

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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



“The suncare sector is estimated to show little change in value in 2016, despite a rise in usage of sun protection and self-tanning products. This is likely due to savvy shopping behaviours which have seen discounters rise in popularity.”

— **Roshida Khanom, Senior Beauty and Personal Care Analyst**

This report looks at the following areas:

- Reassessing the ratings system
- Suncare products are saved for reuse
- Making sampling in self-tanning easier

The mass market suncare sector is estimated to decline in value by 0.4% in 2016, to £242 million, despite a rise in overall usage of suncare products. This is likely due to savvy shopping behaviours, which have seen discounters rise in prominence.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@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

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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

Table of Contents

Overview

- What you need to know
- Products covered in this report
- Excluded

Executive Summary

- Slow and steady growth
 - Figure 1: Best- and worst-case forecast for retail value sales of mass market suncare products, 2011-21
- Higher temperatures but fewer sunshine hours
- Added benefits driving self-tanning sector
 - Figure 2: UK retail value sales of mass market artificial sun tan preparation products by brand, year ending October 2016
- NPD drives suncare sales
 - Figure 3: UK retail value sales of mass market sun protection and after sun products by brand, year ending October 2016
- NPD in new usage occasions
 - Figure 4: New product development in the suncare category, by launch type, January 2013-September 2016
- Greater focus on advertising
 - Figure 5: Recorded above-the-line, online display and direct mail total advertising expenditure in the suncare category, January 2013-September 2016
- SPF usage sees a rise
 - Figure 6: Usage of suncare products, October 2016
- Beliefs in myths is high
 - Figure 7: Beliefs on sun protection, October 2016
- Sunny weather impacts purchase decisions
 - Figure 8: Reasons for not purchasing sun protection products, October 2016
- Young men are using self-tanning products
 - Figure 9: Usage of self-tanning products, October 2016
- Easy-to-use self-tanning products have appeal
 - Figure 10: Usage motivations for self-tanning products, October 2016
- What we think

Issues and Insights

- Reassessing the ratings system
 - The facts
 - The implications
- Suncare products are saved for reuse
 - The facts
 - The implications
- Making sampling in self-tanning easier
 - The facts

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: 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 |
EMAIL: reports@mintel.com

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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

The implications

The Market – What You Need to Know

Slow and steady growth

Sun protection and self-tanning see little change in value

Higher temperatures but lower sunshine hours in 2016

In-shower occasion sees NPD

Increased spending on skincare

Market Size and Forecast

A market with little change

Figure 11: Value sales of mass market suncare products, 2011-21

Slow and steady growth predicted

Figure 12: Best- and worst-case forecast for retail value sales of mass market suncare products, 2011-21

Forecast methodology

The impact of the EU referendum vote

Suncare performed well in the past

Figure 13: Alternative market scenarios for the post-Brexit mass market suncare market, at current prices, 2016-21

Figure 14: Detailed Post-Brexit scenarios for the mass market suncare market, at current prices, 2016-21

Little immediate reaction among suncare shoppers

A sector reliant on weather

Market Segmentation

Sun protection and self-tanning impacted by savvy shopping behaviours

Figure 15: UK retail value sales of mass market suncare products, by segment, 2015-16 (est)

Channels to Market

Savvy shopping behaviours drive discounters

Figure 16: UK retail value sales of mass market suncare products, by outlet type, 2015-16 (est)

Market Drivers

Educating young people

Figure 17: Trends in the age structure of the UK population, 2011-21

Higher temperatures but fewer sunshine hours

Figure 18: Total number of sunshine hours per season, 2015-16

In-shower occasion sees NPD

Figure 19: Activities performed whilst bathing or showering, by gender, October 2015

UV protecting haircare

Figure 20: Changes in haircare habits in the past 12 months, January 2016

Spending more on skincare

Figure 21: Changes in usage of bodycare products in the last 12 months, April 2016

Key Players – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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

NPD drives market value in 2016
Usage occasions provide NPD opportunities
Environmentally friendly claims rise in focus
Own-label shows innovation in 2015
Advertising spend increases
NIVEA increases its advertising spend
Usage translates to trust

Market Share

Added benefits driving self-tanning sector
Figure 22: UK retail value sales of mass market artificial sun tan preparation products by brand, years ending October, 2015 and 2016

NPD drives suncare sales
Figure 23: UK retail value sales of mass market sun protection and after sun products by brand, years ending October 2015 and 2016

Launch Activity and Innovation

Creating new usage occasions
Figure 24: New product development in the suncare category, by launch type, January 2013-September 2016
Figure 25: Examples of overnight self-tanning products, 2015 and 2016

Water as a theme
Figure 26: Examples of launches in the sun-tanning segment with a water format, 2016

Sun protection goes broader
Figure 27: New product development in the suncare category, by sub-category, January 2013-September 2016
Figure 28: Examples of sun protection launches offering broader protection, 2015 and 2016

Environmentally friendly claims see a rise
Figure 29: Top three fastest growing and fastest declining claims in the UK sun/sunbed exposure sub-category, percentage point change as a share of total NPD, 2014-15

Social media in self-tanning
Figure 30: Top three fastest growing and fastest declining claims in the UK self-tanning sub-category, percentage point change as a share of total NPD, 2014-15

Aftersun sees rise in appearance benefits
Figure 31: Top three fastest growing and fastest declining claims in the UK after sun sub-category, percentage point change as a share of total NPD, 2014-15

Own-label brands see activity in 2015
Figure 32: New product launches in the UK suncare category, by top five ultimate companies and others, 2015

Diagnostics see innovation
Figure 33: June Netatmo and La Roche-Posay (L'Oréal) My UV Patch, 2015 and 2016

Advertising and Marketing Activity

Advertising sees a rise in 2016
Figure 34: Recorded above-the-line, online display and direct mail total advertising expenditure in the suncare category, January 2013-September 2016

Outdoor inspiration

NIVEA saw sharp rise in spend
Figure 35: Recorded above-the-line, online display and direct mail total advertising expenditure in the suncare category, % share by top five advertisers in 2015 and others, January 2014-September 2016

Boots targets education at children

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: 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 |
EMAIL: reports@mintel.com

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 36: Attitudes towards and usage of selected brands, September 2016

Key brand metrics

Figure 37: Key metrics for selected brands, September 2016

Brand attitudes: P20 has a good reputation

Figure 38: Attitudes, by brand, September 2016

Brand personality: Fake Bake is fun and vibrant

Figure 39: Brand personality – macro image, September 2016

St Tropez has a glamorous image

Figure 40: Brand personality – micro image, September 2016

Brand analysis

St Tropez appeals to high earners

Figure 41: User profile of St Tropez, September 2016

Piz Buin risks being old-fashioned

Figure 42: User profile of Piz Buin, September 2016

P20 is considered ethical

Figure 43: User profile of P20, September 2016

Boots Soltan appeals to all ages

Figure 44: User profile of Boots Soltan, September 2016

Sally Hansen is expert

Figure 45: User profile of Sally Hansen, September 2016

Fake Bake appeals to men

Figure 46: User profile of Fake Bake, September 2016

The Consumer – What You Need to Know

Sun protection sees a rise in usage

Education opportunities for brands

Saving products for later use

Young men show rise in usage of self-tanning products

Ease-of-use drives self-tanning sector

Usage of Suncare Products

Rise in usage of sun protection products

Figure 47: Trends in usage of suncare products, August 2015 and October 2016

High SPF has the highest usage

Figure 48: Usage of suncare products, October 2016

Make-up use amongst men

Figure 49: Usage of make-up with SPF in the last 12 months amongst men, October 2016

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Suncare - UK - December 2016

Report Price: £1995.00 | \$2490.76 | €2354.10

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

Beliefs on Sun Protection

Consumers think they know it all

Figure 50: Beliefs on sun protection, October 2016

What's UVA/UVB got to do with it?

Once-a-day suncare amongst young people

Figure 51: Selected Beliefs on sun protection by age, October 2016

Purchase of Suncare Products

Saving products for later use

Figure 52: Purchase of suncare and aftersun products, October 2016

Sunny weather impacts purchase decisions

Figure 53: Reasons for not purchasing sun protection products, October 2016

Smart clothing opportunities

Benefitting from sun exposure

Figure 54: Not purchasing sun protection product to benefit from sun exposure, by age, October 2016

Usage of Self-Tanning Products

Rise in use of self-tanning amongst men

Figure 55: Usage of self-tanning products, by gender, August 2015 and October 2016

Oral-tanning supplements see a rise

Figure 56: Usage of oral tanning supplements, August 2015 and October 2016

Gradual tanning opportunities in older people

Figure 57: Usage of self-tanning products, October 2016

Ease-of-use drives usage

Figure 58: Usage motivations for self-tanning products, October 2016

Sampling works

Special occasion tanning

Men are influenced by advertising

Figure 59: Influence of seeing new brands/products in-store or advertising in using self-tanning products, by gender, October 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Forecast methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com