Beauty Beyond Barriers

A ByStorm Beauty White Paper: Research conducted in partnership with Ideally

New research just put a number on beauty's accessibility problem

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“Beauty is supposed to make you feel something. Confident. Creative. Like yourself, but turned up.”

But for millions of people, the feeling beauty products deliver most reliably is frustration. A mascara wand that's impossible to grip. Packaging that takes two hands and a set of teeth to open. Instructions printed in a font size designed for no human eye. A tube that rolls off the counter because nobody thought about what happens when you can't close your fingers around it.

This isn't a story about disability. Not exclusively. This is a story about design — who it was built for, who it leaves behind, and how much money walks out the door every time someone puts a product back on the shelf because it simply doesn't work for them.

At ByStorm Beauty, we believe the answer isn't to fix people. It's to fix the tools. Our adaptive makeup grips made of soft-touch, medical-grade silicone snap onto the beauty products you already love, and were built with and for the disability community.

But the research we're about to share tells a much bigger story. It tells us that beauty's growth ceiling isn't set by demand, it's set by design failure. Category growth is being capped by the products pushing people away before they ever establish a routine.

This white paper, built on original consumer research conducted with our partners at Ideally, lays out what we found, what it means, and what the beauty industry can do about it — starting now.

Storm Menzies
Founder, ByStorm Beauty

Executive Summary

In partnership with Ideally, ByStorm Beauty conducted a nationally representative consumer study exploring the relationship between accessibility and beauty purchasing behaviour. Beauty is a growing category. But growth is being capped. Not by a lack of demand, but by design barriers that suppress purchasing before it happens. The findings challenge the assumption that accessible beauty is a niche concern and reveal instead a widespread pattern of market suppression driven by poor product and packaging design.

The headline findings:

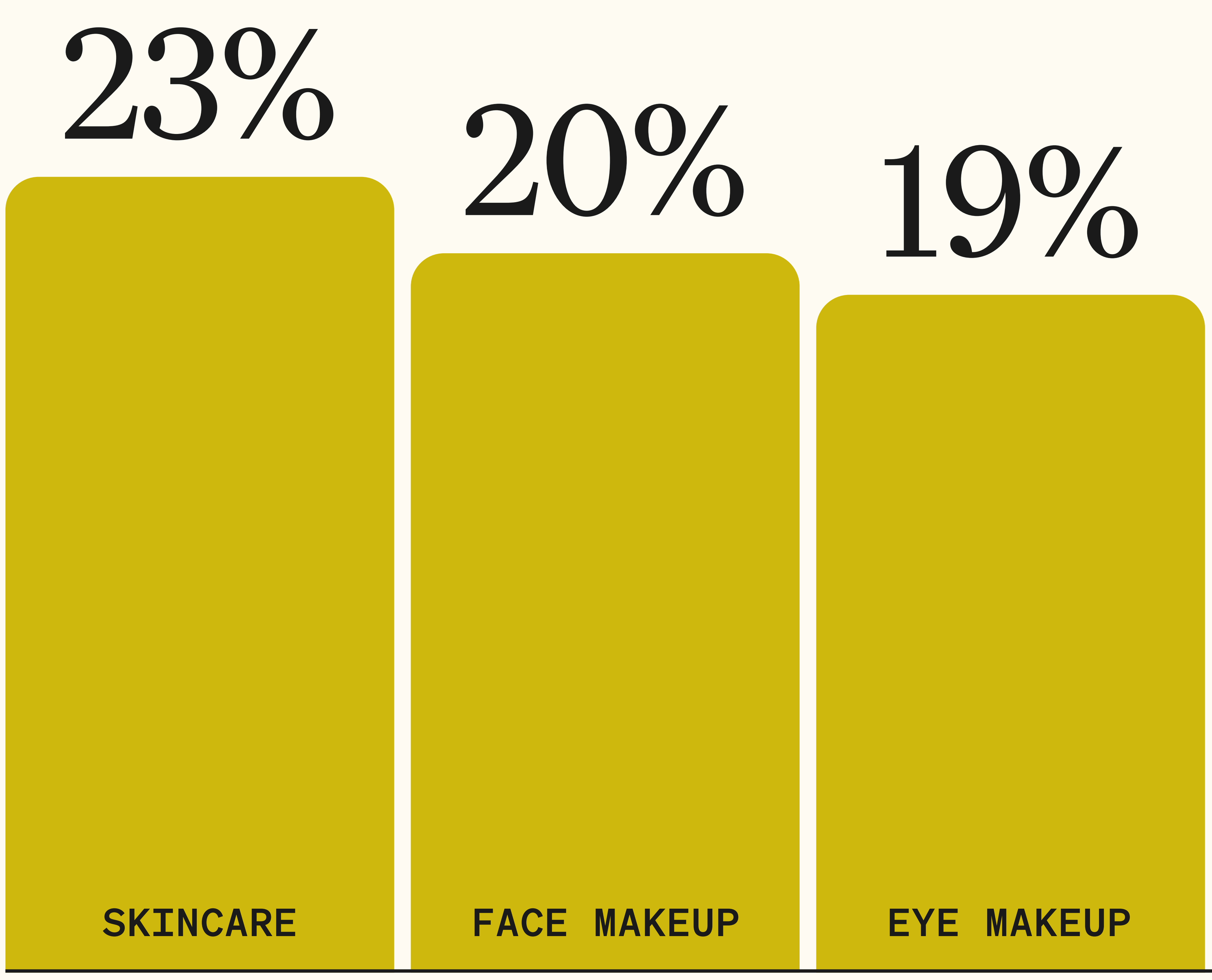
One in five consumers (20%) is purchasing beauty products less often because of accessibility barriers, with a further 2% abandoning the category entirely. This suppression is most acute in the highest-value beauty categories — skincare (23%), face makeup (20%), and eye makeup (19%) — and disproportionately affects younger consumers, with 56% of those aged 18–24 reporting that they avoid entire beauty categories due to complexity or poor design.

The research also reveals that when consumers encounter ByStorm's adaptive design concept, the response is overwhelmingly positive: 81% believe it belongs within mainstream beauty, 43% feel "included and understood," and 37% describe it as "innovative." Critically, almost no respondents (6% or fewer) report negative emotional associations such as feeling singled out or self-conscious.

Accessibility in beauty is not a charitable exercise, it is a commercial growth lever. And the consumers who stand to benefit most are not a narrow segment. They are the majority.

ARE BUYING LESS OR LEAVING DUE TO POOR ACCESSIBILITY.

22%



Accessibility is a growth lever, not a niche feature.

PART ONE

The Market the Industry Is Losing

They haven’t fallen out of love with beauty. They’ve been designed out of it.

PART ONE: THE MARKET THE INDUSTRY IS LOSING

The Suppressed Billion

The beauty industry talks constantly about growth. New categories. New demographics. New geographies. But the Ideally research points to a growth opportunity that requires minimal intervention.

Twenty percent of consumers surveyed report buying beauty products less often specifically because of accessibility barriers. An additional 2% have stopped buying entirely. These are not people who have fallen out of love with beauty. They are people who have been designed out of the category.

To understand the scale, consider what they're avoiding. The research asked consumers which beauty categories they buy less of — or skip altogether — because of accessibility challenges. The answers cluster in the most commercially significant segments of the market:

Skincare leads at 23%, followed closely by face makeup at 20% and eye makeup at 19%. These are not peripheral categories. They represent the engine room of beauty retail — high frequency, high margin, high loyalty. When consumers disengage from these categories, the revenue impact compounds over time. It's not a single lost sale. It's a lost routine.

And the suppression isn't limited to spending frequency. Sixteen percent of respondents report spending less overall on beauty because of accessibility challenges. The barrier doesn't just reduce how often people buy, it compresses how much they're willing to invest in the category at all.

The Generation Being Locked Out

PART ONE: THE MARKET THE INDUSTRY IS LOSING

56%

of 18–24s are avoiding beauty categories due to poor design.

Perhaps the most striking finding in the entire dataset concerns the youngest adult consumers.

Among respondents aged 18–24, a full 56% report avoiding beauty categories because of accessibility-related challenges. This is not a marginal figure. It is the majority of a generation that the beauty industry considers its most critical growth demographic.

The nature of their challenges is instructive. One in four young consumers (25%) says they struggle to understand how to use beauty products. Twenty-eight percent cite sensitivity to fragrance, texture, or ingredients. These are not physical dexterity issues in the traditional sense but they are design, instruction, and sensory barriers that the industry has failed to address.

This generation values efficiency. They gravitate toward routines that are low-effort and high-impact. They reward brands that make things intuitive. And when a product fails that test... when the packaging is confusing, the instructions are unhelpful, or the sensory experience is overwhelming they don't complain. They simply leave the category.

The research confirms they'd come back. Consumers aged 18–24 are the most likely group to say they would buy more often or try new brands and categories if accessibility barriers were removed. The demand exists. The products just aren't meeting it.

→ DON’T UNDERSTAND HOW TO USE PRODUCTS

25%

→ STRUGGLE WITH SENSORY FACTORS

28%

FACTORS STOPPING USERS FROM BUYING BEAUTY PRODUCTS:

37%	PRICE
21%	INSTRUCTIONS/LOW CONTRAST
20%	STAFF SUPPORT
20%	UNCLEAR INFORMATION
17%	LIMITED ACCESSIBLE OPTIONS
13%	DIFFICULT PACKAGING

PART ONE: THE MARKET THE INDUSTRY IS LOSING

Beyond Price: The Solvable Barriers

Across the entire sample, price is the single most cited barrier to purchasing beauty products, at 37%.

This is not surprising, and it's consistent across almost every demographic segment, including higher-income respondents, who still rank it as their top concern.

But the research reveals something more nuanced when you look at what sits alongside price. Hard-to-read instructions and small or low-contrast text rank second at 21%. Lack of staff support or understanding comes in at 20%. Unclear product information matches it at 20%. Limited availability of accessible options sits at 17%. Packaging that is difficult to open or dispense reaches 13%.

Taken together, these non-price barriers account for a far larger share of the overall friction than price alone. And unlike price which requires discounting, margin compression, or value engineering, these are barriers that can be addressed through better design with better information and better retail execution. They represent solvable problems with clear returns.

PART TWO

What Stops a Sale Dead

The Deal-Breakers

PART TWO: WHAT STOPS A SALE DEAD

When a product feels unsafe, uncomfortable, or unusable, consumers don't hesitate… they walk away.

The research asked consumers a direct question: which barriers would completely stop you from purchasing a product?

The answers are unambiguous.

Twenty-six percent of respondents say they would not purchase a product they felt was unsafe to use. Twenty-three percent would walk away from a product that causes physical discomfort or strain. Eighteen percent refuse to buy products they cannot use independently. And 16% are stopped by packaging that is impossible or painful to open.

These are hard lines. They don't represent mild inconvenience. They represent complete purchase refusal. And they cut across demographics. The safety concern is particularly pronounced among men (31%) and those earning less than $75,000 per year (also 31%), while younger consumers aged 18–24 show elevated sensitivity to both in-store obstacles (18%) and safety concerns (30%).

What this tells us is that the beauty industry's biggest conversion killers are not about brand awareness, marketing spend, or shade range. They are about whether the product hurts, whether it feels dangerous, and whether someone can use it without help. These are ergonomic and design failures — and they are costing the industry sales every single day.

OF CONSUMERS WILL NOT PURCHASE A PRODUCT IF IT FEELS UNSAFE TO USE.

26%

Running through the data is a consistent theme: consumers value autonomy.

PART TWO: WHAT STOPS A SALE DEAD

The Independence Imperative

When asked how they'd prefer to buy accessible beauty products, the most popular answer, chosen by 37% of respondents, is self-serve, provided accessibility features and instructions are clearly available. This preference holds remarkably steady across age groups, peaking at 47% among consumers aged 65–74.

But independence doesn't mean isolation. Twenty-six percent of respondents want brief staff guidance available, and 21% say they'd only purchase with staff assistance. The youngest and oldest consumers, 18–24 and 75+, both show elevated interest in human support. This suggests that the need for help is not a linear function of age but of confidence and familiarity.

The implication for retail is a hybrid model: clear, well-signed, intuitive self-service merchandising, with visible and trained staff support as an opt-in layer, not a default. The consumer wants to feel capable, not managed.

→ SELF-SERVE WHEN BUYING ACCESSIBLE BEAUTY PRODUCTS

37%

PART THREE

What Happens When You Get It Right

→ FEEL INCLUDED AND UNDERSTOOD

43%

→ CONFIDENT & EMPOWERED

34%

PART THREE: WHAT HAPPENS WHEN YOU GET IT RIGHT

The Emotional Response

Accessible design doesn’t create stigma. It creates inclusion and confidence.

When respondents were shown the ByStorm concept and asked how encountering the brand would make them feel, the response was decisive.

Forty-three percent said they would feel “included and understood”. The single most common emotional response in the entire study. Thirty-four percent said they would feel “confident and empowered.” These two responses, inclusion and empowerment, dominate the emotional landscape of the brand. They do so consistently across gender, age, income, and household structure.

Just as importantly, the negative emotional associations are negligible. Only 6% or fewer of respondents reported feeling “self-conscious,” “uncertain,” or “singled out.” The stigma concern and the fear that accessible beauty products might make people feel marked or different is, in the data, essentially a non-issue.

This matters enormously for retail strategy. One of the unspoken hesitations retailers carry about stocking accessible products is the worry that they'll sit on shelves because consumers are embarrassed to pick them up. The Ideally research says the opposite. Forty percent of respondents say they are comfortable trying or purchasing ByStorm openly in-store. Comfort rises with age, peaking at 55% for those aged 55–64, and is notably higher among women (45%) than men (33%).

For the segment that does prefer privacy, 18% who'd rather buy online or discreetly, and 14% who want assistance or support. The answer isn't to hide the product. It's to ensure the omni-channel experience works: visible in-store, available online, supported either way.

What They See When They See Us

PART THREE: WHAT HAPPENS WHEN YOU GET IT RIGHT

Top 4 brand perceptions:

→ INNOVATIVE
37%

→ CARING
32%

→ INCLUSIVE
32%

→ MODERN
29%

The research asked respondents to select the words that best describe how the ByStorm brand feels to them. The top four responses tell a clear story:

“Innovative” leads at 37%, followed by “Caring” and “Inclusive” tied at 32%, then “Modern” at 29% and “Approachable” at 21%. The brand is being perceived exactly as intended — forward-looking, warm, welcoming, and design-led.

The words that didn't gain traction are equally telling. “Confusing,” “Intimidating,” and "Outdated" all remain at negligible levels across every demographic group. The "beige medical device" trap — the assumption that accessible products will be perceived as clinical, institutional, or patronising — has been thoroughly avoided.

Dig into the demographic texture and the picture gets richer. “Caring” and “Innovative” strengthen with age, peaking in the 65–74 group — a cohort that is both a key user base and a group that appreciates thoughtful design. “Inclusive” is strong across all household structures, particularly among those living alone, a segment for whom independent beauty routines are not a preference but a necessity. Men are slightly more likely to associate the brand with “Premium” and “Trustworthy,” which has implications for how men's grooming extensions might be positioned.

The Mainstream Question – Answered

PART THREE: WHAT HAPPENS WHEN YOU GET IT RIGHT

Consumers don’t see accessibility as separate – they see it as mainstream.

If there is one data point that should appear in every pitch deck, every press release, and every retailer conversation, it is this: 81% of respondents say ByStorm fits “very well” or “somewhat well” within mainstream beauty.

It is an overwhelming endorsement of the brand's right to exist on the main beauty floor and not in a specialist section, not behind a consultation desk, not online-only. Mainstream. Forty-one percent say “fits very well” and 40% say “fits somewhat well,” with women particularly strong at 45% “very well” versus 33% of men.

The segments where mainstream fit perception is highest, adults aged 35–44 and 65–74, represent both the prime spending years and the age at which many consumers first begin to experience the physical changes that make traditional beauty tools more challenging. These are consumers who don't yet identify with “accessibility” as a label but who recognise good design when they see it.

→ SAY BYSTORM FITS "VERY WELL" OR "SOMEWHAT WELL" WITHIN MAINSTREAM BEAUTY

81%

PART FOUR

The Retail Opportunity

The research asked consumers what signals to them that a retailer is genuinely committed to accessibility in beauty. The answer is practical, not performative.

PART FOUR: THE RETAIL OPPORTUNITY

What Consumers Are Telling Retailers

Clear in-store signage leads at 35%, outpacing every other signal across all genders, age brackets, and most regions. Staff training follows at 24%, and having an accessible range present on shelf comes in at 22%. Online accessibility tools, while recognised at 13% overall, matter disproportionately to younger consumers — 20% of those aged 18–24 and 22% of those aged 25–34 cite them as the most important signal.

The message to brands: show it on the shelf, sign it clearly, train your people, and support it digitally. Consumers are not asking for grand gestures. They are asking for evidence of thought.

CLEAR SIGNAGE

35%

STAFF TRAINING

24%

The Universal Beauty Aisle

PART FOUR: THE RETAIL OPPORTUNITY

What consumers want from accessible beauty retail:

→ SELF-SERVE FIRST 37%	→ SIGNAGE 35%
→ STAFF TRAINING 24%	→ RANGE PRESENCE 22%

Taken together, the data paints a coherent picture of what consumers want accessible beauty retail to look like:

Self-serve first (37%), with products clearly signed and easy to find, accessibility features explained on-pack or at-shelf, and staff available who are trained and ready for those who want guidance. Not a special section. Not a separate experience. An integrated, visible, well-executed presence within the beauty environment people already shop.

This is the concept we call the Universal Beauty Aisle. It doesn't segregate accessible products. It weaves them into the existing retail footprint, supported by the three pillars consumers say matter most: signage (35%), staff training (24%), and range presence (22%).

For retailers, the commercial logic is straightforward. The Ideally data shows 20% of consumers buying less because of accessibility barriers. It shows 32% who say they'd buy more or try new brands if those barriers were removed.

It shows that the categories being suppressed (skincare, face makeup, eye makeup) are the highest-frequency, highest-margin segments on the floor. And it shows that 81% of consumers see accessible tools as belonging in the mainstream aisle.

The question is no longer whether accessible beauty has a place in retail. The question is how quickly retailers are willing to capture the revenue they're currently leaving on the table.

The ByStorm Model: Integration, Not Disruption

PART FOUR: THE RETAIL OPPORTUNITY

ByStorm doesn’t replace products – it unlocks them.

ByStorm's product architecture is designed to work with the beauty ecosystem, not against it. The snap-on grip system is brand-agnostic. It attaches to pencils, tubes, sticks, and brushes from any manufacturer. This means ByStorm doesn't compete with existing beauty brands. It makes them more accessible.

For retailers, this eliminates the zero-sum concern. Stocking ByStorm doesn't cannibalise existing inventory — it activates it. A consumer who couldn't previously grip a mascara wand doesn't switch brands. They buy the mascara they always wanted and the ByStorm grip that lets them use it. The basket grows. The category re-engages a consumer who had walked away.

This is the “third-party accessibility layer” model. A new product category that sits alongside existing beauty, adds value to every brand on the shelf, and creates incremental revenue from a consumer base that was previously being suppressed.

PART FIVE

The Road Ahead

Who Needs Us Most — and Who We Need to Reach

PART FIVE: THE ROAD AHEAD

The Ideally research identifies several audiences where the opportunity, and the obligation, is greatest.

Younger consumers (18–24)
represent the largest responsive market. They avoid the most categories (56%), express the most frustration with product complexity (25%), and show the highest willingness to change behaviour if barriers are removed. They are also the most digitally oriented, expecting online accessibility tools and discovering products through social content. Reaching them requires a presence where they already shop and scroll, with messaging that emphasises “effortless” and “design-forward” over “accessible.”

Mid-career, financially secure consumers (35–54)
show the strongest overall response to the ByStorm concept across brand fit, purchase intent, and desire. These are consumers in their peak spending years who are beginning to encounter the early signs of physical change — and who have the disposable income to invest in products that make life easier. They respond to quality, innovation, and mainstream positioning.

Older consumers (65–75+)
are the segment with the most to gain and the most work still to do. The 75+ cohort shows lower satisfaction with the concept and is more likely to discover products passively (54% say they'd notice a standout product rather than actively search). Serving this audience well may require continued co-design, adjusted messaging, and retail strategies that ensure visibility without requiring active seeking.

Consumers with physical or dexterity challenges
report high purchase intent but lower conviction that the range uniquely fits their needs. This is a signal that the product truth is resonating — they want it — but the specificity of how it helps them needs sharper articulation. The deal-breaker data (safety, independence, packaging) provides the language: this product is designed so you never have to fight your makeup again.

PART FIVE: THE ROAD AHEAD

The Pricing Conversation

Price is the top barrier in the dataset at 37%, and lower-income segments report the lowest desire scores in concept testing. This is a reality that cannot be designed around that must be addressed head-on.

ByStorm's product model carries an inherent advantage here. The grips are a one-time purchase that work across multiple beauty products. A single ByStorm accessory doesn't replace a lipstick, it makes every lipstick in a consumer's collection easier to use. The cost-per-use drops with every application, and the product doesn't need to be repurchased with each new beauty buy.

This “buy once, use everywhere” positioning is the most effective counter to the price objection: the ByStorm grip isn't an ongoing expense. It's an investment in making everything else in your beauty bag work better.

SEE PRICE AS THE TOP BARRIER

37%

Methodology

This white paper draws on original consumer research conducted by Ideally on behalf of ByStorm Beauty.

The study surveyed a nationally representative sample of Australian consumers accounting for emotional and perceptual responses to the ByStorm adaptive beauty concept, and preferences for retail experience design.

834 Australian adults were surveyed, with 618 qualifying respondents included in the final analysis. The study was fielded via the Ideally platform in January 2026 and weighted to be nationally representative.

Respondents reflected a broad cross-section of the Australian population by gender, age, income, household structure, state, and ethnicity. This was intentional. The research was designed to capture the full spectrum of accessibility experiences — not just those with a recognised disability, but anyone encountering physical, sensory, cognitive, situational, or design-related barriers to beauty.

Respondents self-identified their relationship to accessibility and were then shown the ByStorm adaptive beauty concept.

About this research

Ideally is the market research platform that puts real human insight into every creative and commercial decision. We're reinventing research for modern marketing, putting real consumer understanding into the hands of every marketer, strategist, and insights leader who needs it.

The platform delivers fast, always-on insight to understand what customers want, where categories are heading, and how to test ideas, products, and campaigns before they hit the market. Real people. Real responses. At the speed modern brands need to move.

For more information, visit:
goideally.com

ByStorm Beauty designs adaptive makeup tools for accessible beauty. Built with and for the disability community, ByStorm's snap-on grip system empowers confidence, choice, and self-expression — making beauty work for every body.

For more information, visit:
bystormbeauty.com