IMAGE SOURCE: Shakeup Cosmetics

synthesis Audiences

Unboxing Men

Masculinity in crisis: how are brands reshaping their relationship with men.

APRIL 2023 | WWW.SYNTHESIS.PARTNERS

LETTER FROM OUR DATA SCIENTIST

At Synthesis, we believe people don't exist in a vacuum. The strongest brands understand their consumers' interests and passions — beyond category limitations.

That's why we dig into audiences via mapping millions of Open Data connections. By contextualizing audiences in their wider world, we offer our clients a more holistic view.

Synthesis segmentations deliver the usual granularity of demos, sizing and brand affinity, but they also give a data-driven view of consumers beyond your category. What music do they love, where do they hangout, what media do they consume? Our clients use this to prioritize growth, plan media and partnerships with confidence.

As a Data Scientist, I'm passionate about using network theory and mathematics to bring structure to complex, messy data. The way we do this at Synthesis is special. I like to think it shows in the work we do.

Luc
Lead Data Scientist

HU CENTRED MAN

WHY MENS BEAUTY?

From fashion, beauty to booze, a question we hear a lot from our clients is how can they better engage their growth audiences? And, in a world where references to gender can be incendiary, how should brands market to men?

Men's Beauty is an ideal way to unpick this subject. Known within the industry as a huge opportunity for growth, it is often caught up in a one-dimensional view of its target audience. After all, what does masculinity even mean?

This report is where we netted out. We'll show you how Open Data is uniquely positioned to paint a rich picture so you can *feel* the humans behind the data. It will build empathy, get your teams excited about planning long term growth and inspire more resonant communication.

We're excited to share this report with you. I hope you enjoy reading it as much as we did writing it.

The Synthesis Audiences Team
Harriet, Luc, Jon, Nathalia, and Don.

MASCULINITY... ...IN CRISIS?

Welcome fluid masculinities — come as you are.

Our understanding of gender and masculinity is evolving fast. This brings new freedoms to express and greater inclusivity. However, with choice comes complexity. A cursory look at media headlines and social media feeds presents contradictory views on what it is to be a successful man.

Today strong-man archetypes and soft masculinity rise concurrently in pop culture. Men face polarizing directions — Scott Galloway or Joe Rogan? BTS Jimin or Code Kunst?

Must men pick a tribe?

Move over Marlboro Man and charismatic Sungil Shin-types.

A rugged chiseled jaw, physical prowess and charming smile is no longer the standard for a successful man. The days of a single, unifying masculine ideal are gone.

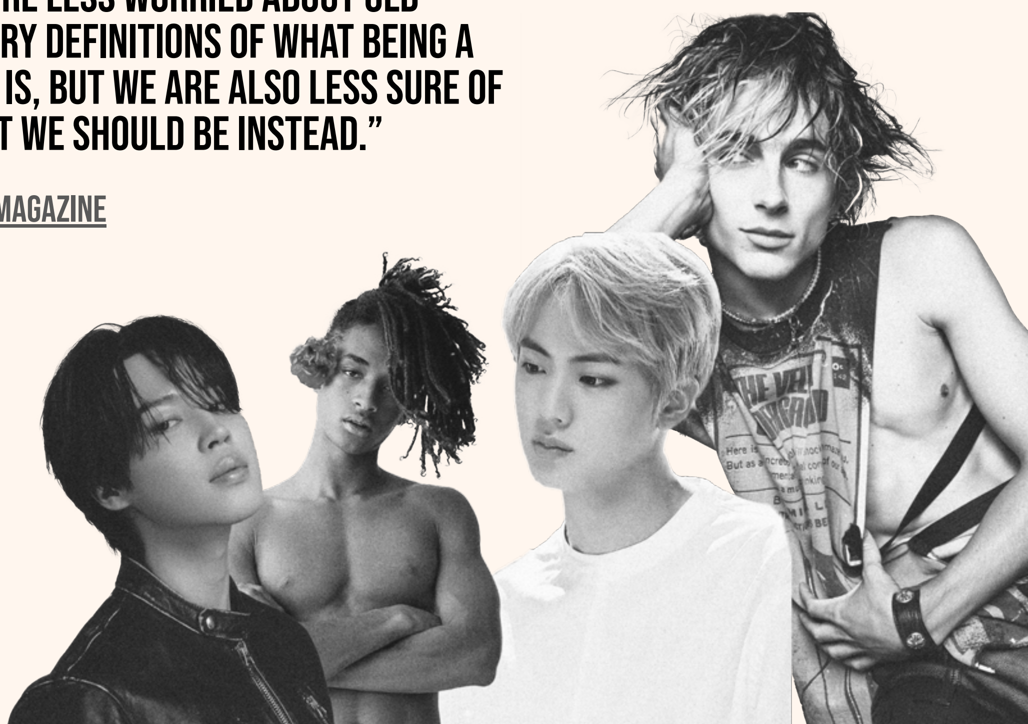
Economic and social shifts have eroded the historical preference for men and disrupted traditional identities. Modern post-industrial economies favor creative thinking, emotional intelligence, communication and relationships skills, not physical strength.

Since 1970's the number of women in workforce and education has risen dramatically. IMF reports indicate the greater the power of women, the greater a country's economic success. Meanwhile, men are not thriving. Almost everywhere, men suffer more from addiction, suicide and have lower life expectancies than women.

IMAGE SOURCE: IMDb, Jeff Bottari via Getty Images, Los Angeles Time, Instagram @chrishemsworth, Instagram @c.syresmith, British Vogue, Bighit Music

"WE'RE LESS WORRIED ABOUT OLD BINARY DEFINITIONS OF WHAT BEING A MAN IS, BUT WE ARE ALSO LESS SURE OF WHAT WE SHOULD BE INSTEAD."

— GQ MAGAZINE



IN A WORLD OF MULTIPLE VERSIONS OF *Masculinity* BRANDS ARE STRUGGLING TO AUTHENTICALLY CONNECT.

Clashing visions of what it is to be a man offer a challenge and opportunity for brands.

With nearly half of Gen Z consumers stating they value brands that don't classify items as male or female, it is not surprising that inclusive and gender-neutral brands such as Telfar and retail experiences such as Nike Style in Hongdae, Korea are resonating.

From Axe to Chanel, brands are broadening the way they depict men in order to stay relevant to the evolving cultural conversation. Those that don't engage meaningfully, or worse, those that continue to market towards outdated personas and gender stereotypes will be left behind.

Egyptian men kicked off the trend for cat eyeliner in ~4000 BC. Yet in our living memory, skincare and makeup has traded heavily in gender tropes and promoted beauty as a feminized space.

The biggest brands in the category focus almost exclusively on women — their skin needs, aspirations and concerns. They allocate a fraction of attention, R&D and marketing spend to men.

NOWHERE IS THIS MORE EVIDENT THAN IN BEAUTY.

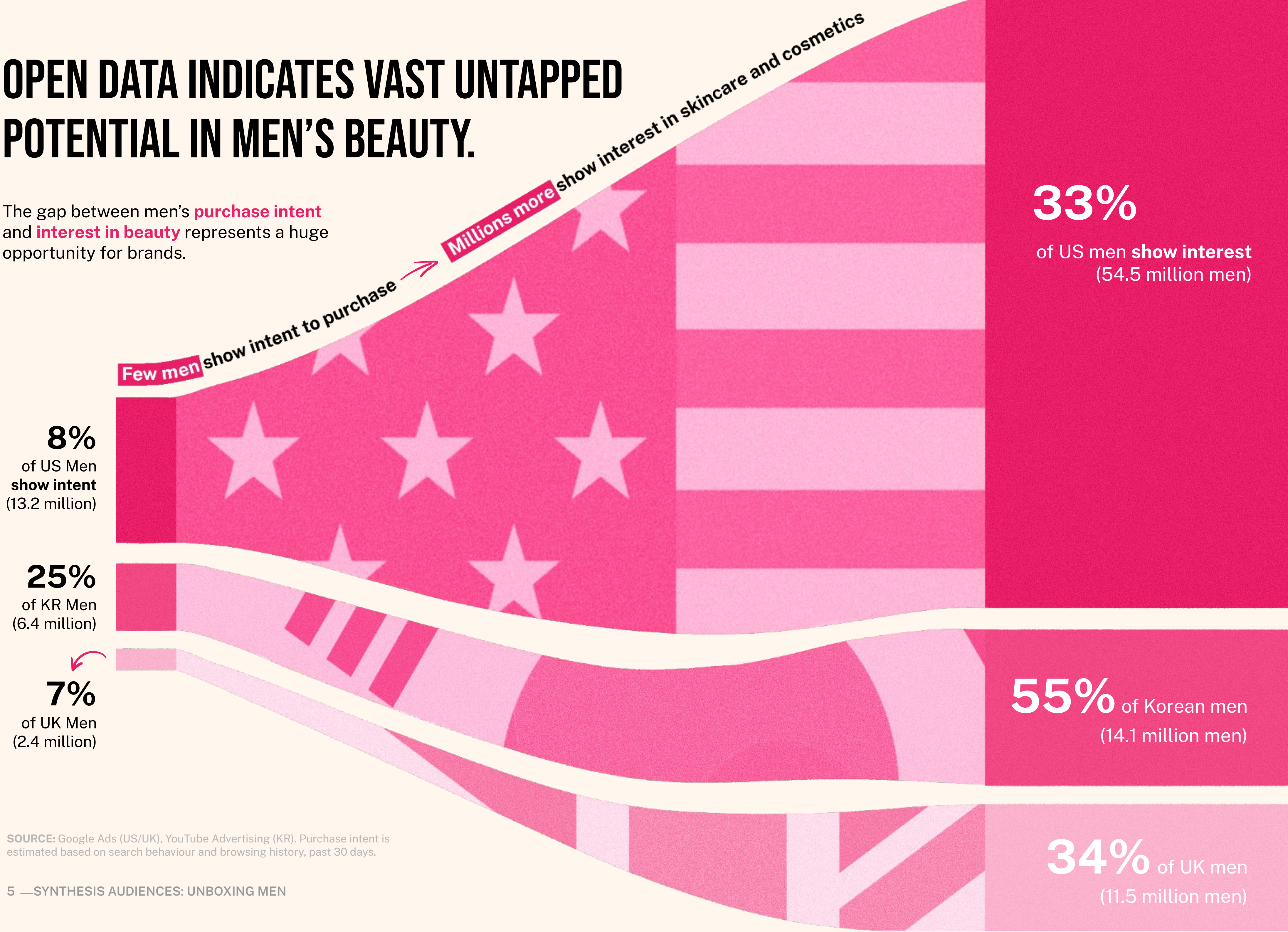
Women's beauty is hyper competitive with innovative propositions catering for a wide range of beauty ideals. By contrast, the men's aisle can lack sophistication and diversity, especially in the US and UK where outdated, strongman archetypes persist. Cue macho semiotics — black, navy, chrome **SHOUTING IN CAPS** — used to signal traditional masculine attribute of physical strength, functional efficacy, conquest and power.

Yet times are changing. Research shows that younger consumers favor brands with broad and inclusive representation, not singular or stereotyped ideals.

Major beauty groups risk losing ground to local, nimble upstarts that promote positive, diverse expressions of manhood. Brands like B.Ready and hims are disrupting with their refreshing tone, new business models and personalized men-first solutions.

OPEN DATA INDICATES VAST UNTAPPED POTENTIAL IN MEN'S BEAUTY.

The gap between men's **purchase intent** and **interest in beauty** represents a huge opportunity for brands.

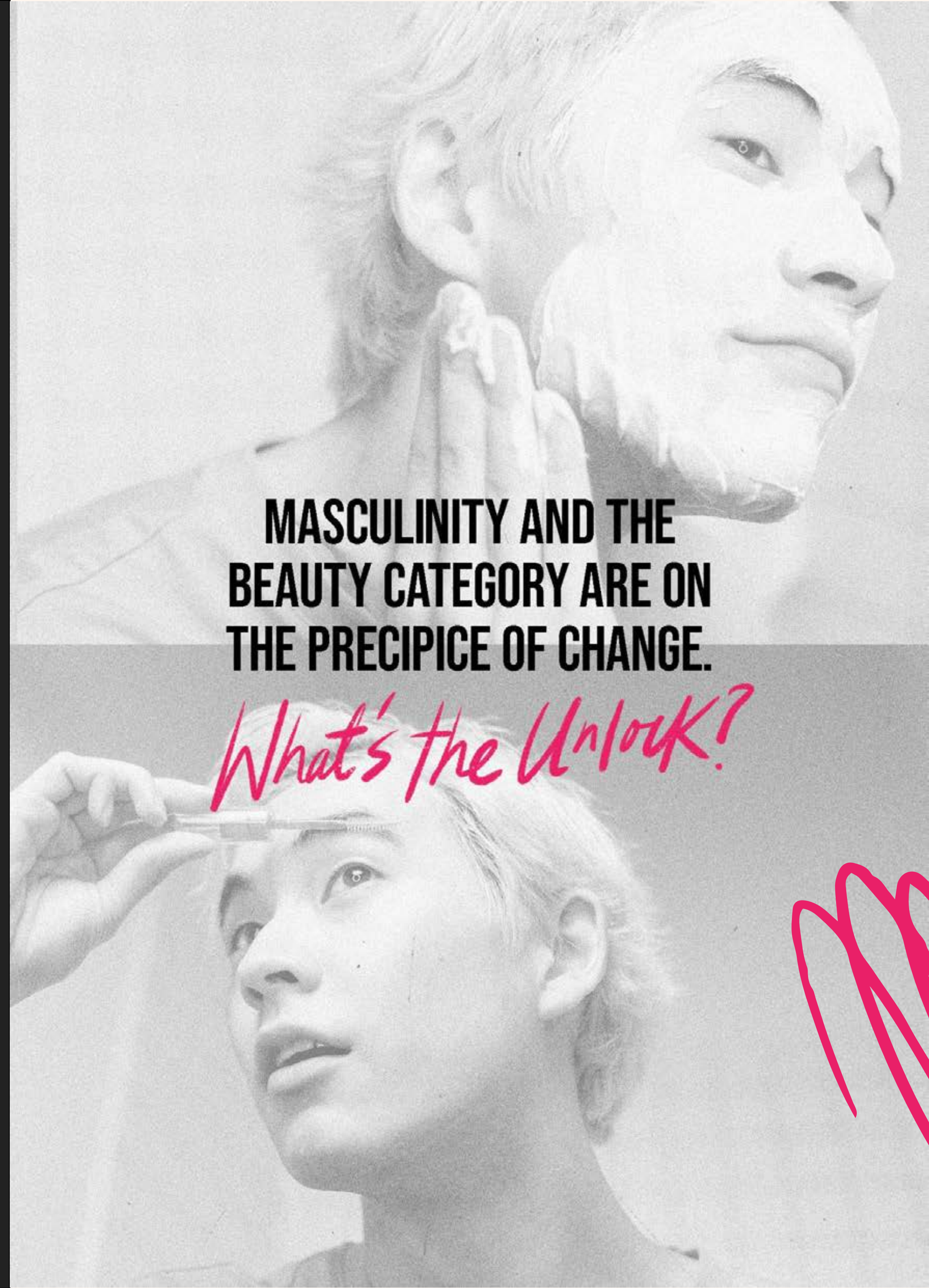


SOURCE: Google Ads (US/UK), YouTube Advertising (KR). Purchase intent is estimated based on search behaviour and browsing history, past 30 days.

THE GROOM BOOM

As the *rules* of gender presentation become more flexible, any remaining stigma around men's skincare is evaporating.

In Asian markets like Korea, China or Japan, men's skincare and makeup is already mainstream. In the US and UK, an explosion of new direct-to-consumer brands have shaken up the category. Makeup is creeping into men's everyday routines — a little concealer on a blemish here, a little brow gel there.



THE GUYS,
THE FASHIONISTAS,
THE KKONMINAM FLOWER BOYS,
THE BEAST IDOL BOYS,
THE BROS, THE BLOKES
& THE GENTLEMEN...

BEYOND THE *Monolith*

MEET THE MEN ENGAGING WITH BEAUTY IN KOREA, US AND UK...

Show me my next growth audience →

MEET THE 14.1 MILLION MEN IN KOREA WHO SHOW INTEREST IN BEAUTY

SOURCE: YouTube Advertising Data (KR), past 30 days.
IMAGE SOURCE: Pinterest @bonsoo_, Instagram @leehk.k, Pinterest @not_so_extrovert

Bright youthful skin, big eyes, double lids, a defined nose, plump lips, a tall, muscular yet androgynous body... Korean beauty standards for men are high.

Investing in one's appearance is not only expected but necessary to compete. These social pressures have made Korea one of the largest beauty markets — estimated at South Korean ₩ 7.64 trillion in 2021 (US $5.8 billion).

THREE QUARTERS OF SOUTH KOREAN MEN UNDERTAKE A BEAUTY OR GROOMING TREATMENT AT LEAST ONCE A WEEK.
GLOBALDATA

The pursuit of a flawless complexion has become the norm. K-pop idols with their bold brows and perfect skin have propelled men's makeup into the mainstream. Korean influencers share routines, reviews, and tutorials, encouraging men to explore, play with their look and ultimately redefining the boundaries of modern masculinity.

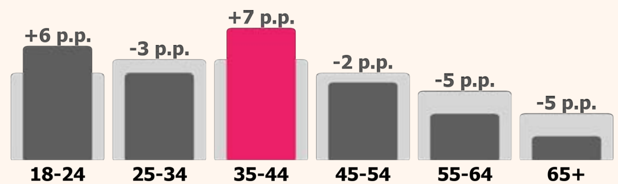
MEDIUM BEAUTY AFFINITY

Straightforward Optimists.

Largest audience in Korea.

Over indexes amongst 35-44 year olds.

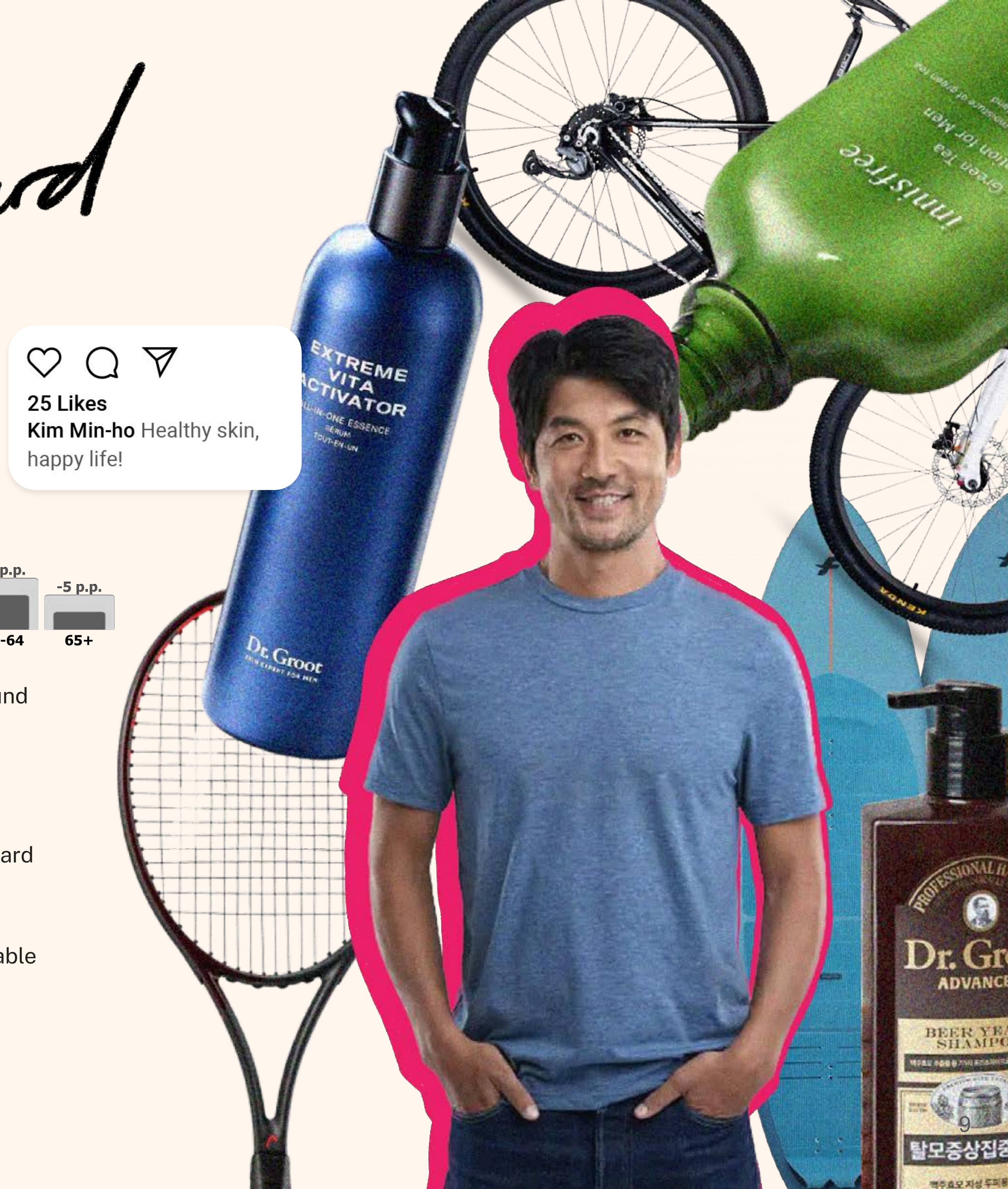
3.9 million men 1.9x average audience size



Lively, cheerful and outgoing, you'll never have a bad day around Straightforward Optimists. They focus on the bright, hopeful aspects of life against all adversity.

Their family and close friends are priority number one, always looking forward to creating meaningful memories with them. Striving to live a healthy life amid city pressures, Straightforward Optimists have active, outdoorsy lifestyles.

When not outside on a hike, self-care and wellness manifests through their skin care. They are drawn to well-known, affordable Korean drugstore brands like Dr G, Innisfree and Espoir.



BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

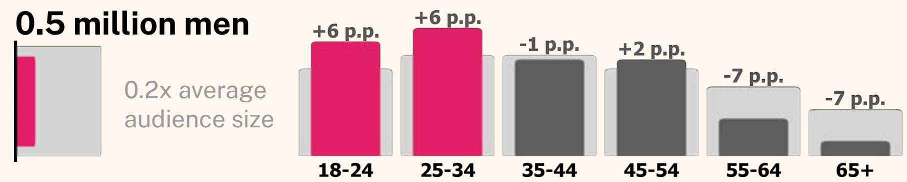
DATA SOURCE: YouTube advertising data (KR). Size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.

HIGH BEAUTY AFFINITY

Thoughtful Jetsetters.

Smallest audience in Korea.

Over indexes amongst 18-24 year olds, and 25-34 year olds.



Luxe-inclined and detail-oriented, Thoughtful Jetsetters spend copious amounts of time curating their style and personal statement.

Their social media profiles showcase color-themed and symmetrical posts, where each smile, garment, place, or product is intentional. This keen attention to detail naturally cultivates cultural curiosity, prompting them to continually seek new experiences to expand their horizons.

Appearing polished and well-presented is a priority. Well-versed in the world of skincare and cosmetics, Thoughtful Jetsetters prefer brands with clean lines, pharma cues and detail on active ingredients like CNP Laboratory and Abib.

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: YouTube advertising data (KR). Size indexed vs. average across segments. age over-skew versus base population highlighted in pink.

Artsy K-Poppers

Playful and curious, **Artsy K-Poppers** dance their way through life. Always surrounded by a community of like-minded people, they seek cultural experiences in food, music, film and design.

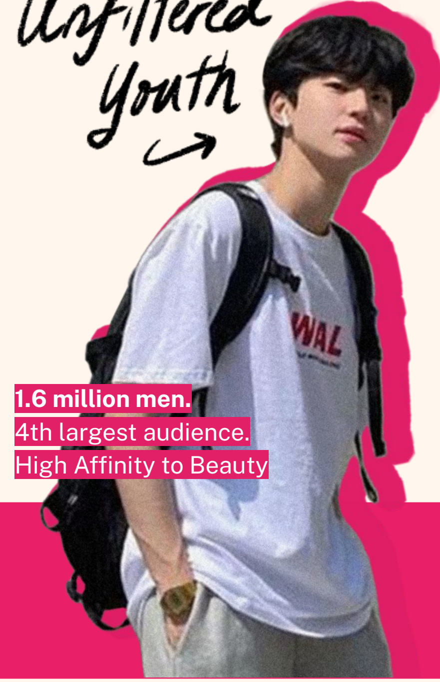
K-pop is their entry point into skincare and makeup. They gravitate towards brands with connections to the scene.

Fashion Buffs

Fashion Buffs have their finger on the pulse; these guys know what's trending. Sharing insider tips gets their name known. Buff body and confident style, they proudly assert their status.

Designer brands and drugstore classics meet their beauty needs. Makeup, fragrance, skincare and injectables all feature.

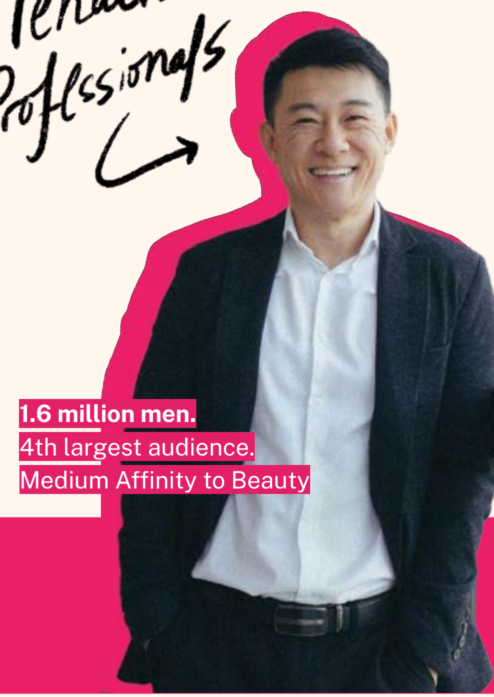
Unfiltered Youth



The youngest of the bunch, **Unfiltered Youth** value authenticity over staged perfection. These guys live in the present and take each day as it comes. Refusing to take life too seriously, they live by their motto: 노력 없이, 스트레스 없이 (no effort, no stress).

Minimalist packaging, pharma and clean beauty brands connect with their desire for a fuss free life and effortless clean look.

Tenacious Professionals



Tenacious Professionals draw inspiration from their heroes. Embodying a growth mindset, they embrace challenges and learning opportunities. These men are pragmatic, work-driven and avid team players.

The have a pragmatic relationship with beauty. Amidst a volatile economy, looking presentable helps them keep up with the competition.

MEET THE 66 MILLION MEN IN THE US & UK THAT SHOW INTEREST IN BEAUTY

SOURCE: Google advertising data (US/UK), past 30 days.
IMAGE SOURCE: Zara man via fashionisto, Pinterest

Though K-Beauty has catered to men for decades, the West has been late to the party. Video conferencing is the new battleground of success, accelerating men's relationship with their appearance. Men are confronted and judged based on their looks more than ever before.

Social media brings pressure, but also anonymous avenues to explore, learn and buy beauty products.

> **"TIKTOK HAS CREATED A WEALTH OF BEAUTY CONTENT, INCLUDING TIPS AND TUTORIALS ON SKIN CARE, HAIR CARE AND GROOMING. THE EASE OF ACCESS TO THIS INFORMATION HAS MADE IT AVAILABLE TO MEN FOR THE FIRST TIME".**
> **@DERMDOCTOR, A SKINFLUENCER WITH 17.9 MILLION FOLLOWERS**

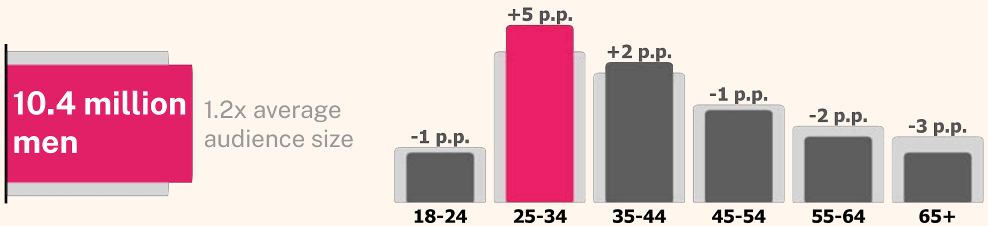
Hard hitting, muscular physiques pioneered by Arnie in the 1980s remain relevant for some; but evolving gender norms are allowing young men to choose individuality and authenticity over perfection.

MEDIUM BEAUTY AFFINITY

Athletic Mavericks

2nd largest audience in US & UK.

Over indexes amongst 25-34 year olds.



These lone wolves trust no-one but themselves. Whether at work or at the gym, Athletic Mavericks stop at nothing to get the results they want. Validation serves as the foundation of their motivation; they have no issue coming off as braggy or cocky. For them, every accomplishment is a step closer to emulating their idols — train by day, Joe Rogan by night baby.

Despite their self confidence, when it comes to beauty, they still seek the permission and reassurance of hard-man codes. Functional claims. Black, gunmetal and chrome semiotics. Traditionally masculine ingredients like Charcoal, Bourbon and Tobacco notes. Brands like Manscaped, Jack Henry and 18.21 Man Made sit top on their shelf.

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

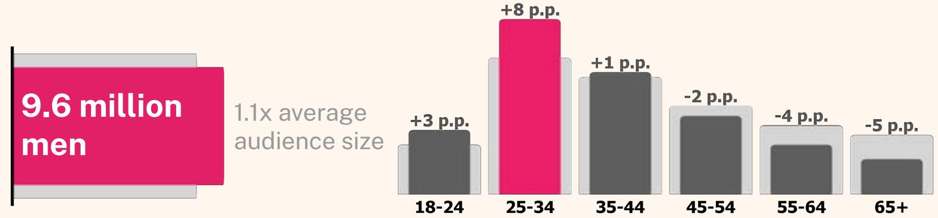
DATA SOURCE: Google ads data (US & UK). size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.

MEDIUM BEAUTY AFFINITY

Sharply Styled Creators.

5th largest audience in US & UK.

Over indexes amongst 25-34 year olds.



Writers, musicians and photographers by profession, Sharply Styled Creators blend their intellectual curiosity and creativity with their love for community. These men value representation and purposeful engagement. Catch them sporting a 'Support Local' tote bag and using products from Black-owned brands… because for them, the story always matters.

They don't shy away from grooming and skincare to achieve a clean, sleek look. While traditional men's brands have typically met their needs, a new generation of men's skincare and cosmetics have captured their attention. Think Scotch Porter, Shakeup Cosmetics, Wolf Projects. Brands by men, for men — all men.

BEAUTY AFFINITY: Audience engagement with beauty based on search behaviour.

DATA SOURCE: Google ads data (US & UK). Size indexed vs. average across segments. Age over-skew versus base population highlighted in pink.

THE BEAUTY INCLINED

Good taste and sophistication is a common trait for these audiences.

Luxe Fashionistas carefully curate each of their outfits. Find them flicking through a copy of Architectural Digest or Kinfolk. **Classic Connoisseurs** extend their refined taste to wine, watches and sports cars.

For **Beauty Allies,** authenticity and self expression take center stage–these men wear their hearts on their sleeves.

When it comes to fragrance, skincare and makeup, all three of these audiences pamper themselves with the occasional luxe brand that speaks to their lifestyle aspirations.

THE BEAUTY CURIOUS

These men embody more ‘traditional’ masculine ideals.

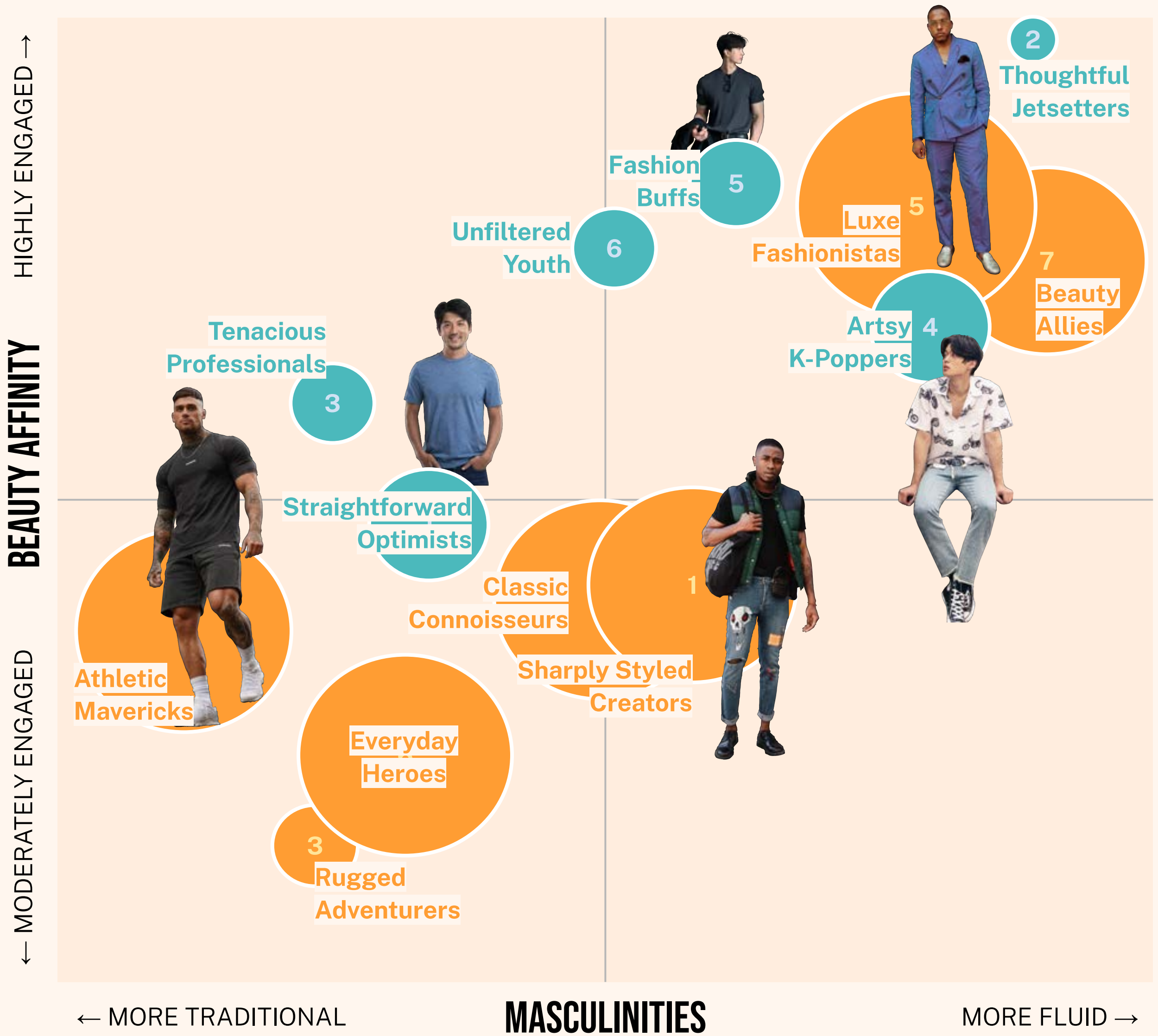
Everyday Heroes are young and optimistic. They relish the thrill of adventure shared with close friends — live football or the latest Marvel movie.

When it comes to skincare they keep it simple with drugstore brands that get the job done.

Rugged Adventurers strive for self-improvement and growth. From leisurely bike rides to lung-busting mountain hikes, these men enjoy challenging themselves and exploring the vastness of Mother Nature.

Grooming is their entryway to beauty. They gravitate to brands with natural ingredients.

WHERE DO OUR AUDIENCES SIT?



ALL OUR AUDIENCES ARE BEAUTY ENGAGED

The highest beauty affinity correlates with more fluid masculine ideals. Reflecting their confidence to express and curate their look, audiences like Fashion Buffs and Luxe Fashionistas engage across fragrance, skincare and some color cosmetics.

For audiences with more traditional ideals, grooming, fragrance and basic skincare are their ways in. Tenacious Professionals approach self-care like other aspects of self-improvement in their lives. Gym-going Athletic Mavericks are very appearance focused, but not highly beauty engaged.

HOW TO READ THIS CHART

Beauty Affinity: A data-driven ranking of our audiences' engagement with beauty based on search behaviour. All score medium+. Low engaged personas excluded from dataset.

Masculinities: A qualitative measure of how audiences portray themselves on social media from more traditional, macho archetypes to more fluid, androgynous ones.

Size reflects audience size, Google Ads data
Color indicates KOREA vs. US & UK audiences

AUDIENCES' VALUES REFLECT IN THEIR TOP BRANDS.

FUNCTION, PHARMACY AND GROOMING.

Moderately engaged beauty audiences such as **Straightforward Optimists** and **Athletic Mavericks** gravitate towards pharma brands such as CNP Laboratory or LAB Series who connect via scientific formulas, clean design and trustworthy reputation.

In the US & UK, grooming brands like Bevel or Murdock draw upon masculine barbershop spaces to give men permission to self-care.

MAKEUP & LIFESTYLE FOR THE FASHION FORWARD.

Fashion Buffs engage with makeup, lifestyle and fragrance brands from luxe to accessible local players like B.Ready, Official Nonfiction and Grafen.

In the US & UK, makeup has most affinity with fashion-forward audiences like **Luxe Fashionistas** and **Beauty Allies.** Shakeup is an exception — men's makeup with mainstream UK appeal thanks to highstreet distribution and straight talking tone.

LOOKING TO THE FUTURE.

TWO TRANSFORMATIONAL CATEGORY SHIFTS TO PUT ON YOUR RADAR.

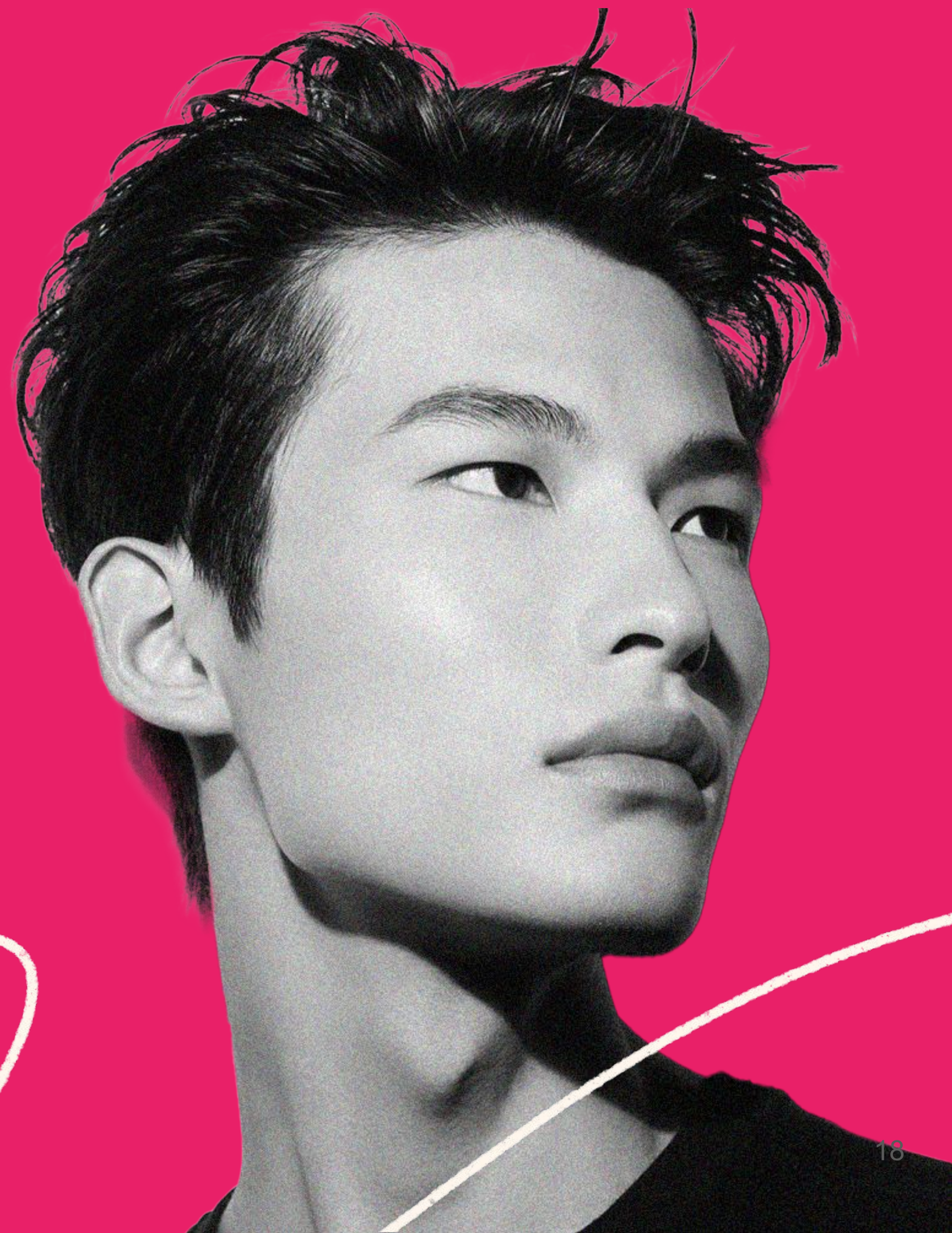


IMAGE SOURCE: BOY DE CHANEL

THE FUTURE IS GENDERLESS?

Pharmacy and luxe brands have been blurring gender lines with neutral semiotics and product-centric comms. Yet their social presence often remains female skewing.

In the US, activist brands like Humanrace have shaken up what gender-neutral really means and brought fresh attention to the argument that 'skin is skin'.

Younger male consumers are attracted to the simplicity, inclusivity and modernity offered by products that focus on skin needs, not gender.

SHIFT 1: THE BEAUTY DIVIDE

THE FUTURE IS DESIGNED SPECIFICALLY FOR MEN?

Hyper-personalization is a global beauty trend here to stay. Testosterone thickens skin, increases oiliness, collagen, and elastin. Shaving causes dryness, hyperpigmentation and ingrown hairs. This makes a strong case for men's specific solutions and DTC brands like hims and geologie are springing up to respond.

In makeup, men want to emphasize features like brows and seek out products that deliver natural, healthy finishes, not dramatic transformation. They look to brands like WarPaint to educate.

WHAT DOES THIS MEAN FOR BRANDS?

- Gendered products, without justification, are passé. Watchout legacy 'For Men' ranges.
- Invest in gender-neutral pharma and clean beauty brands for men — a global growth opportunity.
- Target men-specific skin needs, but be prepared to justify and own your genderedness.
- Create men's specific natural and effortless makeup looks for savvy markets. Include tutorials for makeup-curious consumers.

SHIFT 2: BEYOND BEAUTY

The word ‘beauty’ can be off-putting, cuing an uninviting feminized space. Rising masstige brands tap into the broader language of ‘grooming’, ‘skincare’ or conjure up masculine self-care traditions such as barbershop or gentlemen's outfitters as a way to invite men in.

Luxe brands are taking this to the next level. Positing beauty as part of broader lifestyle and culture choices — fashion, travel, accessories, art. These brands play with collaborations, experiential retail and product ranges that crossover category boundaries. Think Aesop’s City Guides or Tamburins experiential retail spaces in Korea.

IMAGE SOURCE: AESOP

WHAT DOES THIS MEAN FOR BRANDS?

- Collaborations are expected. Grow your reach via smart partnerships in fashion, media and travel.
- Invest in experiential retail that blurs category boundaries and evokes aspirational lifestyle.
- Connoisseurship education beyond the basics. Offer ‘insider’s knowledge’ on beauty as part of broader self-care and lifestyle.

Synthesis Audiences help you grow by identifying the most impactful activation platforms and brand partners to build meaning with your target.

DATA-DRIVEN TACTICAL PRECISION

Synthesis Audiences create output designed for a smooth transition from strategic prioritization to tactical activation.

Go to market data playbook.

Client partners use our data cheatsheet to find impactful partners, media and influencers that land with your target audience, every time.

Make confident decisions with the latest data.

Built for longevity, our audience data can be efficiently refreshed so you can stay close to priority audiences.

Want these tools for your brand?

Tell me more

KR Brand Name	Straightforward Optimists	Thoughtful Jetsetters	Tenacious Professionals
디올 화장품	0.1	1.0	0.1
지방시 메이크업	0.1	0.9	0.2
에스티로더	0.1	0.9	0.2
랩시리즈	0.1	0.8	0.2
아르마니 메이크업	0.1	0.8	0.2
구찌 화장품	0.1	0.8	0.2
에스케이투 포 맨	0.1	0.8	0.3
입생로랑 메이크업	0.0	0.8	0.1
라네즈	0.1	0.8	0.1
끌레드뽀	0.0	0.8	0.2
나스	0.2	0.7	0.3
디올 메이크업	0.1	0.7	0.2
톰포드뷰티	0.1		
샤넬 메이크업	0.1		

Brand Name	...yled Creators	Athletic Mavericks
Malin Goetz	0.2	1.0
The Art of Shaving	0.5	1.0
Murdock London	0.4	1.0
Manscaped	0.1	1.0
Duke Cannon	0.1	1.0
Geologie Skincare	0.0	1.0
Aesop	0.6	0.9
	0.6	0.9

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Geek Out

LEARN ABOUT OUR METHODOLOGY

THE BEAUTY OF OPEN DATA

Open Source Intelligence pieces together public, online data to give a fresh perspective on familiar problems. Our approach sits at the intersection of data science, strategy and humanities.

Synthesis builds segmentations based on millions of Open Data connections — search, social, advertising.

HOW DID WE UNBOX MEN?

Our approach utilizes 3 key concepts:

1. **Network theory** to map, segment and prioritize groups of consumers, influencers and brands with connections to men's beauty.
2. **Audience communities** to understand the everyday people in each segment, and bring them to life.
3. **Image AI** and **Natural Language Processing** to derive insights about communities — what they talk about, wear, love.

Market Scope.
USA & UK (Global English). South Korea.

Data Sources.
Instagram for the network and community build. Search and Ad-targeting data from Instagram, Facebook, Google and Naver for sizing, demographics and prioritization.

THE DETAILS

Defining Dataset. Category experts define a **seed list** of hundreds of men-focused and gender-neutral brands and influencers in grooming, skincare, makeup, fragrance.

Building Audiences. Clustering algorithms create a **network** of people engaging with brands and influencers on the seed list. Similar interests cluster together. We sample profiles from each cluster to analyze their wider world.

Top Brands, Media, Influencers. By looking at top followed accounts distinct to each cluster, we can understand the shared interests of each group.

Sizing. We measure the addressable audience engaging with the category in the P30D on **Instagram, Facebook, YouTube** (interest) and **Google Search** (purchase intent)**.** We size segments by measuring category engagement and with top authorities.

Image Analysis & Semiotics. We apply ML image models to group top engaging posts from beauty brands and influencers by visual themes. Semiotics experts led by James Archer, help unpack how messages can be tailored to appeal to each segment, and why.

DATA PRIVACY

Synthesis is committed to an individual's right to privacy. We do not store or process images from everyday users: only those from official brand, media and influencer verified accounts.

We only extract the data we need, and wherever possible we analyze fully anonymized aggregated data. All data from everyday users is anonymized and automatically deleted following the completion of a project. When a user removes a post or their account, the data is automatically removed from our dataset, too. Our data is encrypted and logged. We do not sell or share raw data with third parties.

OPEN SOURCE INTELLIGENCE FOR BRANDS

Follow Us!

Website www.synthesis.partners
LinkedIn @synthesispartners
Instagram @synthesis.partners

ABOUT US

Synthesis does Open Source Intelligence for Brands.

A team of data scientists and cultural strategists working with clients across categories and geographies.

Want to meet and acquire your next growth audience? Need to build strong connections to retain your core?
AUDIENCES@SYNTHESIS.PARTNERS

synthesis Audiences

Want to know shifting consumer demand, category and culture? Need to know when and how to activate?
TRENDS@SYNTHESIS.PARTNERS

synthesis Trends

The future is dynamic, why plan in a static way? Want to explore scenarios and invent the future?
FUTURES@SYNTHESIS.PARTNERS

synthesis Futures

The Evolution of Men's Grooming

July 2023

Passport

The data included in this report is accurate according to Euromonitor International´s market research database, at time of publication: July 2023

Contents

Introduction

Scope

All values expressed in this report are in US dollar terms, using a fixed 2022 exchange rate. All forecast data are expressed in constant terms. All historic data are expressed in current terms, with inflationary effects are taken into account.

This report includes analysis from the beauty and personal care industries, focusing on the following categories:

The evolution of men's grooming, fuelled by growing self-care, societal change, and the rise of gender fluidity, significantly influences the market. Trust and brand loyalty play major roles in male consumer decisions, bolstered by increasing grooming content over social media. Budget reallocation due to grooming behaviour shifting and inflationary pressure will negatively affect the market value. Despite the challenges, untapped and oncoming Gen Z consumers have gained prominence.

Disclaimer

Much of the information in this briefing is of a statistical nature and, while every attempt has been made to ensure accuracy and reliability, Euromonitor International cannot be held responsible for omissions or errors.

Figures in tables and analyses are calculated from unrounded data and may not sum. Analyses found in the briefings may not totally reflect the companies' opinions, reader discretion is advised.

Key findings

Men’s grooming outperforms wider beauty and personal care industry

The sector witnessed modest fluctuations in per capita spending between 2017-2022, mainly due to the pandemic impacting purchases to categories like deodorants and fragrances. Regions like Western Europe, North America, and Australasia led in per capita spend due to premiumisation and improved grooming habits. Inflationary pressures led men to prioritise premium products in categories like fragrances while trading down on general care products.

More consumers are exploring beyond basic grooming products

The evolution of self-care among men, fuelled by societal change, interest in advanced care and styling, and the rise of gender fluidity, significantly influence the men's grooming market. This shift has led to more men exploring beyond traditional grooming categories, opening up to a broader array of beauty and personal care products.

Social media content serves as a significant influencer for men’s grooming

Even though grooming behaviours vary among consumers from different countries and generations, trust and brand loyalty play a major role in male consumer choices, bolstered by increasing content about grooming tips and product information over social media.

Top trends provide unexplored market opportunities

The men's grooming landscape is being reshaped by the rise of genderless beauty brands and men's cosmetic surgeries. Gamification becomes essential to actively engage male consumers, while Gen Z's digital-first and exploratory approach directs market trends. Additionally, men's grooming is expanding into holistic wellness spaces.

State of the industry

Men’s grooming outperforms the broader beauty and personal care industry in 2022

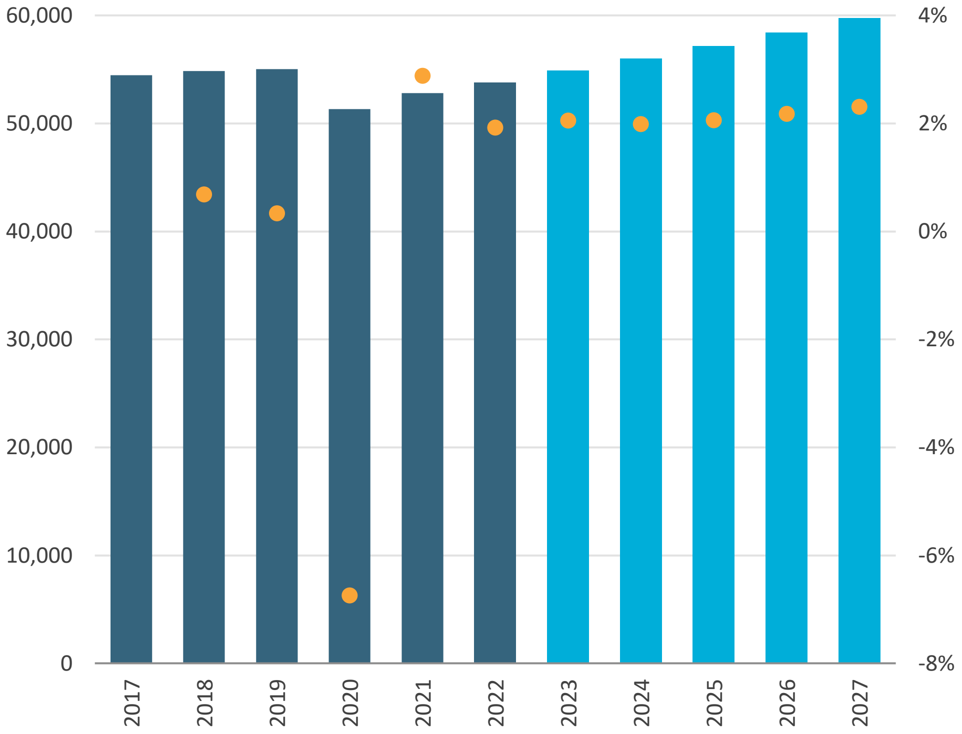
Global sales of men’s grooming grew by 2% in value at constant prices in 2022, outperforming the wider beauty and personal care industry (-0.5% in 2022). With most countries experiencing their first full year without lockdown restrictions in 2022, category growth was predominantly fuelled by sub-categories that benefited from the resurgence in out-of-home activities, like men's deodorants and fragrances.

In constant terms, topline sales for 2022 remained below the pre-pandemic high of 2019. This can be partly attributed to the growing popularity of facial hair, which led to a decline in usage occasions for men’s shaving products, while environmental concerns continued to hinder sales of disposable razors.

Another key factor has been the evolution of self-care among men, with factors like societal change, growing interest in ingredient-led beauty and the rising prominence of genderfluidity, contributing to more men looking beyond the traditional men’s grooming category for beauty and personal care products. Men’s grooming brands are now responding to this placing a greater focus on personalisation, male specific needs, and emerging segments. As such, the global market is predicted a 2% CAGR over 2022-2027.

Men’s Grooming: World % Y-o-Y Growth 2017-2027

Retail Value RSP USD million



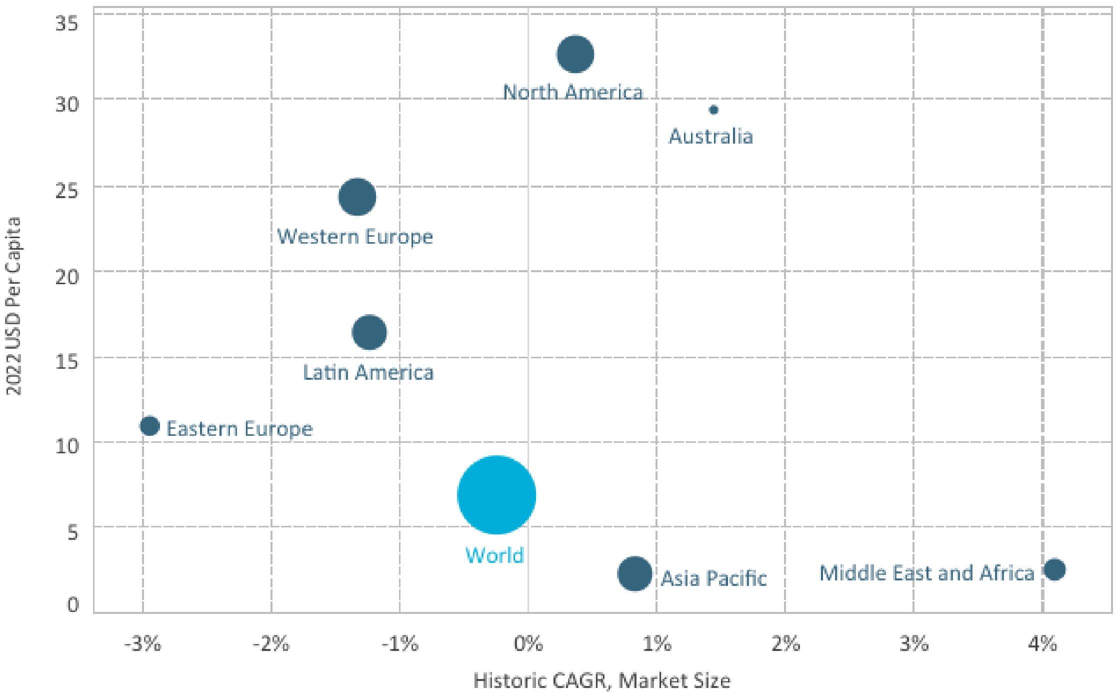
Polarisation of per capita spend between developed and emerging markets

Within beauty and personal care, men's grooming ranked fifth highest for per capita spend, at USD7 in 2022, one-third of the No.1 category, skin care. Between 2017-2022, the category experienced modest fluctuations in per capita spend, predominantly during the pandemic years when deodorant and fragrance purchases reduced.

Developed regions – Western Europe, North America and Australasia – stand out for high per capita spend, owing to premiumisation and improving male grooming habits. Combined they accounted for 47% of total men's grooming sales in 2022. Latin America had the fourth highest capita spend, at USD16, accounting for 20% of global sales. Asia Pacific and the Middle East and Africa outperformed most other regions in CAGR terms between 2017-2022, despite recording the joint-lowest per capita spend at USD2. This can be attributed to younger male consumers in these regions willing to spend more on their appearance compared to older generations.

Men's Grooming: Putting World in Context 2017-2022

Retail Value RSP USD million



Note: Bubble size indicates market size in USD million in 2022. Range displayed: USD762 to 53,816 million.

US drives global growth while China and India lag behind

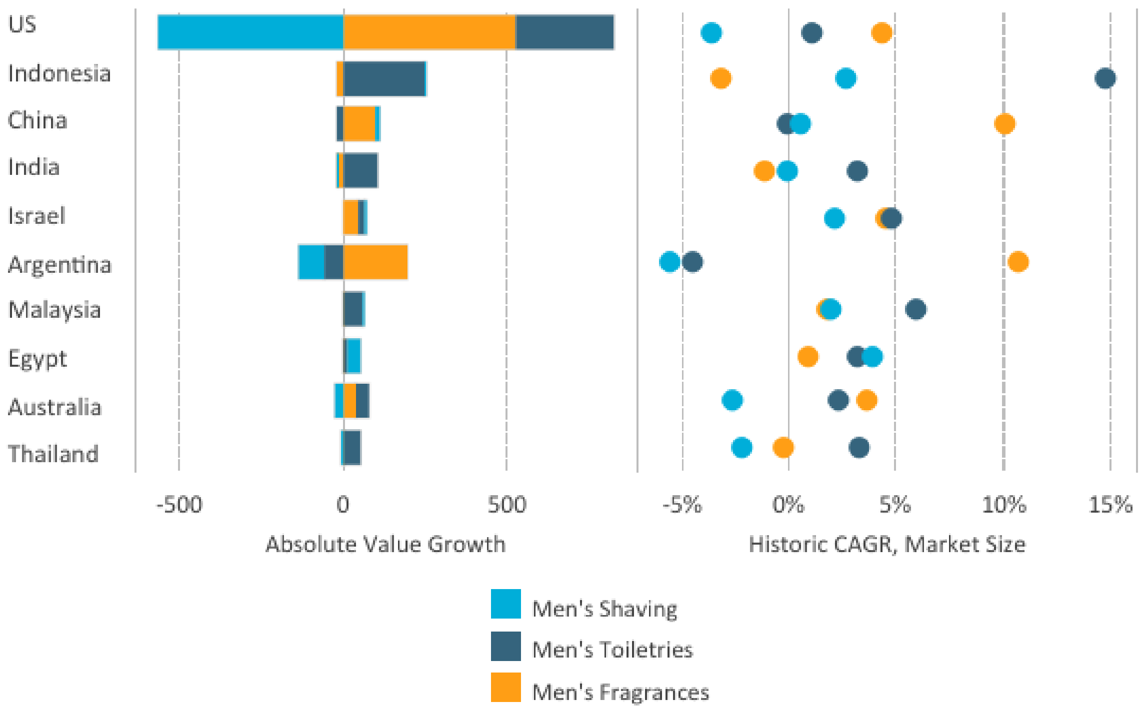
The US led men's grooming in absolute value growth terms between 2017-2022, attributable to the acceleration of premium segments such as fragrances and skin care. This was partly offset by men's shaving, which witnessed a strong decline as more men embraced facial hair, while environmental concerns continued to lower usage of disposable razors.

Indonesia was the standout performed in Asia Pacific as male education regarding beauty and personal care has expanded beyond essential items, leading to growing usage of more sophisticated products like skin serums.

China and India recorded modest absolute growth during the period, considering both their male populations are over 5x larger than the US. China was also hindered by another year of lockdown restrictions in 2023, impacting sales of fragrances and toiletries.

Men's Grooming in World: Breakdown by Category for Top 10 Countries with Biggest Absolute Value Growth 2017-2022

Retail Value RSP USD million



Inflation affecting beauty and personal care players from all regions

Inflation having profound impact on beauty and personal care

Around half of global beauty and personal care industry respondents stated that inflationary factors impacted their company in 2022, with respondents from Latin America noting the greatest impact.

Price increases are nuanced and not uniform across categories, markets and months

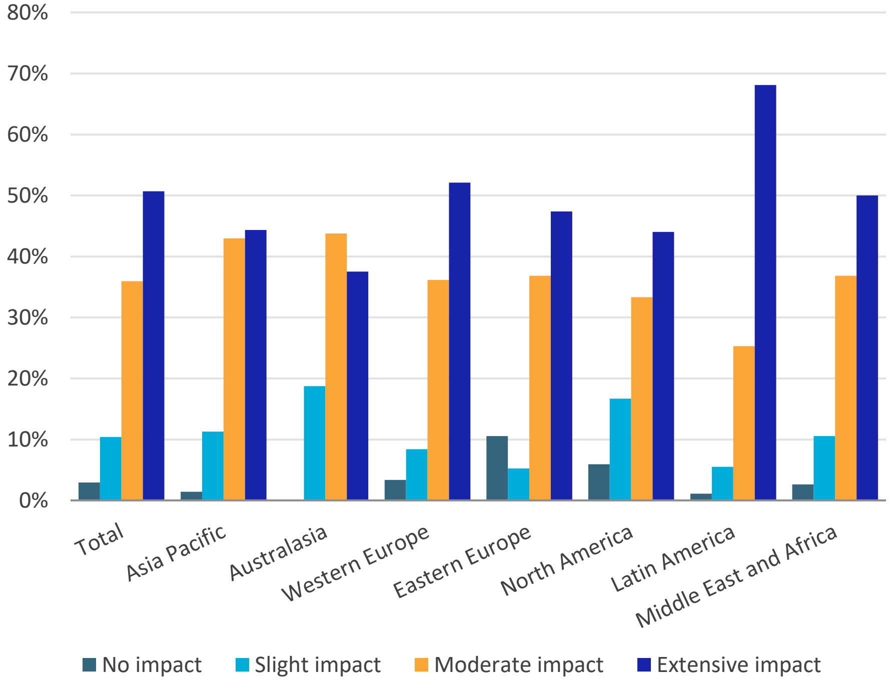
Euromonitor's Beauty and Personal Care Price Tracker found the percentage change in average unit prices in 2022 varied greatly by market and category, including men's grooming. In Poland, electric toothbrush units (42%) and 2-in-1 shampoo + conditioner products (25%) registered the largest price jumps, while men's fragrances (+10%) and men's razor and blades (+9%) were considerably lower. Price increases also varied between premium and mass brands.

Product evolution is also driving higher prices

Higher prices can also be a function value creation. "Skinification" is impacting colour cosmetics and hair care prices, since consumers increasingly expect more sophisticated formulations or concentrated skin care ingredients. Brands are also introducing innovative ways for consumers to experience products, such as product activation and personalisation, which contribute to higher prices.

To what extent has inflation impacted your company in the past 12 months? 2022

% Share of respondents



Source: Euromonitor Voice of the Industry: Beauty and Personal Care, fielded October 2022

Companies conscious of which categories consumers are willing to absorb higher prices

One method that companies and retailers are using to combat the impact of rising costs is by passing them directly onto the consumer. Categories with greater demand in 2022, such as men's deodorants and fragrances, witnessed the strongest change in average unit prices across the Top 10 countries as consumers were more willing to absorb these additional costs.

Players within weaker performing categories in 2022, like men's shaving, have been more conservative with increasing product pricing owing to awareness that any considerable hikes could further deter consumer interest in these spaces.

Consumers from the Asia-Pacific region experienced the strongest hikes, partly driven by higher costs related to the extended lockdown in China, but also by a stronger brand focus on premiumisation. For example, L'Oréal is specifically targeting high-spending consumers in this region, with Armani seeing a stronger price change in China in 2022 compared to the UK and US.

Men's Grooming Price Changes: Top 10 Countries 2021-2022

% change in average unit price of the Top 50 Men's Grooming Brands

	Bath & Shower	Deodorants	Fragrances	Hair Care	Shaving	Skin Care
USA	↗ 3.6%	↗ 8.6%	↗ 5.1%	↗ 2.5%	↗ 3.0%	↗ 2.9%
Brazil	↗ 4.3%	↗ 6.4%	↗ 2.1%	↗ 3.0%	↗ 2.7%	↗ 3.4%
Germany	↗ 3.7%	↗ 8.8%	↗ 3.5%	↗ 1.9%	↗ 2.4%	↗ 3.2%
China	↗ 15%	↗ 25%	↗ 6.8%	↗ 8.5%	↘ 1.4%	↗ 2.3%
UK	↗ 5.3%	↗ 11%	↗ 3.4%	↗ 1.3%	↗ 1.8%	↗ 2.4%
India	↗ 1.3%	↘ 0.7%	↗ 2.5%	↘ 0.1%	↗ 1.0%	↗ 6.4%
France	↗ 3.2%	↗ 5.7%	↗ 5.1%	↗ 5.7%	↗ 3.1%	↗ 1.6%
Japan	↗ 4.1%	↗ 13%	↗ 15%	↗ 1.9%	↗ 1.0%	↗ 4.4%
Mexico	↘ 1.7%	↗ 7.8%	↗ 6.1%	↘ 0.9%	↘ 0.6%	↗ 1.3%
Spain	↗ 3.3%	↗ 6.4%	↗ 5.6%	↗ 2.9%	↗ 3.9%	↗ 2.7%
Category Average	↗ 4.6%	↗ 9.0%	↗ 6.1%	↗ 3.0%	↗ 1.8%	↗ 2.7%

Source: Euromonitor International's Via: Price Tracker

Male expenditure on BPC products rise in 2022 but inflation influences spending habits

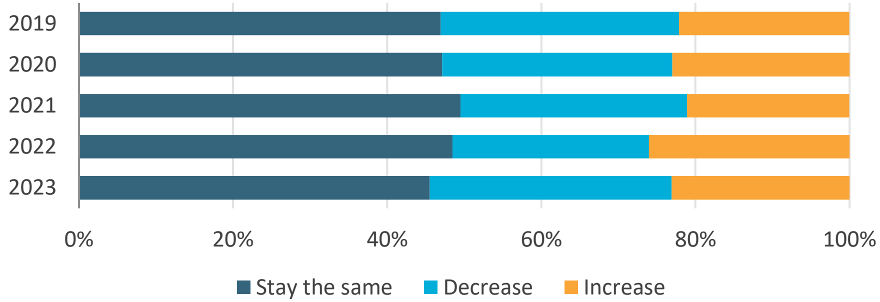
Male consumer spending increased in 2022, largely driven by desire to treat oneself for living in lockdown for two years. However, inflationary pressure has impacted consumer confidence with Euromonitor's Voice the Consumer: Lifestyles Survey, finding that global male respondents in 2023 plan to decrease their spending. The rising cost of beauty and personal care products in 2022 has already influenced purchase habits, with many men trading down in some categories to afford premium acquisitions in others.

Personal care categories, like men's deodorants and bath & shower, witnessed a notable shift from premium to mass in 2022 owing to the perception that these products offer a similar outcome irrespective of their price. Trading down in these categories has enabled men to spend more on products like premium fragrances, as they are longer-lasting and have stronger scents, as well as being perceived as a status symbol, which helps men justify the higher price point.

Amid high inflation, men's grooming private label brands lost market share in 2022 as brand loyalty among this demographic remained strong, particularly driven by a reluctance to try new products during a time of financial uncertainty. The segment was also hindered by a strong increase in promotions, especially multibuys.

Future Spending Habit Intentions 2019-2023

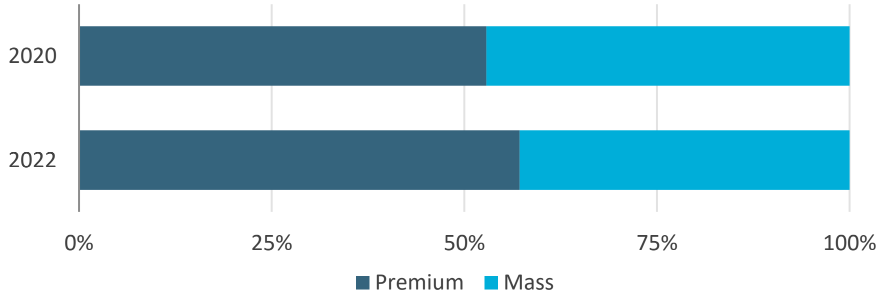
% of global male respondents shopping intentions over next 12 months



Source: Euromonitor Voice of the Consumer: Lifestyles Survey

Men's Fragrances: Mass vs Premium 2020-2022

% of market share, Retail RSP USD constant prices



Category prospects

Passport

Men’s fragrances and men’s skin care offer future market potential

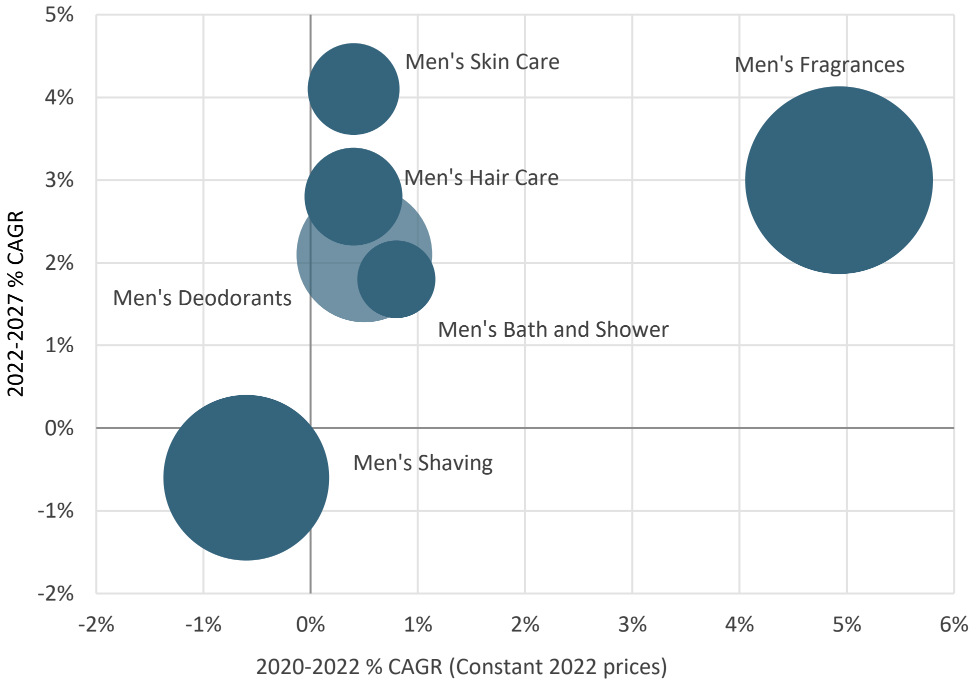
Among the sub-categories in men's grooming, fragrances, shaving, and deodorants are the top three categories in terms of retail value sales in 2022, accounting for 33%, 26%, and 18% of the total sales, respectively. The only category that experienced a decline in constant prices between 2020 and 2022 was men's shaving due to the decrease in product usage caused by fewer outdoor activities during the pandemic and the evolving beard grooming trends.

Products used for basic grooming routines, such as shaving, bath and shower, and deodorants, which already enjoy high usage among male consumers, are expected to show only marginal growth till 2027. However, as more male consumers pay attention to their appearance, men's grooming routines become increasingly sophisticated. Products for styling and advanced care, such as fragrances and skin care, are projected to experience robust growth, with a CAGR of 3% and 4% between 2022 and 2027, respectively.

In terms of men's fragrances, Brazil, China, and Saudi Arabia are expected to have the most significant growth potential. As for men's skin care, China, Indonesia, and the USA are anticipated to become the key drivers for market growth.

World Market for Men’s Grooming: Potential by Category 2020-2027

Retail Value RSP USD million, % CAGR



Note: Size of bubble denotes market size in 2022, USD billion
Source: Euromonitor International Beauty and Personal Care Forecast Model, May 2023 Baseline

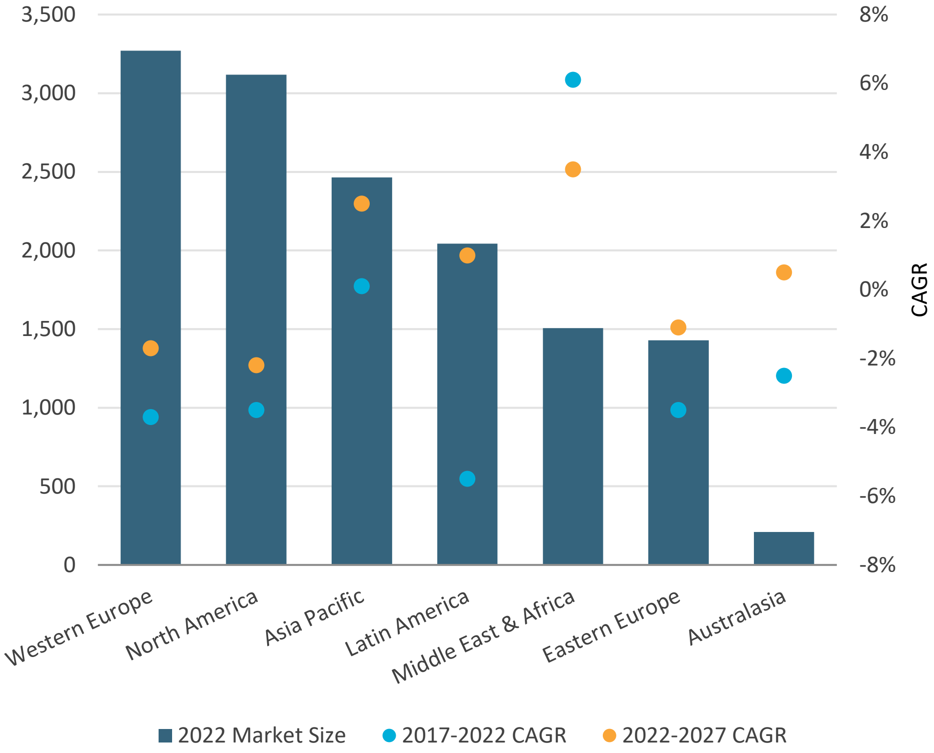
Manscaping projected to ease future decline of men's shaving

Between 2017 and 2022, men's shaving was the underperforming category within men's grooming, declining by 3% in retail value at constant price term. The bulk of the decline came during the pandemic years when fewer social occasions reduced shaving habits, accompanied by more men embracing facial hair. Men's razors and blades, which accounted for 75% of total sales in 2022, witnessed a stronger decline during this period than pre-shave and post-shave products, which accounted for 17% and 8% respectively. This can be attributed to the environmental concerns surrounding disposable razors that has led many consumer to switch to electronic products, which are not tracked in the topline.

Forecast CAGR is projected to be flat for the category globally between 2022 and 2027. Popularity of beards and moustaches in Western markets is expected to fuel further declines but this is expected to be modestly offset by the rising prevalence of manscaping. The niche segment, which focuses on body hair grooming, is growing in popularity among Gen Zs and Millennials amid open discussions around personal hygiene and self-care. The most significant growth potential comes from countries growing from a low base like Pakistan and Egypt.

Men's Shaving Evolution: Performance by Region 2017-2027

Retail Value RSP USD million



Hygiene categories benefit from activities outside the home post COVID-19

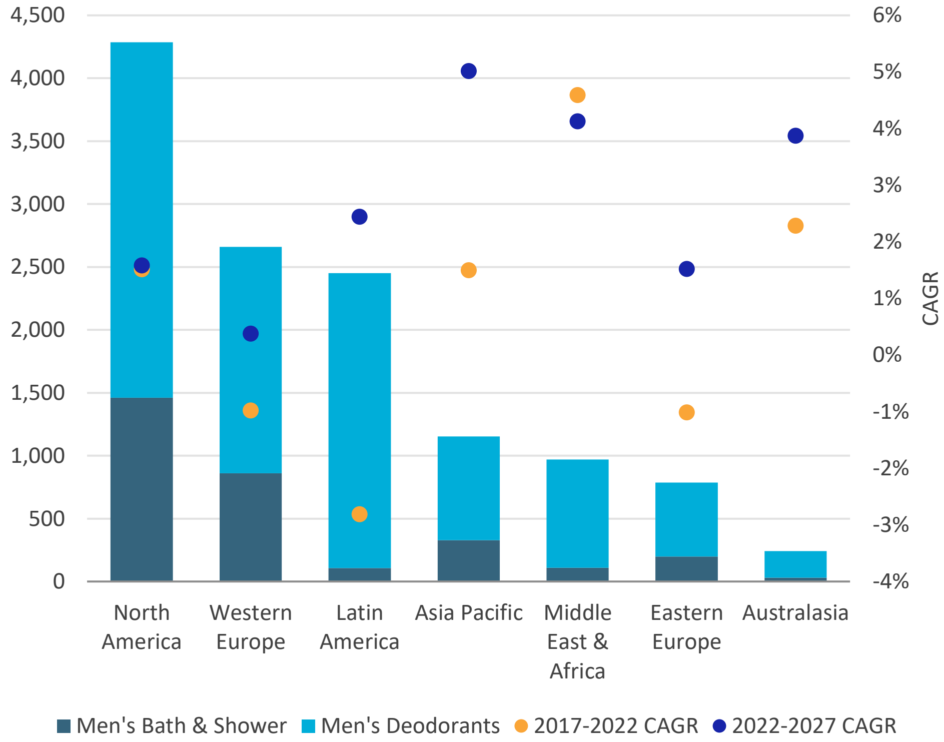
Hygiene-related sub-categories, men's bath & shower and men's deodorants, experienced solid upturns globally in 2022, thanks to most countries experiencing their first full year without lockdown restrictions. As such, out-of-home activities became more prevalent leading to more sweat occasions that boosted washing frequency and deodorant usage.

The most significant growth potential between 2022-2027 is expected in the Asia Pacific region, predominantly driven by China. Unlike other countries, China experienced another year of lockdown restrictions in 2022, which has meant the country has not yet rebounded to pre-pandemic levels like other markets.

Global CAGR growth (+2%) in the forecast period is expected to be driven by population growth and male consumers become more conscious of their grooming habits. One emerging space that is expected to benefit from this trend is men's intimate washes within bath and shower, which has witnessed growing focus and product innovation in recent years. Both sub-categories are also expected to benefit from their ability to provide a natural and appealing fragrance, as smell has become more appreciated post-pandemic after some consumers lost smell from COVID-19.

Men's Bath & Shower and Deodorants: Performance by Region 2017-2027

Retail Value RSP USD million



Hair care expected to benefit from growing popularity of facial hair

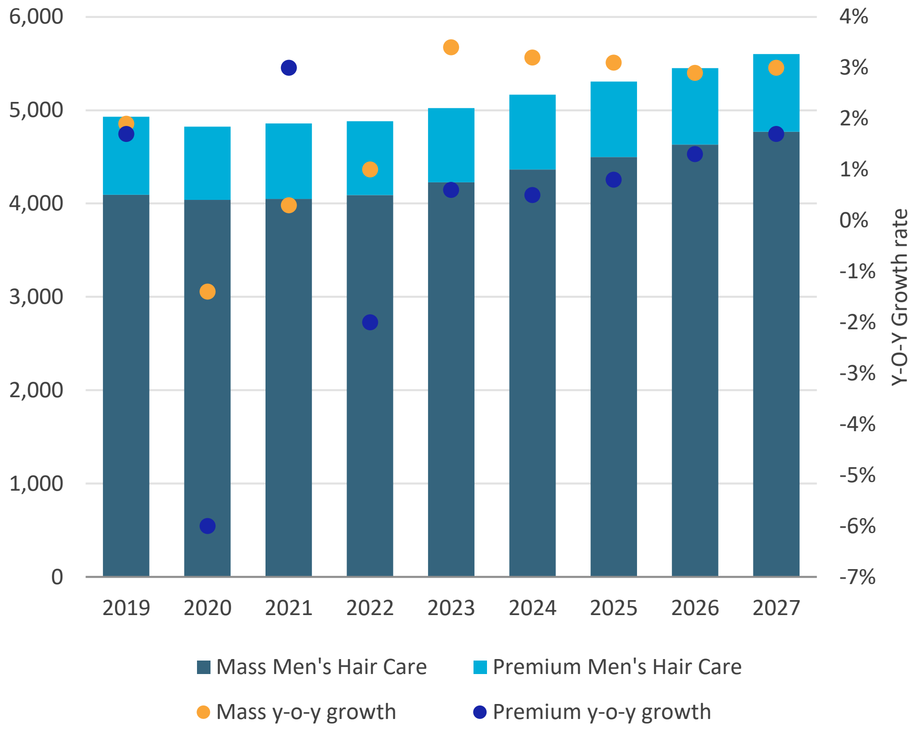
Constant value sales of the global men's hair care market in 2022 remained below pre-pandemic levels, partly driven by men switching to unisex brands as innovation in the men's space has lagged behind the broader category. Performance has also been impacted by improving male knowledge of hair care, particularly through growing awareness that frequent hair washing can have negative impacts, both environmentally and on hair health, which has led to reduced usage of standard shampoos and 2-in-1 shampoo/conditioner products.

Projected growth for the category is expected to be driven by new and emerging segments. One area is scalp treatments, a trend that rose in prominence during 2022 as ingredient-led beauty and hair skinification grew in popularity. Demand in this space is expected to be fuelled by rising concerns surrounding hair loss, partly driven by COVID-19 and stress related to political and economic uncertainty, but also through Gen Zs and Millennials looking to address hair loss concerns from a younger age.

The future loss of sales for men's shaving is anticipated to be partially offset by stronger sales of hair care products for beards and facial hair, driven by more product development in this segment.

Men's Hair Care: Mass vs Premium, Global 2019-2027

Retail Value RSP USD million



Mature markets demanding advanced men's skin care products

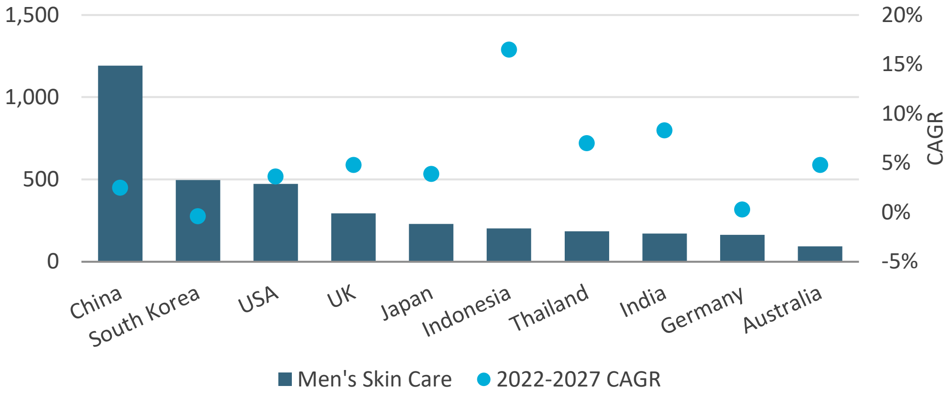
The men's skin care market is forecasted to have a 4% CAGR between 2022 and 2027, with the highest potential growth among all men's grooming categories. The development stages of men's skin care in different countries vary greatly.

In markets where men's skin care awareness is relatively mature, such as China, South Korea, and the USA, the demand for men's skin care is evolving towards a more advanced level. The product offerings are developing diversification towards a more specialised range to cater the niche demands, from basic functionalities like oil control or moisturising to anti-ageing, and sun protection. Moreover, as male consumers become increasingly knowledgeable about their skin concerns and suitable ingredients, they tend to move their budget to a wider range of brands. This means dermocosmetics or gender-neutral brands will erode the market size of "only-for-men" skin care products.

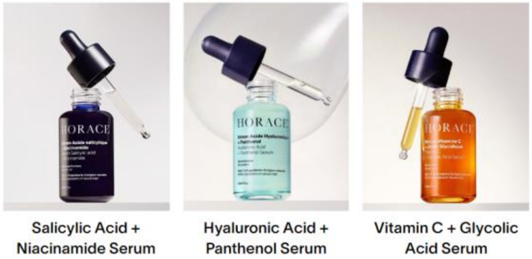
On the contrary, in the countries where men's skin care demands are just started to be awakened, such as Indonesia and India, there is still an untapped demographic dividend to be explored for basic offerings like facial cleansers and moisturisers with considerable room for growth.

Men's Skin Care: Performance by Top 10 Countries, 2022

Retail Value RSP USD million



Source: Euromonitor International Beauty and Personal Care Forecast Model, May 2023 Baseline



USA men's skin care brand HORACE launches the face serum line to tackle men's specific skin issues.

Source: HORACE

Men’s fragrances see potential in the premium sector, but hindered by unisex trend

The fragrance has emerged as a key component of men's grooming routine, with a growing demand for premium, high-quality, unique scents that cater to their preferences. Asia Pacific holds immense potential for the growth of the premium men's fragrances market. On June 2023, Kering's purchase of Creed, famed for its men's fragrance Aventus, demonstrates the company’s intent to tap into burgeoning markets like China and travel retail.

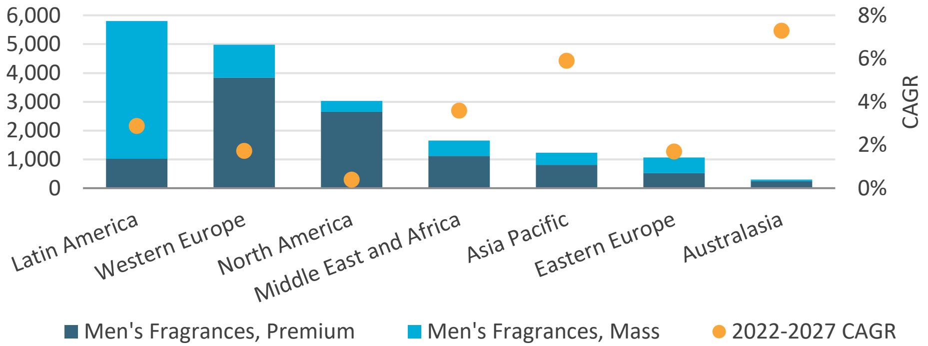
The market landscape is also shaped by the influence of niche brands such as Le Labo and Byredo, alongside fashion house brands like Calvin Klein and Maison Margiela. These brands are catering to a societal shift towards gender-neutral products that reject traditional gender codes and emphasize self-care, acceptance, and gender fluidity.

Premium fragrance launches are increasingly geared towards empowering all gender consumers and enhancing accessibility, as mirrored in the choice of brand ambassadors and the balanced femininity and masculinity of the scents.

This preference for gender fluidity lends a significant advantage to unisex premium fragrances, which are projected to experience a CAGR of 6.5% until 2027.

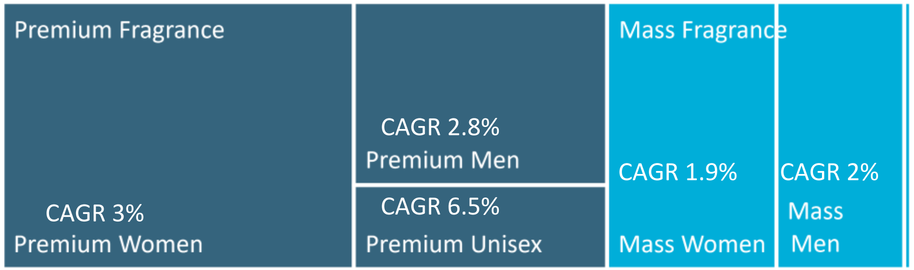
Men’s Fragrances – Performance by Regions

RSP Sales Value in constant prices, USD million



Fragrances segmentation in 2027

CAGR%



Source: Euromonitor International Beauty and Personal Care Forecast Model
Note: Size of boxes denotes forecasted market size in 2027, USD billion

More male consumers embrace using colour cosmetics for a more sophisticated grooming

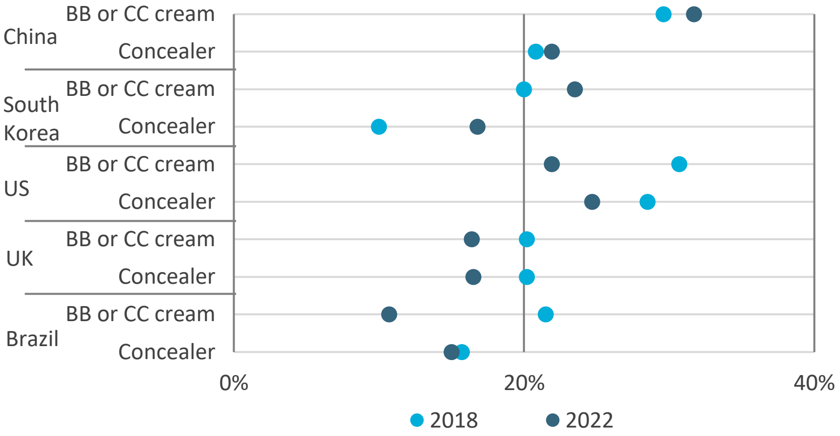
With the evolving perception of masculinity, there is a growing acceptance of men wearing makeup to enhance their appearance and boost self-confidence. This cultural shift has led to the emergence of men's colour cosmetics products tailored explicitly to male consumers.

Particularly in Asia, more male consumers are embracing the regular use of makeup to achieve a polished but natural look. In China, over 30% of male consumers between the ages of 20-34 use BB or CC cream more than once a week, with 14% using it daily. In South Korea, the percentage of male consumers in the same age group using concealer more than once a week grew from 10% to 17% between 2018 and 2022.

Men's colour cosmetics are often positioned as the final step in the grooming routine, prompting many men's grooming brands to expand their product offerings to include colour cosmetics and involve the existing consumer base. Amore Pacific's men's grooming brand, B.Ready, launched a foundation product line in December 2022, offering five shades and a portable cushion format to cater to the increasingly sophisticated demands of young male consumers. Additionally, US-based direct-to-consumer brand Stryx introduced spot-concealing products to their product range.

Frequency of Colour Cosmetics Product Use, Male, Age 20-34

% of respondents who selected “Daily” or “1 to 5 times a week”



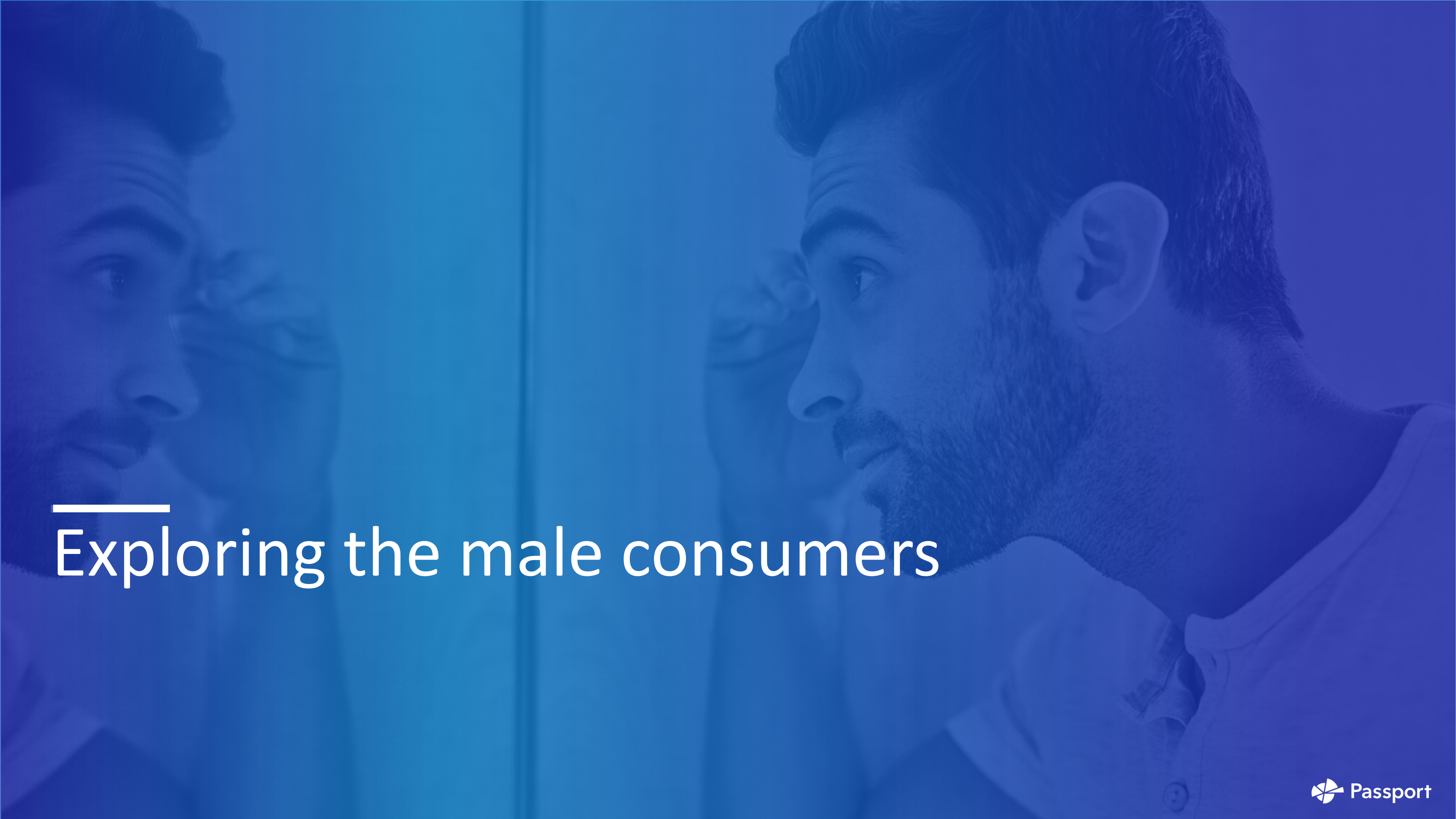
Source: Euromonitor International Voice of Consumer : Beauty Survey 2022

Men’s grooming brand B.Ready from AmorePacific

DTC men’s grooming brand Stryx

Image source: B.Ready,Stryx

Exploring the male consumers



Men's grooming routine are becoming more sophisticated

Frequency of Men's Grooming Product Use, Male 2022

% of respondents who selected "Daily or more frequent" or "1-5 times a week"

	Cleansing & shaving			Basic care		Styling	Advanced care				Makeup
	Pre-shave products	Post-shave products	Facial cleansers	Facial moisturisers	Acne treatment	Hair styling products	Hair loss treatment	Face masks	Sunscreen	Anti-ager	BB or CC cream
USA	↘ 32%	↘ 35%	↘ 36%	↗ 34%	↗ 24%	↘ 32%	↘ 17%	↘ 18%	↘ 31%	↗ 23%	↗ 14%
Brazil	↘ 53%	↘ 58%	↗ 44%	↗ 44%	↗ 27%	↘ 42%	↗ 31%	↗ 20%	↘ 42%	↗ 25%	↘ 10%
Germany	↘ 38%	↘ 50%	↗ 30%	↗ 42%	↗ 19%	↗ 41%	↗ 23%	↗ 20%	↗ 29%	↗ 24%	↗ 13%
China	↘ 44%	↘ 39%	↗ 65%	↗ 48%	↗ 21%	↘ 32%	↗ 28%	↗ 34%	↗ 36%	↗ 31%	↗ 17%
UK	↘ 34%	↘ 40%	↘ 36%	↘ 38%	↗ 16%	↘ 35%	↘ 12%	↘ 17%	↘ 22%	↗ 21%	→ 11%
South Korea	→ 35%	↘ 33%	↗ 32%	↗ 25%	↗ 16%	↘ 29%	↗ 30%	→ 17%	↘ 36%	↗ 22%	↗ 12%
France	↗ 31%	↘ 42%	→ 36%	→ 37%	↗ 16%	↘ 33%	↘ 16%	↗ 14%	→ 17%	↘ 19%	↗ 12%
Japan	→ 29%	→ 19%	↘ 45%	↗ 21%	↘ 12%	↘ 23%	↘ 16%	→ 6%	↗ 13%	↗ 7%	→ 4%
Mexico	↗ 59%	→ 59%	↗ 41%	↗ 47%	↗ 26%	↘ 70%	↗ 34%	↗ 26%	↗ 56%	↗ 25%	↗ 13%
Indonesia	↗ 37%	↗ 34%	↘ 60%	↗ 45%	→ 34%	↗ 49%	↗ 42%	↗ 31%	↗ 38%	↗ 27%	↗ 13%

Source: Euromonitor International Voice of the Consumer: Beauty Survey
Note: The survey-takers are only those male respondents who reported using cosmetics at least sometimes
Calculation : men's grooming value sales / men population in age 15-64
↗ → ↘ *Higher/equal/lower than to 2018 results*

<25% 25-50% >=50%

Grooming and purchase behaviours vary among consumers in different countries and generations

Four types of men’s grooming consumers:

Unsettled budgeteer: Price-conscious and likely to switch brands if similar quality but at a better price. More likely to be attracted to private labels, promotions, and value packs.

Only do the basic routine and are less acceptable to new steps. Some Gen Zs who are still exploring and have not yet formed a usage habit.

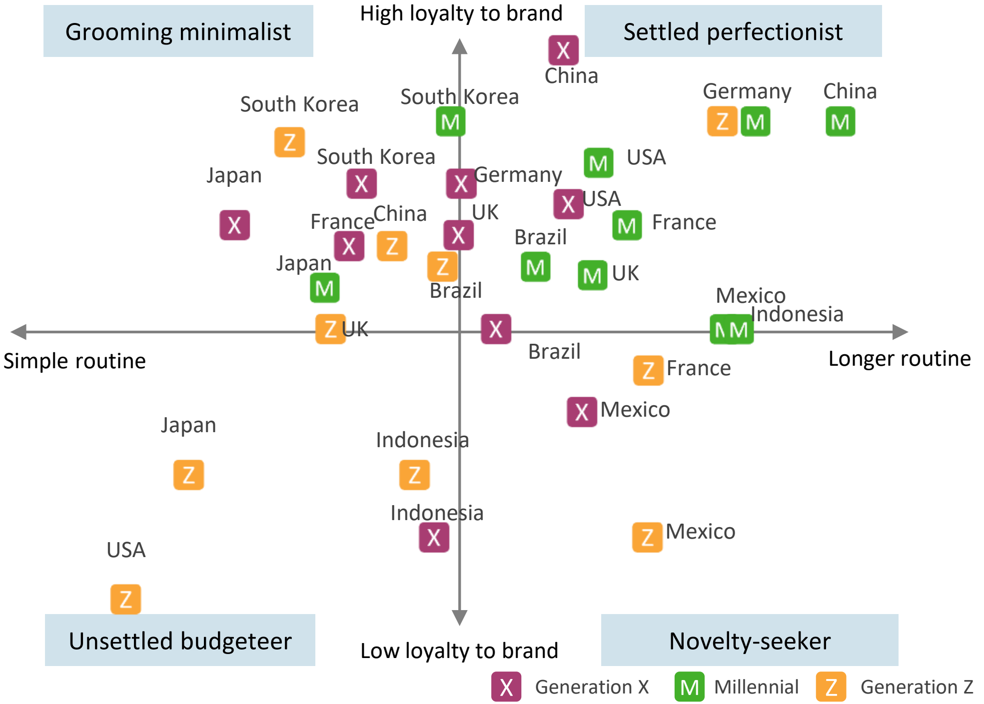
Grooming minimalist: Favour simplicity and functionality and usually stick to a formed grooming routine. Once find the products that meet their demand efficiently, they are likely to stick to the same brand with being less price-sensitive.

Settled perfectionist: Meticulous and have high standards for products, a defined grooming routine, and high brand loyalty.

Tend to prefer natural, high-quality ingredients.

Novelty-seeker: Knowledgeable and like experimenting new brands and grooming tips on social media.

High acceptable to products that offer unique features that help them stand out and be fashionable.



Source: Euromonitor International Voice of the Consumer: Beauty Survey,2022
Simple/longer routine: Survey result of the frequency of the usage of facial cleanser, facial moisturiser, hair styling products, face masks, BB or CC cream
High/low loyalty to brand: Survey result of loyalty to skin care and hair care brand

Male consumers rely on trusted recommendations and show high brand loyalty

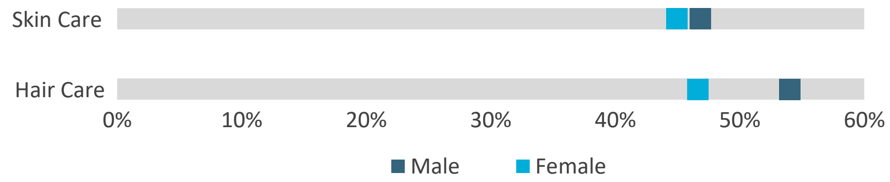
Male consumers tend to have higher loyalty to grooming brands than female. Based on Euromonitor Voice of Consumer: Beauty Survey 2022, 47% and 54% of male consumers always or sometimes buy the same brand/product for skin care and hair care, respectively. Male consumers are more likely to stick to a brand once they find products that suit their needs.

Instead of spending long time comparing and browsing before purchasing, male tend to be more purposeful and assertive in their brand choices than female.

For purchase influencers, male consumers are easily swayed by recommendations from friends, dermatologists, or stylists, which tend to be regarded as trustworthy sources. Brands looking to effectively market grooming products to men, especially those in an advanced care range, should employ an "education + shopping guide" approach. By creating content that educates men on the benefits and usage of the products while also providing a concise shopping guide, brands can cater to the male consumer's preference for purposeful shopping. This strategy equips them with the necessary information to make informed, quick decisions and can lead to increased brand loyalty among this demographic.

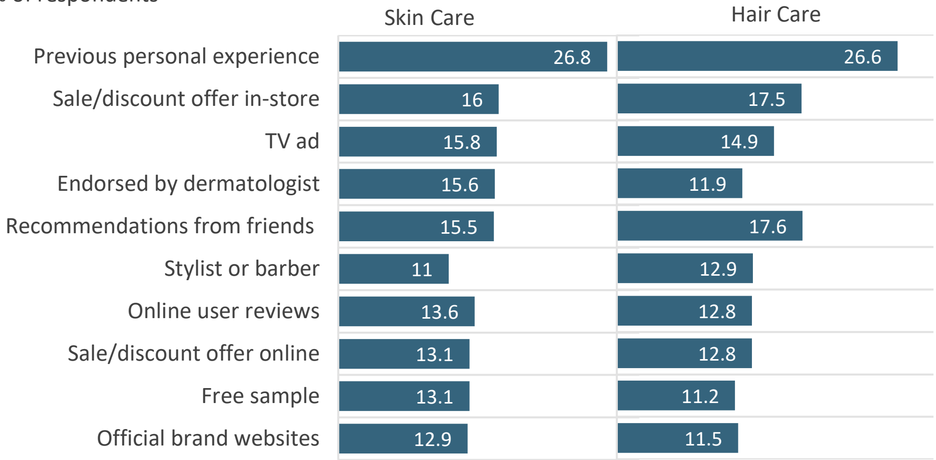
Loyalty to Beauty and Personal Care Brands 2022

% of respondents who selected "Always & sometimes buy same brand/product"



Path to Purchase, Influencers, Male 2022

% of respondents



Source: Euromonitor International Voice of the Consumer: Beauty Survey, 2022

Passport

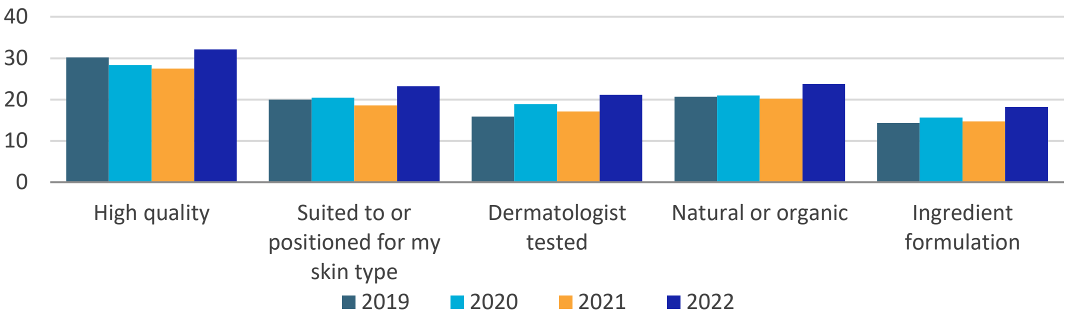
Increased skin care knowledge leads to specific demand for specialised products

Men's skin care was previously centred around all-in-one products that offered simplicity and convenience. This approach stemmed from a need for more awareness and limited options specifically designed for male consumers. Male are now more comfortable discussing skin care and have a deeper understanding of their skin types and specific needs.

By comparing the survey results about desired skin care features between 2019 to 2022, currently, male are seeking skin care products that are high quality, dermatologist tested, and with a focus on ingredient formulation.

According to the Euromonitor Voice of Consumer Beauty Survey 2022, within the top five skin concerns, blackheads, acne, and sensitive skin are the common skin concerns for male across all generations. Male consumers with a high understanding of skin care knowledge are more inclined to make rational choices by selecting brands not exclusively marketed as "for men" and opting for dermocosmetics brands to address specific skin concerns effectively.

Desired Skin Care Features Among Male Consumers 2019-2022



Top five Skin Concerns : Male by Generation 2022

	#1	#2	#3	#4	#5
Gen Z	Blackheads	Blemish/acne-prone	Acne pits	Dark circles	Sensitive
Millennials	Blackheads	Sensitive	Blemish/acne-prone	Acne pits	Dark circles
Gen X	Blackheads	Wrinkles	Sensitive	Dark spots	Blemish/acne-prone
Baby Boomers	Wrinkles	Blackheads	Sensitive	Dark spots	Fine lines

Source: Euromonitor International Voice of the Consumer: Beauty Survey, 2022, n=6,085

Usage of hair loss treatments continues to grow beyond the pandemic

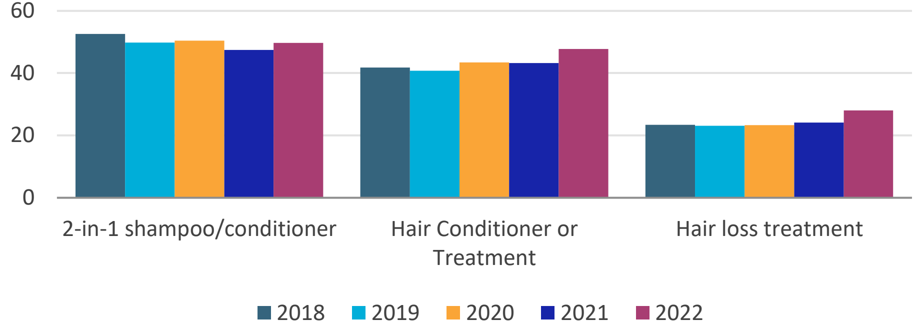
Men's hair care also has a longstanding association with 2-in-1 shampoo/conditioner products. Predominantly driven by convenience, but also by poor consumer knowledge and a lack of product innovation within the men's space.

Platforms such as TikTok, as well as brand activity (e.g. VO5's "If You've Got Hair, Care" campaign), has started to have a positive impact on men's education of hair care. Euromonitor International's Voice of the Consumer: Beauty Survey, found that daily and weekly usage of standard shampoos and 2-in-1 shampoo/conditioners both fell by 5% between 2018 and 2022, partly due to growing awareness that frequent hair washing can impact overall hair health and quality. On the other hand, usage of hair conditioner and treatments grew as more men looked to adopt a more personalised, extensive, hair care routine.

Interest in hair loss treatments continued to grow, partly accelerated by COVID-19 and stress during these times of political and economic trouble. Baby boomers and Generation X are likely to opt for clinically-backed products targeting hormonal hair loss. While the concerns of younger generations are oriented around hair loss prevention, brands could serve to build communities to better utilise social media.

Hair Care Product Usage Among Male Consumers 2018-2022

% of global male respondents who selected daily or weekly usage



Hair Loss Treatment related Shopping Behaviour

% of respondents

30% (in 2020) → **37%** (in 2022) Of Gen Z male consumers use hair loss treatments on a daily or weekly basis

12% (in 2020) → **19%** (in 2022) Of global male consumers purchased hair loss treatments due to new or changing hair needs

12% (in 2020) → **17%** (in 2022) Of global male consumers are influenced by social networking sites when purchasing hair loss treatments

Source: Euromonitor International Voice of the Consumer: Beauty Survey

Social media contents influence and educate male consumers about colour cosmetics use

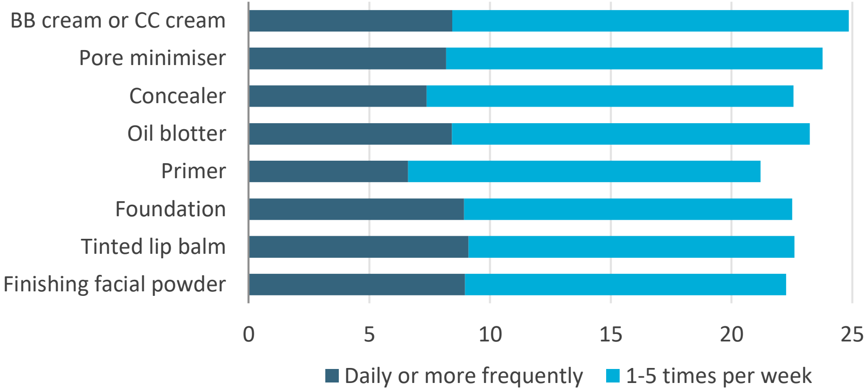
As male consumers increasingly pay attention to appearance and individual expression, more consumers have begun integrating colour cosmetics products into their daily grooming routines.

Among all age groups, males aged 20 to 34 show the highest frequency of colour cosmetics usage, mainly due to their high exposure to various social occasions. Male consumers primarily seek colour cosmetics that enhance their skin's performance, such as blemish and pore coverage, matte finishes, and eyebrow grooming. According to Euromonitor Voice of Consumer: Beauty Survey in 2022, nearly 25% of respondents in the 20 to 34 age group reported using BB or CC cream more than once a week. And the other widely-used products among this age group are pore minimiser, oil blotter, and finishing facial powder.

The popularity of social media content has not only influenced male consumers to place greater importance on their appearance. Still, it has also provided them with new places to access makeup information and knowledge. Additionally, the influence of celebrities has played a significant role in promoting a more inclusive view of masculinity. The changing stereotype of men wearing makeup has contributed to a broader acceptance and greater demand for male colour cosmetics products.

Frequency of Cosmetics Product Use, Male, Age 20-34, 2022

% of respondents who reported using cosmetics at least sometimes



Source: Euromonitor International Voice of the Consumer: Beauty Survey, 2022

Acne Cover Up For Men

ASMR 전문가에게 받는 남자 메이크업 튜토리얼 | Korean Men's make up tutorial | BE...

Image source: Youtube channel "Boys do it too", "Relax Han ASMR"

Competitive landscape

Market fragmentation continues to fall across key markets

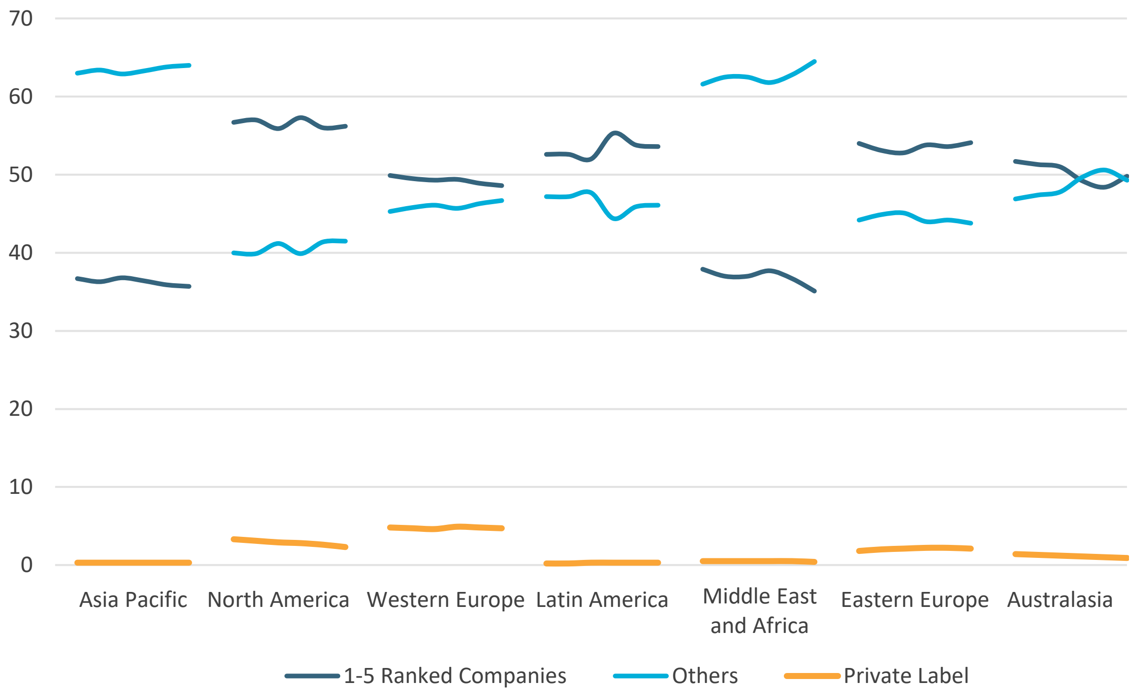
The top five global men's grooming players have seen their combined share fall a percentile to 42% between 2017 and 2022 as smaller brands have benefited from taking a more specialised approach to men's grooming focusing on specific needs.

The perception of men's grooming has evolved. 2022 saw the major companies expand brands into emerging spaces like scalp health, while a more holistic approach has also been witnessed as mental health becomes a key topic.

Despite price concerns increasing, global market share of private label brands within men's grooming fell in 2022. This can be attributed to a stronger reluctance among men to trade-down compared to women owing to the age-old perception that a higher price equals better quality. According to Euromonitor's Voice of the Consumer: Beauty Survey, 42% of men in 2022 preferred to purchase branded skin care products compared to 35% of women.

Men's Grooming in World: Market Fragmentation by Region 2017-2022

% market value share - USD million



Source: Euromonitor International

Top five players witness shares recede as fragrance competitors bounce back

Procter & Gamble and Unilever are the top two players in men's grooming, accounting for 28% of value share in 2022. The former's consolidated position comes from No.1 global brand, Gillette, which accounts for three times the market share of the next entry Axe/Lynx (Unilever). Although the ranking of both companies has remained unchanged between 2017 and 2022, their lower than industry average growth rates during this period, due to the better performance of competitors, has led to their share of the market eroding.

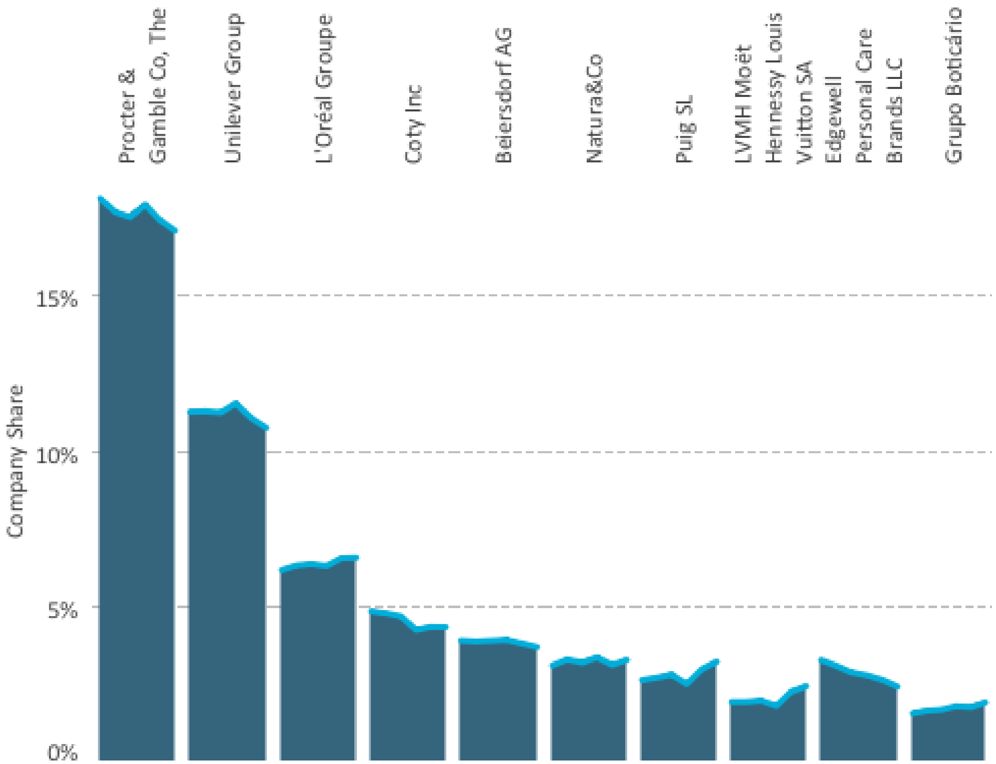
L'Oréal, Coty and Beiersdorf maintained market share in 2022, consolidating their position in the top five.

Natura & Co rose one place in the rankings in 2022 to sixth, thanks to resilient sales from its men's fragrance business in Latin America.

The global rebounding of fragrance sales in 2022 were also key factors behind share growth of Puig SL and LVMH Moët Hennessy Louis Vuitton SA.

MarketMen's Grooming in World: Top 10 Companies 2017-2022

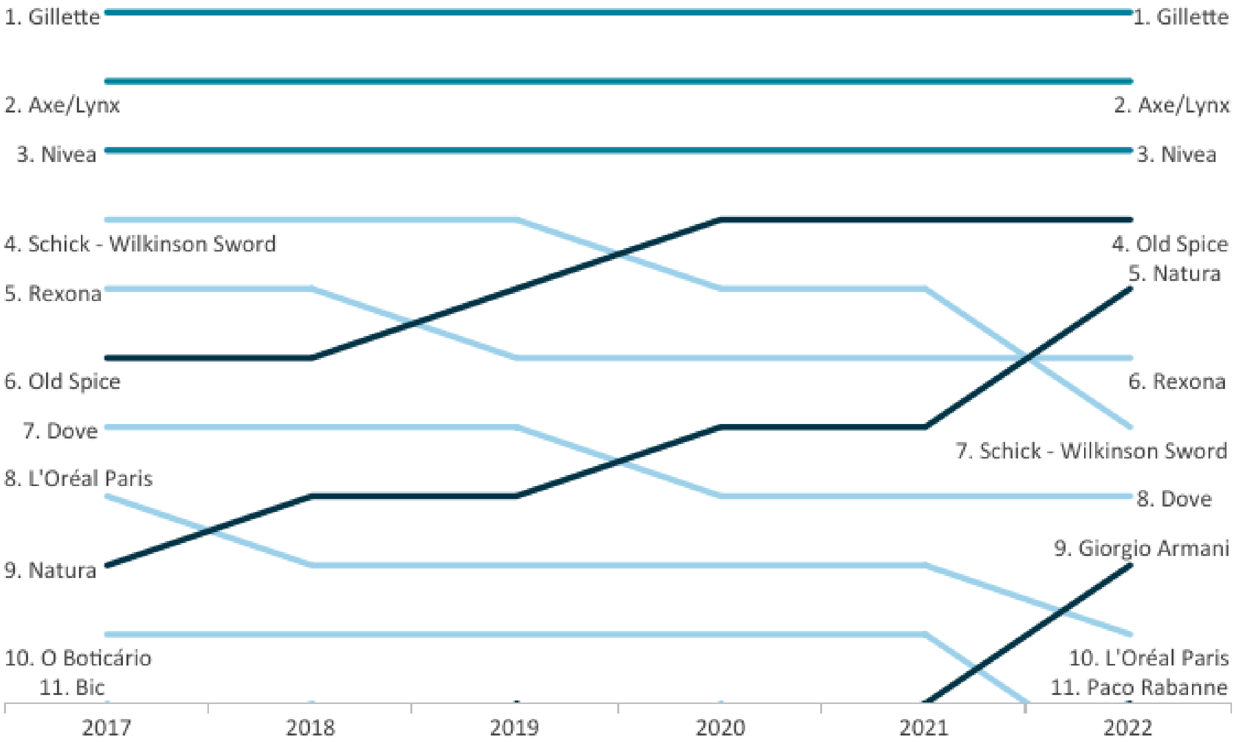
Retail Value RSP USD million



Top 3 brands hold rank while brands associated with out-of-home activity witness growth

MartMen’s Grooming in World: Top 10 Brand Rankings 2017-2022

Retail Value RSP USD million



Unilever continues to heavily support Dove in western markets via product innovation

Dove Men+Care Advanced Care Sensitive Calm

Formulated with aloe vera extract, the mild cleanser calms dry, irritated skin.

Dove Men+Care Advanced Care Dry Repair

Infused with smooth shea butter to help hydrate and restore dry skin.

Dove Men+Care Advanced Care Acne Clear

Brand's first product to be formulated with 1% salicylic acid, alongside active nourishers to help prevent

Image source: Dove.com

Characteristic

- Since 2020, Unilever has placed greater focus on men's grooming by expanding its Dove Men+ Care range in the UK and US. The most recent US launch, the Advanced Care Face + Body Cleansing series in Q1 2023, helps naturally repair the barrier of different men skin types.

Context

- Launch follows Unilever research that found few available cleansers that cater to men's skin types. Compared to women, men produce more oil and are more prone to acne owing to larger pores, while regular shaving and rough skin textures result in drier skin among men.

Consequence

- The launch resonate with the emerging ingredient-led beauty trend, where the specific ingredients has helped to personalise the routines. This will attract men who are busy but eager to try new ingredients. It also reinforces Unilever's commitment to position Dove as a brand that caters to men's needs.

3%
Dove's global market CAGR (2017-2022) in men's grooming

36%
Of US men in 2022 used facial cleansers at least weekly. Up from 31% in 2019

16%
Of US men purchased facial cleansers in 2022 because skin care is now an important priority vs 7% in 2019

Source: Euromonitor Voice of Consumer: Beauty survey 2022

Shiseido launched skin care brand SIDEKICK targeting Gen Z male consumers in Asia

Image source: Shiseido SIDEKICK, fashionsnap.com

Characteristic

- Shiseido launched the new men's grooming brand Sidekick, aiming at Gen Z consumers. The brand focuses on self-expression and the personal style of Gen Z. Through brand communication devised by students at Waseda University in Tokyo, the brand held events where consumers could experience the products with game-themed content, such as UFO catcher and darts.

Context

- The global male grooming market is growing, with Gen Z defining the industry's future. Gen Z consumers are more likely to be interested in self-care and personal grooming than previous generations. Creating social buzz through user-generated content becomes an efficient marketing strategy for brands targeting younger consumers.

Consequence

- As a new trial from Shiseido, the launch of Sidekick has been met with positive reviews from Gen Z consumers. Beyond the skincare function, Shiseido also builds the character of SIDEKICK as a "buddy" and a pioneer who support and help youngster express their individuality.

4%
Forecasted(2022-2027) market CAGR of men's grooming in Asia Pacific

18%
Of Gen Z male in Asia Pacific desire skin care that suited or positioned for their gender

32%
Of Gen Z male in Asia Pacific perceive beauty as "being comfortable in your own skin"

Source: Euromonitor Voice of Consumer: Beauty survey 2022

UK start-up War Paint continues to tackle colour cosmetic taboo among men

Image source: warpaintformen.com, cosmeticbusiness.com

Characteristic

- War Paint, a UK-based start-up established in 2018, aimed to empower men to feel confident in their appearance through a range of colour cosmetic products that are specifically tailored for men's skin.

Context

- The male cosmetic market in the UK is largely untapped, and UK male consumers exhibit limited knowledge of make-up. In response, War Paint aimed to bridge the gap through a straightforward range of colour cosmetic products that have simple techniques and easy-to-follow steps.

Consequence

- War Paint has successfully expanded its retail footprint since release, including its November 2022 launch in leading UK retailer, Superdrug. The company also opened its first bricks-and-mortar store in central London in July 2021, touted as the "world's first men's make-up store".

8%
Forecasted market CAGR 2022-2027 UK colour cosmetics

33%
Of men in the UK define beauty as being comfortable in your own skin

4%
Of UK male respondents used a make-up concealer daily in 2022

Source: Euromonitor International's Voice of the Consumer: Beauty Survey, 2022

Chinese indie brand DearBOYfriend resonate with consumers as a lifestyle brand

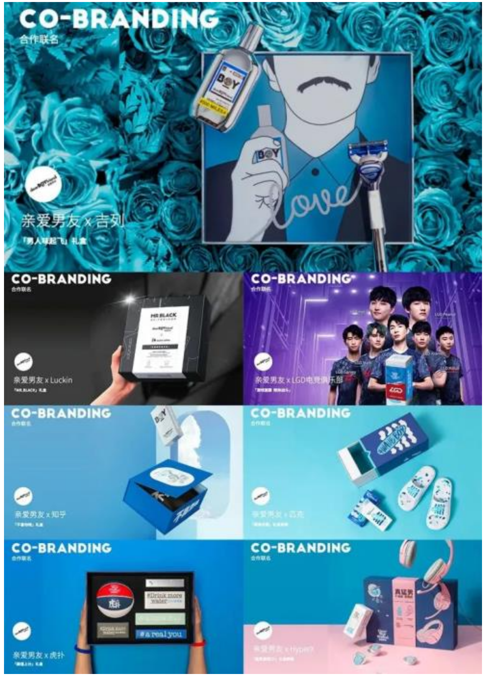


Image source: Image Source: DearBOYfriend

Characteristic

- The Chinese men's grooming brand, DearBOYfriend, aims to redefine the concept of men's grooming by offering products and experiences that resonate with the modern man's lifestyle.

Context

- There is still a lack of channels for consumers to get grooming knowledge in China. DearBoyfriend aims to address this by creating a product line centred around the concept of a lifestyle with various aspects, entertainment, and work scenarios., making it easily accessible for male consumers.

Consequence

- DearBoyfriend has successfully launched its products through diverse channels in China since its debut in 2021, with a lineup of over 20 SKUs. Notably, DearBoyfriend has partnered with NFT digital collection BAYC and introduced exclusive collaboration sets, strategically targeting the interest of young men.

5%
Forecasted market CAGR 2022-2027
China men’s toiletries

39%
Of millennials male in China extremely interest in invest in NFTs

25%
Of male in 18-29 in China prefer gamification functionality as online shopping experience

Source: Euromonitor Voice of Consumer: Digital survey 2023

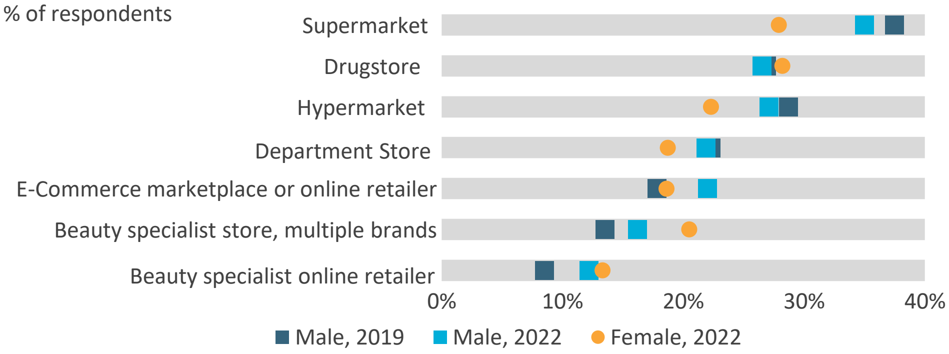
Retail environment

Channel shift to E-Commerce and beauty specialist for a variety of options and convenience

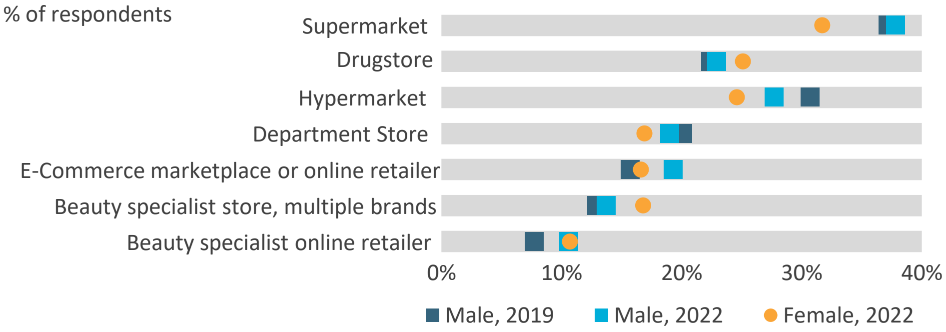
Between 2019 and 2022, men have demonstrated a strong inclination towards E-Commerce and beauty specialists as the preferred shopping channels for grooming products. Traditional mass merchandisers such as supermarkets and hypermarkets have witnessed a decline in male consumers. The percentage of male respondents who shop for skin care and hair care in hypermarkets declined by 2% and 3% between 2019 and 2022, respectively, partly due to the pandemic and, more importantly, the surge of other channels. Male consumers now purchase more in E-Commerce, which provide affordable and convenient solutions like Amazon and JD.com.

Additionally, there has been a noteworthy increase in the percentage of men shopping at beauty specialists, both online and offline. The percentage of male respondents who purchase from beauty specialist online retailers increased by 4% and 3% between 2019 and 2022 for skin care and hair care, respectively. The percentages grew to a level close to the female counterpart, who prefers exploration and comparison before purchase. The increase stemmed from a growing demand for exploring new brands and high-quality products that address advanced efficacies from the curated selections of beauty specialists.

Path to Purchase: Location, Skin Care 2022



Path to Purchase: Location, Hair Care 2022



Source: Euromonitor International Voice of the Consumer: Beauty Survey, 2022

TikTok empowers marketing and sales of men’s products to a vast young male user base

Trends influence and education

TikTok catalyses the emergence of trends and challenges within men‘s grooming, often featuring the utilization of specific products. Dermatologists, barbers, and hairstylists share grooming tips and tutorials, enlightening male consumers to care more about appearance. Hashtags, such as #mensgrooming and #mensskincare, provide an easy, personalised, and community-driven way for men to browse rich grooming trends.

Product discovery and influencer endorsement

Male users are actively or passively exposed to grooming products recommendation through Tiktok from influencers and peer users.

E-Commerce integration and impulse purchases

The impulsive nature of content consumption and seamless shopping integration on TikTok lead to impulse purchases. Men’s grooming is a category that helps Tiktok (Douyin in China) to grow its E-Commerce market share by commercialising the massive traffic from male users.

Tiktok related Shopping Behaviour

% of respondents

32% (in 2020) → 38% (in 2023) Of Gen Z & Millennials male consumers buy goods or services after seeing an influencer review or post

30% (in 2020) → 34% (in 2023) Of Gen Z & Millennials male consumers buy goods or services after seeing a company or brand advertisement

27% (in 2020) → 32% (in 2023) Of Gen Z & Millennials male consumers buy goods or services on social media platform

Source: Euromonitor International Voice of the Consumer: Digital Survey

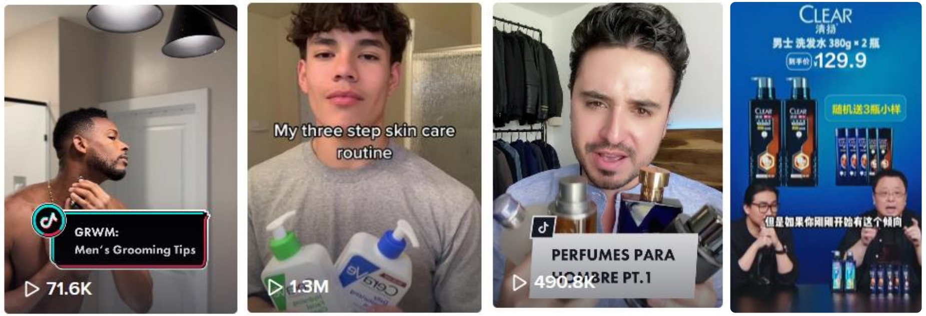


Image source: Tiktok @ajtaughtyou, @ugcbysebastian, @bayardios, Douyin @Jiaogepengyou

UK health and beauty specialists bolster male portfolios through indie brands

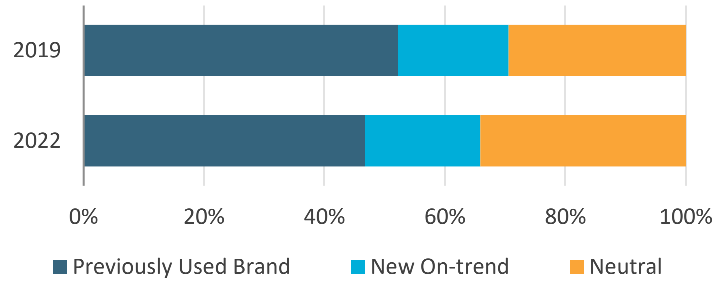
The surge in demand for men's grooming has prompted beauty retailers worldwide, notably in western markets like Portugal and the US, to reassess their shelf space allocation and broaden their product portfolios. This has been particularly evident in the UK, where Boots and Superdrug, leading health & personal specialists, have overhauled their product offerings.

Previously, men's grooming products within UK retailers were largely limited to established legacy players. However, both retailers have started to add fast-growing indie brands to their portfolios in response to the evolving ways that men are now discovering brands. Indie brands are now able to gain mass appeal quickly through retail e-commerce channels and social media, compared to previously when a lack of retail presence in bricks-and-mortar stores hindered their opportunities. In 2023, Boots underwent a category refresh, including the launch of it first premium male products, through brands such as skin care specialist Anthony and hair care range Hanz de Fuko, as well venturing into men's make-up through indie player, Shakeup Cosmetics. The latter is also now available in Superdrug alongside other upcoming brands, like War Paint and Aaron Wallace, a men's grooming brand for curly and afro hair textures.

This demonstrates that UK retailers do not expect male spending on beauty and personal care to ease anytime soon. They could also benefit from the stagnancy of grocery players who still lag behind competitors in refreshing their men's ranges.

Previously Used Brand vs New On-trend Brand: Skin Care

% of UK male respondents



Source: Euromonitor International Voice of the Consumer: Beauty Survey

Shakeup Cosmetic's BB Tinted Moisturiser is Boots' first male grooming product available in tester format

Image source: Humanery.com

Top trends shaping future men’s grooming

Top trends provide unexplored market opportunities in men's grooming

Top five trends shaping men's grooming industry	Gender neutral wider consumer base, inclusivity	Men's cosmetic surgery demand for broader and advanced care offerings	Gamification engagement enjoyable and interactive	Wellness spaces blurring and expansion holistic experiences, self-care	Future Gen Z dominant force, tech-savvy, socially conscious
Current influence on the industry	■■□□□	■■□□□	■■■□□	■■□□□	■■■□□
Future influence on the industry	■■■■□	■■■□□	■■■■□	■■■■□	■■■■■

Men's grooming to be challenged by genderless beauty brands

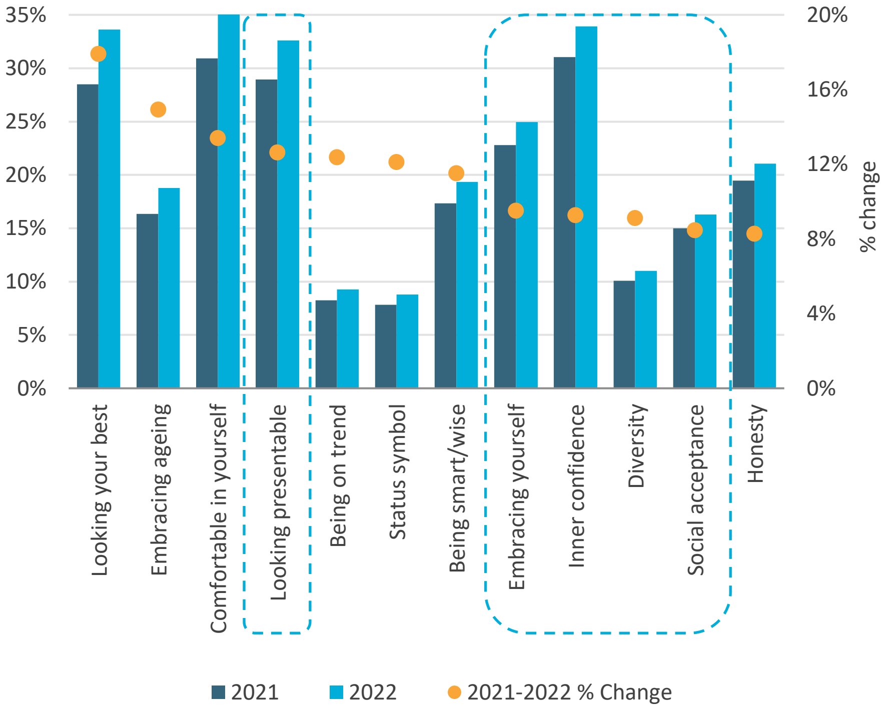
Globally, male consumer attitude towards genderless beauty continues to improve. Euromonitor International's Voice of the Consumer: Beauty Survey, found that five of top 12 largest growing responses to the male definition of beauty between 2021 and 2022 were linked to inclusivity and embracing oneself.

A contributing factor to this rise has been celebrities and pop culture driving the adopting of genderfluid habits among Gen Zs and Millennials. The former has been particularly prevalent, with some launching their own genderless brands (e.g. Harry Styles' Pleasing and Brad Pitt's Le Domaine), while others fronted campaigns (e.g. Fenty Beauty x A$AP Rocky and Lil Nas X) or entered collaborations (e.g. Mac x Harris Reed or Rimmel London x Tom Daley). The influence of this activity has been reflected online through growing movements like "Get Ready With Me", which show a societal change in how men see and interact with beauty products.

The rise in popularity, and availability, of genderless beauty is expected to erode future sales of men's grooming, particularly skin care, where self-care and expression will take priority. Inclusivity is becoming the norm for beauty, and companies will need to make it an integral part of their branding and marketing going forward to appeal to younger demographics.

Male Definitions of Beauty: Top 12 Growing Answers 2021-2022

% of global male respondents, % of respondents



Source: Euromonitor International Voice of the Consumer: Beauty Survey, 2022

Growing male cosmetic surgery creates new demand on advanced post-care products

Cosmetic surgery is becoming more popular among men; according to the American Society of Plastic Surgeons, the cosmetic procedures performed on men grew 20% between 2018 and 2022, to 1.1 million in 2022. The increasing availability of affordable surgeries and the growing acceptance of cosmetic surgery among men contribute to global growth. Also, cosmetic surgery is considered as an once-for-all, convenient solution that sought after by men. Popular surgeries among men are Botox, fillers, hair transplantation, hair removal, and treatment for acne blemishes and scars.

This trend presents new opportunities for product development and channel shifting for the men's grooming market. As more men have cosmetic surgery, there is a rising demand for specialised dermo brands that offer post-surgery advanced care and maintenance. The hospital is expected to serve as a high-conversion channel, with doctors already playing as powerful influencers among men.

Source: LG Electronics

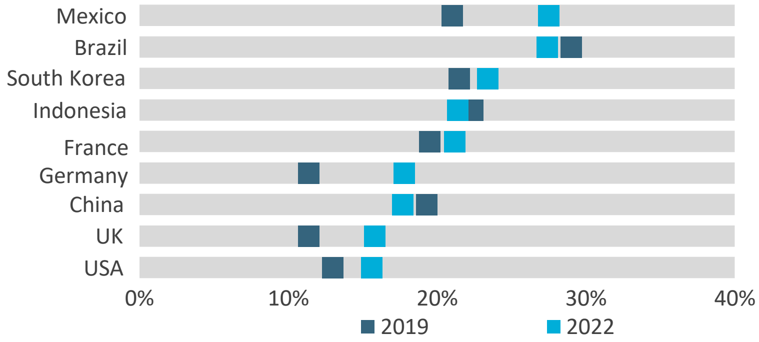
The self-care products incorporate technologies, such as beauty devices, that aid in collagen production or prevent hair loss. In South Korea, LG Electronics launched the light therapy device "Medi Hair" that prevents hair loss, targeting male consumers' concerns even at young ages.

Top male minimal-invasive cosmetic surgery

Injections	Botox, Dermal fillers, Non-surgical Rhinoplasty
Hair	Hair transplantation, Laser hair/beard removal, Eyebrow/hairline tattoo
Skin performance	Chemical Peel, Microdermabrasion, Laser skin treatment, Acne blemish treatment

Used pharma /dermocosmetic hair or skin care products with doctor's consultation in past two years Male 2022

% of male respondents



Source: Euromonitor International Voice of the Consumer: Beauty Survey

Spotlight: How is gamification developing within men's grooming?

Virtual Try-On

Lockdown restrictions accelerated the adoption of digital try-on across beauty brands' websites and mobile apps. Using augmented or virtual reality, consumers are able to upload images to test products virtually and make informed purchasing decisions online. In January 2023, Bulldog Skincare added AI Skin Advisor to its UK website, developed with Revieve, a self-diagnostic solutions creator. The virtual tool analyses the user's skin and provide a personalised routine, as well as advice, in under one minute.

Gaming

Video games have become an integral pastime for many men, with Gen Zs and Millennials particularly willing to devout countless hours into virtual worlds. Men's grooming has always had a vested interested in space through web-based mini games and online quizzes but activity has shifted towards collaborations and e-sports. In January 2022, L'Oréal Men Expert teamed with French-based e-sports team Fnatics, as a shirt sponsor and co-creator of a #PrepToPlay. A docu-series that showed their members' skin and body care routines, and its importance to their success.

Packaging

Gamification within packaging is rapidly changing. Historically, it focused on limited-edition SKUs that would act as a collectable for fans of different video games and TV shows. However, technology like QR codes, have allowed men's grooming players to create a more immersive experience for their consumers, offering prices and collectables, which encourage repeat purchases. Unilever uses this strategy for Lynx Africa, with the latest development in March 2023 seeing the launch of "Greatest of All Time" packaging, which uses QR codes for prizes.

According to Euromonitor International's Voice of the Consumer: Lifestyles Survey, 54% of global male respondents valued online virtual experiences in 2023, up from 52% in 2020.

Blurring of beauty and wellness: Opportunity for the establishment of "mega-brands"?

Globally, male consumers want to take better care of their health, a subject that has risen in prevalence since COVID-19. Euromonitor International's Voice of the Consumer: Health and Nutrition Survey, fielded January to February 2023 (n=21,221), found that 53% of global male respondents in 2023 were either moderately or extremely concerned by their health (up from 48% in 2020).

Interest in this space has also been partly driven by awareness of segments like sexual, mental and skin health improving. The trend is seeing more activity in larger markets, such as the UK, where men's grooming brands blur between the beauty and wellness spaces, creating portfolios that cater to men's evolving needs. For example, telehealth company For Hims, offers personalised treatment plans, which include Rx products, for hair loss, erectile dysfunction and skin care.

With brand loyalty among men strong, alongside the blurring of these segments, it presents opportunities for established brands to expand their portfolios and create "mega brands" that consumers can trust and have confidence in to meet various needs. This is a strategy that Bayer has successfully implemented for several brands within consumer health. For example, the Bepanthen Derma range, launched in 2021, has been accepted by consumers as a more cosmetically positioned range compared to the wider, clinical backing of the original brand. The line extension has been well received in countries such as Brazil, Germany and Saudi Arabia thanks to the strong recognition and trust that consumers had in the brand previously.

Image Source: For Hims, healthcarepackaging.com

Gen Z to shape the future market with their digital-first feature and eagerness to explore

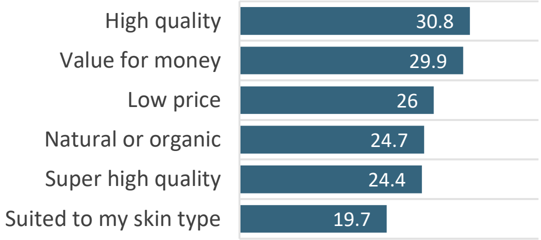
By 2032, Gen Z is projected to constitute 21% of the global population, with Gen Z males playing a significant role in shaping the future of the men's grooming industry. Their distinct behaviours, preferences, and informed approach toward grooming encourage the demand for diverse, specialized products rather than generic solutions.

Gen Z males, as digital natives, demonstrate a strong inclination towards digital engagement. Their purchase decisions are significantly influenced by recommendations from influencers over social media and the digital presence of brands, underscoring the importance of digital engagement and gamification for the industry. Furthermore, Gen Z males are evolving past traditional gender norms and are open to gender-neutral products. This indicates a redefinition of modern masculinity amongst Gen Z men.

Top 10 populated Gen Z Countries, by population, in 2032

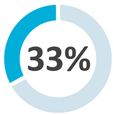
1	2	3	4	5	6	7	8	9	10
India	China	Indonesia	USA	Pakistan	Nigeria	Brazil	Bangladesh	Ethiopia	Mexico

Top desired skin care features by Gen Z male

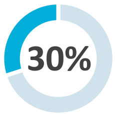


Product features trade-off

Percentage of Gen Z male strongly or somewhat prefer the products with specific benefits/claims than appropriate for general use

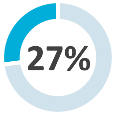


Skin Care

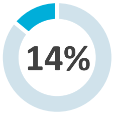


Hair Care

Digital influence of Gen Z male



Of Gen Z male get shopping information from personal social media network



Of Gen Z male get shopping information from personal social media network (Highest among all generations and genders)

Preferred skin care features : Unisex/gender

Source: Euromonitor International Voice of the Consumer: Digital Survey 2023, Lifestyle Survey 2023, Beauty Survey, 2022

Conclusion

Passport

Key findings

Men's grooming outperforms wider beauty and personal care industry

The sector witnessed modest fluctuations in per capita spending between 2017-2022, mainly due to the pandemic impacting purchases to categories like deodorants and fragrances. Regions like Western Europe, North America, and Australasia led in per capita spend due to premiumisation and improved grooming habits. Inflationary pressures led men to prioritise premium products in categories like fragrances while trading down on general care products.

More consumers are exploring beyond basic grooming products

The evolution of self-care among men, fuelled by societal change, interest in advanced care and styling, and the rise of gender fluidity, significantly influence the men's grooming market. This shift has led to more men exploring beyond traditional grooming categories, opening up to a broader array of beauty and personal care products.

Social media content serves as a significant influencer for men's grooming

Even though grooming behaviours vary among consumers from different countries and generations, trust and brand loyalty play a major role in male consumer choices, bolstered by increasing content about grooming tips and product information over social media.

Top trends provide unexplored market opportunities

The men's grooming landscape is being reshaped by the rise of genderless beauty brands and men's cosmetic surgeries. Gamification becomes essential to actively engage male consumers, while Gen Z's digital-first and exploratory approach directs market trends. Additionally, men's grooming is expanding into holistic wellness spaces.

The evolution of men’s grooming

STAGE 1

- The ideal image of masculinity was quite singular, emphasising the gender code 'manly' traits.
- Male consumers weren't inclined to invest much time in grooming routines.
- The product offerings catered mainly to basic shaving and grooming needs, with market products primarily encompassing shaving-related items and all-in-one products.

STAGE 2

- Brands began to identify and cater to men's needs beyond basic cleansing and shaving.
- Products addressing specific skin issues like oil control and acne treatment were well received by young male consumers.
- Expanded categories like fragrances and deodorants started gaining consumes’ attention.

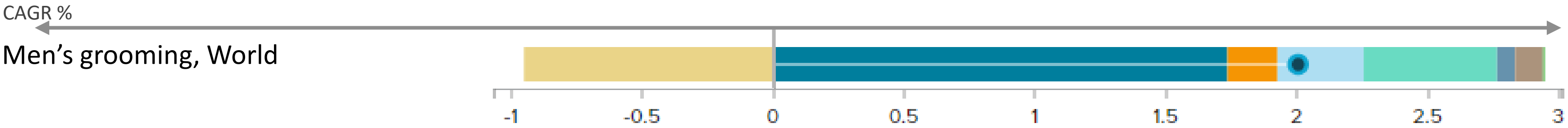
STAGE 3

- The definition of the ideal masculine image became diversified and inclusive.
- Influenced by social media and celebrities, an increasing number of male consumers are willing to invest time in learning about grooming and selecting suitable products for their individual needs.
- As the demand becomes more segmented, product offerings have expanded to include high-end skin care items like serums, moving forward to base makeup.

Image source: MAKE SENSE, L'Oréal, Chanel, Bugformen

Opportunities and challenges co-exist in the future men's grooming market

Retail Value Sales, Constant Prices USD Million, 2022-2027



Negative factors

- Amid inflationary pressures, there's a noticeable trend of price-sensitive male consumers opting for fewer and cheaper products.
- Evolving grooming behaviours, such as maintaining beards, transitioning from disposable razors to electronic ones, and integrating post-shave routines with skincare, could negatively impact the sales of men's shaving products.
- Men with developed grooming behaviours are reallocating their budgets towards skin care, fragrances, and hair care products with fewer traditional gender codes. The growing preference for 'set and forget' solutions to skin concerns will lead to a move in the expenditure on cosmetic surgery from products.

Positive factors

- As products become more advanced in terms of efficacies and ingredients, the introduction of a diverse range of premium options will support market value growth.
- With fragrances becoming a routine part of men's grooming in major markets like China, premium men's fragrances stand to gain prominence.
- There remains untapped consumer segments in developing market and oncoming Gen Z consumers. Powerful social platforms like TikTok, with a significant male user base, play an important role in educating about grooming products, particularly the untapped millennials and Gen Z consumers. This will shape the grooming and purchase behaviours of this future spending cohort.

Source: Euromonitor International Beauty and Personal Care Forecast Model, May 2023 Baseline

Appendix

About Voice of Consumer: Beauty Survey

The panel

Over 20,000 online panellists participate in the Beauty Survey annually

Geographic coverage

20 emerging and developed markets

Sample size

1,000 respondents per market

Age distribution

15-65+ years old*

Gender distribution

In 2022, 70% of respondents in each country were female, and 30% male

For questions about product usage, the results only show all women respondents and only to those male respondents who reported using cosmetics at least sometimes.

The questionnaire

500+ questions measure consumers' attitudes and behaviour relating to:

- Usage and grooming routines
- Dermocosmetic and professional beauty services
- Digital influences and beauty tech usage
- Path to purchase
- Brand preferences and perceptions

*Note: *Respondents range in age from 15–65+; the age distribution of each country's respondents mirrors the age distribution of each country's population.*

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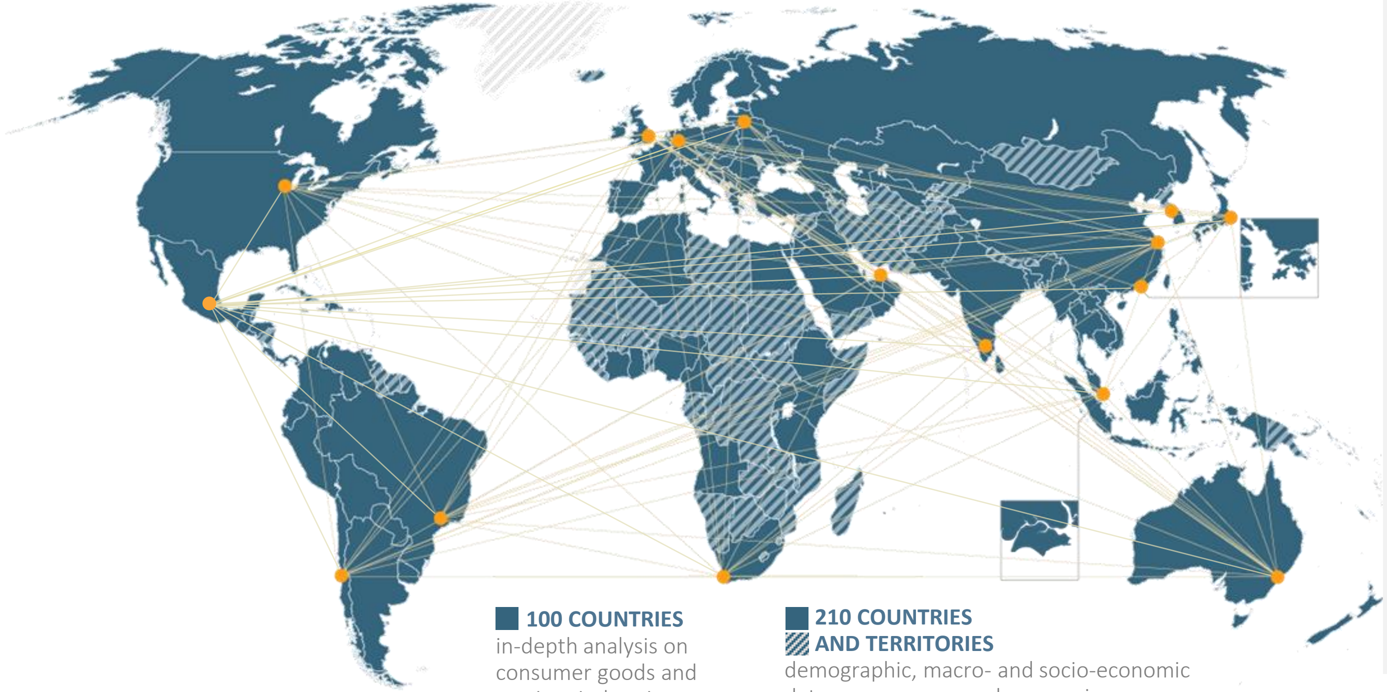

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