

Report Price: £1995.00 | \$2693.85 | €2245.17

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



"The market decline continues as men shrink their skincare regimes. While they look to brands they know to give them affordable options and educate them, big manufacturers are concentrated elsewhere. The advertising narrative needs to appeal to new priorities among men"

- Alex Fisher, Senior Beauty Analyst

This report looks at the following areas:

- Beards drive involvement
- Budget concerns
- Men left in the dark

The men's facial skincare market is expected to decline as men continue to shrink their skincare regimes. Unaware of many aspects of their skin, men look to brands they know to give them affordable options and educate them, but the success of women's skincare means big manufacturers have shifted their focus here.

This has left room for smaller male-specific brands to flourish; changing the way they talk to men about skincare to reflect their changing priorities, simplifying product ranges, communicating about skin health, and continuing to innovate in the growing segment of beard care. As beards seem to be a driver for engagement in the category, they need to feature more heavily in skincare advertising.

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 | \$2693.85 | €2245.17

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

The market

Market decline likely to accelerate

Figure 1: Best- and worst-case forecast of UK value sales of men's facial skincare, 2013-23

Companies and brands

And the winner is...

Figure 2: Brand shares of UK mass-market men's facial skincare, year ending May 2018

Think like a woman

Figure 3: New product development in men's facial skincare, by launch type, January 2015-May 2018

The consumer

Feeling their way

Figure 4: Features of men's facial skin, May 2018

Tried and tested routines

Figure 5: Facial skincare products used by men, May 2018

Engage at the shelf

Figure 6: Factors considered important when buying men's facial skincare, May 2018

A balancing act

Figure 7: Changes in men's facial skincare routines, May 2018

Seen but not heard

Figure 8: Attitudes towards men's facial skincare, May 2018

Beards drive engagement

Figure 9: Facial skincare products used by men (nets), by type of facial hair, May 2018

What we think

Issues and Insights

Beards drive involvement

The facts

The implications

Budget concerns

The facts

The implications

Men left in the dark

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 | \$2693.85 | €2245.17

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

Market decline likely to accelerate

Prestige brands and channels suffer

Older men lack involvement

Market Size and Forecast

Market falls from lack of interest

Figure 10: UK retail value sales for men's facial skincare, at current and constant prices, 2013-23

Slower decline forecast

Figure 11: Best- and worst-case forecast of UK value sales of men's facial skincare, 2013-23

Forecast methodology

Market Segmentation

Prestige value falls faster than mass market

Figure 12: UK retail value sales of men's facial skincare, mass market vs prestige, 2016 and 2017

Figure 13: L'Oréal Men Expert Barber Club range, April 2018

Channels to Market

Retailers follow mass marketmass-market trend

Figure 14: UK retail value sales of men's facial skincare, by retail channel, 2016 and 2017

Market Drivers

Population trend highlights market gap

Figure 15: Trends in UK male population, 2012-22

Little gifting to men

Figure 16: BPC gift recipients, by gender, October 2017

Re-imagining masculinity

Figure 17: Facets of a good male role model, November 2016

Figure 18: Lynx 'Find Your Magic' campaign, April 2017

Male confidence

eLearning

Companies and Brands - What You Need to Know

And the winner is...

Think like a woman

Content over channel

A fresh pair of eyes

Market Share

Bulldog battles the decline

Figure 19: Brand shares of UK mass-market men's facial skincare, years ending May, 2017 and 2018

Launch Activity and Innovation

Innovation stabilises in 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 | \$2693.85 | €2245.17

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

Figure 20: New product development in men's facial skincare, by launch type, January 2015-May 2018

Figure 21: Beard care launches from existing brands, 2017

Claims reflect health focus

Figure 22: Top five men's facial skincare claims in growth and decline, 2016-17

Beards renew brands' approach

Figure 23: Top 10 men's facial skincare ultimate companies and other, 2017

Figure 24: Minimalist men's facial skincare launches, 2017

Advertising and Marketing Activity

Advertising gets physical

Figure 25: Total above-the-line, online display and direct mail advertising expenditure on men's facial skincare, January 2015-April 2018

Figure 26: NIVEA Men Protect and Care advert, 2017

Major players dominate market

Figure 27: Total above-the-line, online display and direct mail advertising expenditure on men's facial skincare, by top companies and others, 2017
Figure 28: Bulldog Skincare bank robbery advert, 2017

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 29: Attitudes towards and usage of selected brands, May 2018

Key brand metrics

Figure 30: Key metrics for selected brands, May 2018

Brand attitudes: High-quality products not always seen as worth paying more for

Figure 31: Attitudes, by brand, May 2018

Brand personality: Premium brands have a more stuffy image

Figure 32: Brand personality - Macro image, May 2018

Successful brands are quirky and youthful

Figure 33: Brand personality - Micro image, May 2018

Brand analysis

NIVEA Men can widen views of masculinity

Figure 34: User profile of NIVEA Men, May 2018

Price of L'Oréal Men Expert is a barrier

Figure 35: User profile of L'Oréal Men Expert, May 2018

ClarinsMen can show how it's done

Figure 36: User profile of ClarinsMen, May 2018

Bulldog's quirky image appeals to young men

Figure 37: User profile of Bulldog, May 2018

The Consumer - What You Need to Know

Feeling their way

Tried and tested routines



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 | \$2693.85 | €2245.17

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

Engage at the shelf

A balancing act

Seen but not heard

Beards drive engagement

Skin Type

Feel the difference

Figure 38: Features of men's facial skin, May 2018

Figure 39: Features of men's facial skin, by age, May 2018

Beards remain in fashion

Figure 40: Presence of facial hair among men, by age, May 2018

Use of Facial Skincare

A well-established basic routine

Figure 41: Facial skincare products used by men, May 2018

Figure 42: Treatment/experience-focused wipes launches, 2016-18

Changing priorities

Figure 43: Facial skincare products used by men, by age, May 2018

Purchasing Facial Skincare

Men take responsibility

Figure 44: Responsibility for purchasing facial skincare, by age, May 2018

Functional factors most important

Figure 45: Factors considered important when buying men's facial skincare, May 2018

Advertising has little impact

Figure 46: Factors considered important when buying men's facial skincare, by age, May 2018

Behavioural Changes

Out with the old

Figure 47: Changes in men's facial skincare routines, May 2018

Care to economise

Figure 48: Changes in men's facial skincare routines, by products used (nets), May 2018

Attitudes towards Facial Skincare

What about us?

Figure 49: Attitudes towards men's facial skincare, May 2018

The 'how-to' of healthy skin

Figure 50: Clarins Beauty Coach men's post, June 2018

The age of ignorance

Figure 51: Agreement with specific statements, by age, May 2018

Figure 52: Agreement with the statement "It is not necessary to use anti-ageing products at my age", by age, May 2018

Figure 53: L'Oréal Men Expert Vita Lift advert starring Nikolaj Coster-Waldau, June 2018

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 | \$2693.85 | €2245.17

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

Impact of Facial Hair

With beards comes wisdom

Figure 54: Features of men's facial skin, by presence of facial hair, May 2018

Figure 55: Features of men's facial skin, by type of facial hair, May 2018

Care and attention

Figure 56: Facial skincare products used by men (nets), by type of facial hair, May 2018

Figure 57: Skin caring products used, by type of facial hair, May 2018

Figure 58: Skin cleansing products used, by type of facial hair, May 2018

Tell me about it

Figure 59: Responsibility for purchasing facial skincare, by type of facial hair, May 2018

Figure 60: Factors considered important when buying men's facial skincare, by type of facial hair, May 2018

What you don't know

Figure 61: Agreement with selected attitudinal statements, by type of facial hair, May 2018

Appendix - Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology