‘THE BIG SQUEEZE’ IS A MAIL METRO MEDIA RESEARCH SERIES THAT TRACKS THE ONGOING IMPACT THAT THE COST OF LIVING CRISIS IS HAVING ON CONSUMERS’ FINANCES AND BEHAVIOURS ACROSS A BROAD RANGE OF CATEGORIES.

EACH WEEK WE ASK OUR MATTERS COMMUNITY MEMBERS ABOUT THEIR BEHAVIOURS IN ONE CATEGORY TO ASCERTAIN IF AND HOW THEY HAVE BEEN IMPACTED BY THE COST OF LIVING CRISIS.

OUR AIM IS TO OFFER USEFUL INSIGHTS AND PRACTICAL GUIDANCE ON HOW BRANDS CAN NAVIGATE THIS DIFFICULT AND TUMULTUOUS PERIOD.

THIS WEEK WE'RE FOCUSING ON BEAUTY AND PERSONAL CARE. WE WANTED TO FIND OUT HOW THE RISING COST OF LIVING IS IMPACTING CONSUMER DECISION MAKING WHEN IT COMES TO BUYING BEAUTY AND PERSONAL CARE PRODUCTS AND WHAT THE FUTURE HOLDS FOR THE SECTOR.
We used our Matters community to find out about people’s current health and beauty purchasing habits, attitudes towards brands, and potential changes to behaviours within the category moving forwards.

**Approach:**
9 mins online survey, respondents recruited through Matters Community Survey

**Fieldwork:**
1st – 8th September 2022

**Sample:**
611 Respondents

Data is weighted to be representative of readership by age and gender.
WHAT WILL WE COVER?

1. KEY FINDINGS
2. THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – CURRENT BEHAVIOURS
3. THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – PRODUCTS AND BRANDS
4. THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – THE FUTURE
5. ADVERTISING AND MAIL METRO MEDIA
KEY FINDINGS

SUMMARY

CURRENT BEHAVIOURS

• 1 in 2 have noticed price increases on some of their favourite health and beauty products. 1 in 3 say financial pressures are making some purchases unaffordable.

• Promotions and price have become significantly more important when making a purchase. Brand loyalty is potentially at risk as consumer finances continue to be impacted by the big squeeze.

• The majority have not yet cut usage across categories – make-up and nail care have seen the highest net decreases in usage.

• 18-34s are most likely to have noticed price increases and show concern about future affordability.

PRODUCTS AND BRAND

• The majority tend to shop for well-known brands across all categories. Over 1 in 4 buy own-label in the bath, hair removal and nail categories.

• Supermarkets are most popular places to buy essential hygiene products; high-street pharmacists are the go-to for cosmetics.

• Boots and Tesco are most popular for purchasing beauty and personal care products for 35+ adults. Online-only beauty retailers are most popular amongst those aged 18-34.

• Boots scores highest amongst consumers on key perception metrics, including key cost of living statements.
THE FUTURE

- Many are looking to reduce costs through offers (2 in 3), reducing purchases (2 in 5) and switching to cheaper products (1 in 3).

- There is limited appetite amongst consumers to compromise on current routine - only 1 in 4 are reducing the number of products in their routine and switching to DIY grooming.

- 1 in 4 intend on signing up to brand loyalty cards and newsletters to help beat the squeeze.

- 18-34s are more likely to begin subscribing to their favourite beauty products.

- Consumers would most like to see content on money saving and how to get the most from their health and beauty products in newsbrands.
“THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – CURRENT BEHAVIOURS”
Q – Firstly, thinking about your current attitudes to beauty, grooming and healthcare. Please state your level of agreement or disagreement with each of the following statements. [NET: Agree]

- 50% I have noticed price increases in some of my favourite health and beauty brands
- 32% Some of my favourite health and beauty brands are now unaffordable
- 30% I am worried about how I will continue to afford purchasing my favourite health and beauty products

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents

▲ = significant at 95% confidence
AS A RESULT, PROMOTIONS AND PRICE ARE BECOMING INCREASINGLY IMPORTANT FACTORS INFLUENCING PURCHASE DECISIONS

Brand loyalty is potentially coming under more pressure—there is still a need to reassure consumers on factors such as product quality and environmental impact.

Q – Thinking again about what you find to be most influential when purchasing health and beauty products have the following factors become more or less important to you in the last 3 months?

Q: 

- Discounts / Promotions: 60% (△), -7%
- Price: 58% (△), -4%
- Low Impact Ingredients: 36%, -8%
- Brand Loyalty: 16%, -16%

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents

△ = significant at 95% confidence
WHILST THE MAJORITY HAVE NOT YET CHANGED THEIR BEAUTY REGIME, NAIL CARE AND MAKE-UP ARE THE MOST IMPACTED

Q – How, if at all, have your consumption habits changed for products within each of the following health and beauty categories in the last 3 months?
[NET: Using Less]
“THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – PRODUCTS AND BRANDS”
The majority tend to shop for well-known brands across all categories. Over 1 in 4 opt for store own-label products when shopping in bath, nail and hair removal categories.
CONSUMERS ARE MOST LIKELY TO SHOP AT SUPERMARKETS FOR EVERYDAY ESSENTIAL HYGIENE PRODUCTS, AND AT HIGH-STREET PHARMACISTS FOR COSMETICS

Q – Where do you tend to shop for [CATEGORY] products?

<table>
<thead>
<tr>
<th>Category</th>
<th>Supermarkets</th>
<th>Pharmacists</th>
<th>Discounters</th>
<th>Online Retailer</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deodorant/ body spray</td>
<td>69%</td>
<td>27%</td>
<td>25%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Soap, bath, shower</td>
<td>76%</td>
<td>29%</td>
<td>27%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Oral hygiene</td>
<td>77%</td>
<td>30%</td>
<td>26%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Haircare</td>
<td>66%</td>
<td>40%</td>
<td>31%</td>
<td>25%</td>
<td>9%</td>
</tr>
<tr>
<td>Facial skincare</td>
<td>45%</td>
<td>27%</td>
<td>26%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>Shaving/ hair removal</td>
<td>70%</td>
<td>39%</td>
<td>32%</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>Body skincare</td>
<td>55%</td>
<td>41%</td>
<td>32%</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>Fragrance/ aftershave</td>
<td>41%</td>
<td>50%</td>
<td>40%</td>
<td>40%</td>
<td>25%</td>
</tr>
<tr>
<td>Make-up</td>
<td>50%</td>
<td>31%</td>
<td>27%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Nail care</td>
<td>31%</td>
<td>18%</td>
<td>22%</td>
<td>23%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents
BOOTS AND TESCO ARE THE MOST POPULAR RETAILERS FOR PURCHASING BEAUTY AND PERSONAL CARE PRODUCTS

The younger demographic are significantly more likely to shop at online-only retailers

Q – Below are a number of retailers offering health and beauty products. Which of the following retailers, if any, do you think you spend the most money with on health and beauty products?

<table>
<thead>
<tr>
<th>Retailer</th>
<th>All Adults</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boots</td>
<td>37%</td>
<td>33%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Tesco</td>
<td>36%</td>
<td>33%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Online Only Beauty Retailer</td>
<td>23%</td>
<td>24%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Superdrug</td>
<td>29%</td>
<td>21%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Sainsbury's</td>
<td>23%</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Amazon</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Asda</td>
<td>14%</td>
<td>20%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Aldi</td>
<td>11%</td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>John Lewis</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>The Body Shop</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>LUSH</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Holland &amp; Barrett</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Marks &amp; Spencer</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents
ON COST-OF-LIVING METRICS, BOOTS LEADS THE WAY ON RANGE AND ADDITIONAL OFFERS - ALDI LEADS ON KEEPING PRICES AS LOW AS POSSIBLE

Q – Thinking again about retailers that sell health and beauty products, to what extent do you agree or disagree with the following phrases when thinking about [BRAND]?

[NET: Agree]

- Boots
- Superdrug
- The Fragrance Shop
- LUSH
- Tesco
- Sainsbury’s
- Aldi
- John Lewis
- House of Fraser
- Cult Beauty

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents
“THE BIG SQUEEZE: BEAUTY AND PERSONAL CARE – LOOKING FORWARD”
2 in 5 consumers have or plan to reduce non-essential purchases and 1 in 3 have or plan to switch to lower cost versions of beauty products.

Q – Below are some statements relating to health and beauty and the rising cost of living. For each statement, please indicate which of the following most applies.

- I have done this recently and intend to continue doing so
- I have not done this recently but am likely to in the near future

Reduced the purchase of my non-essential health and beauty products

Switched to lower cost/cheaper versions of some health and beauty products

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents
DAILY ROUTINES ARE STILL IMPORTANT AND THERE IS LIMITED APPETITE AMONGST CONSUMERS TO COMPROMISE ON THEIR CURRENT ROUTINES

Q – Below are some statements relating to health and beauty and the rising cost of living. For each statement, please indicate which of the following most applies.

- I have done this recently and intend to continue doing so
- I have not done this recently but am likely to in the near future

28% NET: HAVE DONE AND INTEND TO CONTINUE/HAVEN’T DONE BUT LIKELY TO

Reduced the number of health and beauty products I use in my daily routine

25% NET: HAVE DONE AND INTEND TO CONTINUE/HAVEN’T DONE BUT LIKELY TO

Switched to multi-functional beauty and grooming products

24% NET: HAVE DONE AND INTEND TO CONTINUE/HAVEN’T DONE BUT LIKELY TO

Replaced professional beauty and grooming treatments with DIY alternatives

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents

Mail METRO MEDIA Daily Mail The Mail MailOnline METRO i The Telegraph
1 IN 4 INTEND ON SIGNING UP TO BRAND LOYALTY CARDS OR SIGNING UP TO LETTERS TO ACCESS OFFERS

18-34s are significantly more likely to sign up to loyalty cards or newsletters

Q – Which of the following actions, if any, are you likely to take over the next 3 months?

- Signing up to brand loyalty cards: 14%
  - 18-34: 31%
  - 35-54: 15%
  - 55+: 5%

- Subscribing to my favourite products to access a lower cost: 9%
  - 18-34: 25%
  - 35-54: 9%
  - 55+: 2%

- Subscribing to brand newsletters to access special offers: 9%
  - 18-34: 17%
  - 35-54: 10%
  - 55+: 4%

- Any loyalty or subscription: 23%
  - 18-34: 42%
  - 35-54: 22%
  - 55+: 8%

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents

▲ = significant at 95% confidence
ADVERTISING AND MAIL METRO MEDIA
CONTENT AROUND MONEY SAVING IS MOST IN DEMAND

Readers are also interested in product related content including information on new and top products, as well as making products last longer.

Q – Continuing to think about health and beauty content in newspapers (print and/or online). To what extent would you be interested or uninterested in each of the following types of content?

- Money saving tips: 69%
- Information on where to get the best deals: 68%
- Tricks to save money on beauty products: 57%
- Hacks to make your beauty products last longer: 52%
- Reviews on top health and beauty products: 50%
- News on new products / ingredients: 49%
- Must have health and beauty products: 43%
- Tips on how to cut down your routine: 41%

Source: Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents
# REACHING KEY HEALTH AND BEAUTY AUDIENCES WITH MAIL METRO MEDIA

## MMM REACH

- **18.9M**
  - Females reached by MMM monthly (70%)
- **9M**
  - 18-34’s reached by MMM monthly (63%)

## ARTICLES ON BEAUTY

- **360**
  - MMM articles written on beauty and personal care this year

## TARGETABLE DATA SEGMENTS

- **BEAUTY & FASHION**
  - 6.2m
- **BEAUTY LOVERS**
  - 1.3m
- **COSMETICS**
  - 1.1m
- **BEAUTY SHOPPERS**
  - 236K

Dedicated Beauty content

---

Source: TGI, Permutive & Google Analytics (August 2022)
OUT OF REACH?
1 in 3
MMM readers say that some of their favourite health and beauty products are now unaffordable

SHOW ME THE PROMO
60% of MMM readers say sales promotions/discounts have become more important to them over the last 3 months, whilst 58% say price has

SWITCHING IT UP
36% have or intend to switch to lower cost/cheaper versions of products

SIGN ME UP
1 in 4
MMM readers plan to sign up to membership cards or loyalty schemes in the next 3 months

HELP ME SAVE
Over 2 in 3
MMM readers want to see content in newsbrands on money saving tips and information on where to get the best deals when it comes to beauty products

IMPLICATIONS FOR ADVERTISERS

THEMES THAT MATTER

SHOWCASE HOW QUALITY LASTS
With cost becoming increasingly important to consumers, the purchase of well-known/premium brands might come under pressure. Showcase that quality lasts and the benefits of such outweigh the added expense.

BOOST BRAND ENGAGEMENT
Consumers have shown a new willingness to shop around based on what is cheapest with brand loyalty beginning to have less influence. Ensure consumers understand the benefits of staying loyal to brand through awareness of loyalty schemes and subscription options.

OFFER TIPS AND HACKS
Consumers have expressed a preference for content offering money saving tips and tricks as well as hacks to make products last longer. Continue advertising with useful information on ways to save money whilst showcasing benefits of your products.

USE NEWSBRANDS
Newsbrands are a trusted source for beauty and personal care information and Mail Metro Media’s varied print and digital portfolio means we can reach and engage key audiences at scale.
APPENDIX
EVERYDAY ESSENTIAL HYGIENE PRODUCTS HAVE SEEN THE MOST DEMAND IN THE LAST 3 MONTHS

Cosmetic products including fragrance, make-up and nail care have seen the least uptake in the last 3 months

Q – Which, if any, of the following health and beauty products have you purchased in the last 3 months?

1. SOAP/BATH/SHOWER - 80%
2. DEODRANT - 74%
3. ORAL HYGIENE - 66%
4. FACIAL SKINCARE - 46%
5. HAIRCARE - 45%
6. HAIR REMOVAL - 37%
7. BODY SKINCARE - 37%
8. FRAGRANCE - 32%
9. MAKE-UP - 28%
10. NAIL CARE - 21%

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents
### COSMETICS HAVE SEEN THE MOST DEMAND FROM 18-34s

Whilst body skincare purchasing falls behind, facial skincare is in the top 4 most purchased product types across all age brackets.

<table>
<thead>
<tr>
<th>Product Type</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soap/Bath/Shower</td>
<td>73%</td>
<td>76%</td>
<td>75%</td>
</tr>
<tr>
<td>Deodorant</td>
<td>72%</td>
<td>76%</td>
<td>82%</td>
</tr>
<tr>
<td>Facial Skincare</td>
<td>65%</td>
<td>61%</td>
<td>70%</td>
</tr>
<tr>
<td>Hair Removal</td>
<td>60%</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>Haircare</td>
<td>59%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Oral Hygiene</td>
<td>55%</td>
<td>43%</td>
<td>31%</td>
</tr>
<tr>
<td>Make-Up</td>
<td>54%</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Body Skincare</td>
<td>52%</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Fragrance</td>
<td>49%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Nail Care</td>
<td>37%</td>
<td>15%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q – Which, if any, of the following health and beauty products have you purchased in the last 3 months?

**Source:** Health & Beauty Matters Community Survey (September 2022) Base: 611 Respondents
**Q** - How much in total would you say that you have spent in the following health and beauty categories in the last 3 months?

<table>
<thead>
<tr>
<th>Category</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make-up</td>
<td>£28.23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facial skincare</td>
<td>£26.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shaving/hair removal products</td>
<td>£22.41</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body skincare</td>
<td>£17.92</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haircare</td>
<td>£16.71</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fragrance/aftershave</td>
<td>£42.33</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oral hygiene products</td>
<td>£13.73</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soap, bath or shower products</td>
<td>£13.57</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deodorant/body spray</td>
<td>£11.82</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**YOUNGER CONSUMERS HAVE SPENT MOST ON AVERAGE ON ALL CATEGORIES BESIDES FACIAL SKINCARE**

Brands promoting facial skincare need to consider how effectively they are communicating with a younger demographic.

*Source: Health & Beauty Matters Community Survey (September 2022)*

*Base: 611 Respondents*
MARKET SEGMENTATION BY MOTIVATING FACTORS

The largest segment are motivated by product characteristics including texture, smell and ease of application.

**Product Characteristics**
- Products qualities such as texture and smell are most important to this group
- 22% more likely to be 55+
- Reached through newspapers and magazines
- Reached through weekend publications
  - YOU (129)
  - Weekend Magazine (128)
  - Daily Mail Saturday (127)

**Price and Promotion**
- Advertising and packaging are most important to this group
- More likely to be under 55
- Reached through the internet, gaming, VOD and social media
- Reached through print publications
  - Metro (106)
  - Metro.co.uk (106)

**Product Image**
- Advertising and packaging are most important to this group
- 77% more likely to be 18-34
- Reached through social media, cinema, outdoor and reading news online
- Reached through print publications
  - Daily Mail (164)
  - Metro (148)
  - Mail on Sunday (156)

**Ethical**
- Impact of ingredients including to animals and the environment are most important to this group
- 31% more likely to be women
- Reached through newspapers and magazines
- Reached through print publications
  - i Newspaper (160)
  - Metro (124)

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents
PRICE AND QUALITY ARE THE MOST INFLUENCING FACTORS WHEN PURCHASING HEALTH AND BEAUTY PRODUCTS

Under 35’s are more likely to be influenced by advertising; over 55’s are more likely to be concerned with brand loyalty

Q – Thinking about purchasing health and beauty products. Which of the following factors, if any, tend to influence your purchases most?

<table>
<thead>
<tr>
<th>Factor</th>
<th>ALL ADULTS</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>67%</td>
<td>64%</td>
<td>70%</td>
<td>65%</td>
</tr>
<tr>
<td>Product Quality</td>
<td>55%</td>
<td>51%</td>
<td>52%</td>
<td>60%</td>
</tr>
<tr>
<td>Brand Loyalty</td>
<td>32%</td>
<td>25%</td>
<td>24%</td>
<td>40%</td>
</tr>
<tr>
<td>Sales Promotion/Discount</td>
<td>29%</td>
<td>33%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Product Characteristics</td>
<td>21%</td>
<td>25%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Reviews/Recommendations</td>
<td>16%</td>
<td>28%</td>
<td>19%</td>
<td>9%</td>
</tr>
<tr>
<td>Low Impact Ingredients</td>
<td>16%</td>
<td>21%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Advertising/Marketing</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents
CONSUMERS ARE POSITIVE ABOUT RETAILERS WHEN IT COMES TO AVAILABILITY, RANGE AND QUALITY – ARE BRANDS DOING ENOUGH TO HELP WITH THE COST OF LIVING CRISIS?

Q – Thinking again about retailers that sell health and beauty products, to what extent do you agree or disagree with the following phrases when thinking about [BRAND]? [NET: Agree]

Brand Perception

- Has good availability: 49% agree, 83% disagree
- They have a wide range of health and beauty products: 47% agree, 88% disagree
- Own brands are generally of good quality: 47% agree, 79% disagree
- Offer health and beauty products for people like me: 44% agree, 81% disagree
- Have a wide range of affordable and accessible health and beauty...: 43% agree, 79% disagree
- Is looking to help customers through additional initiatives (e.g. loyalty...: 39% agree, 79% disagree
- Is looking to help customers through additional offers: 39% agree, 66% disagree
- Is focused on keeping prices as low as possible for consumers: 36% agree, 48% disagree

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents

Boots has the highest average rating across key brand metrics

- #1 Boots – 75%
- #2 Superdrug – 63%
- #3 Tesco – 61%
- #4 Sainsbury’s – 53%
- #5 John Lewis – 45%
- #6 Aldi – 45%
- #7 Marks and Spencer – 38%
- #8 LUSH – 34%
- #9 The Fragrance Shop – 31%
- #10 LookFantastic – 26%
- #11 House of Fraser – 24%
- #12 Cult Beauty – 22%

Boots is viewed most positively by consumers for cost of living metrics

- #1 Boots – 68%
- #2 Superdrug – 59%
- #3 Tesco – 57%
- #4 Sainsbury’s – 53%
- #5 Aldi – 46%
- #6 M&S – 35%
- #7 John Lewis – 33%
- #8 LUSH – 29%
- #9 The Fragrance Shop – 26%
- #10 LookFantastic – 25%
- #11 House of Fraser – 24%
- #12 Cult Beauty – 22%
A CHANGE TO SHOP IN-STORE IS BASED ON EASE OF COMPARING PRICES AND PRODUCT CONTENTS. SHOPPING ONLINE IS BASED ON PERCEIVED COMPETITIVE PRICING AND CONVENIENCE

Q – Has the way in which you regularly shop for health and beauty products (in store or online) changed in the last 3 months? Q – Why is this?

<table>
<thead>
<tr>
<th>Shopping in-store more than online</th>
<th>It hasn’t changed</th>
<th>Shopping online more than in-store</th>
<th>Don’t know / Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7%</td>
<td>77%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20%</td>
<td>42%</td>
<td>34%</td>
<td>4%</td>
</tr>
<tr>
<td>9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>72%</td>
<td>15%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>86%</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PRO IN-STORE**

“Much easier to compare prices and use coupons. Promotions more often in store than online.”

“Easy to view and purchase.”

“I can compare prices and contents more easily.”

“There are normally samples and people that can advise me.”

“I find it easier to compare prices.”

“It is easier to see the product you are buying.”

“Can browse various products.”

**PRO ONLINE**

“Much easier when it’s delivered to the door, good selection, many choices, lower prices”

“For convenience and for competitive prices.”

“Online shopping is sometimes cheaper as I can also use the cashback sites to save some money.”

“Delivery times are very good and prices are very competitive.”

“Better/lower prices and more deals.”

Source: Health & Beauty Matters Community Survey (September 2022)

Base: 611 Respondents

Mail Metro Media

Community Survey (September 2022)

Base: 611 Respondents
CONSUMERS ARE LEAST WILLING TO COMPROMISE WHEN IT COMES TO EVERYDAY ESSENTIAL HYGIENE PRODUCTS

18-34s and males are more price conscious, being more likely to switch to own-label across all categories.

Q – Thinking about how your attitude may have changed to purchasing products within the following health and beauty categories since your last purchase. Which, if any, of the following statements most applies for each?

- I would now look for cheaper, own label products
- It hasn’t changed
- I would now look for standard/premium brands on offer

<table>
<thead>
<tr>
<th>Category</th>
<th>18-34: 35%</th>
<th>35-54: 14%</th>
<th>55+: 12%</th>
<th>18-34: 38%</th>
<th>35-54: 16%</th>
<th>55+: 11%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deodorant/ body spray</td>
<td>13%</td>
<td>11%</td>
<td>12%</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Soap, bath or shower products</td>
<td>75%</td>
<td>73%</td>
<td>77%</td>
<td>69%</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Oral hygiene products</td>
<td>12%</td>
<td>17%</td>
<td>12%</td>
<td>18%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Haircare</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
<td>19%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Facial skincare</td>
<td>69%</td>
<td>71%</td>
<td>69%</td>
<td>63%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>Shaving/hair removal products</td>
<td>M: 23%, F: 13%</td>
<td>M: 19%, F: 10%</td>
<td>20%</td>
<td>M: 27%, F: 6%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Body skincare</td>
<td>18%</td>
<td>14%</td>
<td>18%</td>
<td>13%</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>Fragrance/ aftershave</td>
<td>15%</td>
<td>17%</td>
<td>15%</td>
<td>69%</td>
<td>69%</td>
<td>69%</td>
</tr>
<tr>
<td>Make-up</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Nail care</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: Health & Beauty Matters Community Survey (September 2022)
Base: 611 Respondents

△ = significant at 95% confidence