

Beauty and Personal Care Retailing - UK - 2023

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This report looks at the following areas:

- How is the cost of living squeeze impacting the BPC market and what savvy shopping behaviours are consumers adopting?
- How and where people have bought beauty and personal care in the last 12 months and growth in purchasing via smartphones.
- What is driving in-store shopping and encouraging consumers to buy from one store over another?
- Changing attitudes to buying BPC products in the last year and interest in the latest innovations.

Almost three fifths (57%) of consumers now agree that value/standard brands are as innovative as premium brands. Consumers have become more open to purchasing products from different price points as brand perceptions have shifted over the last few years.

The beauty sector has seen sales boosted, with spending rising by 8% to £5.7 billion in 2022, buoyed by ongoing interest in colour cosmetics, facial skincare and fragrances. The 'lipstick effect' means people continue to turn to beauty for an affordable mood lift, giving the market some protection from an income squeeze. While inflationary pressures are driving value growth in the BPC market, volume sales are being hit as consumers adopt a mindful approach to spending.

Several personal care categories including soap, bath & shower (SBS) and hair colourants are facing tough comparisons with heightened demand during the pandemic years and are seeing a sustained decline.

In-store shopping for BPC products has seen a significant boost in the last 12 months, almost returning to levels seen in 2019, prior to the COVID-19 outbreak. Retail has the opportunity to continue its evolution and cement itself back into shopper routines with wellness offerings that include not only dedicated product sections but also services and experts. This is particularly the case for



"Amid an ongoing income squeeze, the BPC market has proven more resilient than other sectors as consumers have turned to beauty as an affordable means to lift their mood."

– **Tamara Sender Ceron,**
Senior Fashion Analyst,
January 2023

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under-25s, as they are significantly more likely than average to opt to shop at one store over another due to advice from sales staff and in-store events.

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