



Beauty and Personal Care Retailing - Italy - January 2021

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This report looks at the following areas:

- The impact of COVID-19 on the beauty and personal care retailing sector.
- How people shop for beauty and personal care products and which retailers they use.
- The winners and losers in the beauty and personal care retailing sector since the start of the COVID-19 outbreak.
- How behaviours of beauty and personal care shoppers have changed since the start of the COVID-19 outbreak.
- The growth of the online channel within the beauty and personal care category and the boost given to it by the COVID-19 outbreak.

The beauty and personal care retailing sector has been adversely affected by the impact of the COVID-19 pandemic during 2020, although not as seriously as some other non-food sectors. We expect the spectre of COVID to continue suppressing demand throughout much of 2021 as consumers are likely to remain reticent to venture out to shops in large numbers until the mass vaccination programme has been completed. Additionally, many consumers are living on reduced incomes, either through having been placed on furlough-type programmes or losing their jobs and this will suppress demand further.

As a result of many beauty specialists' stores being closed during lockdown, there has been a shift within the market, with online sales growing by an estimated 25% during 2020 and many consumers buying beauty and personal care items online for the first time. Nevertheless, the vast bulk of sales still go through shops and the major retailers will continue to invest in their multi-channel models. In time, we expect retailers to reduce the number of shops they operate as their online share of sales grows but in Italy online retailing is generally quite poorly developed so this will only happen over a relatively long period of time.

Our consumer research for this report identifies a number of opportunities for retailers to innovate both in terms of their in-store and online offers, ranging



"The COVID-19 outbreak has been challenging for the beauty and personal care retailing sector in Italy but many of the leading retailers have managed to partly mitigate its impact by ramping up their online operations. We expect to see a continued shift towards online which will lead to retailers to consolidate their physical store estates."

– Michael Oliver, Senior Retail Analyst

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from more hygienic ways to try out products, to the use of smart mirrors, augmented reality technology and online video consultations. Looking to the future, we only expect the market to return to more normal levels by 2022 and even then there will still be a greater focus on price and value than before the pandemic due to the number of people whose living standards have been adversely affected by the impact of COVID and it will take time for their finances to recover.

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Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Areas covered in this Report**

EXECUTIVE SUMMARY

- **The market**
- **Consumer spending**

Figure 1: Italy: Annual % change in total consumer spending on beauty and personal care and total consumer spending, 2015-20

- **Sector size and forecast**

Figure 2: Italy: annual % change in retail sales, 2015-20

- **Channels of distribution**

- **Companies and brands**

- **Key metrics**

- **Market shares**

Figure 3: Italy: leading BPC specialists' estimated share of all spending on beauty and personal care, 2019

- **Online**

- **The consumer**

- **Beauty and personal care products purchased**

Figure 4: ITALY: BEAUTY AND PERSONAL CARE PRODUCTS PURCHASED IN THE LAST 12 MONTHS, November 2019 and October 2020

- **Online and in-store shopping for beauty and personal care products**

Figure 5: Italy: in-store and online buyers of beauty and personal care products, November 2019 and October 2020

- **Where beauty and personal care products are purchased**

Figure 6: Italy: where beauty and personal care products were purchased, November 2019 and October 2020

- **Attitudes to innovations in BPC retailing**

Figure 7: Italy: attitudes towards shopping in-store for beauty/personal care products, October 2020

Figure 8: Italy: attitudes towards shopping online for beauty/personal care products, October 2020

THE IMPACT OF COVID-19 ON BEAUTY AND PERSONAL CARE RETAILING

- **Short, medium and long term impact on the sector**

Figure 9: Short, medium and long term impact of COVID-19 on beauty and personal care retailing, February 2021

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Infographic Overview

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- **Opportunities and threats**
- **But the online experience can go so much further**
- **Virtual consultations**

Figure 10: Bobbi Brown Virtual Services Homepage, August 2020

- **Product recommendations using AI**

Figure 11: The Inkey List #askINKEY Campaign, 2020

Figure 12: Boots No7 Personalised Skin Analysis, 2020

- **Adding the human touch with live-streaming**

- **Making beauty shopping more fun**

- **Making shopping safe will pay off**

- **Cash-strapped consumers may restrict BPC spend**

- **How COVID-19 will reshape the industry**

- **Delivery and click-and-collect will continue to ride on convenience**

- **Social media will play a greater role**

- **The store-experience will need to be even better**

- **BPC online audience has grown and specialists must embrace this**

- **Sustainability will continue to be high on the agenda**

- **Health and beauty specialists struggle in 2020**

Figure 13: Europe Big Five: total health and beauty specialist retailers' sales and forecast, 2015-25

Figure 14: Europe Big Five: total health and beauty specialist retailers' sales and forecast, by country, 2015-25

- **The impact of COVID-19 on consumer behaviour across Europe**

- **Concerns around exposure to COVID-19 rise as second wave hits**

Figure 15: Europe: those extremely worried about the risk of being exposed to COVID-19, March 2020-January 2021*

- **The financial impact of COVID-19**

- **Furlough and job losses**

- **Spending falls and consumers look to save where possible**

Figure 16: Europe: financial impact of COVID-19, January 2021*

- **Changes to shopping behaviour**

- **Non-essential spending reduced**

- **Desire to spend less time in-store**

- **Cash is no longer king**

- **Localism rises up the agenda**

- **Online shopping receives major boost**

- **Second wave leads to renewed stockpiling**

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Figure 17: Europe: changes to shopping behaviour since the start of the COVID-19 outbreak, January 2021*

- **Consumers are trying not to handle/touch products in-store**

Figure 18: Europe: people who would feel uncomfortable handling/touching products in-store, November 2020*

- **Spending intentions**

- **Beauty sector sees planned spending decrease**

Figure 19: Net balance* of expected spending on selected items in the next month, January 2021**

- **German consumers the only group planning to spend more on beauty**

Figure 20: Europe: net balance* of expected spending on beauty products and toiletries in the next month, January 2021**

- **How the crisis is impacting on key consumer segments**

- **Women and older people most concerned about the pandemic**

Figure 21: Europe: those extremely worried about the risk of being exposed to COVID-19, by gender and age, January 2021*

- **Women and older age groups also trying to limit time in-store**

Figure 22: Europe: consumers trying to limit the time they spend in-store, by gender and age, January 2021*

- **Online shopping boom is relatively uniform**

Figure 23: Europe: consumers shopping more online, by gender and age, January 2021*

- **Younger and middle-aged consumers more likely to be cutting back on non-essential spend**

Figure 24: Europe: consumers cutting back on non-essential spending, by gender and age, January 2021*

- **COVID-19: market context**

- **UK**
- **France**
- **Germany**
- **Italy**
- **Spain**

ISSUES AND INSIGHTS

- **COVID-19 impact on livelihoods and lifestyles will hit BPC retail**
- **Economic impact will drive increased focus on value**

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- **Structural shifts will lead to lower store footfall and stronger online demand**
- **A growing localism/nationalism movement**
- **What advantages can multichannel retailers leverage over online-only rivals?**
- **Online-only penetration is growing fast**
- **Amazon increases its penetration of the beauty market**
- **Expertise combined with personal and personalised service**
- **Online can complement the offline offer**
- **Blurring the lines between physical and digital**
- **The ability to personalise products and offers**
- **Multi-channel business models cover all bases but role of stores is changing**

THE MARKET – KEY TAKEAWAYS

- **Italian consumer spending power under pressure**
- **Retailers are having to adjust their product mix**
- **Sector declines by 7.1% in 2020**
- **Pandemic reverses trend away from supermarkets**

CONSUMER SPENDING

Figure 25: Italy: consumer spending on beauty and personal care (including VAT), 2015–20

SECTOR SIZE AND FORECAST

Figure 26: Italy: health & beauty specialists' sales (excluding VAT), 2015–20

Figure 27: Italy: health & beauty specialists' sales, Forecasts (excluding VAT), 2021–25

INFLATION

Figure 28: Italy: consumer prices * of personal care items, annual % change, 2015–19

Figure 29: Italy: consumer price inflation (HICP *) on personal care products and services, annual % change, January 2019–December 2020

CHANNELS OF DISTRIBUTION

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Increased online presence should be a priority for Acqua & Sapone**
- **Douglas and Tigoùà have performed the best**
- **Other players have sought to differentiate themselves**
- **Online**

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LEADING PLAYERS

- **Acqua & Sapone at online disadvantage...**
- **...while Tigotà embraced the online channel**
- **Douglas Group recognises importance of online for the future**
- **Other players**

Figure 30: Italy: leading beauty specialists, sales, 2015-19

Figure 31: Italy: Leading beauty specialists, outlets, 2015-19

MARKET SHARES

Figure 32: Italy: leading BPC specialists' estimated share of all spending on beauty and personal care, 2015-19

ONLINE

- **Online activity**
- **Shopping online**
- **Online BPC sales**
- **Leading online players**

Figure 33: Italy: search interest on Google, selected BPC retailers, last 12 months, January 2020-January 2021

THE CONSUMER – KEY TAKEAWAYS

- **COVID pandemic drives strong shift to online**
- **Online buying shifts towards m-commerce**
- **Strong appetite for contactless technology in-store**
- **Opportunities in trying to replicate the in-store experience online**
- **Sustainability is high on consumer agendas**

BEAUTY AND PERSONAL CARE PRODUCTS PURCHASED

- **Beauty and personal care product purchasing is universal**

Figure 34: Italy: beauty and personal care products purchased in the last 12 months, November 2019 vs October 2020

- **Women are principal buyers of haircare, skincare and beauty products**

Figure 35: ITALY: BEAUTY AND PERSONAL CARE PRODUCTS PURCHASED IN THE LAST 12 MONTHS, by gender, October 2020

ONLINE AND IN-STORE SHOPPING FOR BEAUTY AND PERSONAL CARE PRODUCTS

- **Dramatic increase in online shopping in 2020**

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Infographic Overview

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Figure 36: Italy: in-store and online buyers of beauty and personal care products, November 2019 vs October 2020

- **Women more likely to shop online**

Figure 37: Italy: in-store and online buyers of beauty and personal care products, by gender, October 2020

- **Online purchasing still concentrated on younger groups**

Figure 38: Italy: in-store and online buyers of beauty and personal care products, by age, October 2020

- **Strongest growth in online purchasing among over-55s**

Figure 39: Italy: online buyers of beauty and personal care products, by age, November 2019 vs October 2020

WHERE BEAUTY AND PERSONAL CARE PRODUCTS ARE PURCHASED

- **Specialists still the preferred outlet but generalists made strong gains in 2020**

Figure 40: Italy: where beauty and personal care products were purchased, November 2019 vs October 2020

- **Where people shopped and what they bought**

Figure 41: Italy: where beauty and personal care products were purchased (specialist retailers), by beauty and personal care products purchased, October 2020

Figure 42: Italy: where beauty and personal care products were purchased (non-specialist retailers), by beauty and personal care products purchased, October 2020

ATTITUDES TO INNOVATIONS IN BPC RETAILING

- **In-store**
- **Hygienic in-store testing is a key priority**
- **Payment innovation offers customer and business benefits**
- **Product refill stations tap into growing sustainability trend**
- **Product information particularly important to older buyers**

Figure 43: Italy: attitudes towards shopping in-store for beauty/personal care products, October 2020

Figure 44: Italy: attitudes towards shopping in-store for beauty/personal care products, by products purchased, October 2020

- **Online**
- **Sustainability in online packaging is an issue**
- **Personalisation trend continues to offer opportunities**
- **Online tools have potential to bridge gap between stores and digital**

Figure 45: Italy: attitudes towards shopping online for beauty/personal care products, October 2020

What's included

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Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

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Figure 46: Italy: attitudes towards shopping online for beauty/personal care products, by products purchased, October 2020

APPENDIX

- **Abbreviations**
- **Data sources**

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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