

Report Price: £1995.00 | \$2478.79 | €2334.35

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



"Consumers are growing bored due to less innovation and advertising spend in hand, body and footcare. The prestige sector should copy professional treatments as the trade down from premium to mass brands accelerates, or partner with fashion and social media."

- Alex Fisher, Senior Beauty Analyst

This report looks at the following areas:

- No need for prestige
- Footcare too functional

Growth is stalling in the hand, body and footcare category due to competitive pricing and a 'trade down' mentality. Value sales have inched from £540 million in 2015 to just £541 million in 2016.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: 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



Report Price: £1995.00 | \$2478.79 | €2334.35

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

Excluded

Executive Summary

The market

Modest growth predicted for the category

Figure 1: Best- and worst-case forecast for UK retail value sales of hand. body, and footcare, 2011-21

Companies and brands

E45 appeals to comfort concerns in bodycare

Figure 2: UK brand shares in value sales of mass-market bodycare, year ending January 2017

Irritation pushes handcare brands forward

Figure 3: UK brand shares in value sales of mass-market handcare, year ending January 2017

Footcare takes a step back

Figure 4: UK brand shares in value sales of mass-market footcare, year ending January 2017

Decline in true innovation

Figure 5: New product development in the hand, body and footcare category, by launch type, January 2014-February 2017

The consumer

Comfort before beauty

Figure 6: Skin concerns, by body part, January 2017

Category advancement is in our hands

Figure 7: Change in product usage in the last 12 months, January 2017

Bring in the professionals

Figure 8: Behavioural changes over the last 12 months ("yes" responses only), all vs youngest demographics, January 2017

Special offers no longer enough

Figure 9: Reasons for purchasing new products, January 2017

Keep it simple, keep it safe

Figure 10: Attitudes towards hand/body/footcare products, January 2017

What we think

Issues and Insights

No need for prestige

The facts

The implications

Footcare too functional

The facts

The implications

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2478.79 | €2334.35

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

The Market - What You Need to Know

Prestige grows, but not enough

Footcare limping behind

A hands-on approach to hydration

Market Size and Forecast

Category indifference could create trouble for prestige

Figure 11: UK retail value sales of hand, body and footcare, at current and constant prices, 2011-21

Modest growth predicted for the category

Figure 12: Best- and worst-case forecast for UK retail value sales of hand, body and footcare, 2011-21

Forecast methodology

Market Segmentation

Step change needed in footcare

Figure 13: UK retail sales value of hand, body and footcare, by segment, 2015-16

Basic bodycare reigns

Figure 14: UK retail sales value of bodycare, by segment, 2015-16

Mass market poised for growth

Figure 15: UK retail value sales of hand, body and footcare, mass vs prestige, 2015-16

Channels to Market

Less traditional channels seizing value

Figure 16: UK retail value sales of hand, body and footcare, by outlet type, 2015-16

Market Drivers

Population growth amongst youngest and oldest

Figure 17: Trends in the age structure of the UK population, 2011-21

Needs of the next generation

Figure 18: Children's usage of BPC Products, by gender, August 2016

Confidence in personal finance under question

Figure 19: GFK NOP Consumer Confidence Index, Jan 2013-Jan 2017

A struggle for prestige

Figure 20: Brand types of beauty products most commonly used, October 2016

The cycle of indifference

Figure 21: Time spent on maintaining/enhancing face, hair and body, December 2016

Social media pressure

Figure 22: Usage of select social and media networks in the last three months, by age, March 2016

Companies and Brands - What You Need to Know

Bodycare gets intensive

Handcare users need soothing relief

Footcare takes a step back



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2478.79 | €2334.35

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

Innovation decline driven by bodycare

Spend in TV advertising slides

Market Share

Specialist dry skin brands doing well in bodycare

Figure 23: UK retail value sales of mass-market bodycare, by brand, years ending January, 2016 and 2017

Handcare market experiencing the most growth overall

Figure 24: UK retail value sales of mass-market handcare, by brand, years ending January, 2016 and 2017

Footcare remains medicinal as Scholl sees large losses

Figure 25: UK retail value sales of mass-market footcare, by brand, years ending January, 2016 and 2017

Launch Activity and Innovation

Hands get increased attention

- Figure 26: New product development in the hand, body and footcare category, by sub-category, January 2014-February 2017
- Figure 27: Examples of range extensions through spray formats and larger packs, 2016-17
- Figure 28: New product development in the hand, body and footcare category, by launch type, January 2014-February 2017

Growth of mass market

- Figure 29: New product development in the hand, body and footcare category, by price positioning, January 2014-February 2017
- Figure 30: New product development in the hand, body and footcare category, by branded vs own-label, January 2014-February 2017

All to play for

- Figure 31: New product development in the hand, body and footcare category, by ultimate company, 2016
- Figure 32: Range extensions in the hand, body and footcare category, 2016-17

Demanding the facts

- Figure 33: Percentage change in biggest hand, body and footcare product launch claims, 2015-16
- Figure 34: Hand and bodycare NPD featuring direct claims, 2016-17

Advertising and Marketing Activity

Advertising spend falls as traditional avenues receive less investment

Figure 35: Total above-the-line, online display and direct mail advertising expenditure on hand, body and footcare, January 2014–February 2017

Major players end their TV campaigns

Figure 36: Recorded above-the-line, online display and direct mail advertising expenditure on hand, body and footcare, by media type, January 2014-February 2017 Figure 37: Share of recorded above-the-line, online display and direct mail advertising expenditure on hand, body and footcare, by top advertisers 2016

Figure 38: NIVEA Body Q10 Firming Lotion advert, 2016

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 39: Attitudes towards and usage of selected brands, March 2017

Kev brand metrics

Figure 40: Key metrics for selected brands, March 2017

Brand attitudes: Dove's body confidence campaigns strike a chord with users

Figure 41: Attitudes, by brand, March 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2478.79 | €2334.35

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

Brand personality: Intensive hydration brands seem lacklustre

Figure 42: Brand personality - macro image, March 2017

Garnier's youthful status may affect perceived expertise and effectiveness

Figure 43: Brand personality - micro image, March 2017

Brand analysis

Dove's widening appeal helps brand image but not sales

Figure 44: User profile of Dove, March 2017

E45 benefits from interest in basic, hydrating formats

Figure 45: User profile of E45, March 2017

With positive user experiences, Aveeno invests in awareness

Figure 46: User profile of Aveeno, March 2017

Underwhelming consumer experience hampers trust in Garnier

Figure 47: User profile of Garnier, March 2017

Palmers lacks much identity

Figure 48: User profile of Palmers, March 2017

Nip+Fab falls victim to the dwindling interest in beauty claims

Figure 49: User profile of Nip+Fab, March 2017

The Consumer - What You Need to Know

Age before beauty

Category advancement is in our hands

Bring in the professionals

The push and pull of social media

Keep it simple

Skin Concerns

Hands denote age while feet lack moisture

Figure 50: Skin concerns, by body part, January 2017

Older users go back to basics

Figure 51: Number of skin conditions, all vs oldest demographics, January 2017

Product Usage

Hand usage is rising

Figure 52: Change in product usage in the last 12 months, January 2017

Figure 53: Selected behavioural changes among those using less of selected product formats, January 2017

Footcare signals an advanced repertoire

Figure 54: Usage of product formats (same usage as 12 months ago), by users of specific products, January 2017

Figure 55: VOESH's Pedi in a Box, March 2017

Behavioural Changes

Recessionary behaviour is on the rise

Figure 56: Behavioural changes over the last 12 months, January 2017

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300



Report Price: £1995.00 | \$2478.79 | €2334.35

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

Professional treatments favoured over prestige

Figure 57: Selected behavioural changes over the last 12 months ('yes' reponses only), by age group, January 2017

Figure 58: Product launches incorporating professional techniques, 2015-17

Men need a helping hand

Figure 59: Selected behavioural changes over the last 12 months amongst men ('yes' responses only), by age, January 2017

Figure 60: AB Crew bodycare launches, 2015

Attitudes towards Hand, Body and Footcare

Transparency garners trust

Figure 61: Attitudes towards hand/body/footcare products, January 2017

Simplicity could drive category growth

Figure 62: Selected attitudes towards hand/body/footcare products (any agree), by purchase type, January 2017

Purchasing of Hand, Body and Footcare

Adults either try or don't even buy

Figure 63: Purchasing behaviour in the last 12 months, January 2017

Lotion users are less experimental

Figure 64: Formats used, by purchase of new products in the last 12 months, January 2017

Special offers risk undermining interest

Figure 65: Reasons for purchasing new products, January 2017

Hand and footcare are more considered purchases

Figure 66: Selected reasons for purchasing new products, by product type, January 2017

New influencers may breathe life into bodycare

Figure 67: Personal care packaging collaborations with fashion designers, 2016

Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

Appendix - Companies and Brands

Figure 68: New product development in the bodycare segment by launch type, January 2014-February 2017

Figure 69: New product development in the handcare segment, by launch type, January 2014–February 2017

Figure 70: New product development in the footcare segment, by launch type, January 2014-February 2017

Figure 71: Percentage change in biggest bodycare product launch claims, 2015-16

Figure 72: Percentage change in biggest handcare product launch claims, 2015-16

Figure 73: Percentage change in biggest footcare product launch claims, 2015-16