

MEN'S ATTITUDES TO SKIN AND HAIRCARE - GERMANY - 2020

A lack of dedicated NPD is undermining men's involvement in the BPC sector. Harness lifestyle factors, expand mass market options and boost education to excel.



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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- Ageing population and financial concerns challenge growth
- Diversity and inclusivity begin to make their mark

Mintel predicts

- A greater focus on male-positioned NPD
- A greater focus on male-positioned NPD
- Increased brand/retailer activity targeting men
- Increased brand/retailer activity targeting men
- More eco-friendly options
- More eco-friendly options

What consumers want, and why

- Consumers want: added care benefits for hair
 - Graph 1: men's usage of hair products, September 2019
- Consumers want: more reasons to use male skincare
 - Graph 2: men's usage of facial cleansing products, September 2019
- Consumers want: more reasons to use male skincare
 - Graph 3: men's usage of facial caring products, September 2019
- Consumers want: simplicity
 - Graph 4: men's behaviours around facial skin/haircare, September 2019
- Consumers want: simplicity
- Consumers want: guidance
- Consumers want: guidance

Opportunities

- Education, education, education
- Education, education, education
- Expand mass offerings
- Expand mass offerings
- Stress the benefits
- Stress the benefits
- Quick download resources

MARKET DRIVERS

- Ageing population poses a challenge for engagement
 - Graph 5: share of maximum population projections for men, by age group, 2020-30
- German consumers face a tough economic climate
- Hair and facial skin are male grooming priorities
 - Graph 6: men's top three grooming priorities after hygiene basics on an average day, by age, January 2019
- The rise of the ethnic barbershop
- Retail for men - reimagined
- Younger men would benefit from BPC solutions to busy lifestyles
 - Graph 7: men's frequency of conducting selected lifestyle tasks, October 2019
- Improvements needed to male-positioned BPC advertising
 - Graph 8: men's interest in sector advertising*, by age, October 2019
- Use humour to gain interest

WHAT CONSUMERS WANT, AND WHY

Usage of hair products

- Innovate in shampoo for scalp-care to tempt older men
 - Graph 9: men's usage of haircare products, by age, September 2019
- Under-35s most engaged with hair styling
 - Graph 10: men's usage of hair styling products, by age, September 2019

Purchase factors when buying haircare

- Men lack proactive approach to their hair
 - Graph 11: purchase factors for men when buying hair products for themselves, by age, September 2019
- Integrate guidance and education into campaigns
- Integrate guidance and education into campaigns

Interest in trying haircare with specific ingredients

- Limited interest shown in newer hair product ingredients...
 - Graph 12: men's usage and interest in hair product ingredients, September 2019
- ...but rises for under-35s
 - Graph 13: men's usage and interest in hair product ingredients, under-35s only, September 2019

Usage of facial cleansing products

- A basic approach to cleansing
 - Graph 14: men's usage of facial cleansing products, September 2019
- Newer formats appeal to younger men

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- Graph 15: men's usage of facial cleansing products, by age, September 2019

Usage of facial care products

- Half of men do not use facial care
 - Graph 16: men's usage of facial care products, September 2019
- Increase product visibility and affordability
 - Graph 17: repertoire of facial care products used by men, by age, September 2019

Changes in behaviours around facial skincare

- Lifestyle challenges product use
 - Graph 18: men's facial skincare behaviours over the last 12 months, September 2019
- Lifestyle challenges product use
- The impressionable younger man
 - Graph 19: men's facial skincare behaviours over the last 12 months, under-35s only, September 2019
- The impressionable younger man

Sources of inspiration

- It's all about who you know
 - Graph 20: sources of grooming inspiration for men, by age, September 2019
- Brands can lean on barbershop expertise

Statements around face/haircare

- Keep it simple
 - Graph 21: men's behaviours around facial skin/haircare, September 2019
- Keep it simple
- Testing times
- Look to the future

Attitudes towards face/haircare

- A lackadaisical attitude to grooming
 - Graph 22: men's attitudes towards facial skin/haircare, September 2019
- Younger men feel the pressure
 - Graph 23: men's attitudes towards facial skin/haircare, under-35s only, September 2019
- Younger men feel the pressure
- Intel Trend: Guiding Choice
- Intel Trend: Guiding Choice

LAUNCH ACTIVITY AND INNOVATION

- Men under-catered for in NPD
 - Graph 24: share of total NPD in facial skincare and hair products positioned at men, 2016-19

- Face care NPD has universal approach
- Face care NPD has universal approach
- Potential lies in NPD for eyes and lips
- True innovation dominates face care
 - Graph 25: NPD in men's facial skincare, by launch type, 2016-19
- Merge short- and long-term benefits for maximum appeal in Germany
- Tangible claims lead in face care
 - Graph 26: NPD in men's facial skincare, by leading claims*, 2016-19
- A need for more education
- Leading companies dip in and out of men's face care market
 - Graph 27: NPD in men's facial skincare, by most active ultimate companies*, 2016-19
- Prestige products dominate face care NPD
 - Graph 28: NPD in men's facial skincare, by beauty price positioning, 2016-19
- Styling and hygiene vs care
- Styling and hygiene vs care
- Promote longer-term benefits of care in Germany
- Hair products maintain high innovation
 - Graph 29: NPD in men's hair products, by launch type, 2016-19
- New brands/ranges look to make their mark in hair products
- Men's haircare: An open market
 - Graph 30: NPD in men's hair products, by most active ultimate companies*, 2016-19
- Hair product claims shift to everyday nourishment
 - Graph 31: NPD in men's haircare, by leading claims*, 2016-19
- Added moisture + added vitamins = added care for hair
- Polarised price positioning for hair products undermines engagement
 - Graph 32: NPD in men's hair products, by beauty price positioning, 2016-19

APPENDIX

Appendix - products covered, abbreviations and consumer research methodology

- Products covered in this Report
- Abbreviations
- Abbreviations cont.
- Consumer research methodology

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