

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"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. Targeting Hispanics through relevant promotions (such as refer-a-friend) and products specifically tailored to Latino needs is a good start."

– Susan Menke, Category Manager, Multicultural

# This report looks at the following areas:

- How can personal care products stand out as more than a mere commodity?
- · Why are promotions not speaking to less affluent Hispanics?
- How can products be positioned to meet Hispanics' specific needs?

Hispanics are a large and fast-growing population who have many personal care needs. Because the Hispanic population is a diverse group with a varied set of attitudes about personal care, there is a tremendous opportunity for marketers who can meet the specific needs of these consumers.

### Readers of this report will learn:

- Important demographics of the Hispanic consumer, including how varying levels of acculturation and income affect purchasing behavior.
- Where Hispanics buy personal care products and services and the types of products and services they are shopping for.
- The factors that influence Hispanic consumers' buying decisions.
- The influence that promotions have on Hispanic shopping choices.
- · Resources Hispanics use when shopping for personal care products and services.
- Hispanic attitudes regarding personal care, including self-concept, product preferences, and ideas for improvement.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: oxygen@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



Report Price: £2466.89 | \$3995.00 | €3133.71

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

#### **Table of Contents**

#### Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

#### **Executive Summary**

#### Hispanics spend an average of \$570 million on personal care

Figure 1: Average expenditures by Hispanic households for personal care products and services, at current prices, three-year rolling averages, 2007-12

#### Opportunity for personal care services, as Hispanics under index

Figure 2: Average expenditures for personal care products and services, by Hispanic and non-Hispanic households, indexed to all households, 2012

## Nine in 10 Hispanic women buy personal care products of every variety

Figure 3: Personal care products purchased in last six months—any purchase, Hispanic women, July 2013

# Mass merchandisers are preferred retailer for hygiene and beauty products

Figure 4: Type of retailer used for personal care product purchases, all Hispanics, July 2013

# Spanish-speaking Hispanics more influenced by friends and family

Figure 5: Factors influencing buying decision, by language spoken in the home, July 2013

# Promotions not speaking to least affluent Hispanics

Figure 6: Influence of promotions in the purchase decision, by household income, July 2013

## Individual uniqueness resonates with less acculturated Hispanics

Figure 7: Agreement with attitudinal statements regarding self-image and personal care products, by language spoken in home, July 2013

### What we think

### Issues and Insights

How can personal care products stand out as more than a mere commodity?

Insight: educate less acculturated Hispanics on their choices

Why are promotions not speaking to less affluent Hispanics?

Insight: offer products in bulk, refer-a-friend promotions

How can products be positioned to meet Hispanics' specific needs?

Insight: emphasize individual uniqueness

# Trend Applications

Trend: Return to the Experts
Trend: Non-Standard Society
Mintel Futures: Generation Next



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

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

### Hispanic Expenditures on Personal Care

#### Key points

# Personal care spending stagnant

Figure 8: Average expenditures by Hispanic households for personal care products and services, at current prices, three-year rolling ...gallo 0. Average experiantures by mispanic mouseholds for personal care products and services, at current prices, three-year rolli averages, 2007-12
Figure 9: Average expenditures by Hispanic households for personal care products, at current prices, three-year rolling averages, 2007-12

Figure 10: Average expenditures by Hispanic households for personal care services, at current prices, three-year rolling averages, 2007-12

## Hispanics over index personal care product spending

Figure 11: Average expenditures for personal care products and services, by Hispanic and non-Hispanic households, indexed to all households, 2012

## Marketing Strategies

#### Overview

#### Head & Shoulders partners with soccer star Lionel Messi

Figure 12: Head & Shoulders, television ad, 2012

#### Avon emphasizes personal touch

Figure 13: Avon, television ad, 2013

## Eva Mendes provides crossover appeal for Pantene

Figure 14: Pantene, television ad, 2012

Figure 15: Pantene, television ad, 2012

# Gillette speaks to Hispanic men looking to go hairless

Figure 16: Gillette, television ad, 2013

## Social Media—Hispanics and Personal Care

## Key points

## Key social media metrics

Figure 17: Key brand metrics, personal care brands, August 2013

### Market overview

## Brand usage and awareness

Figure 18: Usage and awareness of selected personal care brands, July 2013

# Interaction with brands

Figure 19: Interaction with selected personal care brands, July 2013

## Online conversations

Figure 20: Online mentions, selected personal care brands, by week, Feb. 24-Aug. 25, 2013

# Where are people talking about personal care brands?

Figure 21: Mentions by page type, selected personal care brands, Feb. 24-Aug. 25, 2013

# What are people talking about?

Figure 22: Mentions by type of conversation, selected personal care brands, Feb. 24-Aug. 25, 2013

Figure 23: Major areas of discussion surrounding personal care brands, by page type, Feb. 24-Aug. 25, 2013

## Brand analysis

### Avon

Figure 24: Avon key social media indicators, August 2013

**BUY THIS** REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Key online campaigns

What we think

Clinique

Figure 25: Clinique key social media indicators, August 2013

Key online campaigns

What we think

Suave

Figure 26: Suave key social media indicators, August 2013

Key online campaigns

What we think

Neutrogena

Figure 27: Neutrogena key social media indicators, August 2013

Key online campaigns

What we think

Dove

Figure 28: Dove key social media indicators, August 2013

Key online campaigns

What we think

Colgate

Figure 29: Colgate key social media indicators, August 2013

Key online campaigns

What we think

Personal Care Products Purchased

Key points

Nearly all Hispanics buy hygiene products, beauty products less frequent

Figure 30: Personal care products purchased, July 2013

Nine in 10 Hispanic women buy personal care products of all types

Figure 31: Personal care products purchased in last six months—any purchase, by gender, July 2013

Hygiene product purchases largely unaffected by acculturation

Figure 32: Personal care products purchased—any purchase in last six months, by languages spoken in home, July 2013

Oral Care

Key points

Regular toothpaste is used most frequently

Figure 33: Types of toothpaste used most often, by gender, January 2012-March 2013

Spanish-speaking respondents less likely to use whitening toothpaste

Figure 34: Types of toothpaste used most often, by language spoken in home, January 2012-March 2013

Colgate dominant brand among Hispanic consumers

Figure 35: Brands of toothpaste used most often, by gender, January 2012-March 2013

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

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

## Haircare

#### Key points

#### Hispanic women seek a wide variety of haircare products

Figure 36: Types of shampoo used in last seven days, by gender, January 2012-March 2013

### Head & Shoulders recently rises to most popular brand

Figure 37: Brands of shampoo used in last seven days, by gender, January 2012-March 2013

## TRESemmé popular among younger Hispanics

Figure 38: Brands of shampoo used in last seven days, by age, January 2012-March 2013

## Deodorants/Antiperspirants

#### Key points

#### Most Hispanics choose solid/stick deodorant

Figure 39: Forms of deodorants and antiperspirants used in last seven days, by gender, January 2012-March 2013

#### Roll-on forms still popular with Spanish-speaking audience

Figure 40: Types of deodorants and antiperspirants used in last seven days, by language spoken in home, January 2012-March 2013

#### Brand preferences defined by gender

Figure 41: Brands of deodorants and antiperspirants used in last seven days, by gender, January 2012-March 2013

#### Feminine Hygiene

## Key points

# Spanish-dominant Hispanics using feminine hygiene products

Figure 42: Personal care products purchased in last six months—Feminine hygiene (e.g., tampons, sanitary napkins, etc.), by language spoken in the home, July 2013

# Brand loyalty demonstrated

Figure 43: Brands of tampons used, by household income, January 2012-March 2013

# Always brand is category leader

Figure 44: Brands of sanitary pads and napkins used, January 2012-March 2013

# Perfume, Cologne, and Body Sprays

## Key points

### Spanish-dominant Hispanics more likely to use perfume

Figure 45: Type of perfume, cologne, and toilet water used, by language spoken in home, January 2012-March 2013

### Perfume brands

Figure 46: Brands of perfume, cologne and toilet water used, by gender, January 2012-March 2013

## Body/Hand Lotion

# Key points

## Most Hispanics choose regular lotions

Figure 47: Types of moisturizers, creams, and lotions used, by gender, January 2012-March 2013

## Lotions with enhancements appeal to more acculturated Hispanics

Figure 48: Types of moisturizers, creams, and lotions used, by languages spoken in home, January 2012-March 2013

# No clear leading brand

Figure 49: Brands of moisturizers, creams, and lotions used, by language spoken in home, January 2012-March 2013

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: oxygen@mintel.con



Report Price: £2466.89 | \$3995.00 | €3133.71

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

## Shaving Supplies, Razors/Creams

#### Key points

#### Most Hispanics use regular shaving cream

Figure 50: Types of shaving creams or gels used, by gender, January 2012-March 2013

#### Less acculturated choose regular

Figure 51: Types of shaving creams or gels used, by language spoken in home, January 2012-March 2013

#### Gillette leader among shaving creams

Figure 52: Brands of shaving creams or gels used, by gender, January 2012-March 2013

## Hispanic women looking for strong razor brand

Figure 53: Brands of razor used, by gender, January 2012-March 2013

#### Sun Protection, Block, Tanners

### Key points

## SPF30+ used most by Hispanics by a wide measure

Figure 54: Type of sunscreen/suntan lotion used, by gender, January 2012-March 2013

## Young Hispanics are the sole audience looking to tan

Figure 55: Type of sunscreen/suntan lotion used, by age, January 2012-March 2013

## Banana Boat most popular brand among Hispanics

Figure 56: Brand of sunscreen/suntan lotion used, by language spoken in home, January 2012-March 2013

### **Facial Products**

### Key points

## Youthful population indicates specific facial cleansing needs

Figure 57: Type of facial cleansing products used, by age, January 2012-March 2013

## Neutrogena most popular brand

Figure 58: Brands of facial cleansing products used, by age, January 2012-March 2013

## Where Products are Purchased

## Key points

### Mass merchandisers are a preferred retailer of hygiene and beauty products

Figure 59: Type of retailer where hygiene and beauty products are purchased most often, July 2013

## Hispanic women more likely to use specialty channels

Figure 60: Type of retailer where hygiene and beauty products are purchased most often, by gender, July 2013

## Younger Hispanics shop at dollar stores

Figure 61: Type of retailer where hygiene and beauty products are purchased most often, by age, July 2013

### More affluent Hispanics shop online

Figure 62: Type of retailer where hygiene and beauty products are purchased most often, by household income, July 2013

## Hispanics are purchasing beauty care products at department stores

Figure 63: Type of retailer where beauty products are purchased most often, by type of beauty product, July 2013

## **Buying Decisions**

## Key points



VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

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

# Recommendation from family/friend influences purchases most

Figure 64: Factors influencing buying decision, by gender, July 2013

#### Social media outlets more influential among younger Hispanics

Figure 65: Factors influencing buying decision, by age, July 2013

## Spanish-speaking Hispanics are more influenced by friends and family

Figure 66: Factors influencing buying decision, by language spoken in the home, July 2013

### Professionals influence purchase of cosmetics and nail care products

Figure 67: Factors influencing buying decision, by type of personal care products purchased, July 2013

Figure 68: Factors influencing buying decision, by personal care products purchased, July 2013

#### Influence of Promotions

#### Key points

#### Sales are the most effective promotion

Figure 69: Influence of promotions, by gender, July 2013

#### Promotions not speaking to least affluent Hispanics

Figure 70: Influence of promotions, by household income, July 2013

## English-speaking Hispanics are more swayed by promotions

Figure 71: Influence of promotions, by languages spoken in home, July 2013

## Drug stores and dollar stores effectively promoting products

Figure 72: Influence of promotions, by type of retailer where hygiene products are purchased most often, July 2013

Figure 73: Influence of promotions, by type of retailer where hygiene products are purchased most often, July 2013 (continued)

## The Purchase Process

### Key points

## Majority of Hispanics shop by browsing

Figure 74: Resources used when shopping for personal care products, by gender, July 2013

## Hispanics aged 35-44 more likely to refer to ads before shopping

Figure 75: Resources used when shopping for personal care products, by age, July 2013

# More affluent Hispanics participate in store loyalty programs

Figure 76: Resources used when shopping for personal care products, by household income, July 2013

## Department store shoppers looking for deals in print, online

Figure 77: Resources used when shopping for personal care products, by type of retailers where beauty products are purchased, July 2013

### Attitudes toward Personal Care Products

# Key points

## Good grooming is valued by Hispanics

Figure 78: Attitudes toward grooming and personal care products, by gender, July 2013

### Half of Hispanics think they need a makeover

Figure 79: Attitudes toward grooming and personal care products, by age, July 2013

## Looking one's best at all times important for more affluent Hispanics

Figure 80: Attitudes toward grooming and personal care products, by household income, July 2013

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: oxygen@mintel.cor



Report Price: £2466.89 | \$3995.00 | €3133.71

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

#### Individual uniqueness resonates with less acculturated Hispanics

Figure 81: Attitudes toward grooming and personal care products, by language spoken in home, July 2013

#### Appendix - Overview of the Hispanic Consumer

### Key points

## Hispanic purchasing power projected to reach \$1.7 trillion in four years

## Hispanic household income lags Whites and Asians

Figure 82: Median household income, by race/Hispanic origin of householder, 2011

### Hispanic male median personal income improved in 2011

Figure 83: Median personal incomes of people aged 15 or older, by Hispanic origin and gender, in inflation-adjusted dollars, 2001-11

### Hispanic unemployment rates declining

Figure 84: Percent unemployment at end of third quarter, by race/Hispanic origin, 2007-12

#### Hispanics among the fastest-growing population segments in the U.S.

# Hispanics are overwhelmingly young

Figure 85: Generational profile, Hispanics versus non-Hispanics, 2011

## Hispanic households larger than non-Hispanic households

Figure 86: Average household size, by Hispanic origin/race of householder, 2001, 2008, and 2011

Figure 87: Number of households, by number of people in the household—Hispanics versus all, 2011

## Hispanic households have younger children

Figure 88: Number of households with children, by race and Hispanic origin of householder, 2012

Figure 89: Number of households, by race of householder and presence and ages of children, 2011

## Hispanic educational attainment generally high school or lower

Figure 90: Educational attainment of Hispanic men, by age, 2011

Figure 91: Educational attainment of Hispanic women, by age, 2011

# Hispanics overwhelmingly reside in Southern and Western America

Figure 92: Largest\* Hispanic groups, by region, by country of origin/ancestry, 2010

## Immigration is declining—but immigration reform may present an opportunity

Figure 93: Estimates of the U.S. unauthorized immigrant population, 2000-11

## Appendix – Other Useful Consumer Tables

Figure 94: Type of retailer where hygiene products are purchased, by gender, July 2013

Figure 95: Type of retailer where beauty products are purchased, by age, July 2013

Figure 96: Type of retailer where beauty products are purchased, by household income, July 2013

Figure 97: Factors influencing buying decision, by household income, July 2013

Figure 98: Influence of promotions, by age, July 2013

Figure 99: Influence of promotions, by type of retailer where beauty products are purchased, July 2013

Figure 100: Brands of deodorants and antiperspirants used in last seven days, by age, January 2012-March 2013

## Appendix - Social Media

Figure 101: Brand usage or awareness, July 2013

Figure 102: Dove usage or awareness, by demographics, July 2013



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: oxygen@mintel.con



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 103: Suave usage or awareness, by demographics, July 2013

Figure 104: Neutrogena usage or awareness, by demographics, July 2013

Figure 105: Colgate usage or awareness, by demographics, July 2013

Figure 106: Avon usage or awareness, by demographics, July 2013

Figure 107: Clinique usage or awareness, by demographics, July 2013

Figure 108: Social media activities, July 2013

Figure 109: Dove—social media activities, by demographics, July 2013

Figure 110: Dove—social media activities, by demographics, July 2013

Figure 111: Suave—social media activities, by demographics, July 2013

Figure 112: Suave—social media activities, by demographics, July 2013

Figure 113: Neutrogena—social media activities, by demographics, July 2013

Figure 114: Colgate—social media activities, by demographics, July 2013

Figure 115: Colgate—social media activities, by demographics, July 2013

Figure 116: Avon—social media activities, by demographics, July 2013

Figure 117: Avon—social media activities, by demographics, July 2013

Figure 118: Clinique—social media activities, by demographics, July 2013

#### Online conversations

Figure 119: Online mentions, selected personal care brands, Feb. 24-Aug. 25, 2013

Figure 120: Mentions by page type, selected personal care brands, by week, Feb. 24-Aug. 25, 2013

Figure 121: Mentions by type of conversation, selected personal care brands, Feb. 24-Aug. 25, 2013

Figure 122: Major areas of discussion surrounding personal care brands, by week, Feb. 24-Aug. 25, 2013

Figure 123: Major areas of discussion surrounding personal care brands, by page type, Feb. 24-Aug. 25, 2013

Appendix - Trade Associations

EMAIL: oxygen@mintel.cor