

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The market’s previous trajectory for growth has been short-lived, and the market is expected to decline to an estimated £1.16 billion in 2019. The move away from K-Beauty-inspired routines has been driven by women’s evolving interest in radiance and glow.”

– Alex Fisher, Associate Director BPC

This report looks at the following areas:

Serums and oils are the formats chosen to create this look, while other products have been dropped from the routine in favour of lifestyle changes.

- Wipes are on the naughty list
- Deconstructed skincare
- Glow minimises care routine

**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

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Executive Summary

The market
Market will stabilise
Figure 1: Best- and worst-case forecast of the UK value sales of women's facial skincare, 2014-24

Companies and brands
Accept the change
Figure 2: UK retail value sales of mass market women's facial skincare, by brand, year ending May 2019

Prestige pushes hydration
Figure 3: New product launches in the women's facial skincare market, by launch type, January 2016-May 2019

The consumer
Cause for concern
Figure 4: Areas of concern on face/neck, May 2019

Keep cleansing simple
Figure 5: Facial cleansing products used in the last 12 months, May 2018 and May 2019

Caring becomes about glow
Figure 6: Facial caring products used in the last 12 months, May 2018 and May 2019
Figure 7: Facial treatment products used in the last 12 months, May 2018 and May 2019

The right balance
Figure 8: Changes in facial skincare routine/behaviour over the last 12 months, May 2019

Water is a winner
Figure 9: Correspondence analysis for facial caring formats, May 2019

What we think

Issues and Insights

Wipes are on the naughty list
The facts
The implications
Deconstructed skincare
The facts
The implications
Glow minimises care routine
The facts
The implications

The Market – 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

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Market will stabilise
 The growth of big hitters
 Retailers on a journey
 Living my best life

Market Size and Forecast

Women pare back
 Figure 10: UK retail value sales of women's facial skincare, at current and constant prices, 2014-24

Market set to stabilise
 Figure 11: Best- and worst-case forecast of the UK value sales of women's facial skincare, 2014-24

Forecast methodology

Market Segmentation

Quality over quantity
 Figure 12: UK retail value sales of mass market women's facial skincare, by segment, years ending May 2018 and 2019
 Figure 13: UK retail value sales of mass market women's facial skincare, mass vs prestige, years ending May 2018 and 2019

No more double cleansing

Channels to Market

Looking for niche brands
 Figure 14: UK retail sales value of women's facial skincare, by outlet type, 2017 and 2018

The premium experience
 Figure 15: Boots' new beauty hall concept, March 2019

Market Drivers

Older women could fuel market downturn
 Figure 16: Trends in the age structure of the UK female population, 2013-23

Premium not always expensive
 Figure 17: Boots No7 HydraLuminous Water Surge Gel, May 2019

Cosmetics strengthen their benefits

Wipe out

Double cleanse or straight to bed?
 Figure 18: Time spent on evening beauty and grooming routines, by gender, February 2019

Show me my reflection
 Figure 19: Interest in diversity in advertising, October 2018

Companies and Brands – What You Need to Know

Accept the change
 Prestige pushes hydration
 Return to TV
 Build an identity

Market Share

**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

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

A clean sweep

Figure 20: UK retail value sales of mass market women's facial skincare, by brand, years ending May 2018 and 2019

Don't dwell on age

Figure 21: L'Oréal Revitalift Filler +Hyaluronic Acid 7-Day Cure Replumping Ampoules, April 2019

Launch Activity and Innovation

Face care moves the category forward

Figure 22: New product launches in the women's facial skincare market, by launch type, January 2016-May 2019

Figure 23: New product launches in the women's facial skincare market, by segment, January 2016-May 2019

Hydration hits the big time

Figure 24: Top growing and declining formats/textures in women's facial skincare, 2017-18

Figure 25: NPD examples of top growing formats/textures, 2018

Figure 26: Top growing and declining claims in women's facial skincare, 2017-18

Figure 27: New products with brightening/illuminating AND antioxidant claims, 2018

Prestige pushes back

Figure 28: New product launches in the women's facial skincare market, by price positioning, January 2016-May 2019

Figure 29: New product launches in the women's facial skincare market, by ultimate companies and other, 2018

Advertising and Marketing Activity

Outdoor gains share

Figure 30: Total above-the-line, online display and direct mail advertising expenditure on women's facial skincare, by media type, Jan 2016-May 2019

Figure 31: NIVEA Daily Essentials Urban Skin Detox Night Gel Cream, September 2017

Big players reduce spending

Figure 32: Total above-the-line, online display and direct mail advertising expenditure on women's facial skincare, by top companies and other, 2018

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 33: Attitudes towards and usage of selected brands, April 2019

Key brand metrics

Figure 34: Key metrics for selected brands, April 2019

Brand attitudes: Major brands aren't seen as interested in consumer wellbeing

Figure 35: Attitudes, by brand, April 2019

Brand personality: Brands considered ethical also struggle with boring image

Figure 36: Brand personality – macro image, April 2019

Many struggle to separate the image of different prestige brands

Figure 37: Brand personality – micro image, April 2019

Brand analysis

La Roche-Posay makes sensitivity premium

Figure 38: User profile of La Roche-Posay, April 2019

Simple prepares for the future

**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

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 39: User profile of Simple, April 2019

Figure 40: Simple biodegradable cleansing wipes, 2019

L'Oréal Paris could win with Millennials

Figure 41: User profile of L'Oréal Paris, April 2019

Garnier loses strong image

Figure 42: User profile of Garnier, April 2019

Pixi's success could falter

Figure 43: User profile of Pixi, April 2019

Superdrug B. needs to forge its own way

Figure 44: User profile of Superdrug B., April 2019

Nip+Fab going after the next generation

Figure 45: User profile of Nip+Fab, April 2019

Figure 46: NIP + FAB Purify Teen Skin Fix Salicylic Acid Concentrate, June 2019

Ole Henriksen confuses users

Figure 47: User profile of Ole Henriksen, April 2019

The Consumer – What You Need to Know

Cause for concern

Keep cleansing simple

Caring becomes about glow

The right balance

Water is a winner

Areas of Concern

Ingredients for eyes

Figure 48: Areas of concern on face/neck, May 2019

Figure 49: Eye care innovation containing glycolic acid, 2018

Figure 50: Overnight anti-ageing treatments containing retinol, 2018

Stamping out stress

Figure 51: Areas of concern on face/neck, by age, May 2019

Figure 52: Realine Frown Line Patches, May 2018

Figure 53: Sothys nO2ctuelle Chrono-Destressing Sleeping Mask, March 2018

Facial Cleansing Routines

Return of the washcloth

Figure 54: Facial cleansing products used in the last 12 months, May 2018 and May 2019

Figure 55: Face/neck care NPD featuring reusable cloths, 2018

Simpler times

Figure 56: Repertoire of facial cleansing products used in the last 12 months, May 2018 and May 2019

Figure 57: Stick format innovation in facial skincare, 2018-19

Older Millennials fear for their face

**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

Women's Facial Skincare - UK - July 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 58: Percentage point change in users of facial cleansing products, by age, May 2018 vs May 2019

Facial Caring Routines

Morning dew

Figure 59: Facial caring products used in the last 12 months, May 2018 and May 2019

Figure 60: Facial oils using glow terminology, 2019

Oil aboard

Figure 61: Percentage point change in use of facial caring products, by age, May 2018 vs May 2019

A nourished glow

Figure 62: Facial treatment products used in the last 12 months, May 2018 and May 2019

Figure 63: Atlantis Skincare Glowing Skin Serum Gel, 2018

Masking the problem

Figure 64: Percentage point change in use of facial treatment products, by age, May 2018 vs May 2019

Changes in Behaviour

Health remains internal

Figure 65: Changes in facial skincare routine/behaviour over the last 12 months, May 2019

A balancing act

Figure 66: Changes in specified facial skincare routine/behaviours over the last 12 months, by age, May 2019

Figure 67: Vitamins and supplements with beauty-enhancing claims, 2018

Authority figures

Format Associations

Serum is a winner

Figure 68: Correspondence analysis for facial caring formats, May 2019

It's not all bad

Figure 69: Words/phrases associated with facial caring formats, May 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Correspondence 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