

The Private Label Beauty Consumer - UK - 2022

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

- Impact of COVID-19 on the private label beauty sector.
- Purchase of branded vs private label beauty products across multiple categories.
- Locations of purchase of private label beauty products.
- Reasons for buying private label beauty products.
- Interest in buying private label beauty products.
- Shopping habits for private label beauty products.

Branded beauty dupes appeal to the consummate bargain hunter, however retailers can do more to drive digital discovery particularly as younger shoppers use social media to discover new private label beauty brands. Conscious consumerism is very much en-vogue and no longer the preserve of the artisanal or niche brands. Private labels are in a strong position to bring ethical and eco credentials to the masses ensuring that affordability is not a barrier to purchase of ethical beauty. Themes of inclusivity are also on the rise with gender fluidity, multi-racial, agelessness and universal appeal set to become golden tickets for private label beauty throughout the 2020s.



"Brexit and the pandemic brought with them uncertainty that saw shoppers adopting a savvier mindset, a trend that existed beforehand and will outrun both."

- Roshida Khanom, Category Director BPC

Buy this report now

Visit store.mintel.com

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

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Economic and other assumptions
- Products covered in this report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on private label beauty**
Figure 1: Short, medium and long term impact of COVID-19 on private label beauty, 2021
- **The market**
- **Real incomes plummet due to COVID-19 but bounce back in 2021**
- **Most people's financial situation is comfortable**
- **Companies and brands**
- **NPD by private labels is increasingly on-trend**
Figure 2: NPD of private label beauty products as a share of total BPC, 2018-21
- **Advertising taps into social trends**
- **The consumer**
- **Private label brands earn new followers**
Figure 3: Purchase of branded vs private label beauty products, by category, 2021
- **In-store shopping favoured for private label beauty buys**
Figure 4: Purchase of private label beauty products, 2021
- **Convenience gives supermarkets a distinct advantage**
Figure 5: Places of purchase of private label beauty products, 2021
- **Value-proposition of private labels appeals more to women**
Figure 6: Reasons for buying private label beauty products, 2021
- **Use private label to make ethical beauty affordable**
Figure 7: Factors that would encourage the purchase of private label over branded beauty products, 2021
- **Develop a smoother digital experience to unlock online sales for supermarkets**
Figure 8: Private label beauty buying behaviours, 2021

ISSUES AND INSIGHTS

- Private label products prove themselves during the pandemic
- Drive digital discovery for Millennials

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

- **Waking up to being woke**

MARKET DRIVERS

- **Employment has held up, but young people have been impacted**
Figure 9: Unemployment rates, by age group, 2018-2021
- **Consumers' financial wellbeing has slipped from its recent high point**
Figure 10: Household financial wellbeing index, 2016-2021
- **Pandemic impacts supply**
- **Ingredients shortages creates opportunity to win brand fans**
- **Consumers go back to professional services**
Figure 11: Visited a hairdresser/barber, 2020-2021

LAUNCH ACTIVITY AND INNOVATION

- **Private label NPD remains steady**
Figure 12: NPD of private label beauty products as a share of total BPC, 2018-21
Figure 13: Selection of Amazon's Belei skincare products, 2019
- **Price positioning is not the differentiator**
- **Beauty dupes gain column inches**
Figure 14: NPD in private label launches that rival branded alternatives, 2021
- **Private label brands aim to be trendy**
Figure 15: Examples of ingredient-led NPD from Boots and Superdrug, 2021
- **CBD on the high street**
Figure 16: Examples of private label NPD featuring CBD, 2021
- **Private label brands tap into the sleep trend ...**
Figure 17: Marks & Spencer formula absolute ultimate sleep cream with CBD oil, 2020
- **... and promote the at-home spa experience**
Figure 18: Examples of NPD by private label brands featuring hot cloths, 2021
- **Conversion credentials**
Figure 19: Examples of NPD in eco-friendly private label products,
- **Taking inspiration from high-end brands**
Figure 20: Examples of NPD in beauty bundles by private label brands, 2021

ADVERTISING AND MARKETING ACTIVITY

- **Inclusivity takes centre stage**
- **Celebrity influence could evolve innovation**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **Bundles and boxes offer excitement and trial**

BRAND RESEARCH

- **Brand map**
Figure 21: Attitudes towards and usage of selected brands, 2021
- **Key brand metrics**
Figure 22: Key metrics for selected brands, 2021
- **Brand attitudes: Budget supermarket brands offer best value for money**
Figure 23: Attitudes, by brand, 2021
- **Brand personality: Boots Ingredients and B. by Superdrug seen as most ethical**
Figure 24: Brand personality – macro image, 2021
- **Long-timers M&S and Boots Bring Expertise to the table**
Figure 25: Brand personality – micro image, 2021
- **Brand analysis**
- **Boots Ingredients is on trend**
- **B. by Superdrug focuses on skin needs rather than age**
- **M&S Formula – Quality for middle-aged adults**
- **Aldi Lacura secures strong loyalty among women**
- **Lidl Cien enjoys higher brand awareness among women**
- **Zara Beauty yet to convert high awareness into usage**
- **Primark PS taps into current lifestyle demands**
- **Media partnerships consolidate Glossybox’s youthful appeal**

PURCHASE OF PRIVATE LABEL BEAUTY PRODUCTS

- **Partner with skinfluencers to target younger lifestyles**
Figure 26: Purchase of branded vs private label beauty products, by category, 2021
- **Marketing to the menopausal could create a golden opportunity**
- **Personalised services could steal market share from branded hair colour**
- **Private labels need to become more aspirational**
Figure 27: Repertoires of branded and own-label beauty products purchased, 2021
- **Private label facial skincare brands earn new followers**
Figure 28: Purchase of private label beauty products only, by product type, 2018–2021
- **Men switch to private label in skincare and fragrances**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 29: Purchase of private label facial skincare and fragrances only, amongst men, 2018-2021

LOCATIONS OF PURCHASE OF PRIVATE LABEL BEAUTY PRODUCTS

- **Retailers up the edge online**
Figure 30: Purchase of private label beauty products, 2021
- **In-store shoppers prioritise price**
- **Digital path to purchase for online shoppers**
- **Community-led approach drives online-engagement and conversion**
- **New retailers dive in**
- **Big four benefit from space for beauty**
Figure 31: Places of purchase of private label beauty products, 2021
- **Ancillary offerings aid multi-brand retailers but could be key for others**

REASONS FOR BUYING PRIVATE LABEL BEAUTY PRODUCTS

- **Value drives purchase for women in particular**
Figure 32: Reasons for buying private label beauty products, 2021
- **Convenience is key to winning over time-poor customers**
- **Millennials value the performance of private label brands**
- **Reviews play an important role for younger shoppers**
- **Market firsts will set private labels apart**

INTEREST IN BUYING PRIVATE LABEL BEAUTY PRODUCTS

- **Eco credentials are an expectation rather than a USP**
Figure 33: Factors that would encourage the purchase of private label over branded beauty products, 2021
- **Younger shoppers want beauty products as unique as they are**
- **Customised consultations would add a touch of class to own-label cosmetics**
- **Unique brand names give private label products more credibility**
- **Conscious consumerism offers conversion potential**
Figure 34: Agreement with being encouraged to buy private label over branded beauty products if they supported a cause, by age and gender, 2021
- **Cancer charities preferred for partnerships**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

PRIVATE LABEL BEAUTY SHOPPING BEHAVIOURS

- **Intentional purchase driven by dupes**
Figure 35: Private label beauty buying behaviours, 2021
- **Digital seamless journey from discovery to purchase is crucial**
- **Impulse purchase**
- **Make ethical beauty affordable and accessible**
- **Accessibility not an issue but presents opportunities**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.