

December 2013

## Black Consumers and Personal Care - US

“Black consumers spend a tremendous amount of their discretionary income on looking good, whether we’re talking about apparel, personal care products, or services. The recent recession had little impact on what Black consumers spent in the personal care category. Expenditures have remained stable and in some cases there have been ...

## Vitamins, Minerals and Supplements - US

“While vitamin sales are robust, there are a few factors that could contribute to a decline in the category. As consumers continue to eat a healthier diet, the need for a separate supplement could be eliminated. Additionally, negative press about the quality and necessity of vitamins could erode usage and ...

## Senior Lifestyles - US

“Today’s seniors are living longer, are more connected and informed, and lead a more active lifestyle than they did a few decades ago. As the 76 million strong Baby Boomer generation shifts toward senior status, the future over-65s will be even more diverse, tech savvy, active in the workforce, and ...

## Natural and Organic Personal Care Consumer - US

“Consumers are expressing some skepticism and apathy toward the natural and organic personal care category. However, this represents an opportunity for brands to be more transparent, show shoppers the long-term value of going green, address consumers based on their current lifestage needs, and be creative with retailing.”

## Suncare - UK

“The rise in the population of the eldest demographics poses challenges as well as opportunities, as although the over-55s are the most knowledgeable when it comes to the dangers of the sun, they are least likely to use sun protection and self-tanning products. However, as they continue to seek tans ...

## Hispanics and Retail - US

“Hispanics are social shoppers. They enjoy shopping and often shop with family and friends. It is therefore not surprising that recommendations from friends and family are the single most influential factor for Hispanic buyers. Though obviously neither friends nor family, marketers have an opportunity to replicate the influence of kin ...

## Shopping for Beauty Products - US

“For most consumers, beauty products shopping is fairly routine. Most buy beauty products to replace items that they use regularly and choose mass merchandisers and drug stores to do their shopping. While they are loyal to retailers and products, there is somewhat of an interest to try new products. Retailers ...

## Beauty Online - UK

“The money saving appeal and convenience of shopping online has resulted in consumers becoming increasingly comfortable on e-commerce platforms. Engaging with consumers and encouraging online shoppers to browse can help the online experience become more appealing than in-store.”

## The Savvy Shopper - UK

“Mobile platforms and tools are already changing the savvy shopping repertoire. Increasing adoption of smartphones and tablets, as well as increased availability of online connectivity, signal a bright future for m-commerce and t-commerce.”

## November 2013

### Activities of Kids and Teens - US

“Compared to previous generations, kids and teens increasingly live a sedentary lifestyle. These digital natives are interconnected and tend to divide attentions across multiple platforms and channels, prompting impatient behaviors, quick-fix mentality, and instant gratification. Their loyalty is likely to mirror this trend, spreading thinly across brands, and easily switched ...

### Home Hair Color - US

“Functional benefits such as covering grays and long-lasting results are essential, but have also become expected in the hair coloring category. Shoppers are seeking more customized solutions for their hair coloring needs—through products developed specifically for their age, ethnicity, lifestage, or hair type.”

### Hair Colourants and Home Perms - UK

“Although the market has seen notable innovation from 2012-13, driven by new formulas and easier application methods, health concerns remain an area of some contention in the media. Brands have a responsibility to their users to be more transparent about product content and facilitate easier allergy testing initiatives to alleviate ...

## October 2013

### Hispanic Attitudes toward Advertising - US

“The Hispanic population continues to experience growth, primarily due to high birthrates, and this will have a significant impact on the makeup of America. Hispanics will likely experience some tension between coming of age in American society and growing accustomed to the American way of life while concurrently wanting to ...

### Shaving and Hair Removal Products - US

### Lifestyles of Young Adults - UK

“The internet has become the main hub of activity for today’s young adults, as over half now prefer to watch TV programmes online, rather than on the TV set. Brands would benefit from heeding this trend and adjusting their marketing mix to incorporate online sources and social media.”

### Sun Protection and Sunless Tanners - US

“The sun protection and sunless tanners category is starting to show signs of struggle. There are some specific challenges that need to be addressed. Companies need to better engage with men to educate them around sun protection and grow their usage. Determining ways to increase regular sunscreen usage is also ...

### Gastrointestinal Remedies - UK

“A reluctance to take gastrointestinal remedies and a reactionary rather than precautionary approach to digestive health has hindered the market in the past. This highlights an opportunity for encouraging people to take a more proactive approach to their digestive health, particularly as there is a high interest in products that ...

### Men's Personal Care - US

“The men’s personal care category is expected to grow steadily into 2018. However, there are some challenges. Companies need to look for ways to better engage with older men, determine how male-specific skincare and haircare products can better compete with general market products, and improve the current shopping experience.”

### Lifestyles of Dads - UK

## Beauty and Personal Care - International

“Consumers are price driven when shopping the shaving category, but they also demand performance and simplicity. Products that deliver improved functionality and convenience while utilizing technology to encourage increased usage could help drive category growth.”

“Today’s dads’ involvement in children’s lives will influence the attitudes of the next generation of parents and will shape their views on parenting and family life. Companies and brands play an instrumental role in painting a picture of what it means to be a father in modern Britain, especially considering ...

### Men's Toiletries - UK

“Growth in the men’s toiletries market came to a halt in 2013 as fashion moved toward a relaxed image, and money-saving behaviours resulted in a reduced spend. However, the trend for facial hair creates an opportunity for male toiletries to expand into areas less catered for, such as facial care ...

### First Aid - UK

“The first aid category has remained stagnant and shown small incremental declines in value sales since 2008. The driving forces behind this are a combination of stiff competition from own-label brands, low investment in advertising and brand communication, as well as low consumer confidence in treating other people’s wounds/injuries ...

### Hispanics and Personal Care - US

“In order to grow the Hispanic market, personal care manufacturers need to find new ways to entice Hispanics to try new products and get excited about the shopping experience. Personal care products don’t need to be thought of as a commodity; less acculturated Hispanics still have a long way to ...

## September 2013

### Marketing to Moms - US

“In addition to advertising overexposure, moms are confronted with issues such as safety, childhood bullying, health and nutrition, and the influence of social media. Understanding moms’ top concerns as they relate to her children—and her aspirations for them—can help brands tailor messaging that will resonate with moms and assist with ...

### Lifestyles of Mums - UK

“Brands that are responsive to mums’ concerns and aim to grow with their preferences (which are increasingly expressed via social media channels) will be in a stronger position when competing for their consumer loyalty.”

### Marketing to Non-Traditional Parents - US

“Non-traditional parents face the same challenges as traditional parents in providing for their kids and doing so in the most cost-effective ways possible. Marketers can acknowledge non-traditional families and the fact that their family settings have become more common by including them in advertising.”

### Vitamins and Supplements - UK

“Although the market has seen growth in value in 2012 driven by special offers and promotions, people are not experimenting and special offers may be hindering overall growth in the category. Different approaches in special offers, for example bundling discounted vitamins with products in other categories, could encourage experimentation. Legislative ...

### Men's and Women's Shaving and Hair Removal - UK

### Fragrances - US

## Beauty and Personal Care - International

“Despite the increasing availability of permanent hair removal devices for use in the home, the high initial cost is still off-putting for most consumers. The convenience, flexibility and price of razors is already of high appeal to both men and women alike, although advances in lubricating strips and moisture bars ...

“The fragrance category is highly competitive, with fine fragrances often being viewed as occasional use items. However, innovations that add functionality combined with creative retailing and packaging opportunities could lead to increased usage, helping to propel future category growth.”

### August 2013

#### Black Haircare - US

“Image is everything to Black consumers and they are keenly aware that hair plays a key role in how people view them. In the Black community, there are sensitivities revolving around hair. Today, Blacks are learning to embrace and love their hair. It is likely that natural hairstyles are here ...

#### Luxury Goods Retailing - International

“A number of brands – including Tiffany, Burberry and Gucci – have made efforts to push upscale in recent years. And there looks to be scope for brands to continue this journey and so capture the more resilient ultra-affluent shopper.”

#### Teen and Tween Beauty and Personal Care Consumer - US

“Capturing the attention of the multitasking and often distracted teen and tween audience creates challenges for marketers. Ultimately, capitalizing on teens’ and tweens’ proclivity for sharing information while ‘influencing the influencer’ will be a winning strategy for beauty and personal care brands.”

#### Sexual Health - UK

“As women take more control of their contraception, there is much the market can do to better target this demographic. Women are better informed about the dangers of unprotected sex, and are more likely to use condoms at the beginning of a relationship; however marketing is currently aimed more at ...

#### Men's and Women's Fragrances - UK

“Most consumers prefer to test fragrance before they buy, resulting in sales from bricks and mortar stores eclipsing online retail for fragrances. However, encouraging more buyers to venture online could result in boosted sales for completely new or niche perfumes. Innovative and dynamic communication should therefore be a key area ...

### July 2013

#### Lifestyles of the Under- and Unemployed - US

“Many Americans have not recovered from the financial impact of the Great Recession resulting in a rise in the percentage of Americans who are downwardly mobile. These adults need products and services commonly associated with a middle-class lifestyle buy at budget

#### Color Cosmetics - US

“Sustaining stronger rates of growth in the color cosmetics category will rely on new product innovation as well as the utilization of technology and expanded education efforts to help women better navigate this sometimes overwhelming category.”

rates as well as services (childcare, transportation) that extend ...

## Colour Cosmetics - UK

“Consumers are continually looking for ways to save time. Growth opportunities for colour cosmetics products lie in creating products which are quicker and easier to use to appeal to modern women.”

## June 2013

### Asian American Premium Brand Consumer - US

“Asian American consumers control substantial collective buying power, but cannot be addressed as one group. Because there are multiple languages and multiple generations to address, promoters of luxury goods to Asian audiences would do well to focus on a particular Asian subgroup.”

### Body Care - US

“While the body care category has been struggling, shifting consumer’s focus from price and promotional incentives to improved functionality and value-added benefits should help put the category on a growth track.”

## May 2013

### Attitudes towards Cosmetic Surgery - UK

“The ageing population in the UK bodes well for the growth in the surgical and non-surgical cosmetic procedures market. However, the industry would do well to step up their efforts towards a commonly accepted set of standards to reassure potential customers that they are in safe hands.”

### Facial Skincare - UK

### Body, Hand and Footcare - UK

“More than one in three people feel a twinge of guilt about their bodycare routine: companies have access to a potentially receptive target group (35%) who feel they should use bodycare products more often. Finding a way to harness the guilt will help boost usage and stem declining value and ...

### Oral Healthcare - UK

“Appearance, health and hygiene remain the most important drivers in this category, with older people more focused on health and hygiene and younger people more focused on appearance. With the growth of the oldest and youngest demographics predicted, this offers opportunities for more tailored product offerings. Own-label remains competitive in ...

### Sanitary Protection and Feminine Hygiene Products - UK

“With an ageing population, the market could cater better for women who are leaving the sanitary protection market but entering the adult incontinence market. Closing the gap between pre- and post-menopause could come in the form of product ranges targeted to specific needs of this time in a woman’s life ...

### Feminine Hygiene and Sanitary Protection Products - US

## Beauty and Personal Care - International

“Facial care remains an integral part of beauty and grooming routines. However in a results-driven category, consumers are very demanding of their facial skincare products and brands tread a fine line between igniting interest and the ability to deliver on promises.”

### Facial Skincare - US

“The sheer number of facial skincare products, claims, and benefits can create confusion for consumers when shopping the category, potentially deterring them from trying new products. Innovative retailing and marketing strategies to help consumers better navigate this overwhelming category may offer a fresh approach to facial skincare.”

### Oral Care - US

“The oral care market can expect to see growth in the coming years due to consumers’ regular usage of these products along with a lack of competitive alternatives. However, this market does have some issues it will need to address. In some segments, private label offerings are slowly starting to ...

“The feminine hygiene and sanitary protection products market is up against several challenges, including private label brands and other new product innovations. Brands that continue to innovate and offer line extensions, as well as build a relationship with users, will be most successful.”

### Weddings - US

“While the wedding market has returned to modest growth, a smaller share of the population is choosing marriage and more opting to cohabitate without commitment instead. Industry players will need to look beyond the traditional parameters of weddings to attract marriage holdouts. Other avenues for market growth include answering other ...

### The Arts and Crafts Consumer - US

“The arts and crafts industry has room to grow in the U.S. To increase involvement, marketers must appeal to more consumers by positioning handmade items as conducive to financial, personal, and social gain. The most likely artists and crafters are those who can either save or make money by ...

## April 2013

### American Lifestyles 2013: Five Years Later - US

“Nearly four years into the economic recovery, the labor market remains historically weak and median household incomes have yet to return to pre-recession levels. The lingering effects of the worst economic downturn since the ‘Great Depression’ of the 1930s have consumers retaining a budget mindset that applies to purchasing across ...

### Living Local - US

“Local marketers have a challenge to simultaneously position local involvement as conducive to community and personal gain. While helping the local and wider economy and supporting patriotic sentiments are leading drivers of living local, participation in the local market are unlikely to be completely selfless. Whether focused on bettering their ...

### British Lifestyles 2013: Examining the Legacy of the Economic Downturn - UK

This report looks at British lifestyles in 2013 and examines the legacy of the economic downturn. The report looks at British lifestyles through the eyes of the consumer. It looks at the sectors where people spend more or less in the beginning on 2013 compared with the same time in ...

### Disposable Baby Products - US

“While disposable baby products enjoy high household penetration and purchase incidence among those households with babies and toddlers, the market has experienced stagnant sales in the past five years. Private label offerings are grabbing market share and sales; challenging economic circumstances and falling birth rates are decreasing product demand; and ...

## Beauty and Personal Care - International

### Shampoo, Conditioners and Styling Products - US

“The haircare category is highly saturated and competitive, creating challenges for manufacturers and retailers to encourage increased consumer spending in the category. However, continued improvements in product functionality combined with the emergence of new segments such as anti-aging have the potential to drive future category growth.”

### Shampoo, Conditioners and Styling Products - UK

“A tough economic climate has resulted in a ‘want it all’ attitude amongst consumers. They have come to expect additional product benefits but don’t want to pay a premium for them. Creating an experience around haircare brands is likely to win over consumers who increasingly value expert opinion and advice ...

### Cold and Flu Remedies - UK

“Growth in the market will be driven by continued product innovations and a boost in the population of children, impacting the children’s and parents’ OTC market. Opportunities exist in extending product ranges and innovating in faster-acting formulations and product formats.”

## March 2013

### Hispanic Consumers’ Diet and Wellness - US

“The Hispanic population has the second highest rate of being overweight or obese in the U.S., falling second to African-Americans. This is leading to health conditions like diabetes and hypertension, which are causing more Hispanics to search out foods and health services that can help manage illness. Hispanics are ...

### Black Consumers' Diet and Wellness - US

“Black consumers exhibit the highest incidence of obesity and related diseases, but they are doing little to address it. Cultural as well as economic elements play a big role in unhealthy dietary habits and sedentary lifestyle. Creating awareness about the link between diet and food is the key to restoring ...

### Soap, Bath and Shower Products - UK

“Changing habits have shown a decrease in the frequency of bathing and an increase in the frequency of showering, translating to a growth in the shower market. This is driven by time constraints and increased water

### Soap, Bath and Shower Products - US

“The soap, bath, and shower market can expect to see growth in the next few years due to near universal consumer usage of these products for hygiene maintenance along with a lack of competitive alternatives. However, this market does have some issues it will need to address: private label offerings ...

### Marketing to the Green Consumer - US

– **Fiona O'Donnell, Senior Lifestyles & Leisure Analyst**

### Beauty Devices - US

“The beauty devices industry has strong growth potential as consumers are motivated by getting professional results at home. However, the industry will face challenges in creating increased interest in and awareness of skincare devices as well as increased usage



bills but also an ageing population with mobility issues. Extending the shower category to ...

occasions for haircare appliances. Expanding the mass market skincare device segment ...

### February 2013

#### Marketing to Hispanic Moms - US

“From figuring out how to provide nutritional meals on a budget or determining what is ‘nutritional,’ Latina moms want additional information from the media. Whether it is editorial content or branded advertising, brand messages are not influencing Hispanic moms’ purchasing decisions. This begs the question: Do brands understand how ...

#### Millennials' Leisure Trends - US

“Compared with older generations, more Millennials want to spend leisure time connected to the internet, and can as such be dubbed the ‘online generation.’ However, marketers can make more inroads among these young adults by making them more comfortable in offline social situations as well as giving them opportunities ...

#### Natural and Organic Toiletries - UK

“Although consumers are keen to make the right choices when it comes to their own health and the wellbeing of the planet, they find the natural and organic toiletries market difficult terrain to negotiate, causing many to revert to making their product choices based on the tried and tested values ...

#### Christmas Shopping Habits - UK

“Christmas 2012 could have been a lot worse, but consumer confidence picked up through the year and that was enough for consumers to spend more this year than last, in spite of a very demanding comparative from 2011. With a modest recovery in the economy in 2013 and continuing improvement ...

#### Deodorants and Antiperspirants - US

“The deodorant/antiperspirant market can expect to see growth in the coming years due to near universal consumer usage of these products along with a lack of competitive alternatives. However, the market faces some challenges: the women’s segment has experienced a decline for the first time in years, consumers continue ...

#### Anti-aging Skincare - US

“New product launches and innovations are certainly important in growing the anti-aging skincare category, but the industry will experience ongoing pressure to stand out in an increasingly competitive and saturated marketplace.”

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

“With the baby boom set to continue in the year ahead, and the average age of parents rising, this comes as good news to the category suggesting the market will continue to grow. A growingly multicultural environment offers opportunities to bring foreign influences into product innovations.”

### January 2013



## Beauty and Personal Care - International

### Beauty Retailing - France

Beauty Retailing Europe provides detailed coverage of the beauty retail sectors in six Western European markets: the UK, France, Germany, Italy, Spain and the Netherlands. The data in its entirety is contained in the single copy six-country report, which gives a full overview of beauty retailing in these markets. Single ...

### Beauty Retailing - Italy

Beauty Retailing Europe provides detailed coverage of the beauty retail sectors in six Western European markets: the UK, France, Germany, Italy, Spain and the Netherlands. The data in its entirety is contained in the single copy six-country report, which gives a full overview of beauty retailing in these markets. Single ...

### Beauty Retailing - Europe

*Beauty Retailing Europe* provides detailed coverage of the beauty retail sectors in six Western European markets: the UK, France, Germany, Italy, Spain and the Netherlands. The data in its entirety is contained in the single copy six-country report, which gives a full overview of beauty retailing in these markets. Single ...

### Beauty Retailing - UK

“As affordable quick fix beauty treatments have become more established in the UK, we’ve seen greater spontaneity from consumers, a shift in channels to market and an opening up of the mass market.”

### Baby Boomers' Leisure Trends - US

*“Because the baby boom generation comprises nearly 76 million individuals born across a span of nearly two decades, the leisure habits and preferences within this group vary tremendously based not only on age, but also life stage, family responsibilities, and finances, to name just a few.”*

### Beauty Retailing - Germany

Beauty Retailing Europe provides detailed coverage of the beauty retail sectors in six Western European markets: the UK, France, Germany, Italy, Spain and the Netherlands. The data in its entirety is contained in the single copy six-country report, which gives a full overview of beauty retailing in these markets. Single ...

### Beauty Retailing - Spain

Beauty Retailing Europe provides detailed coverage of the beauty retail sectors in six Western European markets: the UK, France, Germany, Italy, Spain and the Netherlands. The data in its entirety is contained in the single copy six-country report, which gives a full overview of beauty retailing in these markets. Single ...

### The Drug Store Shopper - US

“Sales of drug stores are likely to grow over the next few years, largely as a result of the aging population and the rising cost of healthcare. However, drug stores are not immune to challenges such as the impact of competition from other channels, both online and brick-and-mortar. Many drug ...

### Deodorants and Bodysprays - UK

“Growth in the market in the last two years has been driven by competitive pricing, product innovations and creative marketing campaigns. With an ageing population, ensuring products and advertising are tailored to this demographic will be essential to ensure further growth.”

– Roshida Khanom, Beauty and Personal Care Analyst

### Nail Color and Care - US

“The nail color and care category has experienced strong growth since 2007, with growth forecast through 2017. However, the industry will face challenges as the category becomes more competitive and saturated. New products are critical to category growth, but reaching out to growing segments like multiculturals and older women will ...