

## Women's Facial Skincare - UK - July 2019

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’s previous trajectory for growth has been short-lived, and the market is expected to decline to an estimated £1.16 billion in 2019. The move away from K-Beauty-inspired routines has been driven by women’s evolving interest in radiance and glow.”

– Alex Fisher, Associate Director BPC

This report looks at the following areas:

Serums and oils are the formats chosen to create this look, while other products have been dropped from the routine in favour of lifestyle changes.

- Wipes are on the naughty list
- Deconstructed skincare
- Glow minimises care routine

**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

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

# Women's Facial Skincare - UK - July 2019

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 will stabilise
    - Figure 1: Best- and worst-case forecast of the UK value sales of women's facial skincare, 2014-24
- Companies and brands
- Accept the change
  - Figure 2: UK retail value sales of mass market women's facial skincare, by brand, year ending May 2019
- Prestige pushes hydration
  - Figure 3: New product launches in the women's facial skincare market, by launch type, January 2016-May 2019
- The consumer
- Cause for concern
  - Figure 4: Areas of concern on face/neck, May 2019
- Keep cleansing simple
  - Figure 5: Facial cleansing products used in the last 12 months, May 2018 and May 2019
- Caring becomes about glow
  - Figure 6: Facial caring products used in the last 12 months, May 2018 and May 2019
  - Figure 7: Facial treatment products used in the last 12 months, May 2018 and May 2019
- The right balance
  - Figure 8: Changes in facial skincare routine/behaviour over the last 12 months, May 2019
- Water is a winner
  - Figure 9: Correspondence analysis for facial caring formats, May 2019
- What we think

### Issues and Insights

- Wipes are on the naughty list
  - The facts
  - The implications
- Deconstructed skincare
  - The facts
  - The implications
- Glow minimises care routine
  - The facts
  - The implications

### The Market – What You Need to Know

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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)

# Women's Facial Skincare - UK - July 2019

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.

Market will stabilise  
The growth of big hitters  
Retailers on a journey  
Living my best life

## Market Size and Forecast

Women pare back  
Figure 10: UK retail value sales of women's facial skincare, at current and constant prices, 2014-24

Market set to stabilise  
Figure 11: Best- and worst-case forecast of the UK value sales of women's facial skincare, 2014-24

Forecast methodology

## Market Segmentation

Quality over quantity  
Figure 12: UK retail value sales of mass market women's facial skincare, by segment, years ending May 2018 and 2019  
Figure 13: UK retail value sales of mass market women's facial skincare, mass vs prestige, years ending May 2018 and 2019

No more double cleansing

## Channels to Market

Looking for niche brands  
Figure 14: UK retail sales value of women's facial skincare, by outlet type, 2017 and 2018

The premium experience  
Figure 15: Boots' new beauty hall concept, March 2019

## Market Drivers

Older women could fuel market downturn  
Figure 16: Trends in the age structure of the UK female population, 2013-23

Premium not always expensive  
Figure 17: Boots No7 HydraLuminous Water Surge Gel, May 2019

Cosmetics strengthen their benefits

Wipe out

Double cleanse or straight to bed?  
Figure 18: Time spent on evening beauty and grooming routines, by gender, February 2019

Show me my reflection  
Figure 19: Interest in diversity in advertising, October 2018

## Companies and Brands – What You Need to Know

Accept the change  
Prestige pushes hydration  
Return to TV  
Build an identity

## Market Share

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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)

# Women's Facial Skincare - UK - July 2019

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.

## A clean sweep

Figure 20: UK retail value sales of mass market women's facial skincare, by brand, years ending May 2018 and 2019

## Don't dwell on age

Figure 21: L'Oréal Revitalift Filler +Hyaluronic Acid 7-Day Cure Replumping Ampoules, April 2019

## Launch Activity and Innovation

### Face care moves the category forward

Figure 22: New product launches in the women's facial skincare market, by launch type, January 2016-May 2019

Figure 23: New product launches in the women's facial skincare market, by segment, January 2016-May 2019

### Hydration hits the big time

Figure 24: Top growing and declining formats/textures in women's facial skincare, 2017-18

Figure 25: NPD examples of top growing formats/textures, 2018

Figure 26: Top growing and declining claims in women's facial skincare, 2017-18

Figure 27: New products with brightening/illuminating AND antioxidant claims, 2018

### Prestige pushes back

Figure 28: New product launches in the women's facial skincare market, by price positioning, January 2016-May 2019

Figure 29: New product launches in the women's facial skincare market, by ultimate companies and other, 2018

## Advertising and Marketing Activity

### Outdoor gains share

Figure 30: Total above-the-line, online display and direct mail advertising expenditure on women's facial skincare, by media type, Jan 2016-May 2019

Figure 31: NIVEA Daily Essentials Urban Skin Detox Night Gel Cream, September 2017

### Big players reduce spending

Figure 32: Total above-the-line, online display and direct mail advertising expenditure on women's facial skincare, by top companies and other, 2018

### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 33: Attitudes towards and usage of selected brands, April 2019

### Key brand metrics

Figure 34: Key metrics for selected brands, April 2019

### Brand attitudes: Major brands aren't seen as interested in consumer wellbeing

Figure 35: Attitudes, by brand, April 2019

### Brand personality: Brands considered ethical also struggle with boring image

Figure 36: Brand personality – macro image, April 2019

### Many struggle to separate the image of different prestige brands

Figure 37: Brand personality – micro image, April 2019

### Brand analysis

#### La Roche-Posay makes sensitivity premium

Figure 38: User profile of La Roche-Posay, April 2019

### Simple prepares for the future

**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)

## Women's Facial Skincare - UK - July 2019

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 39: User profile of Simple, April 2019

Figure 40: Simple biodegradable cleansing wipes, 2019

L'Oréal Paris could win with Millennials

Figure 41: User profile of L'Oréal Paris, April 2019

Garnier loses strong image

Figure 42: User profile of Garnier, April 2019

Pixi's success could falter

Figure 43: User profile of Pixi, April 2019

Superdrug B. needs to forge its own way

Figure 44: User profile of Superdrug B., April 2019

Nip+Fab going after the next generation

Figure 45: User profile of Nip+Fab, April 2019

Figure 46: NIP + FAB Purify Teen Skin Fix Salicylic Acid Concentrate, June 2019

Ole Henriksen confuses users

Figure 47: User profile of Ole Henriksen, April 2019

### The Consumer – What You Need to Know

Cause for concern

Keep cleansing simple

Caring becomes about glow

The right balance

Water is a winner

### Areas of Concern

Ingredients for eyes

Figure 48: Areas of concern on face/neck, May 2019

Figure 49: Eye care innovation containing glycolic acid, 2018

Figure 50: Overnight anti-ageing treatments containing retinol, 2018

Stamping out stress

Figure 51: Areas of concern on face/neck, by age, May 2019

Figure 52: Realine Frown Line Patches, May 2018

Figure 53: Sothys nO2ctuelle Chrono-Destressing Sleeping Mask, March 2018

### Facial Cleansing Routines

Return of the washcloth

Figure 54: Facial cleansing products used in the last 12 months, May 2018 and May 2019

Figure 55: Face/neck care NPD featuring reusable cloths, 2018

Simpler times

Figure 56: Repertoire of facial cleansing products used in the last 12 months, May 2018 and May 2019

Figure 57: Stick format innovation in facial skincare, 2018-19

Older Millennials fear for their face

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)

# Women's Facial Skincare - UK - July 2019

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 58: Percentage point change in users of facial cleansing products, by age, May 2018 vs May 2019

## Facial Caring Routines

### Morning dew

Figure 59: Facial caring products used in the last 12 months, May 2018 and May 2019

Figure 60: Facial oils using glow terminology, 2019

### Oil aboard

Figure 61: Percentage point change in use of facial caring products, by age, May 2018 vs May 2019

### A nourished glow

Figure 62: Facial treatment products used in the last 12 months, May 2018 and May 2019

Figure 63: Atlantis Skincare Glowing Skin Serum Gel, 2018

### Masking the problem

Figure 64: Percentage point change in use of facial treatment products, by age, May 2018 vs May 2019

## Changes in Behaviour

### Health remains internal

Figure 65: Changes in facial skincare routine/behaviour over the last 12 months, May 2019

### A balancing act

Figure 66: Changes in specified facial skincare routine/behaviours over the last 12 months, by age, May 2019

Figure 67: Vitamins and supplements with beauty-enhancing claims, 2018

### Authority figures

## Format Associations

### Serum is a winner

Figure 68: Correspondence analysis for facial caring formats, May 2019

### It's not all bad

Figure 69: Words/phrases associated with facial caring formats, May 2019

## Appendix – Data Sources, Abbreviations and Supporting Information

### Abbreviations

Consumer research methodology

Correspondence methodology

Forecast methodology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)