

### December 2015

#### Consumers and the Economic Outlook: Quarterly Update - UK

"Mintel's key measures of consumer confidence show that people are still wary. Although the improvements in sentiment that accompanied the end of the income squeeze have been sustained, 2015 has been a year of consolidation, rather than one of soaring consumer spirits. Earlier in the year, the election added ...

#### Mature Beauty - UK

"As life expectancy increases, the definition of 'old' is ever changing and marketers are slowly catching on to this. Recent years have seen the use of older models in advertising, whilst NPD sees a number of niche brands targeting the specific needs of older women. However in-store environments are yet ...

#### Complementary and Alternative Medicine - UK

"The CAM market has enjoyed relatively strong sales growth in recent years, bolstered by an ageing population seeking musculoskeletal treatments and the booming healthy living trend. Opening CAM treatment centres in business districts and shopping centres could now help to increase accessibility to the market, whilst further promotion on online ...

### November 2015

#### Supermarkets - UK

"The grocery superstores are losing market share and the main focus of this report is to examine why. We think that there are underlying socio-economic changes taking place which allied to the growth of the hard discounters, Aldi and Lidl, is leading to growth in more frequent shopping trips and ...

#### Suncare - UK

#### Natural and Organic Personal Care Consumer - US

"Natural and organic personal care brands offer a variety of options that are largely appealing, though consumers express some confusion due to the prevalence of natural claims, limited regulations, and a less than clear category definition. However, consumers are concerned about green issues, and aspire to live a healthier lifestyle ...

#### Skincare Ingredient and Format Trends - US

US adults are looking for easy-to-use, functional formats when shopping for skincare products, explaining the popularity of wipes and sheet masks. Brands may also consider a focus on natural ingredients, with charcoal, micellar water, and aloe appealing to consumers. Further success can be achieved by incorporating trends from the Asian ...

#### The Savvy Beauty Consumer - UK

"Although the economy has entered recovery, savvy shopping behaviours have become engrained in consumers' minds, and they remain drawn to sales, multi-buys and discount retailers. While brand loyalty has helped dampen the effect of savvy shopping on primary beauty markets, such as colour cosmetics; hygiene-oriented markets, including soap, bath and ...

#### Healthy Lifestyles - UK

## Beauty and Personal Care - International

“Usage of suncare protection continues to be dependent on the weather, with value falling across 2014-15 in line with lower levels of sunshine. Looking forward, suncare brands can further align themselves with the skincare category in order to position their products as an integral part of a daily skincare routine ...

“Whilst prevention of future illness is a major driver of healthier habits, this argument runs the risk of being viewed as ‘nanny state’. Instead, companies and brands would increasingly benefit from emphasising how their products and services help consumers improve their appearance/look younger for their age and help improve ...

### Personal Care Consumer - US

A mature personal care market benefits from widespread product usage of functional items such as oral care and deodorant, while younger women drive growth of discretionary items including facial skincare. Brands can benefit by focusing on gentle products or natural sounding ingredients, which appeal to consumers amidst concerns over ingredient ...

## October 2015

### Healthy Lifestyles - US

"Though Americans are increasingly aware of health issues, many struggle to make significant changes. Consumers are constantly looking for new and better ways to live a healthy lifestyle without making significant sacrifices or interfering with other commitments and desires."

- **Lauren Bonetto, Lifestyles & Leisure Analyst**

### Shaving and Hair Removal - US

"Current sales in the shaving and hair removal category remain sluggish, due to the competitive landscape and value-driven nature of the category. Sales are expected to level off with minimal gains through 2020."

### Lifestyles of Millennials - UK

“Because all the traditional markers of adulthood are less available to today’s Millennials, they are redefining what it means to be an adult for themselves. Marketing messages focused on traditional milestones of adulthood may no longer be as relevant; brands that acknowledge the shifting social norms will forge a much ...

### Anti-Ageing Beauty - UK

“The anti-ageing beauty markets benefit from a society which is perceived to prioritise youth; a pressure felt most strongly by women. The ageing population, coupled with men’s changing attitudes towards beauty and grooming, is set to expand the user base, although traditional topical products may be threatened as treatments and ...

### Men's Personal Care - US

The men’s personal care market has remained relatively flat, with the biggest gains seen in the skincare segment, which is now beginning to stabilize. Looking forward, strong haircare sales will be the biggest driver in the market due to product launches among popular men’s brands as well as men’s increasing ...

### Inside-Out Beauty - UK

“There is a strong consumer perception of appearance through health; however usage of beauty supplements remains low which may be driven by low knowledge of beauty ingredients, as well as the high cost of products. Targeting the mass market could secure growth for the category, in addition to raising awareness ...

## September 2015

## Beauty and Personal Care - International

### Food and Non-food Discounters - UK

"In both food and non-food retailing discounters are making a big impact and they still have some way to go. We expect a period of consolidation in non-food discounting which will begin with Poundland absorbing 99p Stores. But even with that bonus Poundland and its multi-price peers led by B&M ...

### Marketing to Moms - US

"Less pressure to settle down and have children early in life means more women are having kids on their own terms – which often means fewer children, later in life. While modern women have more choices than ever before, they also face greater expectations. Even though moms are increasingly working ...

### Vitamins and Supplements - UK

"Value sales of vitamins and mineral supplements flatlined in 2014, as reduced NPD (New Product Development) and a shift towards healthier diets impacted consumer interest in the market. Sales of demographically targeted vitamins continued to fare well, however, reflecting the consumer desire for personalisation."

### Vitamins, Minerals and Supplements - US

Traditionally, sales in the vitamins, minerals, and supplements market have been driven by older consumers who are more engaged in the category. Now, brands are attempting to increase use among younger adults by focusing on short-term benefits, such as vitamins that address beauty concerns as well as provide energy or ...

## August 2015

### Consumers and the Economic Outlook: Quarterly Update - UK

"The generally positive outlook of the economic climate, and the benefits that are gradually being witnessed at the individual level, means that the people of Britain are finally regaining their confidence. For the first time

### Beauty Accessories - US

The \$3 billion beauty accessories market has shown slow, uneven growth in recent years. However, while the largest market segment, hair accessories, has effectively stagnated, there are strong areas of growth and innovation in the smaller make-up and shower accessories segments. Indeed, a number of smaller players have seen sales ...

### Marketing to Mums - UK

"The lives of British mothers have changed to a great extent over the past several decades, however marketing has been much slower to catch up to and acknowledge the changing realities of what it means to be a parent in modern Britain. Treating and addressing mothers as a homogenous group ...

### Spa, Salon and In-Store Treatments - UK

"The beauty treatment markets enjoyed strong growth in recent years, boosted by new destinations and growing interest; however sales were impacted by cheaper pop-up locations and at-home devices in 2014. Encouraging an older demographic to visit spas and salons with a health positioning, as well as tempting clients with high-tech ...

### Fragrances - UK

"The category as a whole has shown incremental growth in value in the past, and, despite a decline predicted in 2015, is likely to show growth again in the future. Improved financial situations and savvy shopping behaviours are driving down the value of the mass fragrance and body sprays segments ...

since the economic downturn, Mintel's data shows that more people feel better off compared to ...

## Black Consumers and Haircare - US

"Haircare is perhaps one of the largest areas of consumer expenditures among Black consumers. Hair is an important part of Black consumers' image – it shapes their identity and sends a signal to the world of who they are as a person. With the variety of ways that Black consumers ...

## In-salon Hair Services - UK

"Salons competing for loyalty, and a new generation of booking platforms have resulted in a strong discounting culture in the hair services market, with sales declines anticipated for 2015 as a result. Encouraging clients to trade up, or expand to new treatments and services is essential for returning the market ...

## Winter Holiday Shopping - US

"Retailers have their work cut out for them during the 2015 winter holiday season given that 2014 was touted as one of the strongest in recent years. However, positive economic factors like higher consumer confidence, lower gas prices, and an improving job market signal that competing over 2014 is attainable ...

## July 2015

### Face Colour Cosmetics - UK

"Strong growth continues within the sector, which is expected to be worth £1.44 billion in 2015; a rise of 8% on 2014. Sales of prestige products continue to fare well, boosting the overall market, though the prevalence of budget brands has also helped encourage experimentation and increase product repertoires."

### The Ethical Consumer - UK

"For today's consumers there is a sense that companies are inherently immoral, unless they can demonstrate that's not the case. The most effective way of asserting

## Beauty and Personal Care - International

### Fragrances - US

"The impact of a saturated marketplace and increased competition from scented toiletries has led to flat performance in the \$3.7 billion fragrance category. To combat consumer apathy and confusion, industry players can leverage new product development and honed marketing emphasizing value-added benefits/ functionality, demographic-specific use, and customization. Delivering unique ...

### Luxury Goods Retailing - International

The concept of luxury goods is still highly subjective. It is usually obvious where a product is luxury and equally obvious where it isn't, but there is a grey area that is more subjective. Take the Swatch group, for example. Swatch itself is clearly mass market and, while they are ...

### Color Cosmetics - US

"Slow growth in the color cosmetics category is reflective of an intensely competitive category landscape. While beauty trends such as bold brows and bright lips are translating to gains for certain segments, overall category growth has been kept in check. Brands are challenged with keeping women engaged in the category ...

## Beauty and Personal Care - International

CSR (Corporate Social Responsibility) credentials is not via annual company reports, but via product packaging and television, which will have the most direct impact ...

### June 2015

#### Hand and Bodycare - UK

“Body moisturiser sprays have been positioned in the market as an easy-to-use format, with focus on their quick absorption properties. With high usage of the format amongst those concerned about skin irritation, future claims opportunities could focus on reduced risk of aggravated skin from using the format. The men’s market ...

#### Body Care and Deodorant - US

The body care and deodorant market has experienced growth, benefiting from improved spray deodorant formats as well as strong therapeutic skincare sales. This \$5.9 billion category presents opportunities for brands to focus on beauty benefits in body care products, such as lotion that provides a shimmering effect, to reach ...

#### Social Media: BPC - UK

Social media has grown in recent years to be an integral part of marketing and promotional activity in the beauty and personal care markets. Brands and retailers are now harnessing the opportunities the social media space offers, in regards to engaging in two-way communication with consumers, and using word of ...

#### Oral Care - UK

“Whilst the essential nature of oral care products means that usage is relatively high across most demographics, there remains an opportunity for oral care brands to grow sales by targeting marketing and NPD at seniors and men, helping to make them more engaged with the market overall.”

– Jack ...

### May 2015

#### Marketing to Teens - US

“The teen years are a unique middle ground; teen consumers are not quite children, not quite adults. A big part of being ‘not quite an adult’ is that teens rely heavily on their parents to buy things for them. This means that brands often have to gain the approval of ...

#### Women's Facial Skincare - UK

The women’s facial skincare market has seen sales stall in 2014, with the mass market slipping into decline. Changing consumer behaviours, including switching to discount retailers and online channels, are enabling women to save money on their purchases. Meanwhile the prestige market is also suffering as women switch to smart ...

#### Oral Care - US

“Sales within the oral care market remain steady, benefiting from widespread product usage. Opportunities exist in the \$7.2 billion category for brands to increase the frequency of product usage, especially through portable oral care products, and a focus on new product innovations within the floss/accessories/tools segment. Additionally ...

#### Facial Skincare and Anti-Aging - US

Growth in the near-\$7 billion facial skincare and anti-aging category is slow, driven by the highly competitive category landscape and continued below-average usage among men and older adults. Also, as skincare staples like facial cleansers offer more comprehensive benefits, specialty skincare segments struggle to grow. While new product development ...

### OTC Analgesics and Cold and Flu Remedies - UK

"In 2014/15 the UK cold/flu remedies market benefitted from the seasonal flu vaccine being less effective than usual, resulting in many lapsed users returning to the category. Cold/flu remedy brands could now use this to their advantage, using marketing and product developments to reignite interest in the ...

### Consumers and the Economic Outlook: Quarterly Update - UK

"Economic improvements are finally beginning to be felt at the consumer level. Falling prices of essentials and rising wages are helping incomes go further and there are indications that people are beginning to relax their budgets and spend on items and experiences that have been out of reach during the ...

## April 2015

### American Lifestyles 2015: The Connected Consumer – Seeking Validation from the Online Collective - US

"Americans have endless choices to make on a daily basis and even the simple act of buying staple household products can be overwhelming to those who have yet to establish a routine or build brand loyalties. In a never-ending quest to buy the 'best,' consumers are looking to others' ...

### Cough, Cold, Flu and Allergy Remedies - US

"OTC manufacturers of cough, cold, flu, and allergy remedies have built-in demand: there is no shortage of cold, flu, and allergy sufferers. While providing relief is important, further investment should be made in finding more effective remedies and in promoting methods for reducing the transmission of infection. These efforts will ...

### Shampoo, Conditioner and Hairstyling Products - US

### Men's Facial Skincare - UK

"The high proportion of men describing their skin as neutral presents opportunities in the market for better diagnostic tools and more help for men to identify their skin's needs and products suited to them. Male-specific expertise is important, with most men choosing and purchasing their own skincare products.

### Disposable Baby Products - US

"As long as birth and fertility rates remain flat, maximizing growth through 2019 may hinge on attracting consumers ready to invest more, on high-end products, which may include natural and customizable offerings. Opportunities for growth appear strongest with first time parents and Hispanics, whose attitudes reveal a level of interest ...

### Women's Haircare - UK

"The women's haircare market is challenged by changing product usage, with traditional styling products falling from favour and natural botanical oils threatening leave-in conditioners and serums. Inspiring an older female audience and expanding product repertoires are essential for returning the market to a faster pace of growth."

## Beauty and Personal Care - International

"The shampoo, conditioner, and hairstyling product market is stable, posting steady gains of 2-3% on a yearly basis since 2011, with similar growth trends expected through 2019. Current hairstyle trends and consumer perceptions of having healthy hair are driving sales of conditioners, shampoo alternatives, and smoothing products. Looking forward, category ...

### March 2015

#### Beauty Devices - US

"There is disparity in the beauty devices market, with sales of skincare devices gaining momentum, while growth in the hair appliance market is stagnant. The promise of professional results at home is helping to drive sales of skincare devices."

#### Babies' and Children's Personal Care Products, Nappies and Wipes - UK

"As the baby boom shows evidence of coming to an end, it may be more relevant for the category to focus on toddlers rather than new-borns. Extending product ranges for older children and offering greater product segmentation by age could be a way to ensure the category shows growth. Greater ...

#### The Private Label Beauty Consumer - UK

"The media attention given to beauty products launched by discount retailers, along with a high level of NPD in the sector, has seen own-label colour cosmetics soar in popularity, taking a 53% share of the private label beauty market in 2014. However, at a total level, the private label beauty ...

#### Beauty and Personal Care Retailing - Ireland

"With Irish consumers keen to see more beauty ranges with natural ingredients, brands should look to innovate across beauty and personal care sectors with a focus on botanical extracts as well as newer ingredients such as argan oil to appeal to skin-conscious consumers."

### February 2015

#### Soap, Bath and Shower Products - UK

"Retail sales declines are evident for the second year in a row in the soap, bath and shower (SBS) market (-1.2% to £638 million in 2014) as the trend of saving money on day-to-day hygiene essentials continues; consumers are maintaining their reliance on price promotions, as well as trading ...

#### The Drug Store Shopper - US

"Retail channel lines continue to blur with more outlets like mass merchandisers and supermarkets clambering to become consumers' primary destinations for their drug store needs including OTC and prescription

#### Home Hair Color - US

"Sales of home hair color remain stagnant, as consumers are increasingly reliant on the salon for hair coloring services. Still, growth opportunities exist in the more than \$2 billion category, including hair color products that promote hair health and salon-quality results. Focusing on relatively untapped demographics, such as men and ...

#### Consumers and the Economic Outlook: Quarterly Update - UK

"People are finally starting to feel the benefit of the recovery in their pay packets. After five years, average

## Beauty and Personal Care - International

medications. Traditional drug stores can no longer afford to be just drug stores, and should continue evolving their positioning as health ...

wages are finally increasing more quickly than prices. Although this will take time to feed through into consumer confidence, there are signs that spending habits are changing.

### Marketing to Millennials - US

“Millennials will continue to play an increasingly important role in the workplace and the economy. In order to effectively target Millennials, brands must understand how they see themselves (and their generation overall), how they are rethinking traditional adulthood milestones, and how to market to Millennials without alienating older generations.” ...

### OTC Sleep Aids - US

“Building market share may require more granular outreach to consumers and targeted marketing to address the different needs, interests and concerns of young, active, tech-savvy 18-35-year-olds; busy parents and aging baby boomers. Key opportunities may lie in areas such as promoting natural products, mobilizing the insights offered by wearable fitness ...

### Christmas Shopping Habits - UK

“The distinction between online and in-store retailing is becoming more and more irrelevant. For any store based retailer it is not how people buy that matters, but whether they buy from you at all. The key is to make it as easy as possible for customers to buy from you ...

### Marketing to Baby Boomers - UK

“Whilst many Baby Boomers enjoy financial stability, health is a major consideration for all in this generation. Brands could benefit from focusing on this aspect through their marketing, offering help, guidance and advice to Baby Boomers with existing conditions, or positioning products as helping to keep potential health issues at ...

### Soap, Bath and Shower Products - US

“The soap, bath and shower category continues to grow steadily as a fundamental element of personal hygiene. Opportunities do exist for makers and marketers of soap, bath and shower products to improve transparency and efficacy claims, focus on the differentiated needs of the multicultural consumer, and address efficiencies in product ...

### Nail Color and Care - US

“After years of stellar gains, sales have slowed considerably in the nail color and care category, driven largely by the cyclical nature of beauty trends and the growing impact of the salon market. Still, opportunities exist in the nearly \$2 billion category for brands and retailers to offer women ways ...

### Nail Colour - UK

“Following strong growth in the nail colour market of 7% from 2012-13 to £244 million, driven by fashion favouring nail art and new textures and effects, sales stalled in 2014 at £245 million, the result of women amassing large collections of nail varnishes that are not regularly used.”

January 2015

### Beauty Retailing - UK

### Hair Colourants - UK





## Beauty and Personal Care - International

“Department stores look most at risk from the growth in online-only retailers because both channels are biased to branded merchandise (particularly premium/luxury labels) which makes it easier for shoppers to compare prices. Where price is a major factor then people are more likely to choose the pure player over ...

### Beauty Retailing - US

“For many consumers, buying beauty products can become somewhat of a mundane task. Shoppers in this category have a multitude of options to choose from including where they shop and what they buy, but still, many will frequent a few favorite places, and/or buy the same brands repeatedly. Retailers ...

“Despite strong grey coverage claims in the category, the oldest demographics with the most grey are less likely to colour their hair. Repositioning part-colouring techniques, such as highlighting, as ways to complement grey hair rather than covering it could be more appealing. Young men, who have more grey than young ...

### Deodorants - UK

“Older people have traditionally not been a major target for deodorant brands due to their leading less active lifestyles than young adults, meaning that they consequently sweat less. However, with seniors leading increasingly active lifestyles, in terms of both doing more exercise and helping with raising their grandchildren, brands could ...