

## Beauty Online - UK - January 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The continued use of technology has resulted in 2015 being an innovative year for beauty brands online, with apps and social media initiatives expanding audiences. The importance of video content in the beauty market keeps consumer engagement; tutorials have become invaluable for young women especially."

– Charlotte Libby, Senior Beauty Analyst

### This report looks at the following areas:

- A more challenging environment for online beauty sales
- Less blogging, more vlogging for today's Millennials
- Men need more guidance in the online BPC arena

While the retail value sales of online beauty products remains in growth, this has slowed in 2015 (to 12.6%) as consumers resent delivery charges and fear counterfeit goods.

Young women are a core audience for beauty brands online, with video sites such as YouTube being one of the preferred platforms. Beauty bloggers remain powerful influencers, with retailers and brands exploring partnerships with social media stars in 2015. The success of newer male bloggers indicates there is scope for similar marketing strategies targeting young men.

In the last year beauty apps have become a growth area with consumers able to virtually test products, shop and easily watch tutorials. The popularity of fitness and food trackers can be expanded into the beauty market, helping consumers alleviate bad beauty habits.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Beauty Online - UK - January 2016

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

- What you need to know
- Products covered in this report

### Executive Summary

- Pace of online sales growth begins to slow  
Figure 1: Best- and worst-case forecast for online consumer expenditure on beauty products, 2010-20
- Supermarkets most commonly used BPC online retailer  
Figure 2: Online retailers used to purchase BPC products, October 2015
- YouTube a powerful force in BPC social media  
Figure 3: BPC online activities, October 2015
- Drawbacks of online BPC shopping  
Figure 4: Attitudes towards BPC online, October 2015
- Skin tracker apps have untapped potential  
Figure 5: Attitudes towards beauty apps, October 2015
- Blogs have a poor perception outside of their core target  
Figure 6: Correspondence analysis – Opinion of online beauty sources, October 2015
- What we think

### Issues and Insights

- A more challenging environment for online beauty sales
- The facts
- The implications
- Less blogging, more vlogging for today's Millennials
- The facts
- The implications
- Men need more guidance in the online BPC arena
- The facts
- The implications

### The Market – What You Need to Know

- Pace of online sales growth begins to slow
- Smartphone and tablet ownership continues to grow
- Changes in online activities
- New delivery charges
- Retail calendar event sales tempt shoppers
- Supermarkets challenge chemists and drugstores
- Pureplayers struggle to further grow share

### Market Size and Forecast

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Beauty Online - UK - January 2016

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Pace of online sales growth begins to slow

Figure 7: Market size and forecast of online consumer expenditure on beauty products, 2010-20

Future growth slower but stable

Figure 8: Best- and worst-case forecast for online consumer expenditure on beauty products, 2010-20

## Market Drivers

PDI improves post-recession

Figure 9: Trends in how respondents would describe their financial situation, February 2009-September 2015

Smartphone and tablet ownership continues to grow

Figure 10: Personal ownership of smartphones, tablets and smartwatches amongst UK consumers, by generation, June 2015

Changes in online activities

Figure 11: Online activities performed in the past three months, June 2014-June 2015

New delivery charges

Consumers suspicious of cheap products online

Retail calendar event sales tempt shoppers

Figure 12: Example of Black Friday 2015 promotion, November 2015

## Channels to Market

Supermarkets challenge chemists and drugstores

Figure 13: Retailer shares of online sales of BPC products, 2013-15

Pureplayers struggle to further grow share

## Key Players – What You Need to Know

Social media users enjoy exclusives

Online retailers launch exclusive offers

Brands focus on consumer engagement

## Brand Communication and Innovation

Social media

Burberry Snapchat previews

Figure 14: Burberry backstage fashion week posts, September 2015

Marc Jacobs Tweet Shop

The Beauty Boy YouTube success

Figure 15: The Beauty Boy eyebrow tutorial, November 2015

Adverts now on Instagram

Brand Initiatives

Kind is Simple store

Figure 16: The #KindIsSimple store, London, May 2015

L'Oréal explores connected make-up to learn about consumers

LiLash launches feedback comp

Figure 17: LiLash reviews competition, November 2015

Tarte cosmetics partners with ShadeScout

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Beauty Online - UK - January 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Netflix publish moustache styling guide

Figure 18: Screenshot of Netflix Moustache search on Twitter, November 2015

Retailer campaigns

Feelunique.com celebrates 10 years

Figure 19: Promotional email for feelunique.com purchasing incentives, September 2015

Space.NK boosts online sales with exclusive online discount

Figure 20: Space.NK online sales promotion, October 2015

The Outnet launches beauty offering

Figure 21: The Outnet beauty launch, October 2015

Tesco Beauty Bloggers

## The Consumer – What You Need to Know

Supermarkets most commonly used BPC online retailer

Subscription market shows growth

Consumers more likely to use web for research

YouTube a powerful force in BPC social media

Building a more educated BPC consumer base

Drawbacks of online BPC shopping

Skin apps have untapped potential

Apps can help guide product purchases

Beauty blogs have a loyal audience

Brand websites have the expertise

## BPC Online Retailer Preferences

Supermarkets most commonly used BPC online retailer

Figure 22: Online retailers used to purchase BPC products, October 2015

Subscription market shows growth

Figure 23: Amazon Dash button example, 2015

Older men are not online

Figure 24: Those who have not shopped for BPC products online in the last 12 months, by age and gender, October 2015

Figure 25: Space.NK email marketing communications, September 2015

## BPC Online Activities

Consumers more likely to use web for research

Figure 26: BPC online activities, October 2015

Online facilitates price comparisons

YouTube a powerful force in BPC social media

Reviews are valued but not given

## Attitudes towards BPC Online

Building a more educated BPC consumer base

Figure 27: Attitudes towards BPC online, October 2015

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Beauty Online - UK - January 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Drawbacks of online BPC shopping

Connected devices should target the male market

### Beauty Apps

Skin tracker apps have untapped potential

Figure 28: Attitudes towards beauty apps, October 2015

Scalp health of interest to young men

Apps can help guide product purchases

Young women key app users

Figure 29: Young women's attitudes towards beauty apps, October 2015

### Opinion of Online Beauty Sources

Blogs have a poor perception outside of their core target

Figure 30: Correspondence analysis – Opinion of online beauty sources, October 2015

Online beauty retailers considered impartial

Figure 31: Perceptions of online beauty sources, October 2015

Brand websites have the expertise

Figure 32: Lipcote Lipstick Finder, December 2015

Magazine websites compete with blogs

### Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Abbreviations

Fan chart forecast

Correspondence analysis

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)