



Netherlands beauty 2022

Ecommerce Country Report

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Introduction



Welcome to the Netherlands Beauty Sector Report. This is an interesting sector that varies across multiple types of product that range from the everyday essentials such as shower gels and toothpaste that are bought by everyone through to cosmetics and fragrances, which have a smaller customer base.

As I look over the charts and expert analysis that my team has brought together in this report, I see a country with a strong market that's still operating, to a degree, under the influence of the pandemic. It is not long since restrictions were in place that defined which stores could remain open and where and how consumers could socialise.

The result of such restrictions within the Netherlands has been sales in the beauty and cosmetics sector rising and falling in line with societal freedoms and consumer anxiety.

The internet was already a major sales channel even before the pandemic, so consumers in the Netherlands have shifted more spend online during the last couple of years. Some of the areas investigated in this report are the impact the internet is having on beauty and cosmetics retail sites, the ways products are merchandised and the services

offered to customers. It is always satisfying to see a sector responding strongly online, embracing omnichannel and offering customers choice. This extends all the way from the retailer offering a variety of delivery and payments services – as expected by consumers in the specific country – to having a strong proposition to differentiate a business from its competitors.

Innovation online highlights the maturity of all retailers in the Netherlands, as well as those specifically in this sector. The use of loyalty programmes, skin analysers and personalised recommendations all show a sector comfortable operating online.

Dutch consumers are frequent social media users, which hasn't gone unnoticed by retailers, especially not by those companies specialising in colour cosmetics, which can now call on tutorials, techniques and individual brands for a steady flow of relevant content. The beauty and cosmetics industry has always worked alongside celebrities, so it has taken social media and influencers in its stride. Retailers in the Netherlands are no different.

Ian Jindal, CEO, RetailX

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Market Context

The beauty and cosmetics sector encompasses a diverse range of products with global factors influencing sales

The beauty and cosmetics sector includes a wide product range, from shower gel and deodorants through to skin care and colour cosmetics. **In 2020, consumers in the Netherlands spent around €3bn (\$3.47bn) on such products**, a decrease of 4.1% on 2019's figure.

The personal care segment, which includes soap, deodorant and toothpaste, has the largest share of the sector in the Netherlands. Skin care is the second largest segment. In 2020, it accounted for 19% of the total market.

In recent years, the beauty and cosmetics market in the Netherlands has been undergoing **major changes as global factors influence how and what consumers buy**.^[1]

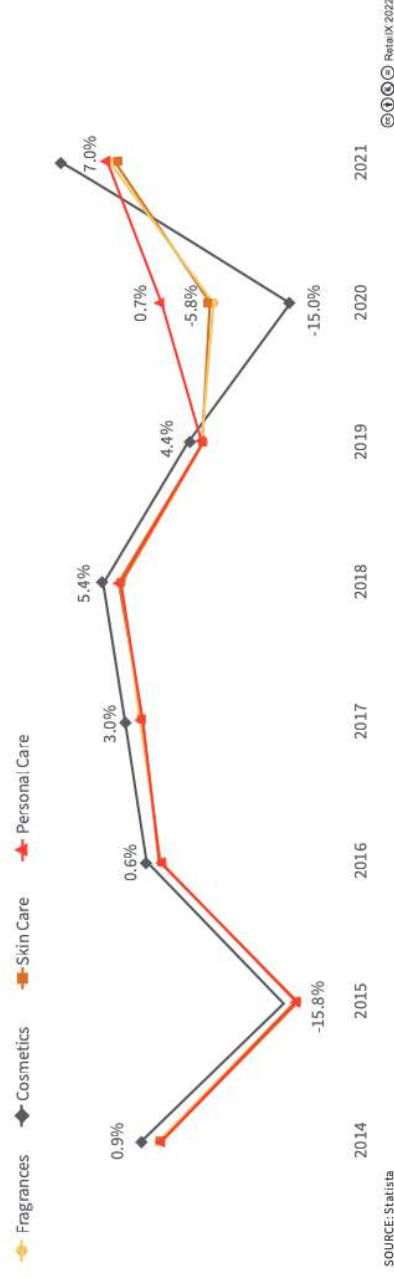
First, the rise of ecommerce saw consumers buying online and shifting spend away from bricks-and-mortar stores. **The internet has also been an enabler for social media, bloggers, vloggers and influencers** to share product advice, tutorial videos and inspiration. **This has further diluted the reach of in-store beauty advisors**, especially among the younger, digitally-native generations.

Revenue in the Dutch beauty sector, by segment (\$m)



Revenue change in the Dutch beauty sector, by segment

Revenue change is shown as a percentage of the previous year's revenue



In 2019, online accounted for almost a fifth of the total market but more recently, the pandemic has altered where beauty and cosmetics products are bought as well as what consumers are purchasing.

Some bricks-and-mortar stores were forced to close temporarily as the government in the Netherlands put restrictions in place to slow the spread of coronavirus. As a consequence, many consumers turned to the internet for much of their shopping. This resulted in online's share of sales in this category growing by 3.4 percentage points.

Since they tended to escape lockdown closures, supermarkets took some of the bricks-and-mortar sales that would normally have been made from specialist retailers such as cosmetics retailers and fragrance shops. **Consumers also bought from pharmacy chains**, such as Kruidvat, which remained open throughout 2020 and 2021.

Another factor affecting the sector is sustainability and concern for the environment. Legislative changes, such as **the EU's Green Deal, is forcing manufacturers to reduce the impact their products have on the environment**, while consumers put pressure on both brands and retailers to change behaviour. This is seen especially in areas such as reusable and recyclable packaging.^[2]

[1] <https://retailix.net/product/beauty-cosmetics-2021-sector-analyst-report/>

[2] <https://internetretailing.net/sustainablecommerce/sustainability-report-2021>

Revenue per capita in the Dutch beauty sector, by segment

The average Dutch consumer spends more than \$200 each year on beauty and personal care products



Dutch online and offline revenue split

Online shoppers account for an increasing share of this sector



Dutch desktop and mobile revenue split

Mobile shoppers account for an increasing share of this sector





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The Netherlands offers beauty retailers a mature ecommerce market that's one of the most advanced in the world, in which omnichannel retailing is prevalent. Dutch consumers are as happy to buy online as they are in-store, choosing to have online orders fulfilled in a way that suits each particular purchase.

The past few years have seen global ecommerce grow at an accelerated rate due to the pandemic and the Dutch market is no different. Only now, as growth rates return to a 'normal' level, can retailers gauge the more settled, post-Covid market. According to the latest RetailX figures, this remains larger than before in the Netherlands, with 26% of beauty products bought online, up from 19% in 2019. Many of the consumers who shopped online for the first time during the pandemic continue to do so. Those who increased the amount they bought online have not completely reverted to their 2019 shopping patterns.

This flush of new customers, alongside increased activity from existing shoppers, has given retailers a wealth of

data enabling a deepening understanding of customers as cohorts as well as individuals. More so, with the right consents, it enables retailers to be hyper personalised and relevant with their interactions with individual customers.

Shoppers expect personalised service from beauty retailers already. It is an industry sector that's awash with tutorials, online content and opportunities for one-to-one service. Online, skin analysers give personalised recommendations on skincare products while in-store, assistants advise on all areas of skincare and cosmetics, from matching brands or individual products to suit each customer through to showing how they can be applied. This extends to recommendations to match individual skincare issues, allergies and ethical preferences. In this sector, every customer is truly unique.

The challenge for retailers is unifying the data and then stepping up to activate it in a way that allows communication with customers in an intelligent and personalised way and, importantly, highlights opportunities not only to be relevant and provide convenience but to also 'surprise and delight' customers.

This hyper-personalisation can only be achieved through the efficient management and analysis of data, which leaves retailers two questions to answer: 1) is the data reliable? and 2) what should it be used for?

Omnichannel was once about giving customers choice about how and when they wanted to buy and by what means they wanted to receive their order. Unifying data enables retailers to understand each shopping journey, to know the answer to such questions and to act accordingly. Relevance is not just about convenience, it's also about understanding the whole situation and taking care of the situation that the customer is in.

For instance, if we know you're allergic to certain ingredients and are going on holiday tomorrow, when you buy sunscreen from us online, we will ensure that none of the ingredients have changed before we suggest collection from your local store so that these suitable products will be ready before you have to leave for the airport.



Tealium provides the industry standard platform for businesses aiming to unleash innovation with a real-time, universal data foundation. More than 850 companies trust Tealium to orchestrate their customer data. These include Domino's, Gap, IBM, Molekule, Epson America, Cambia Health, Orange, TUI, Rakuten, Sportsbet and Network 10.

www.tealium.com

Consumers

As the pandemic continues to cause sales to fluctuate, consumers shift online and move up to premium skincare

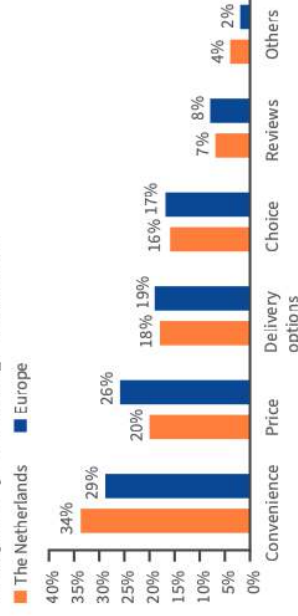
GDP per capita in the Netherlands is one of the highest in the EU. This gives consumers in the Netherlands a good standard of living as well as disposable income^[1].

Almost the entire population (96%) has access to the internet, and **the majority of people aged over 16 shopped online in 2020.** Overall, year-on-year sales online increased 27% in 2020, according to Dutch ecommerce association Thuiswink.nl.

Consumers in the Netherlands are active social media users, with 95% having a social profile. Among the younger, digitally native group, **31% like to see messages about beauty and cosmetics on their Instagram feed.**

When it comes to buying beauty and cosmetics products, it is women who buy more online. 40% of female, online shoppers say they have bought such items online, compared to 14% of men. **Beauty and cosmetics is the third-most purchased category online for women in the Netherlands**, after fashion and homewares.

Why do you shop online?

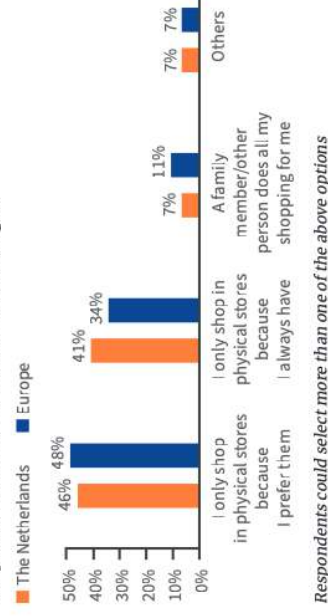


Note that respondents could select more than one of the above options.

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Why do you not shop online?

The 12% of Dutch and 7% of European* consumers who don't shop online have various reasons for doing so



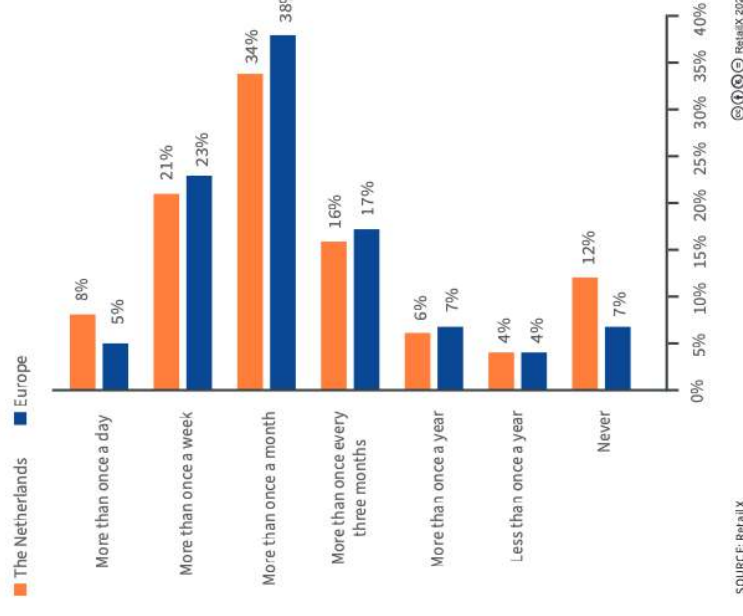
Respondents could select more than one of the above options

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*A population-weighted average of surveys in Belgium, Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, Switzerland and the United Kingdom

How often do you shop online?

The Dutch are more extreme than the European average,* with significantly more consumers shopping online more than once a day and significantly more never shopping online at all



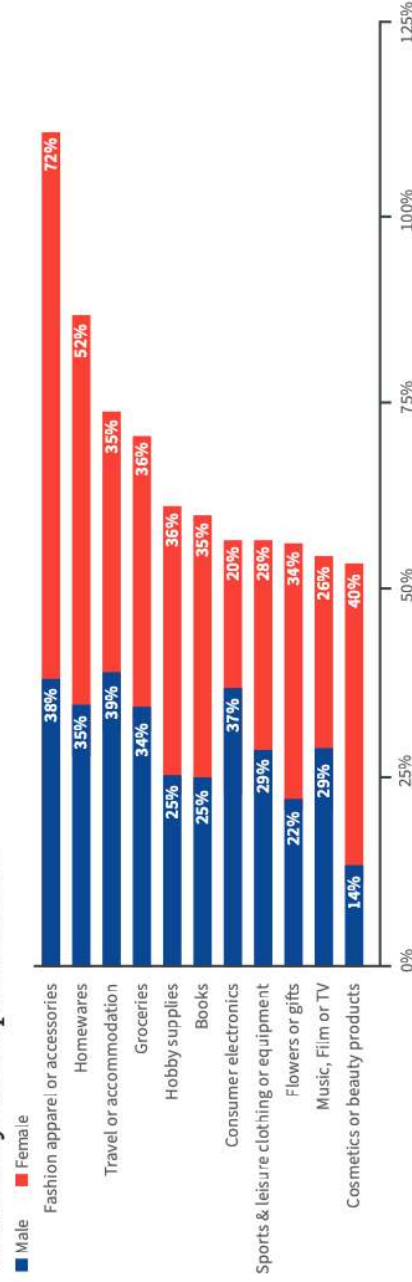
The products that consumers bought from within this segment fluctuated in 2020 and 2021 due to the pandemic. **Colour cosmetics and fragrances saw sales fall and rise with social and work from home restrictions.**

Cosmetics sales were picking up in 2021 when fresh restrictions on movement at the end of the year saw them slump again. For instance, **mask wearing has led to a reduction in lipstick sales**, according to Majorielein, van Oostrum, manager of Dutch cosmetics association Nederlandse Cosmetica Vereniging (NCV). “Also, people have been playing less sport,” she says, explaining why sales of deodorants and body care items have reduced.

One segment that consumers have been spending more money on is skincare. The increased need to moisturise hands due to constant hand sanitising is one reason for this growth, but not the whole story. **Good skincare has become synonymous with health** and looking after yourself and this, in turn, has seen consumers spending more on facial care and moisturisers. They are also spending more on higher priced premium brands, as well as ones which are seen as natural, organic or causing less damage to the environment. Overall, sales of independently certified products have increased, according to NCV.

[1] See the RetailX Benelux E-commerce Regional Report

What do you shop for online?



Notes: Respondents could select multiple options

Results include 441 (250 female, 191 male) 16+ Dutch respondents (88.2% of survey respondents) who say they shop online, and are stratified by age and gender
Survey conducted in November 2021

SOURCE: RetailX

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Which of these body care and cosmetic products do you use regularly?

Personal care product usage in the Netherlands, by category, 2021



Notes: Respondents could select multiple answers

Results include 2048 18-64 Dutch respondents

Survey conducted in 2021

SOURCE: Statista

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The Largest 100

What does RetailX data say about the retailers from which consumers in the Netherlands buy?

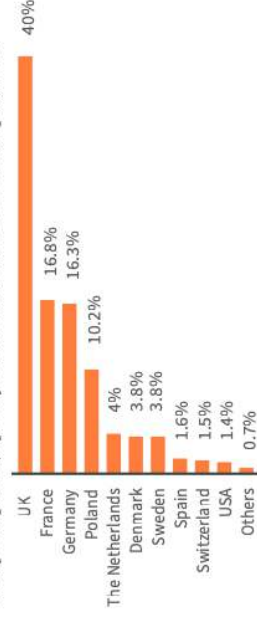
Bricks-and-mortar stores are still the predominant sales channel for beauty and cosmetics products in the Netherlands. There are, of course, variations in the channel mix between different product categories and also by type of retailers from which consumers buy. Multi-category stores feature prominently among the retailers from which consumers shop, especially online.

Understanding where – and in which categories – shoppers in the Netherlands browse when they are online offers useful insights into demand. Such data puts a spotlight on some of the commercial opportunities available to those retailers and brands that are considering investing in this market. RetailX researchers worked with SimilarWeb to explore customer visits to the Largest 100 websites in the Netherlands market as well as to the sites of retailers within the beauty and cosmetics sector. It also looked at the way that consumers explore other international markets.

Looking at how consumers shop online from the 16 beauty and cosmetics companies with the highest levels of traffic from consumers in the Netherlands, shows that

The countries where beauty and cosmetics companies popular among European consumers are based

European* web traffic to beauty and cosmetics retailers in the Europe Top1000, split by where the retailers are headquartered



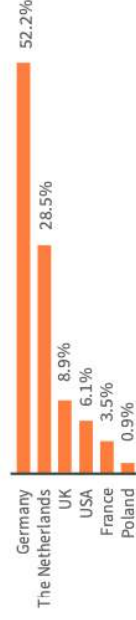
*Europe refers to the EEA, the UK and Switzerland

SOURCE: RetailX, drawing on data from SimilarWeb

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The countries where beauty and cosmetics companies popular among Dutch consumers are based

Dutch web traffic to the largest online beauty retailers* in the Netherlands, split by where the retailers are headquartered



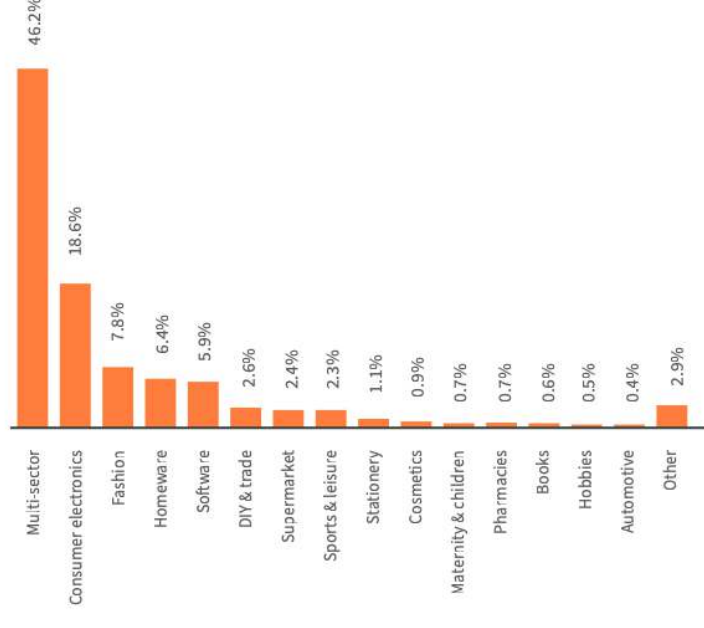
*16 beauty and cosmetics -only retailers comprise the largest beauty retailers in the Netherlands, which are selected based on web traffic

SOURCE: RetailX, drawing on data from SimilarWeb

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European web traffic split

The fraction of web visits to the Europe Top1000 retailers from European consumers, split by sector



Note: "Europe" refers to the EEA, the UK and Switzerland

SOURCE: RetailX, drawing on data from SimilarWeb

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the majority of traffic goes to retailers headquartered in Germany. Almost a third of web traffic goes to retailers based in the Netherlands, with the remainder from retailers in the UK, the US, France and Poland.

In comparison, it is retailers headquartered in the UK that account for the largest share of traffic from across Europe. Beauty and cosmetics retailers in the Netherlands receive 4% of the traffic.

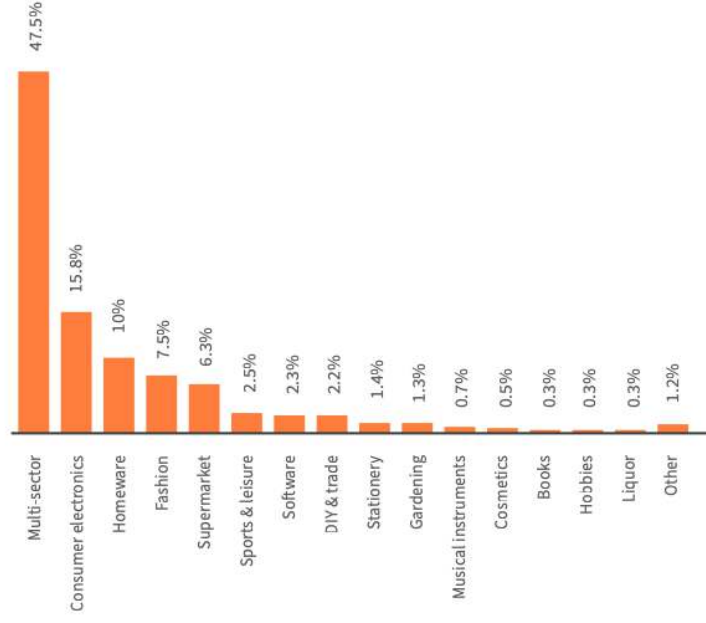
Viewing the data from the perspective of the whole group of 100 largest retailers by web traffic from consumers in the Netherlands, **almost half of the web traffic goes to retailers selling across multiple categories.** This includes retailers such as bol.com, which sells beauty products as one segment of the many it sells online.

Retailers specialising in cosmetics account for just 0.5% of traffic. This is less than the 0.9% that such retailers receive across Europe.

Web traffic follows a similar pattern in the Netherlands as that seen across Europe and the globe, with online traffic rising sharply in every quarter of 2020 when compared to the same quarter in the previous year. With such high increases of traffic between 2019 and 2020, it is hardly surprising that growth in 2021 was not as high.

Dutch web traffic split

The percentage of web visits to the NL Largest 100 retailers from Dutch consumers, split by sector



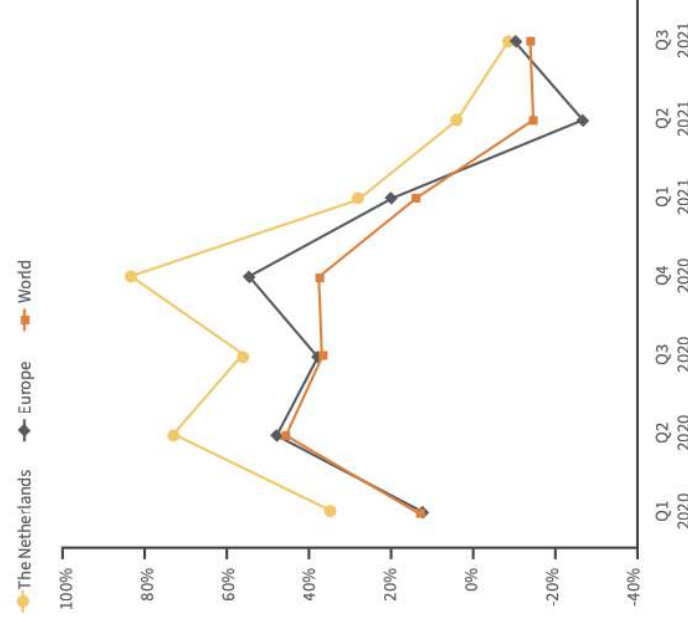
Note: retailers in the Largest 100 are selected for their significance to consumers in the country irrespective of where they are headquartered

SOURCE: Retailix, drawing on data from SimilarWeb

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Web traffic YOY change by quarter, 2019 - 2021

The web traffic change as a percentage of the same quarter in the previous year, from Dutch, European* and all consumers to significant beauty and cosmetics retailers



Note: "Europe" refers to the EEA, the UK and Switzerland

SOURCE: Retailix, drawing on data from SimilarWeb

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COSMANIA

The world's finest beauty brands

Company: Cosmania

Headquartered: Netherlands

Founded: 2010

Online: www.cosmania.nl

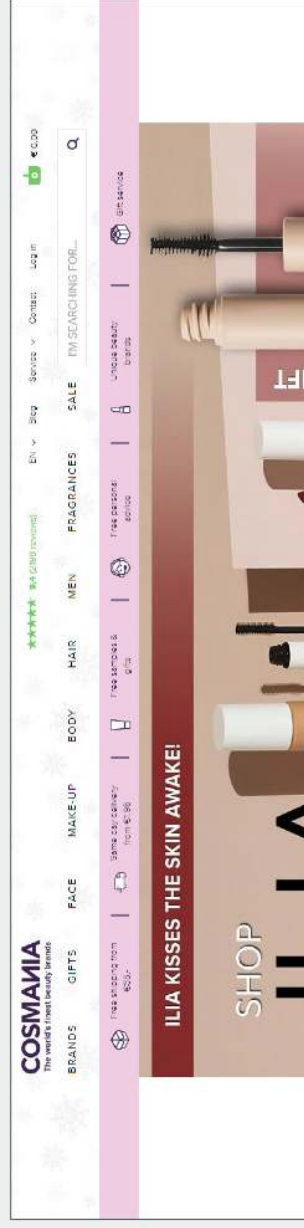
Championing international brands

The founders' love of beautiful, international brands with strong stories shines through the ecommerce and beauty experience

Cosmania operates online, where it offers international brands to a wider Dutch marketplace. These include

This Works, Neal's Yard Remedies and Cowshed, all brands with a strong story to tell. Since many of the brands Cosmania sells online are not available through other channels within the Netherlands, this exclusivity lies behind the retailer's own brand philosophy.

Cosmania's founders, Marije Hoff and Marcel Dekker, have strong feelings about openness and interaction. These manifest through product reviews and customer



Cosmania's Skin Advisor analyses both a customer's makeup-free selfie and responses to questions in order to provide personalised skincare recommendations

involvement in deciding which products are sold online. They also **openly welcome suggestions on brands** that customers come across overseas or in magazines.

Customers can contact the retailer through multiple channels including WhatsApp, Instagram and Facebook.

Live chat is available on its website for shoppers to talk directly with beauty advisors, while a self-service skin advisor provides further recommendations. To use this, the consumers uploads a makeup-free selfie and answers questions about their skin type and any skin concerns they have, such as rosacea, eczema or hyperpigmentation. Together, these are analysed and personal product recommendations returned.

Cosmania offers free, next-day shipping for orders of €35 and above, with same-day delivery available for €1.95. Orders below this level are charged €3.95 for next-day or €5.95 for same-day delivery. **A carbon neutral delivery with Budbee is also available** for €3.95, the same price as delivery by Dutch postal service PostNL.

Payment can be made using iDeal, Visa or Mastercard. PayPal and AfterPay accrue an additional fee of €1.50.

The retailer's 'Cosmania Club' loyalty scheme enables customers to collect 'coins' when they make a purchase. These can be collected and used as future discounts.



Online: www.debijenkorf.nl

Service and personal experience are offered by this exclusive department store which celebrates art, design and innovation

Service is an important part of the retailer's offering. It will deliver purchases made instore, adjust clothing through its tailoring service and personalise

De Bijenkorf also offers **beauty help online through exclusive, interactive masterclasses**. These educate and inspire customers about the latest products from a particular brand as well as techniques for applying product. Brands offering masterclasses include Charlotte Tilbury, Clinique and NARS. Video tutorials are also available on how to apply different looks such as perfecting a natural look and defining eyebrows.

In 2011, de Bijenkorf joined the Selfridges Group, but retained its own “celebration of art, design and innovation”. A decade later, it was sold again, along with Selfridges, to Thailand’s Central Group.

DOUGLAS

Company: Douglas

Headquartered: Germany

Founded: 1910

Online: www.douglas.nl

Digital first retail

Innovation with a digital-first approach is highlighted by this retailer blazing a trail for livestreaming in the beauty industry and beyond

Douglas is an **international success story** selling a wide mix of beauty items across cosmetics, skincare, hair care and perfume in multiple European countries, including the Netherlands. It has 110 stores in the country as well as an online business at Douglas.nl. **It carries 160,000 beauty and lifestyle products.**

The company's promotional tagline is: "We open all eyes to the beauty of uniqueness, bring it to life and make life itself more beautiful. For a world where everyone feels seen, heard and valued."



Douglas is a digital-first business that inspires its customers through livestreaming

Douglas is a digital-first business and its operations in the Netherlands showcase how it innovates through videos and livestreaming. These are run from its site in order to inspire and teach customers about different beauty brands, applications and techniques as well as **giving the retailer an opportunity to interact with customers directly.**

Shoppers can enter competitions and claim discounts against different products and brands while taking part in the livestreams.

They also provide extra opportunities for brands to give away products. Honest Beauty and Clarins are among the brands which have participated in this way.

Videos, and livestreaming in particular, have become **increasingly popular in recent years due to the rise of social media and influencers.** While this is a move that many beauty companies are making, Douglas is more prolific with its content that most. **Hosting videos on its site helps with customer acquisition**, particularly among the younger customer base that it is trying to reach. An abundance of videos also increases dwell time for existing customers.

Across Europe, Douglas Group's ecommerce operations posted outstanding results for its 2020/21 financial year. Online revenue grew to €1.199bn, an increase of 46.8% over FY 2019/20's €817m.



Company: Etos

Headquartered: Netherlands

Founded: 1919

Online: www.etos.nl

Etos gains a high Net Promoter Score by helping customers

Etos customers appreciate this retailer's customer service and availability, resulting in an NPS score of 8.3/10 and an award for best personal care retailer online

Etos is owned by Ahold Delhaize. It operates an ecommerce site in the Netherlands, along with 536 bricks-and-mortar stores, **selling perfume and cosmetics as well as pharmacy and healthcare products**. Its branded products are sold across the wider group in the US and Europe.



Members of Etos' loyalty scheme can buy the same item again for half price once they buy one of more than 1,000 Etos own-brand products

The retailer, which has repeatedly been awarded best personal care retailer online, **prides itself on its customer service and availability to answer customer questions** on the healthcare side of the business.

This ambition extends through to the beauty segment.

The Etos site incorporates an online skin analyser, which gives shoppers **free skincare advice and personalised product recommendations** from its beauty experts.

Ways to interact with the company through Instagram, Facebook and YouTube are displayed prominently on its homepage. Etos also welcomes customer contact via Whatsapp, telephone and post, as well as via quick feedback online.

Customers receive a number of privileges by becoming members of the Etos extra loyalty scheme. Along with receiving points on every purchase, which can be exchanged for discounts at a later date, Etos extra members can choose to buy one, get one half price on more than 1,000 Etos own-branded products. Points can also be exchanged for free items or turned into a donation of €5 worth of products for a local food bank.

Etos is part of a large retail corporation which has been investing in technology that enables it to **get closer to customers through personalised engagement**. This puts it in a strong position for cross-brand fertilisation for digital success, as well as customer marketing.

ICI PARIS XL

Company: ICI Paris XL

Headquartered: Belgium

Founded: 1968

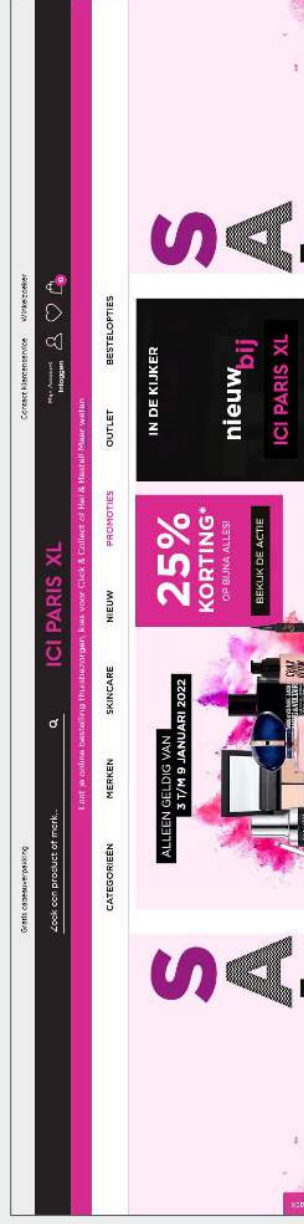
Online: www.iciparisxl.nl

Following an omnichannel strategy

ICI Paris XL integrates online and bricks-and-mortar retailing effectively to create seamless customer experiences

ICI Paris XL is an AS Watson Group company specialising in perfume, skincare and cosmetics. Its brick-and-mortar stores and online presence extends across the Netherlands, as well as into the wider Benelux region.

The retailer sells products from a variety of brands from luxury houses including **Chanel, Dior, Hermes** and **Yves Saint Laurent**, with beauty advisors on hand in the stores and online – and via live chat – to help consumers pick the right products and tailor their



In 2021, ICI Paris XL launched a number of own-brand skincare ranges including natural, vegan skincare products

beauty regime. Step-to-step beauty tutorials are also available on its ecommerce site.

ICI Paris XL has consistently won awards in the Netherlands from 2004 to 2021 for 'Best Perfumery' and 'Best Webshop'.

Shoppers can also use an artificial intelligence-powered Skin Analyser to check their skin type and receive personalised product recommendations on the retailer's ecommerce site. **The tool uses computer vision technology and mobile skin diagnostics to analyse 120 skin metrics from a selfie.** These are combined by skincare and beauty-related algorithms with the consumer's responses to a series of questions

about their skin type and skin concerns. The Skin Analyser tool has increased conversions and average order value as well as doubling shopper dwell time.

The retailer is keen to use digital to enhance customer experiences offline and across channels. It is backed by AS Watson Group's O+O retailing strategy to create integrated offline and online experience powered by technology, big data and artificial intelligence.

Its loyalty scheme enables customer data to be collected and engagement personalised, while a mobile app offers further personalisation and exclusive content. Customers can chat with beauty experts through the app as well as it being a store for their loyalty card.



Company: Kruidvat

Headquartered: Netherlands

Founded: 1975

Online: www.kruidvat.nl

Providing health and beauty at an affordable price

Promotions and offers are the cornerstone of Kruidvat's sales operations as it bids to make beauty accessible to everyone

Kruidvat is a multichannel business within the AS Watson Group. It operates through a **chain of almost 1,000 bricks-and-mortar stores in the Netherlands** as well as online. Cosmetics, beauty and personal care products make up part of the wide range of categories it sells within the health and beauty sector. It also sells items for babies and children, household and cleaning, fashion and consumer electronics as well as offering photographic services.



Promotions form the backbone of Kruidvat's operation, with top sellers and promotions displayed prominently

The retailer emphasises its commitment to making health and beauty accessible to everyone by

showcasing its value-for-money proposition on its ecommerce site. Large pack sizes, special offers and BOGOF promotions feature heavily.

Promotions remain prominent on the beauty category page while easy-to-follow pictorial navigation funnels consumers further into the individual areas of cosmetics, perfume, hair care, skincare, men's skincare, beauty and hair accessories.

Top sellers, current promotions, popular brands and trending items are all highlighted helping shoppers drawn to an offer or looking for inspiration. Further

inspiration is provided on the retailer's blog, which covers the latest trends and makeup tips by showing how best to use featured beauty products.

Customers can pay with iDEAL, Mastercard, Visa or by using a gift card.

Delivery is free for orders above €50 and €3.99 otherwise. Items ordered before 10pm are delivered next-day. Kruidvat **aims to send customers an order confirmation within two hours of their order being placed** and shipping confirmation on the day the order leaves the warehouse. Customers can't choose a specific timeslot for their delivery but the shipping notification includes track and trace information.

Figures & Sources

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The countries where beauty and cosmetics companies popular among Dutch consumers are based	9	Dutch online and offline revenue split (%) www.statista.com/outlook/cmo/beauty-personal-care/netherlands#sales-channels	The countries where beauty and cosmetics companies popular among Dutch consumers are based www.similarweb.com
European web traffic split	9	Dutch desktop and mobile revenue split (%) www.statista.com/outlook/cmo/beauty-personal-care/netherlands#sales-channels	European web traffic split www.similarweb.com
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Conclusion

In the last few years, the beauty and cosmetics industry has operated against a backdrop of continual change due to consumer behaviour, ecommerce, social media influencers and, more recently, the pandemic.

Retailers in the Netherlands have reacted with strong online and omnichannel operations that offer additional services, customer advice and support to increase dwell time online, while also helping to turn browsing shoppers into paying customers. Many retailers showcase innovation online with skin analysers offering a personalised experience for skincare products.

To keep up with changes in consumer behaviour, blogs and video have become commonplace. Livestreaming, which first rose to prominence in the beauty sector in China, is in the early stages of adoption in the Netherlands – but only by those specialist beauty retailers with a Europe-wide presence.

With the diverse range of retailers offering products in this sector, it is unsurprising that so many operate loyalty programmes in order to better understand their own customers and help retain them.

We hope that you have found our research and analysis to be of interest and commercial value. We would be very pleased to hear from you with questions, suggestions or comments on retailing in the Netherlands or the beauty and cosmetics sector in this country, or others. In particular, we would like to hear about any areas you think we should include in the 2023 report. Please get in touch via: research@retailx.net

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