MIRROR/MIRROR: AARP SURVEY OF WOMEN’S REFLECTIONS ON BEAUTY, AGE, AND MEDIA™

2019 Report
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EXECUTIVE SUMMARY
Executive summary

• Beauty is important to women, and its importance does not diminish with age.

• Intrinsic definitions of beauty trump extrinsic definitions — and get even more prominent as women age.

• Women make a significant investment of time and money in beauty.

• Yet, as women age, they have unmet beauty needs.

• In fact, as women age, they are more likely to feel the beauty industry treats them as an afterthought, and they are less likely to see themselves represented in media.

• Across generations, women would like ads to have more age diversity and more authentic images.

• Women reward brands that promote real inclusion — including age.
IMPARTANCE OF BEAUTY
Beauty is important to women, and its importance does not diminish with age.

Overall, **89 percent** of women say beauty and personal grooming are at least somewhat important to them (43 percent very important, 47 percent somewhat important).

How important if at all, is beauty and personal grooming to you?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>18+ Women</td>
<td>89%</td>
</tr>
<tr>
<td>Millennials</td>
<td>91%</td>
</tr>
<tr>
<td>Gen X</td>
<td>90%</td>
</tr>
<tr>
<td>Boomers</td>
<td>89%</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q19: How important, if at all, is beauty and personal grooming to you? (% very/somewhat)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
DEFINITIONS OF BEAUTY
Top definitions of beauty are more often intrinsic than extrinsic.

There is consistency in the top three elements that define beauty — none of which include physical appearance.

What do you feel defines beauty? (aided)

<table>
<thead>
<tr>
<th>Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)</th>
<th>Q18: You may have mentioned some of these before, but which of the following elements, if any, do you feel define beauty? Select up to three elements that are most important to you.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18+ Women</td>
</tr>
<tr>
<td>Kindness</td>
<td>49%</td>
</tr>
<tr>
<td>Morals, character, values</td>
<td>46%</td>
</tr>
<tr>
<td>Personality</td>
<td>45%</td>
</tr>
<tr>
<td>Physical appearance</td>
<td>28%</td>
</tr>
<tr>
<td>Personal grooming</td>
<td>17%</td>
</tr>
<tr>
<td>Physical health</td>
<td>14%</td>
</tr>
<tr>
<td>Personal image</td>
<td>14%</td>
</tr>
<tr>
<td>Wellness</td>
<td>11%</td>
</tr>
<tr>
<td>Wisdom</td>
<td>11%</td>
</tr>
<tr>
<td>Mental health</td>
<td>10%</td>
</tr>
<tr>
<td>Perception of body image</td>
<td>9%</td>
</tr>
<tr>
<td>Personal fulfillment</td>
<td>6%</td>
</tr>
</tbody>
</table>

“Compassion, love, nature, original, nonjudgmental.”
- Millennial

“Confidence. Being true and honest with oneself without taking people down around you.”
- Gen Xer

“Beauty is not a physical trait, but rather a personality trait.”
- Boomer

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Similarly, top motivations for focusing on beauty are intrinsic.

**Top motivations**, which are intrinsic, are relatively consistent across generations. Some **secondary motivations** differ across generations.

How much does each of the following motivate you to focus on your own beauty and personal grooming?

<table>
<thead>
<tr>
<th>Top motivations</th>
<th>18+ Women</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>To feel clean</td>
<td>94%</td>
<td>92%</td>
<td>93%</td>
<td>96%</td>
</tr>
<tr>
<td>To take care of myself</td>
<td>93%</td>
<td>90%</td>
<td>93%</td>
<td>96%</td>
</tr>
<tr>
<td>To be healthy</td>
<td>91%</td>
<td>86%</td>
<td>90%</td>
<td>94%</td>
</tr>
<tr>
<td>To be myself (i.e., an individual)</td>
<td>90%</td>
<td>87%</td>
<td>89%</td>
<td>92%</td>
</tr>
<tr>
<td>To be happy with my looks</td>
<td>89%</td>
<td>86%</td>
<td>90%</td>
<td>90%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Secondary motivations</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>To be attractive</td>
<td>60%</td>
<td>66%</td>
<td>62%</td>
<td>53%</td>
</tr>
<tr>
<td>To stand out</td>
<td>35%</td>
<td>48%</td>
<td>35%</td>
<td>21%</td>
</tr>
<tr>
<td>To be popular</td>
<td>26%</td>
<td>35%</td>
<td>26%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q20: How much does each of the following motivate you to focus on your own beauty and personal grooming? (% a lot/some)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
As women age, the increased importance of inner beauty reflects the decreased importance of external motivations.

Agree that inner confidence is more important than outer beauty

Base: 18+ Women (n=1,992), Millennials (n=353), Gen X (n=591), Boomers (n=551)
Q24: Indicate how much you agree or disagree with each statement? (% agree strongly/agree)

- 18+ Women: 92%
- Millennials: 88% (▼)
- Gen X: 92%
- Boomers: 95% (▲)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Being healthy is a stronger motivator for women ages 50 and older than for those who are younger.

How much does each of the following motivate you to focus on your own beauty and personal grooming?

To be attractive to others (strongly agree)

- Women 18-49: 24%▲
- Women 50+: 13%▼

To be healthy (strongly agree)

- Women 18-49: 56%▼
- Women 50+: 67%▲

Base: Women 18-49 (n=1,077), Women 50+ (n=915)
Q24: Indicate how much you agree or disagree with each statement. (% agree strongly/agree)
INVESTMENT IN BEAUTY
Women invest a significant amount of time and money in their beauty and personal grooming regimen.

On average, women use six beauty and personal grooming products each day, devote at least 30 minutes per day to their beauty and personal grooming regimen, and spend $40 per month on beauty and personal grooming products.

<table>
<thead>
<tr>
<th>Number of products used each day</th>
<th>Spending in a typical month</th>
<th>Minutes spent per day</th>
</tr>
</thead>
<tbody>
<tr>
<td>18+ Women</td>
<td>6</td>
<td>$39</td>
</tr>
<tr>
<td>Millennials</td>
<td>7</td>
<td>$47</td>
</tr>
<tr>
<td>Gen X</td>
<td>6</td>
<td>$42</td>
</tr>
<tr>
<td>Boomers</td>
<td>5</td>
<td>$30</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=494), Gen X (n=573), Boomers (n=542)

Q26: On average, how many minutes do you spend on your beauty/personal grooming regimen (e.g., hair, skin, make-up, shaving) in the morning?
Q27: On average, how many minutes do you spend on your beauty/personal grooming regimen (e.g., hair, skin, make-up, shaving) in the evening?
Q28: Thinking about your morning and evening routines, on average, how many beauty and personal grooming products do you typically use each day?
Q30: In a typical month, how much do you think you spend on beauty/personal grooming products for yourself, not for other people?

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
As women age, they feel increasingly ignored by the beauty and personal grooming industry.

Older women are more likely than younger women to feel ignored by the beauty and personal grooming industry.

% who feel the beauty and personal grooming industry does not create products with people my age in mind

- 39% of 18+ Women
- 24% of Millennials
- 40% of Gen X
- 53% of Boomers

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q36. Now, thinking about the beauty and personal grooming industry in particular, please indicate how much you agree or disagree with the following statement: The beauty and personal grooming industry creates products with people my age in mind. (% disagree/disagree strongly)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Women ages 50 and older have difficulty finding products tailored to their age.

Those under age 50 are more likely to use home remedies and to turn to social media for solutions.

Base: Women 18-49 (n=1,077), Women 50+ (n=915)
Q25: Which of the following challenges, if any, do you face with regards to beauty/personal grooming?
Q32: Do you rely on any “home remedies” to meet your beauty and personal grooming needs?
Base: Women 18-49 social media users (n=1,007), Women 50+ social media users (n=702)
Q39: Below is a list of statements related to the depiction of beauty in social media. Please indicate how much you agree or disagree with each point. (% agree/strongly agree)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Women 40 and older have unmet beauty and personal grooming product needs related to perimenopause and menopause.

70% of women ages 40+ want to see more perimenopausal and menopausal beauty and personal grooming products.

Products women want to see more of in relation to perimenopause and menopause

<table>
<thead>
<tr>
<th>Product</th>
<th>Total 40+</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skincare products for face</td>
<td>44%</td>
<td>45%</td>
<td>48%</td>
</tr>
<tr>
<td>Haircare products</td>
<td>33%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Skincare products for body</td>
<td>30%</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Products for hot flashes</td>
<td>28%</td>
<td>37%</td>
<td>23%</td>
</tr>
<tr>
<td>Products for night sweats</td>
<td>25%</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Products for vaginal dryness</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>Products for low libido</td>
<td>15%</td>
<td>19%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: 40+ Women (n=1,236), Gen X (n=591), Boomers (n=551)
Q34: What beauty and personal grooming products do you want to see more of when thinking specifically about perimenopause and menopause.

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
REPRESENTATION IN MEDIA
Women across generations agree that older adults are not adequately represented in advertising.

Feel representation of older adults in advertising is inadequate

- **18+ Women**: 65%
- **Millennials**: 58%
- **Gen X**: 64%
- **Boomers**: 74% ▲

*Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)
▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level*
Boomers feel most underrepresented in media imagery.

Feel people their age are underrepresented in media imagery

- **64%** 18+ Women
- **51%▼** Millennials
- **65%** Gen X
- **81%▲** Boomers

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Boomers are also most likely to feel like the beauty and personal grooming industry treats them as an afterthought.

The beauty and personal grooming industry treats people my age as an afterthought

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q36: Now, thinking about the beauty and personal grooming industry in particular, please indicate how much you agree or disagree with the following statements.

- ▲ Statistically higher than all groups at the 95% confidence level
- ▼ Statistically lower than all groups at the 95% confidence level

59% 18+ Women
51% Millennials ▼
61% Gen X
68% Boomers ▲
Women want ads with more realistic images of people.

<table>
<thead>
<tr>
<th>Statement</th>
<th>18+ Women (%)</th>
<th>Millennials (%)</th>
<th>Gen X (%)</th>
<th>Boomers (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wish ads had more realistic images of people</td>
<td>85</td>
<td>83</td>
<td>85</td>
<td>89</td>
</tr>
<tr>
<td>Say media images of people make them feel unattractive</td>
<td>53</td>
<td>64 (▲)</td>
<td>54</td>
<td>47 (▼)</td>
</tr>
<tr>
<td>Feel seeing beauty and personal grooming ads with real people makes them feel better about themselves</td>
<td>75</td>
<td>78</td>
<td>74</td>
<td>76</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
The beauty industry gets a mediocre grade for age representation.

The majority of women feel that media images in general are ageist (69% total women, 64% Millennials, 70% Gen Xers, 74% Boomers). As women age, they are more likely to grade the beauty and personal grooming industry with a **C or worse** for representing people their age in its ads.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Feel media images are ageist</th>
<th>Grade the beauty and personal grooming industry a C or worse for age representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>18+ Women</td>
<td>69%</td>
<td>57%</td>
</tr>
<tr>
<td>Millennials</td>
<td>64%</td>
<td>39%</td>
</tr>
<tr>
<td>Gen X</td>
<td>70%</td>
<td>60%</td>
</tr>
<tr>
<td>Boomers</td>
<td>74%</td>
<td>73%</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q35: Please indicate how much you agree with each statement (% strongly agree/agree).
Q37: Overall, what grade would you give the beauty and personal grooming industry for representing people your age in its ads?

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Women reward brands that feature age diversity and inclusion.

Brands can deepen emotional connections with consumers and potentially increase revenue as well.

<table>
<thead>
<tr>
<th>Feel better about brands that feature a mix of ages in their ads</th>
<th>More likely to buy from brands that feature a mix of ages in their ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>18+ Women</td>
<td>86%</td>
</tr>
<tr>
<td>Millennials</td>
<td>82%</td>
</tr>
<tr>
<td>Gen X</td>
<td>87%</td>
</tr>
<tr>
<td>Boomers</td>
<td>88%</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Women’s desire for inclusivity is not limited to age.

<table>
<thead>
<tr>
<th>Statement</th>
<th>18+ Women</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feel better about brands that feature a mix of races and ethnic identities in their ads</td>
<td>78%</td>
<td>81%</td>
<td>77%</td>
<td>76%</td>
</tr>
<tr>
<td>Feel better about brands that feature people with different body shapes in their ads</td>
<td>86%</td>
<td>86%</td>
<td>86%</td>
<td>89%</td>
</tr>
<tr>
<td>More likely to buy from brands that feature a mix of cultures and backgrounds in their ads</td>
<td>69%</td>
<td>76%</td>
<td>71%</td>
<td>62%</td>
</tr>
<tr>
<td>More likely to buy from brands that feature people with different body shapes in their ads</td>
<td>77%</td>
<td>80%</td>
<td>78%</td>
<td>78%</td>
</tr>
</tbody>
</table>

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)
Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)
▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Across generations, women show loyalty to brands that represent people their age.

More likely to recommend brands that feature people their age in their advertising

- **18+ Women**: 70%
- **Millennials**: 71%
- **Gen X**: 70%
- **Boomers**: 71%

Would consider switching to a brand they feel represents their age

- **18+ Women**: 70%
- **Millennials**: 67%
- **Gen X**: 75%
- **Boomers**: 71%

Base: 18+ Women (n=1,992), Millennials (n=535), Gen X (n=591), Boomers (n=551)

Q35: How much do you agree or disagree with each statement? (% agree strongly/agree)

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
While social media holds promise, it also carries pressures.

Among social media users

<table>
<thead>
<tr>
<th>Positives of social media</th>
<th>18+ Women</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media has helped me find new methods for my beauty and personal grooming routine</td>
<td>47%</td>
<td>62%▲</td>
<td>45%</td>
<td>24%</td>
</tr>
<tr>
<td>Social media is changing my perception of beauty and personal grooming for the better</td>
<td>35%</td>
<td>45%▲</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>Social media is moving consumers away from the norm of air-brushed advertisements</td>
<td>44%</td>
<td>50%▲</td>
<td>39%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Negatives of social media</th>
<th>18+ Women</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel pressure to post good photos of myself on social media</td>
<td>47%</td>
<td>60%▲</td>
<td>46%</td>
<td>32%▼</td>
</tr>
<tr>
<td>I have edited a photo before posting it on social media to make myself look better</td>
<td>40%</td>
<td>58%▲</td>
<td>39%</td>
<td>14%▼</td>
</tr>
</tbody>
</table>

Base: 18+ women users of social media (n=1,709), Millennial women users of social media (n=517), Gen X women users of social media (n=507), Boomer women users of social media (n=429)

Q39: Below is a list of statements related to the depiction of beauty in social media. Please indicate how much you agree or disagree with each point.

▲ Statistically higher than all groups at the 95% confidence level
▼ Statistically lower than all groups at the 95% confidence level
Methodology

An online survey of 1,992 women was conducted July 2–16, 2019, by Hotspex, Inc., using the Dynata panel supplemented by offline intercepts among unacculturated Hispanics/Latinos. The data were weighted by age, region, education, and ethnicity to reflect U.S. women ages 18 and older. The margin of error associated with a 95% confidence interval for the total sample is +/- 2.5%.

The following definitions were used for each generation:

• Millennials: Ages 22–38
• Gen X: Ages 39–54
• Boomers: Ages 55–73
About AARP

AARP is the nation’s largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation’s largest circulation publications, AARP The Magazine and AARP Bulletin. To learn more, visit www.aarp.org or follow @AARP and @AARPadvocates on social media.

About Hotspex, Inc.

Hotspex Inc. is a full-service market research company with one purpose: to help brands grow. Founded in 2000, Hotspex has conducted research in 34 countries around the world. Hotspex operates globally, with offices in Toronto, New York and London. For more information, visit Hotspex’s website at www.Hotspex.com.