

THE BUSINESS^{OF} BEAUTY

A DSN Special Report

Elevating
the Beauty
Experience

Elevating the beauty experience

By ANTOINETTE ALEXANDER

Long gone are the days when growth in the beauty aisle was driven largely by manufacturers and marketers via packaging and promotion. Times have changed, and today, retailers and technology are playing an even greater role in the marketing process to further elevate the beauty experience.

“In the post-recessionary environment, it is more important than ever to coax shoppers back into the beauty aisles and elevate the shopping experience,” stated research firm Euromonitor International in a recent “Beauty

and Personal Care in the U.S.” report. “The reinvigoration of the in-store beauty display or subtle changes to improve consumer comfort can yield significant rewards for both retailers and the leading brands.”

It is an important point that is not going unnoticed. Mass market retailers are increasingly working to become a beauty destination for savvy shoppers with a melding of upscale decor, higher-end beauty brands, in-store services and innovative technology to help ease the shopping experience.

The heightened focus on elevating the beauty experience at mass and creating a multichannel

experience is further being fueled by intense competition from specialty retailers and the growth in Internet retailing. In fact, A.T. Kearney and its Global Consumer Institute released in 2012 its “Beauty and the Beast” e-commerce study, which found that 62% of respondents shop online regularly, and of these, 60% purchase beauty and personal care products online. Among the most frequently purchased categories by online shoppers are skin care, personal care and hair care.

Going forward, such efforts at retail will only become increasingly critical as consumers further evolve and expect more — much more — from their shopping experience.

IN-STORE BEAUTY SERVICES

Beauty today is not just about carrying the product on the shelf. It is also about providing a service. One ideal example is Walgreens, which is truly revolutionizing

beauty at mass.

Walgreens’ journey to transform the beauty experience within its stores to create a “best in class” beauty depart-

ment — focused on improved design, customer engagement and experience — really shifted into high gear following the 2010 acquisition of Duane Reade. The latter, under the guidance of visionary Joe Magnacca, then SVP and chief merchandising officer of Duane Reade, was turning the drug store beauty experience in Manhattan on its head by bringing a bit of European flair to the market with its upscale LOOK Boutique.

While the number of LOOK Boutiques within both Duane Reade stores in New York City and Walgreens stores nationwide continues to grow, a shining example of the retailer’s true beauty prowess can be found at the Duane Reade flagship store at 40 Wall St. in downtown Manhattan.

Within this flagship location, beauty mavens will find a nail salon offering manicures, gels and the latest nail color shades from OPI and Essie; a hair salon by Phyto Universe offering such services as hair/scalp analysis, blowouts and styling; and a Ramy-branded brow bar for in-store brow-shaping services.

Various components of the LOOK Boutique, such as the Ramy-branded brow bar and nail salon, are being rolled out to additional store locations where it makes the most sense.



A PERSONAL TOUCH

Unlike department or specialty stores, the mass market channel is not exactly known for having beauty advisers on hand to help shoppers with product recommendations. That is changing.

Target, for example, created and began testing in 2012 a Beauty Concierge program. The concierges — dressed in all black with an apron to identify them — are armed with an iPad, a product sample box and a mirror, said Christina Hennington, divisional merchandising manager of beauty for Target. They are available for approximately 40 hours each week to provide guests with detailed information about products in the beauty and personal care aisles.

“Target created the Beauty Concierge program to build upon the cohesive guest experience the beauty department redesign provides. It also adds comprehensive education and recommendation components that many of our guests want and expect while shopping beauty, and allows Target to offer more specialty/prestige brands that require deeper product knowledge,” Hennington said.

The concierge program is being tested in 28 Target stores in Chicago before the retailer decides whether or not to expand it to several hundred

stores across the country.

Meanwhile, Walgreens has an army of 26,000-plus beauty advisers across its network, and CVS/pharmacy also has some beauty advisers in its locations across the country.



'BEAUTIFYING' TECHNOLOGY

Technology is playing a greater role in-store as retailers are increasingly implementing in-store kiosks and virtual makeover tools to further enhance the beauty experience.

One new concept Walgreens is testing in beauty to create a multi-

channel play inside the store is tying in some of the e-commerce assets the company acquired in 2011 in the Drugstore.com deal.

“State and Randolph is a good example of that, where you can actually kiosk the Beauty.com business. We think that has tremendous horsepower in terms of differentiating ourselves, and leading the traditional drug store space,” Joe Magnacca, president of daily living products and solutions for Walgreens, told *Drug Store News* in an earlier interview.

In addition, shoppers at the Duane Reade flagship store at 40 Wall St. in downtown Manhattan can “try on” makeup before they buy using a virtual makeover kiosk.

Retailers outside of retail pharmacy also are doing some pretty impressive stuff with technology. Not to be outdone, Sephora is bolstering its in-store shopping experience with such technology as the Skincare IQ kiosk, which is available at select stores to help shoppers find the skin care products that best meet their needs.

In addition, global clothing retailer Uniqlo opened in early October its first flagship store on the West Coast in San Francisco, which featured the global unveiling of Uniqlo’s “Magic Mirror” technology. Developed by printing company Dai Nippon Printing, this “virtual dressing room” allows customers to use the Kinect color-changing engine and half-mirror touch-panel technology to instantly switch between different color palettes of clothing.



BEST IN BEAUTY RETAIL CONCEPTS



WALGREENS

The recent opening of Walgreens' new Los Angeles store — its 8,000th store nationwide and first flagship store on the West Coast — marked the debut of Boots No7 in a Walgreens location. It's the same fixturing presented to customers in the U.K. market, but with special items developed for the United States.

It's also the first store to include the merchandising pop of big beauty brands like Avene that helps to create more of an upscale department store feel where the brands are destinations.



CVS/PHARMACY

Nail care is hot — red hot — with sales increasing by 40% since 2011 and growing by double digits each year since 2008. So it comes as no surprise that CVS/pharmacy is making a major splash with its new Nail HQ Kiosk.

Available in more than 2,000 CVS/pharmacy locations since November 2012, the new Nail HQ serves as a platform to showcase the latest trends, product innovations and new shade options, allowing shoppers to view polish shades outside of the bottles through nail color strip displays.



RITE AID

Rite Aid's recently unveiled new store in Lemoyne, Pa., makes nail care a key focal point within the beauty department. Products have been taken from the shelf and are now housed in a nail bar that showcases the top brands and latest shades.

In addition, the men's grooming area has been expanded with a new Axe display where shoppers can use an iPad to sample a new look, and the hair care aisle has hands-on displays where customers can touch and feel the items before purchase.



SEPHORA

Beauty retailer Sephora is further elevating the beauty experience with its new Skincare iQ in-store technology. Available in select Sephora locations, Skincare iQ helps clients address a myriad of skin concerns through a series of deductive questions and simplifies the product selection process by cross referencing the retailer's full skin care assortment across more than 1,200 SKUs and 60 brands. Users can sort recommendations by price, rating, best-sellers and relevance, as well as jump to other categories.



TARGET

At an October beauty event at the Target Studio in New York, the retailer reminded beauty editors of its goal to drive ethnic beauty.

Target recently has doubled or tripled its multi-ethnic beauty merchandising in select stores, with some sets reaching up to 36 ft. Today Target has more than 1,000 unique multi-ethnic merchandise SKUs in beauty.

Come spring 2013, Target will be the exclusive mass market retailer for ethnic brand Camille Rose.



PHARMACA

Nestled along Sunset Boulevard in Los Angeles is a little slice of spa-like tranquility — Pharmaca's recently opened Natural Beauty Bar.

This new 1,000-sq.-ft. beauty bar offers shoppers a prestige in-store experience that centers around a brow bar for waxing and threading services and a makeup area for makeup application.

"With [the new beauty bar], it's really allowed us to expand on some new items," Tiana Ukleja, Pharmaca's health and beauty category manager, told *Drug Store News*.

Innovative products drive shoppers from salons to retail store shelves

SECTION BY ANTOINETTE ALEXANDER

BEAUTY AND PERSONAL CARE MARKET*

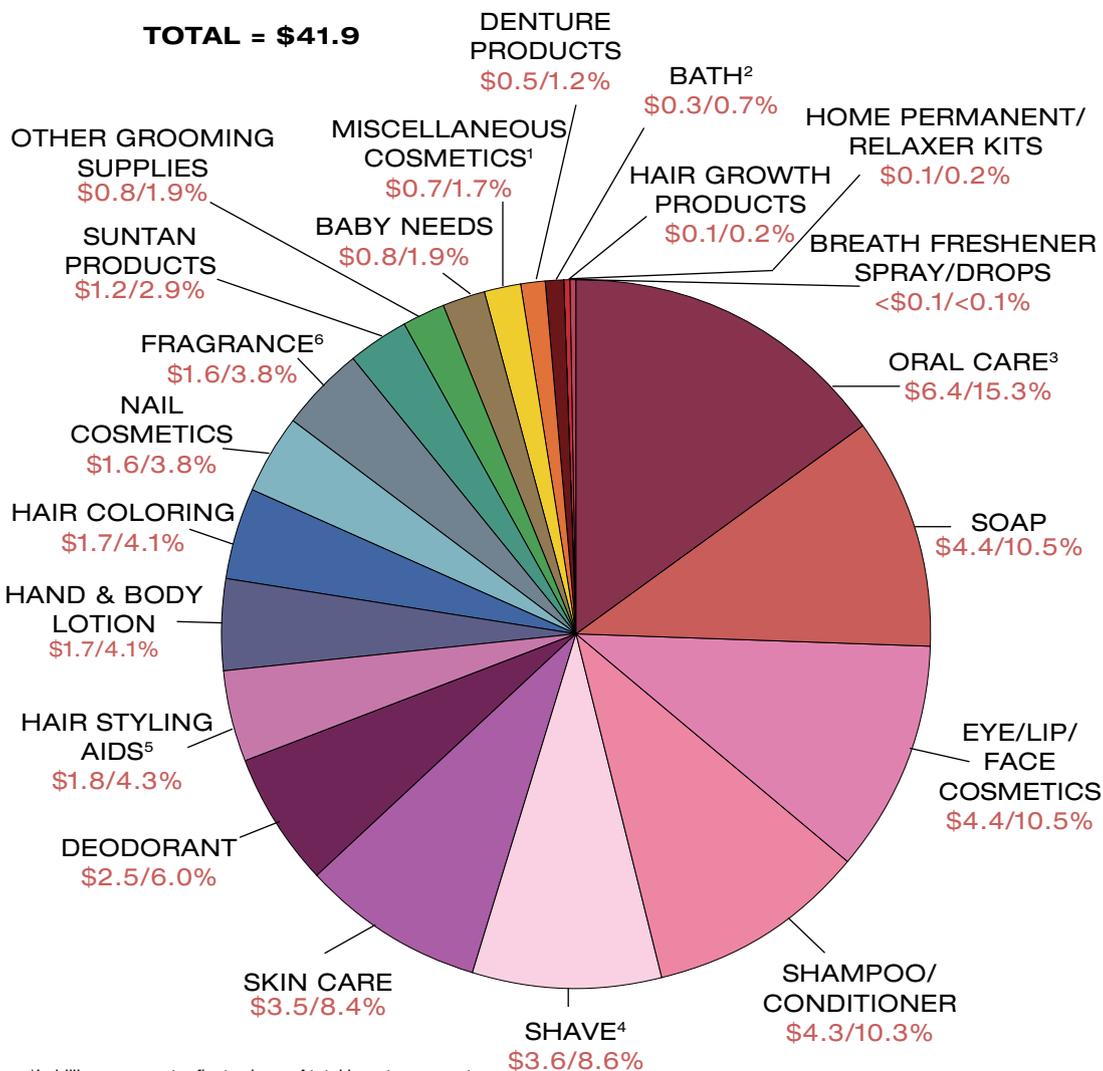
Although an economic rebound has been slower than expected and unemployment remains high, the beauty and personal care market at mass has benefited as many consumers shifted spending habits away from pricey salon services, retailers increasingly reinvented the in-store shopping experience and manufacturers churned out products that promised greater convenience and value-added features.

Data from SymphonyIRI Group revealed that the core beauty and personal care segments focused on by DSN generated \$41.9 billion in sales for the 52 weeks ended Nov. 4 at total U.S. multi-outlets, which covers supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains.

During the past year or so several categories have no doubt helped fuel overall beauty sales, and in this special report DSN is taking a closer look at 10 such categories. One shining star, for example, is nail care.

Driven by the huge success in the salon arena, gel nail color at retail over the past year has firmly established a new segment, and this is not just a trend, said Bruce Kowalsky, managing partner of Red Carpet Manicure. Industry sources have projected that the gel segments will represent 50% of the nail care category within the next two to three years. Kowalsky noted that Red Carpet Manicure will be doubling its SKU-count in 2013 with an additional 64 items and a newly re-engineered merchandising presentation to spotlight its at-home gel nail system.

In addition to nail, this extensive beauty report also will examine the resurgence of the buzz around men's grooming products, the BB cream craze and the continued focus on anti-aging formulations.



*In billions; percent reflects share of total beauty segments
 Source: Infoscan Reviews, SymphonyIRI Group for Total U.S. Multi-Outlet (supermarkets, drug, mass, military commissary, and select club and dollar stores) for the 52 weeks ended Nov. 4, 2012.
 1 Includes cosmetic accessories, cosmetic storage. 2 Includes bath products, bath/body scrubbers/massagers. 3 Includes toothbrush/dental accessories, toothpaste and mouthwash. 4 Includes razors, blades, shaving cream. 5 Includes hair spray/spritz, hair styling gel/mousse. 6 Includes fragrances - women's, shaving lotion/men's fragrance.

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Depilatory sales experience smooth sailing

Depilatories have, perhaps to the surprise of some, experienced a serious uptick in sales as product innovation and new entrants to the category have resulted in some hair-raising sales.

According to data from SymphonyIRI Group, a Chicago-based market research firm, sales of depilatories rose about 12.5% to more than \$190 million for the 52 weeks ended Nov. 4 at total U.S. multi-outlets, which covers supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains.

New product innovations that promise to deliver better results, skin-smoothing nutrients and improved fragrance have undoubtedly helped bolster sales. Manufacturers also have demonstrated that hair removal isn't all about legs and underarms.

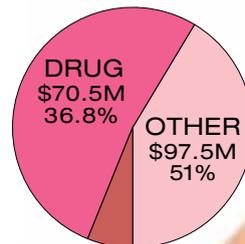
Products that target unwanted facial hair have caught the eye of many women. In fact, according to a 2010 Olay global survey of 6,600 women, 85% of women remove facial hair occasionally, and are as concerned about unwanted facial hair as they are about fine lines and wrinkles. And 41% of American women think that visible facial hair — in certain areas — is simply not socially acceptable.

As manufacturers continue to develop innovative products that promise improved results, it is likely that this segment will continue to grow. No pun intended. One example is Nad's new nose hair waxing product.

DEPILATORIES†

Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012.

† Percent reflects share of total category
For more data on depilatories, see the skin care chart on page 34.



FOOD \$23.3M/12.2%



Ethnic consumers go wild for natural

ETHNIC HAIR CARE

Locations where purchased products



Source: Mintel, April 2012



The African-American hair care market has held up well, despite a weakened economy, as cash-strapped shoppers shifted from pricey salons to drug store and beauty supply shops.

Research firm Mintel estimates sales of African-American hair care products hit \$684 million in 2012, reflecting little change from 2007, despite the economic downturn. Mintel predicts that the market will increase by 11% in current prices between 2012 and 2017, and by 2% in inflation-adjusted prices, as the effects of the recession ease and consumers become more comfortable spending more on personal care.

Mass market retailers and manufacturers have been working to expand their offerings to appeal to African-Americans who are looking for alternatives to more expensive salon products. Target, for example, has been offering a greater selection of hair care products. (For more information, see page 22.)

Also fueling growth is the continued trend toward natural from relaxed hair. "This has meant that there are new entrants on store shelves that are meant to appeal to women with kinky or frizzy hair, promising shine and smoothness while strengthening and moisturizing hair," Mintel stated in a 2012 "Black Hair Care" research report.

Bold brows trend translates to bold sales



When it comes to eye makeup, eyebrows have proven to be a shining star, as bold brows are on trend and simply ooze sex appeal. The trend is translating into bold sales in beauty.

According to data from SymphonyIRI Group, sales of brow makeup rose more than 10% to about \$81 million for the 52 weeks ended Nov. 4 at total U.S. multi-outlets.

And while research firm Mintel didn't specifically breakout brows, it did note in a 2012 report on color cosmetics that eye makeup — which includes eyebrow makeup — is the largest of the three color cosmetic segments, with a 41.2% share in 2012.

Flip through the pages of beauty magazines and follow the latest looks gracing the runway, and you are bound to see that brows are hot. Manufacturers have responded to the trend by bringing new brow makeup to market, and the focus on brows also can be seen off the shelf and on the retail floor.

For example, as part of its effort to elevate the beauty experience with its chic LOOK Boutique, Duane Reade has installed in select locations a Ramy-branded brow bar for in-store brow-shaping services. Walgreens is following suit as it works to export Duane Reade's LOOK Boutique from New York to its locations nationwide.

The trend shows little signs of slowing. In fact, as this issue of *Drug Store News* headed to the printer, celebrity eyebrow stylist Joey Healy announced the opening of his Fifth Avenue Eyebrow Studio in New York City.

EYE COSMETICS

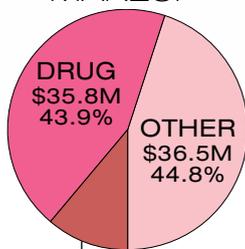
	Multi-Outlet*	% Chg	Drug	% Chg
Eyebrow Makeup	\$81.4	10.5%	\$35.8	13.6%
Eye Combo	45.0	27.9	7.5	58.1
Eye Liner	534.0	3.5	211.3	2.1
Eye Shadow	341.3	-2.7	136.7	-2.8
Mascara	931.3	0.7	319.7	-1.1
Total	1,933.1	1.7	710.9	0.6

* Supermarkets, drug stores, mass market retailers, military commissaries and select club and dollar retail chains

† Percent reflects share of total category

Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.

EYEBROW MAKEUP†



FOOD \$9.2M/11.3%

BB creams makeover facial products

While BB creams, aka “blemish/beauty balms,” are still relatively new, they continue to gain traction and are paving the way for CC creams, or “color control” creams — the next hottest thing in facial products. BB creams combine the functionality of primers, SPF and moisturizers, along with the anti-aging benefits of skin serums. According to the NPD Group, in the 12 months ended March 2012, BB creams sold in U.S. department stores generated close to \$9 million.

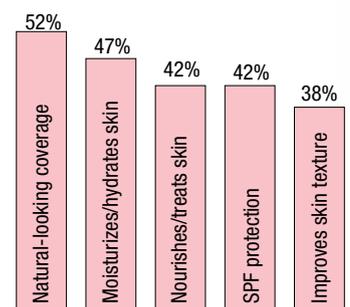
NPD reported that although the incidence of purchasing BB creams

was very small (i.e., 2% of total beauty shoppers), the majority of purchasers said they were extremely or very satisfied with their last BB cream purchase, and 77% expressed positive repurchase intent. According to NPD, almost 4-out-of-10 beauty shoppers said they would consider buying a BB cream in the future.

“Consumers are seeking out new, innovative products; the latest hope in a jar,” noted Jeff Carducci, VP sales for Derma E. Manufacturers are responding with inventive formulas and creative ways to deliver more personalized skin care recommendations at point of sale, he added.

BB CREAMS

Top five expected benefits



Source: NPD Group



False lashes glam it up

False lashes have proven that they are no longer faux pas among beauty mavens and no longer considered a purchase to be made only at Halloween. According to SymphonyIRI Group, sales of false lashes and adhesives rose nearly 17% to about \$80.5 million for the 52 weeks ended Nov. 4 at total U.S. multi-outlets.

"The retailers are realizing that over in the United Kingdom and other global markets that those retailers have lash bars and have education. They go from your traditional standard lashes to the glitz and flair," said Mike Matulis, SVP sales and category management at Pacific World.

The interest also spurred beauty manufacturers to develop super-volumizing mascaras that promise to give the look of false lashes.

COSMETIC ACCESSORIES

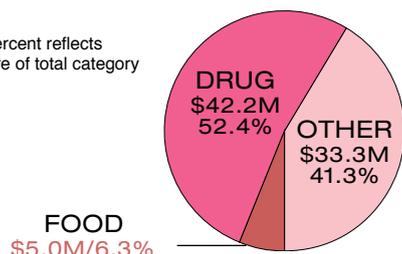
	Multi-Outlet*	% Chg	Drug	% Chg
Eyelash Adhesives	\$14.2	24.9%	\$8.0	19.2%
Eyelash Curler	29.8	-3.9	11.4	-6.7
False Eyelashes & Adhesives	80.5	17.0	42.2	12.8
Makeup Applicators	125.9	6.8	48.2	6.3
Makeup Remover (lotion/gel)	70.1	1.4	22.5	1.4
Makeup Remover Implements	196.2	22.3	65.9	19.6
Sharpeners	29.1	2.0	7.7	-5.1
Total	545.8	12.0	205.8	10.0

* Supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains
Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.



FALSE EYELASHES & ADHESIVES†

† Percent reflects share of total category

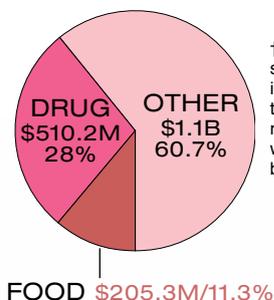


FOOD \$5.0M/6.3%

Fragrance lingers as popular indulgence

FRAGRANCE†

† Percent reflects share of total category, includes men's traditional fragrance/toiletries/body mists and women's fragrance/body mists



FOOD \$205.3M/11.3%



Fragrance has long been one of the trickier categories for mass market players as they've experimented with ways to successfully offer in-store testing, such as the innovative fragrance testers now at select Duane Reade stores.

A Total Beauty Media Group study that was released in December 2011 found that 40% of women with a household income under \$25,000 spent upward of \$150 on fragrance. Scent samples and in-store trials were the most influential factors in their buying decisions.

According to an annual holiday retail study by the NPD Group, fragrance moved up from the No. 8 to the No. 6 position on consumers' holiday shopping list.

Over the course of the entire year, 40% of individual fragrance sales take place during the holidays, while 80% of fragrance gift set sales occur during the holiday season, according to stats from the SymphonyIRI Group database that were recently cited by Coty.

FRAGRANCE

	Multi-Outlet*	% Chg	Drug	% Chg
Men's Traditional Fragrance	\$348.4	-4.7%	\$117.8	-4.0%
Men's Toiletries/Groom	601.1	-0.9	122.4	-6.8
Men's Body Mists	253.6	-9.2	46.0	-15.8
Women's Fragrance	507.1	-7.2	201.4	-7.1
Women's Body Mists	110.6	-21.6	22.6	-23.7
Total	1,933.1	NA	710.9	NA

* Supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains
Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.

Lipsticks brighten category sales

Within the lip category, lipstick was the only segment to enjoy an uptick, according to the data. According to data from SymphonyIRI Group, a Chicago-based market research firm, sales of lipstick rose about 1.4% as the overall lip category slipped about 2.5% during the 52 weeks ended Nov. 4 at total U.S. multi-outlets.

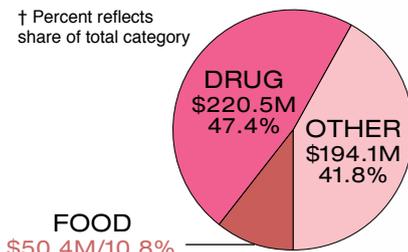
Manufacturers helped fuel growth of lipstick in 2012 by developing products that promised longer wear and moisturizing benefits — two advantages that are important to beauty shoppers.

In a recent 2012 “Color Cosmetics” report, research firm Mintel stated that “the biggest sales increases from 2011 to 2012 came from lip makeup (i.e., 5.7%) based on long-lasting color promises, tinted balms and added functionality.”

Meanwhile, the NPD Group, which tracks prestige beauty, predicted that lips would sparkle during the 2012 holiday season. The lip segment — consisting of lip color, lip liner, lip gloss and applicators — generated in prestige more than \$548 million year-to-date, January through November 2012, and increased 9% in dollars versus the same time last year. The big winner in the lip segment? Lip color, which posted an 11% growth in dollar sales year-to-date 2012, NPD noted.

LIPSTICK†

† Percent reflects share of total category



FOOD
\$50.4M/10.8%

LIP COSMETICS

	Multi-Outlet*	% Chg	Drug	% Chg
Lip Combo	\$1.2	-63.2%	\$0.5	0.6%
Lip Gloss	204.4	-8.3	85.3	-8.2
Lip Liner	46.2	-4.8	24.4	-3.5
Lip Treatment	12.1	-20.9	8.1	-29.7
Lipstick	464.9	1.9	220.5	-0.7
Total	728.8	-2.6	338.8	-3.8

* Supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains
Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.



Skin care gets manly with products ‘for him’

As men increasingly step out of their comfort zone to embrace beauty routines, marketers bolster advertising and manufacturers develop new products just for him, men’s grooming continues to grow.

While men’s shaving/grooming and deodorants continue to dominate the male grooming segment, there’s no doubt that guys are increasingly taking greater notice of skin care products. In fact, market research company the NPD Group, which tracks prestige beauty, found that men’s skin care sales increased 6% January through July 2012, compared with the same time last year, generating \$45.5 million. Interestingly, NPD also found that at least 7-out-of-10 consumers are buying facial skin care products for themselves.

MEN'S GROOMING

Year	Sales*	% Annual Chg
2012 (est.)	\$1.57	0.9%
2013 (est.)	1.58	0.9
2014 (est.)	1.59	0.7
2015 (est.)	1.61	0.7

* Sales at inflation-adjusted 2009 prices; in millions for FDMx
Source: Mintel/based on SymphonyIRI Group InfoScan Reviews

“With substantial growth in a number of smaller categories, it seems that men are stepping out of their comfort zone even further to try the latest skin care innovations,” stated Karen Grant, VP and senior global industry analyst for the NPD Group. “Men are purchasing toners and clarifiers to brightening specialists and ‘in sun’ protection products, making it quite an interesting time for men’s grooming products.”

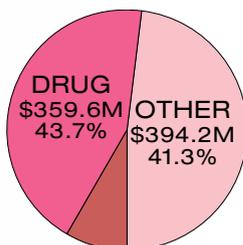


DIY points to nail-centric culture



* Supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains
 † Percent reflects share of total category
 Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.

NAIL POLISH†



FOOD
 \$69.9M/8.5%

Thanks to a flood of innovative technologies that enable women to achieve salon effects at home, and a nail-centric fashion culture, the mass market nail care segment has enjoyed double-digit growth.

Among the most notable developments within nail care at mass is the entrance of at-home gel manicures. Delivering long-lasting results at a fraction of the price of a salon gel manicure, these DIY products took the mass market nail segment by storm.

NAILS

	Multi-Outlet*	% Chg	Drug	% Chg
Artificial Nails/ Accessories	\$181.3	10.5%	\$72.0	12.8%
Nail Accessories/ Implements	250.7	7.2	102.9	4.4
Nail Polish	823.8	29.4	359.6	23.7
Nail Polish Accessories	2.5	-3.9	0.8	-15.4
Nail Polish Removers	116.8	13.7	40.9	13.0
Nail Treatments	194.7	20.8	101.3	22.0
Total	1,569.7	20.7	677.6	18.2

Also contributing to the explosive growth were such innovations as adhesive nail stickers bearing wild colors and edgy patterns, cracked nail polish, glitter nail polish and magnetic nail polish.

Nail shows little sign of slowing as manufacturers and retailers look to drive sales by pulling the product off the wall to create stand-alone nail displays.

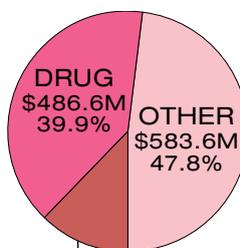
Aging without blemish

Anti-aging products continue to dominate skin care.

Sales of facial skin care products within food, drug and mass (excluding Walmart) is expected to accelerate through 2015, according to research firm Mintel, as the economic recovery gains steam and consumers become more confident in their future economic prospects. In a "Facial Skincare" report released in 2011, Mintel projected that food, drug and mass sales will increase from 3.9% to 4.4% each year from 2011 to 2015, reaching approximately \$2.5 billion by 2015.

When it comes to desired ingredients, Mintel found that 39% of facial skin care users said they use products with sunscreen, while 21% reported using SKUs with "active natural anti-aging properties, such as vitamin C or green tea," and 21% said they use "active chemical anti-aging properties."

FACIAL ANTI-AGING†



FOOD
 \$149.9M/12.3%

* Supermarkets, drug stores, mass market retailers, military commissaries, and select club and dollar retail chains
 † Percent reflects share of total category
 Source: SymphonyIRI Group for the 52 weeks ended Nov. 4, 2012, in millions.

SKIN CARE

	Multi-Outlet*	% Chg	Drug	% Chg
Acne Treatments	\$639.0	1.4%	\$186.5	2.7%
Body Anti-Aging	24.1	-13.1	8.1	-9.8
Depilatories	191.2	12.5	70.5	7.9
Facial Anti-Aging	1,221.9	-0.3	486.6	0.4
Facial Cleansers	963.4	4.9	294.6	6.8
Facial Moisturizers	403.1	4.0	141.5	6.9
Fade/Bleach	79.9	-2.4	32.7	-8.7
Total	3,522.7	2.4	1,220.4	3.0

