you? [1] | ***Millennial respondents only***



"Here's the vital key that we millennial moms have finally figured out: Self care does not equal selfish. **Self care equals self preservation**. And just as importantly, it equals **family preservation**. Because they're kind of the same thing."

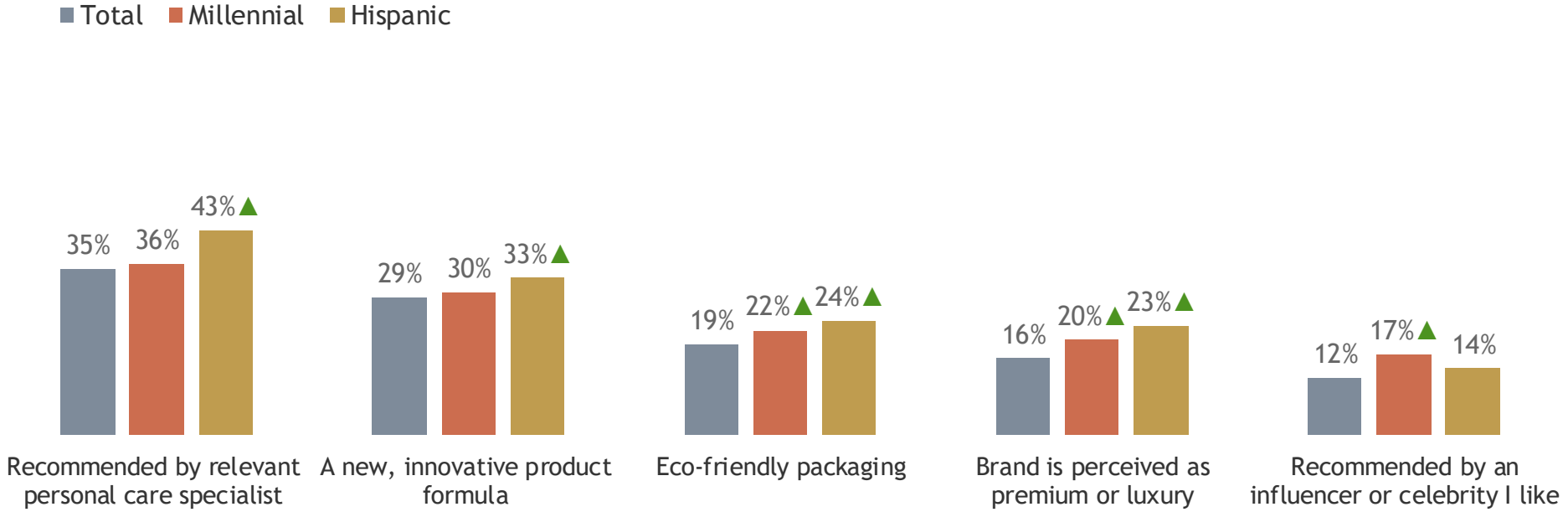
—KATIE M. MCLAUGHLIN
BLOGGER, PICK ANY TWO



Sources: Collage Group Category Essentials Fall 2024 (18-78), weighted data; Single-select grid
▲▼ Significantly over/under Total. Confidence level 95%
What Millennials Moms Understand about Self-Care

Millennials and Hispanics set a high bar for new personal care products: rave recommendations, green packaging, and a luxury feel

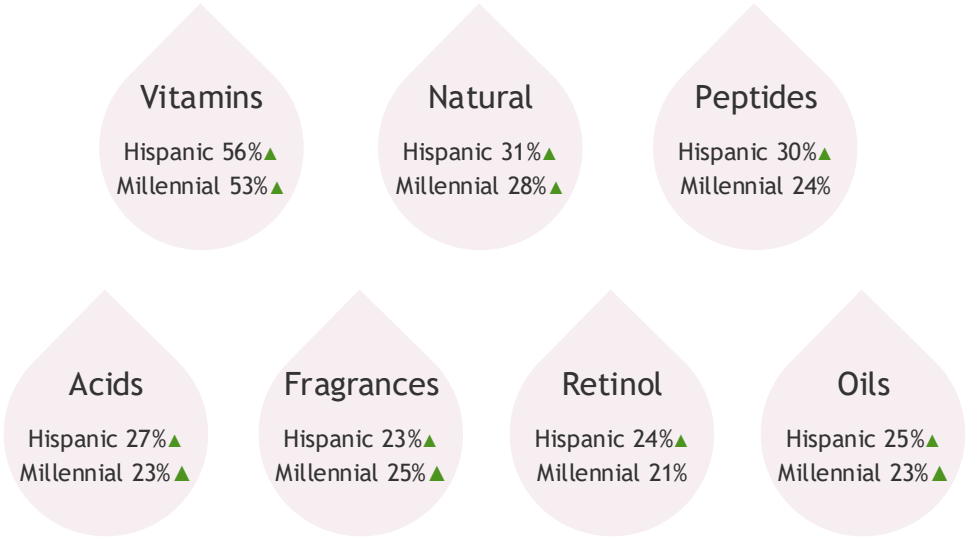
Which of the following could convince you to try a personal care brand you haven't tried before?



Source: Collage Group Category Essentials Spring 2024 (18-78), weighted data; Multiselect;
Options not shown: Recommended by a friend or family member, Option to buy a small, lower cost trial size, None of the above
▲▼ Significantly over/under Total. Confidence level 95%

They crave an efficient skincare routine of multifunctional, active-ingredient-packed products

Which types of ingredients do you prefer in your skincare products? [1]



Driver for new skincare brand discovery: [2]

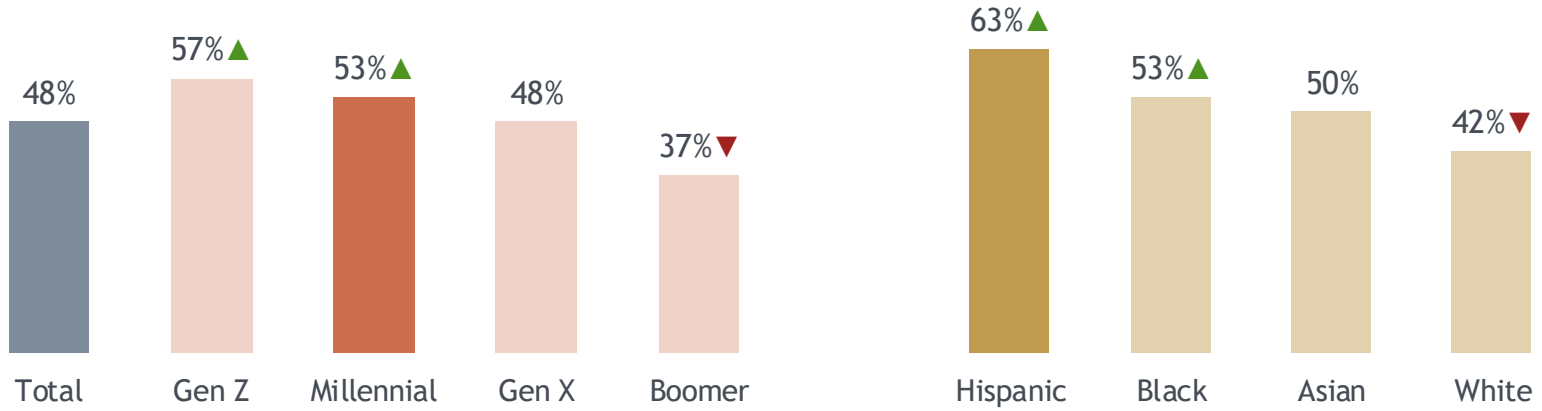
One product that replaces several products and simplifies the routine.

28%	31%▲	35%▲
Total	Millennial	Hispanic

Source: Collage Group Category Essentials Fall 2024 (18-78), weighted data; Multiselect.
[1] Option not shown: SPF; 2 Original question: "Which of the following could convince you to try a skincare brand you haven't tried before?"; 8 response options.
▲▼ Significantly over/under Total. Confidence level 95%

Millennials and Hispanics strive to live out their values and make ethical personal care product choices

*I usually check personal care products to make sure they are **cruelty-free** before buying*



Source: Collage Group Category Essentials Spring 2024 (18-78), weighted data; % yes
▲▼ Significantly over/under Total. Confidence level 95%

A cohesive “scent signature” is part of maintaining personal style

Both segments make sure to smell all their personal products before buying

Which of the following products do you normally need to smell before you choose what to buy?

	Total	Millennial	Hispanic
Perfume or cologne	71%	79% ▲	86% ▲
Body wash/soap	63%	72% ▲	72% ▲
Deodorant	58%	68% ▲	71% ▲
Body lotion	57%	67% ▲	74% ▲
Shampoo and conditioner	51%	60% ▲	62% ▲
Moisturizers	41%	48% ▲	53% ▲

	Total	Millennial	Hispanic
Leave-in conditioners	32%	42% ▲	45% ▲
Aftershave	27%	32% ▲	38% ▲
Hair oils	24%	32% ▲	37% ▲
Hair spray	23%	31% ▲	37% ▲
Dry shampoo	21%	31% ▲	34% ▲
Face serums	20%	27% ▲	32% ▲
Shaving cream	19%	25% ▲	29% ▲

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Source: Collage Group Category Essentials Fall 2024 (18-78), Single-select grid, % “I need to smell before buying”
▲▼ Significantly over/under Total. Confidence level 95%

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Treat busy parents to affordable, efficient, and ethically-sourced personal care routines

Beauty Pie's innovative formulas and smart sourcing bring affordable, guilt-free luxury to busy parents.

Beauty Pie offers high-end active ingredients for skincare, hair care, makeup, fragrances, and supplements from the labs used by the luxury labels—all without the middlemen and retail markups.

Their expert-curated products earn **trust** and help busy parents build the most **fitting**, effective, and personalized routines for themselves and their families at up to 70%-off typical retail prices.

The brand appeals to **Millennials' Relentless** and **Hispanics' Activist values** by using sustainable and cruelty-free practices. Additionally, the company lives out its DEI commitment, including being led by an executive team that is >50% female.



From the irresistible value proposition, to thoughtfully curated routines and gift guides, Beauty Pie helps parents make the most of their limited resources.

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Source: Beauty Pie, Beauty Pie on Instagram

Personal Care brands must meet consumers' distinct and urgent needs during key life transitions

ATTENDING COLLEGE



Foster individual expression with fun, customizable routines

HAVING A CHILD



Simplify life with subscriptions and multi-purpose products

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Next Steps

Dive deeper into Collage's Audience and Category insights

Following up with Collage



Compare brands and **examine** insights using the Head-to-Head Dashboard on fluenci™



Utilize Audience Profiles to understand how your brand can generate Relevance with Audience-specific insights



Explore **Spark** to benefit from Collage's billions of available data points and answer pressing questions

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Intersectional, Growth, and Custom Audiences

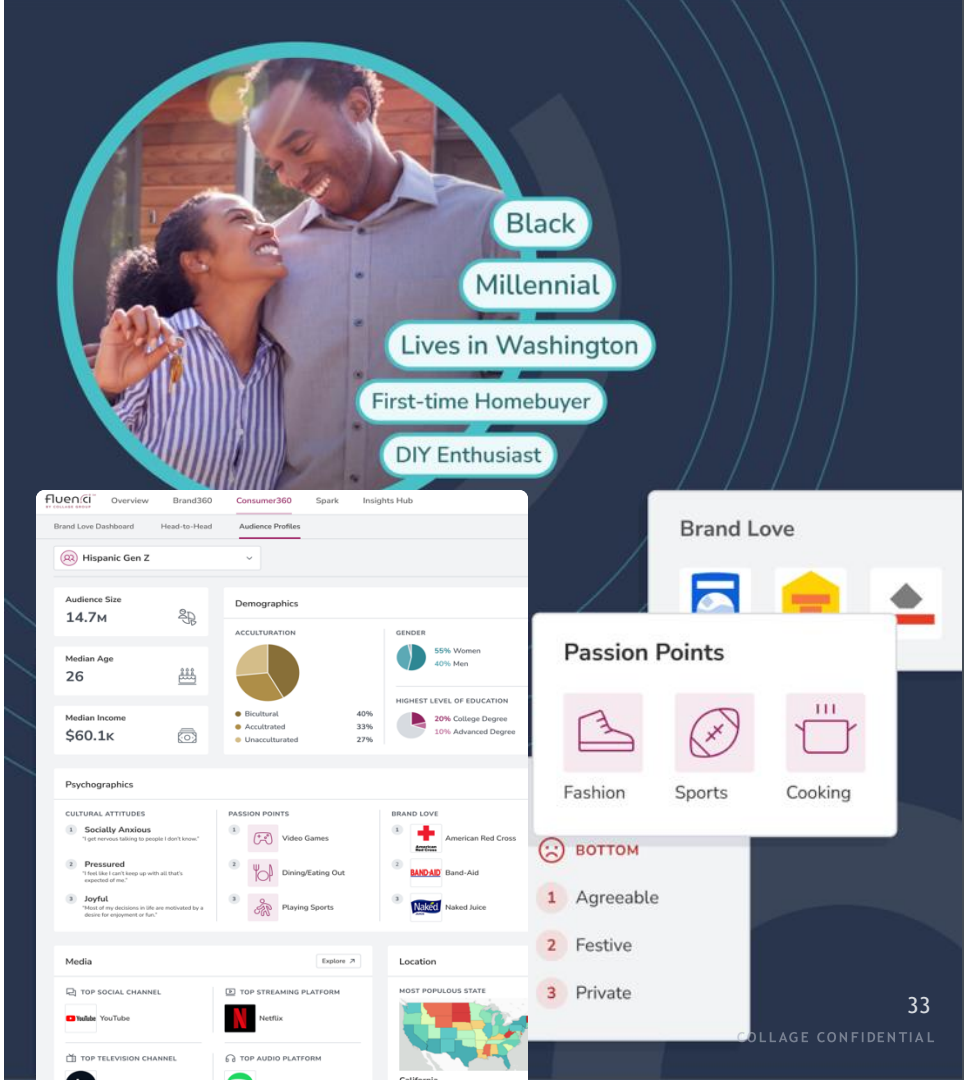
Bring your consumer profiles to life with in-depth, culture-driven insights, create meaningful connections, and drive brand growth.

Enrich your personas and segmentation strategy with unique, culture-centric insights not available anywhere else

Intersect any of Collage's 26 billion+ primary data points across intersectional demographics and psychographics to deeper cultural beliefs and values, geolocation, shopping habits, Passion Points, media consumption, purchase drivers, and more

Unlock actionable, curated insights in fluen.ci to:

- Create highly targeted campaigns
- Optimize product development and launches
- Enhance customer retention
- Enter new markets with confidence



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All Available Life Stage Audiences

Personal Life Events:

- About to or Recently Attended college
- About to or Recently Attended Grad School
- About to or Recently Became a grandparent
- About to or Recently Began caring for an elderly family member
- About to or Recently celebrated a child's coming-of-age (e.g., quinceañera)
- About to or Recently ended a relationship
- About to or Recently got a new pet
- About to or Recently got divorced
- About to or Recently got engaged
- About to or Recently got married
- About to or Recently got pregnant
- About to or Recently graduated from college
- About to or Recently had a child
- About to or Recently had a child go away to college
- About to or Recently had a child graduate from college
- About to or Recently have a new teen driver
- About to or Recently lost a pet
- About to or Recently moved to a new city or state
- About to or Recently Retired
- About to or Recently started or completed an educational program
- About to or Recently started a new relationship

"About to" refers to plans for the next six months and "Recently" refers to things respondents have done in the past six months.
All Audiences are available separately for each period.

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All Available Life Stage Audiences (cont.)

Professional Life Events:

- About to or Recently lost a job
- About to or Recently started a new job
- About to or Recently got a promotion at work
- About to or Recently changed jobs or careers
- About to or Recently retired from full-time work
- About to or Recently had a spouse or partner lose a job
- About to or Recently had a spouse or partner retire
- About to or Recently deployed for military service
- About to or Recently had a spouse deploy for military service
- About to or Recently had an adult child deploy for military service
- About to or Recently moved due to military service

Financial Life Events:

- About to or Recently bought a home
- About to or Recently made major home renovations
- About to or Recently bought a major home appliance
- About to or Recently bought or leased a vehicle
- About to or Recently took a vacation
- About to or Recently took a loan out for college
- About to or Recently paid off a student loan
- About to or Recently moved to a new rental or house
- About to or Recently bought a home for the first-time
- About to or Recently took a mortgage on a house
- About to or Recently took a personal loan
- About to or Recently refinanced a mortgage or took a line of credit on the house
- About to or Recently opened a new credit card
- About to or Recently moved out of parents' house to live on own
- About to or Recently moved back into parents' house to save money
- About to or Recently opened a new bank account

"About to" refers to plans for the next six months and "Recently" refers to things respondents have done in the past six months. All Audiences are available separately for each period.

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