

Cosmetics and Fragrance Marketing and Management Master's Degree Program

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Capstone 2014 White Paper **MEN'S BEAUTY**

Authors: Simone Bolotin (Coty Prestige), group leader; Colleen Celentano (L'Oréal), co-leader; Renee Bukowski (IFF); Alexandra de Lara (The Estée Lauder Companies); Michael Kremer (L'Oréal)

"To men a man is but a mind. Who cares what face he carries or what he wears? But woman's body is the woman."

AMBROSE BIERCE, 1958

Introduction

Over the past decade, men's grooming has been dubbed "the final frontier" of beauty, poised to take the industry by storm. With over 138 million men in the United States comprising about 50% of the population (Census.gov, 2014), it presents a true goldmine of untapped users. But have brands been able to crack the men's code?

Men's grooming is a \$35 billion global industry, with the U.S. holding a 17% share. The \$5.7 billion U.S. men's grooming market has grown by 7% in the past five years, with a focus on basic needs products such as deodorant, shampoo, and bar soap. Meanwhile, the global men's market has grown at 23%, more than three times faster than the U.S. during the same five-year span (Euromonitor, 2014). South Korea has grown at 67% and China at a staggering 157%, driven primarily by sophisticated categories such as skin care. If the U.S. grooming market had matched global growth, it would already be a \$7 billion industry today.

While historically it has been a challenge to engage U.S. men in the categories that enjoy success abroad, the economic crisis of 2008 has fueled major shifts in gender roles, behaviors, and attitudes among men. Men were most affected by the recession, with a job loss rate nearly 50% higher than that of women, an economic phenomenon coined "the mancession" (Investopedia, 2009). The current marketing model does not reflect the authentic needs or values of the modern U.S. male consumer.

This paper will highlight opportunities to

leverage the changing roles, changing views, and changing faces of the modern man to grow a more sophisticated men's grooming market. It will also outline a new model that will capture men's interest and loyalty, including key pillars critical for the growth of this opportunity-rich category.

History

While the U.S. market has enjoyed success in selling men's basic needs products, attempts to move into more sophisticated categories have proved challenging. In order to move forward, the industry first needs to understand why attempts to break through this barrier have been unsuccessful.

Historically, men have taken a need-based, utilitarian approach to their personal care products. Today, the categories with highest use among men are those that are essential for maintaining basic hygiene. Once men have identified a problem, they want a simple and quick solution. For example, deodorant is the most commonly used product among men, with 92% reporting that they use it regularly to protect themselves from odor and perspiration. Shampoo is the second most widely used category at 86%, followed by bar soap at 70%, and shaving cream at 61% (Mintel, 2014). The U.S. men's grooming industry has done an exceptional job of building these basic need categories, with a 38% dollar share of the global men's bath and shower market, thanks to popular launches and advertising by Old Spice, Axe, and Dove Men+CARE.

Aside from the practical uses, these categories have cultural significance as well. While most women in the U.S. grew up learning how to apply lipstick and set their hair in curlers from their mothers and grandmothers, most boys grew up learning about deodorant and basic hygiene in health class at school, or teaching themselves to shave after observing their fathers and grandfathers. As a result, getting men interested in products beyond the basics has been challenging, since they inher-

ently do not think seriously about a sophisticated grooming routine.

Men's lack of interest in grooming can also be linked to evolutionary factors. Biologists explain that historically for women, physical beauty was an evolutionary advantage that could lead to biological success by attracting a mate. In her book, *The Male Brain*, neuropsychiatrist Louann Brizendine explains that "men have been biologically selected over millions of years to focus on fertile females," with traits that indicate youth and health (Brizendine, 2010). For men, however, biological success was based on their ability to provide food for their mate. "The males who showed they were willing to provide food got more sexual access to the females, increasing their chances of paternity" (Brizendine, 2010). While women have an innate biological motivation for beautifying, for men, money, power and other indicators of their ability to provide can often take the place of good looks in the mating game.

As a society, our depictions of men in advertising and popular culture have not historically contributed to an environment ripe for changing the male mindset. In *The Beauty Myth*, author Naomi Wolf uses the stereotypical depiction of a standard evening news team to highlight the disparities between the accepted appearance of men and women, describing "that double image—the older man, lined and distinguished, seated beside a nubile, heavily made-up female junior" (Wolf, 2002). In the grooming industry, messaging has traditionally reinforced prevalent gender stereotypes. From Axe, to Old Spice, to the now defunct TAG Body Spray brand, hyper-masculine or oversexualized images have long been used to sell basic needs products to men.

While using stereotypes in advertising has proven effective for basic needs categories, we are hitting a wall. In the past five years, the U.S. deodorant market was flat and the total shave category grew by only 2% (Euromonitor, 2014). The limitations of the U.S. market's

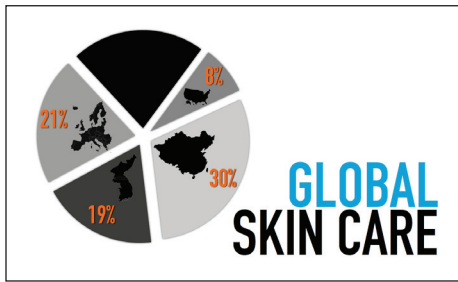


Figure 1

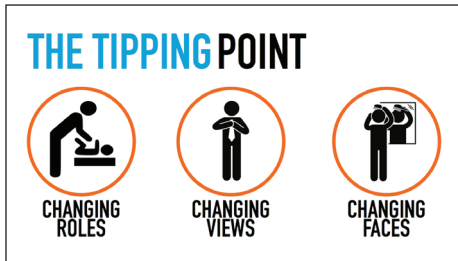


Figure 2

current approach is also apparent in its global share of men's skin care at only 8%, ten share points less than any other U.S. male category (Euromonitor, 2014). Globally, skin care represents the biggest opportunity for men's grooming, with 73% growth in the past five years alone. Currently, China leads the charge with 30% share, followed by Western Europe at 21%, and South Korea at 19% (Euromonitor, 2014), (see Figure 1).

These facts are not surprising considering how men's skin care has traditionally been launched in the U.S. Brands often try to recreate their women's lines in a more masculine form, using similar product offerings and retail distribution models. While marketers are comfortable having the standard moisturizer, eye product, cleanser, toner, and serum in the range, this strategy often proves overwhelming to men. This is clear by the number of complicated men's skin care lines that have not succeeded in the U.S., including Gillette's first attempt in 2004, Old Spice in 2005, and even Biotherm Homme, the number one brand globally, in 2006.

From biological motivations to popular depictions of accepted gender roles, men and women have historically approached grooming in vastly different ways. While American men have been successfully educated on basic grooming needs, the challenge ahead is to inspire men to adopt a more sophisticated skin care regimen.

The Tipping Point

We have reached a pivotal time in the future of men's grooming. As a result of the economic crisis of 2008, the attitudes and mindset of

the American male has evolved to encompass the "new masculinity." Men today are more dynamic, open-minded, and sophisticated than ever before. Gender roles are no longer clearly defined, and the stereotypes of the past are becoming less relevant. While men's internal motivations may not have shifted, external drivers are altering their wants, needs, and aspirations. The industry has reached a tipping point for men's grooming as a direct result of men's changing roles, changing views, and changing faces (see Figure 2).

Changing Roles: Today, three out of four men agree that men and women don't need to conform to traditional roles and behaviors anymore, and that gender doesn't define a person as much as it used to. As noted in JWT Intelligence's *The State of Men* report, "With gender roles blurring and many women working as much as or more than their partners, the household is becoming more gender-neutral as men embrace an active role at home or are pushed into it out of economic necessity." Household tasks and childcare are now commonly shared responsibilities. Research also shows that men are just as concerned as women with achieving a work-life balance. Two out of three men say they would stay home full time with their family if they could afford to. Over 90% of men also express that part of being a man today is taking care of family and those around you (Berelowitz, 2013).

Changing Views: As men become more image-conscious, their perception of spending on fashion and grooming has also changed; men are placing higher stock in looking good. One out of three men say they actively choose to portray a particular look, and style themselves carefully to maintain it. Today, 76% of men agree that males are under more pressure than past generations to present a polished image. Some even say there is now as much pressure on men to dress well and be well-groomed as there is on women (Berelowitz, 2013). NPD reported that for the last few years (with the exception of 2012), sales of men's apparel consistently outpaced growth in women's. Sales of men's apparel reached \$57 billion in 2012 alone. Due to the emergence of digital resources such as fashion blogs and online retailers, men are more aware than ever of trends in clothing and accessories. New online retailers such as Bonobos and Mr. Porter provide curated experiences allowing men to shop at their convenience. As men get more comfortable with fashion and being style-conscious, they are also paying closer attention to their grooming habits. Last year marked the first time that men spent more cash on male-

specific toiletries than on shaving products (Walker, 2014).

Changing Faces: The face and demographics of the male consumer are also changing. The growth that is expected for older male age segments far surpasses that of the total population, with men aged 55-64 expected to grow by 8% and men aged 65-74 expected to grow by 21% by 2018 (Mintel, 2013). With Boomers and older demographics getting divorced at increased rates and putting off retirement due to economic challenges, it could lead to men focusing more on their appearance in order to compete with younger age groups.

On the other end of the spectrum, millennial men are more likely to accept products and routines associated with women's grooming, such as facial cleansers and moisturizers, compared to older generations (Mintel, 2013). Mintel's research suggests that this is a positive indicator for the skin care segment and overall category in the future, since younger men will likely continue to use skin care products as they age.

Population growth in both the African American and Hispanic male population will also be a positive market driver in the coming years. Both of these key demographics over-index in their use of several types of men's personal care products, most notably skin care. Forty-seven percent of African American men report that they buy male-specific offerings—more than any other ethnic and racial segment (Mintel, 2013). Targeting African American and Hispanic men with relevant messaging and product benefits will be critical for overall category success in the coming years.

Despite all this growth and opportunity, the majority of brands are not focusing on men as a key target. Now is the time for brands to make a change.

The 4G Growth Engine

As gender roles become increasingly dynamic and stereotypes become less and less relevant, men are searching for brands that do not attempt to label them, but instead help them to curate their own version of masculinity. Isabela de Mello of IDEO explains, "Many men are figuring out that what they were raised to be no longer works, and society has not yet stepped in to support proper alternatives. Men are looking for options that appeal to their identities, roles, and behaviors." There are many more options for men today, and a variety of resources for men to learn about and purchase new items. What is missing is an authentic, personal, and cohesive to-market strategy that reflects the changing habits and

identities of the modern man.

As an industry, companies have spent decades understanding and cultivating women's needs, and educating them about the consequences of not using their products. From serums to primers to peels, women today have complex regimens that address a laundry list of needs and consequences that feel authentic and necessary. However, the industry has not communicated with men in this way. Currently, men see no consequences if they do not use grooming products. Through this research, it has become clear that the road to growth is not through another purchase model. The industry needs a movement.

The 4G Growth Engine (see Figure 3) includes four key pillars, represented by gears, which are critical to success in men's grooming. This new model addresses the authentic needs and habits of the male consumer, leveraging the people and places that matter to him most, with a communication style reflective of the modern face of masculinity to help drive him towards a more sophisticated grooming routine.

Ignite: The first gear is based on igniting the movement with an authentic approach to men's needs. While women are driven by the idea of "hope in a jar," men are driven by the need to look powerful and experienced, both of which are only complemented by gray hair and fine lines. Brands must ignite men's interest by identifying authentic needs and genuine consequences.

When a coach of the Florida Gators football team discovered that his players were being negatively affected by heat related illnesses, he worked with a team of researchers to create a carbohydrate-electrolyte beverage that would replace the key components lost by players through dehydration (Gatorade.com, 2014). Gatorade has since ignited the loyalty of thirsty athletes and civilians alike with this simple solution to a genuine problem, commanding 46% of the worldwide sports drink market (Forbes, 2014). Gatorade is an excellent example of a brand that has successfully targeted an authentic, universal, yet previously untapped need.

In grooming, brands often assume that men's needs are the same as women's, missing a major opportunity to appeal to their unique drivers. Dr. Ivona Percec, Professor of plastic and reconstructive surgery at the Hospital of the University of Pennsylvania, reports that the most common reason men request Botox is not that they fear looking older, but that they had been told they looked angry and feared that as a consequence it would hold

them back professionally (Hart, 2014). By truly understanding men's authentic needs and the consequences associated with these needs, brands have the ability to ignite long-term trust and loyalty.

Steer: The second gear of the 4G Growth Engine is to steer men to more sophisticated grooming purchases by leveraging the influential people and places that help to shape their decision-making process.

With the exception of fragrance, 90% of men report that they make all or most of their own grooming purchases themselves (Bialik, 2011). Research shows three key categories of influencers: immediate family, peers, and significant others (Bialik, 2011). Immediate family members have the most influence in shaping early product decisions such as shaving, deodorant, and body wash.

Peers have a critical influencing role as a man grows up. The number one influencer in a man's grooming purchase is observing a peer using a product (L'Oréal Men's Grooming Report, 2010), making it essential for brands to target this group.

Significant others have proven most successful in motivating a man to try new categories (L'Oréal Men's Grooming Report, 2010). These are the people that brands must educate and leverage to steer men towards more sophisticated products such as skin care. Not only do marketers need to understand men, it is also essential to understand what is driving these key influencers as well. Jacqueline Nam, Marketing Manager of SK-II Men, shared research that suggests some women feel insecure when their partner tries to improve his looks. Brands should consider incentivizing women through male and female combined sets, loyalty cards, or GWPs in order to motivate them to encourage their partner to purchase men's products. (Nam, Jacqueline 2014).

Brands can also steer men to purchase by being present where and when he needs a grooming solution. Men are not shopping for grooming products on the women's cosmetics floor; 65% of purchases are currently being made at mass merchandisers, supercenters, warehouse clubs, dollar stores, and off-price retailers (Mintel, 2013). Men are driven by ease, access, and trust in their retail environment (Izquieta, 2012). For brick-and-mortar, brands can maximize presence and education efforts at local barbershops, gyms, airports, and clothing stores—environments where men feel comfortable, and are already thinking about their image.

E-commerce is also critical for men,

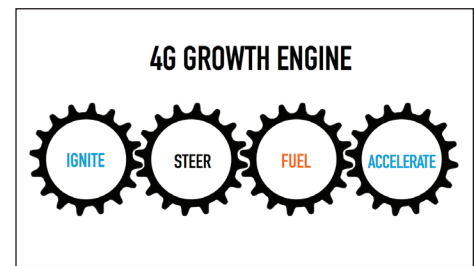


Figure 3

highlighting their preference for ease and accessibility. Research shows that 41% of online shopping by affluent males is done on Amazon.com (Honigman, 2013). In May 2013, Amazon launched a men's grooming shop featuring mass and prestige brands in the skin care, body care, and hair care categories. This strategy perfectly capitalizes on a man's partiality to streamline the shopping journey as much as possible. Curated product selections support Amazon's win in customer segmentation and exhibits potential to result in increased sales and market share. As the 2013 FIT Capstone research on Digital Commerce brought to light, it is necessary for brands today to encompass "convenience, technology, excellent customer service, and rapid delivery" (Voyten et al., 2013), and this is particularly true for men. If they lack resources to deploy this infrastructure themselves, brands should be aiming to partner with e-tailers such as Amazon and eBay to ensure they are truly steering men to purchase their products with the right value proposition and discoverability (Voyten et al., 2013).

Comparably, marketers must also think mobile-first design, with 68% of male smartphone users likely to make purchases thanks to mobile ads (Honigman, 2013). It is no surprise that subscription commerce services like Dollar Shave Club, Trunk Club, and Five Four Club are growing in popularity, as they allow men to get exactly what they need in a streamlined way (Izquieta, 2012). Rather than adding an extra step by creating another grooming specific offering, brands should consider partnering with fashion services to provide men the ability to purchase grooming in a place where they are already shopping.

Fuel: Next, brands must fuel the movement via imagery and communications that appeal to men on a personal level. New research has found that today, exaggerated male stereotypes have a negative impact on men's willingness to try a product (Otnes & Tuncay-Zayer, 2012). In a recent survey, an astonishing 65% of men responded that, "No commercial portrayals of men are accurate" (Étienne, 2014). Companies

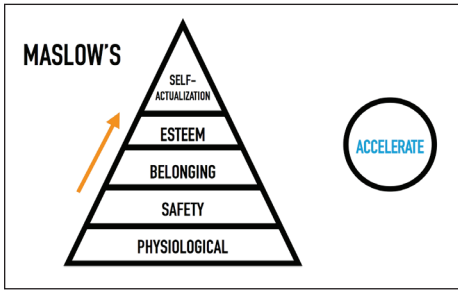


Figure 4. Maslow's Hierarchy of Needs

must create campaigns centered on the modern depictions of realistic male roles, such as “The Dad,” the “Dedicated Partner,” and the “Open Minded Millennial.”

To promote their Chrome web browser, Google appealed to men's softer side with an ad called “Dear Sophie,” which depicts a father sending his daughter photos, emails, and other memories in Gmail from the day she was born for her to read when she is older. By portraying technology as a facilitator of love, Google connected with men, not by highlighting technical benefits like speed or new apps, but by forging an emotional and relatable connection that appealed to men's desire to be good fathers (Miller, 2011). In grooming, don't hide the men. Men must be present in beauty and grooming campaigns and POS visuals at all touch points. Combining modern imagery reflective of the “new masculinity” with products that target authentic needs is key to fueling a more sophisticated men's grooming market.

Accelerate: Once the male consumer has been engaged, the final gear of the 4G Growth Engine is to accelerate, helping him to move up a level on the hierarchy of grooming. Similar to Maslow's Hierarchy of Needs (see Figure 4), brands must recognize the importance of understanding a man's level of grooming sophistication when introducing a new product. In Maslow's theory, a person makes their way up the pyramid by fulfilling each of the needs below (McLeod, 2007). For grooming, once a brand can capture a man's loyalty with simple solutions to the most obvious needs, he will be ready for education on another solution to a slightly more complex need. Instead of overwhelming men by launching too many products at once, marketers should focus on one hero product at a time that addresses an authentic need, with immediate benefits that will give him a reason to believe. A smaller, more targeted product selection will help him feel like he is making an informed choice (Hardie, 2014).

MEN'S GROOMING

Simone Bolotin (Coty Prestige)
Calleen Celeniano (L'Oréal)
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Alexandra de Lara (The Estée
Lauder Companies)
Michael Kremer (L'Oréal)

THE TIPPING POINT

- We have reached a pivotal time in the future of men's grooming as a result of the economic crisis of 2008
- Men today are more dynamic, open-minded, and sophisticated than ever before
- Gender roles are no longer clearly defined, and the stereotypes of the past are becoming less relevant
- While men's internal motivations may not have shifted, external drivers are altering their wants, needs, and aspirations



CHANGING ROLES

- Three out of four men agree that men and women don't need to conform to traditional roles and behaviors anymore
- Gender doesn't define a person as much as it used to



CHANGING VIEWS

- Men are placing higher stock in looking good
- 76% of men agree that males are under more pressure than past generations to present a polished image

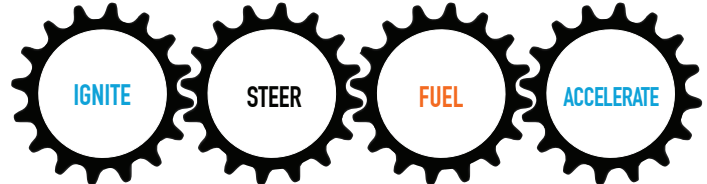


CHANGING FACES

- Growth expected for older male age segments far outpaces total population
- Millennial men are more accepting of products and routines associated with women's grooming
- Growing African American and Hispanic male populations are early adopters

4G GROWTH ENGINE

- Includes four gears critical to success in men's grooming, representing a network of interdependent actions
- Addresses the authentic needs of the male consumer, leveraging the people and places that matter to him most, with a communication style reflective of the modern face of masculinity to help drive him towards a more sophisticated grooming routine



- Identify authentic needs and genuine consequences for grooming product non-use
- Introduce simple solutions with a reason to believe

- Leverage key influencers
- Be present in the right places, at the right times in a man's life
- Focus on ease, accessibility, and trust

- Utilize imagery and communications reflective of the dynamic state of masculinity

- Focus on one hero product at a time, building momentum, sophistication, trust, and loyalty over time

GROWTH PROJECTIONS

- There are 106 million men in the U.S. that fall into the key target demographic ages of 14-65
- This group is estimated to use only one product per day with a repurchase rate of approximately five times per year, creating a market size of \$5.7 billion
- With the current growth rate of 1.8% per year, the market is projected to reach \$7.6 billion by 2030
- By 2030, there will be 120 million men in the U.S. ages 14-65
- If we are able to increase their yearly product purchase number from five to seven, at an average of \$10 each, the U.S. market will reach \$10 billion by 2030, 30% greater than projected

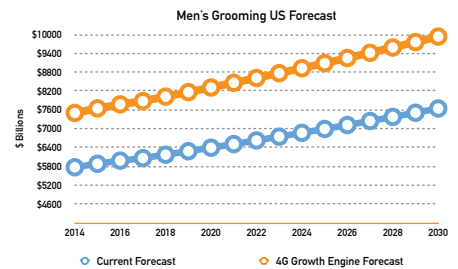


Figure 6

Growth Implications

Today, there are 106 million men in the U.S. that fall into the key target demographic ages of 14-65. This group is estimated to use only one product per day with a repurchase rate of approximately five times per year, creating a market size of \$5.7 billion (Euromonitor, 2013). With a current growth rate of 1.8% per year, the market is projected to reach \$7.6 billion by 2030 (Euromonitor, 2013).

By implementing the 4G Growth Engine, the market growth potential is significantly greater. By 2030, there will be 120 million men in the U.S. ages 14-65 (DemographicsNow, 2014). If we are able to increase their yearly

product purchase number from five to seven, at an average of \$10 each, the U.S. market will reach \$10 billion, 30% greater than projected. This represents a tremendous opportunity for brands to grow their bottom line.

Industry Recommendations

In the 4G Growth Engine, the four gears symbolize a network of interdependent actions, all requisite to accelerating the men's movement. Without all gears in place, the machine can't operate at all. But this model is only a subset of the industry as a whole. The \$70 billion U.S. beauty and personal care category took hundreds of years to build, and the men's

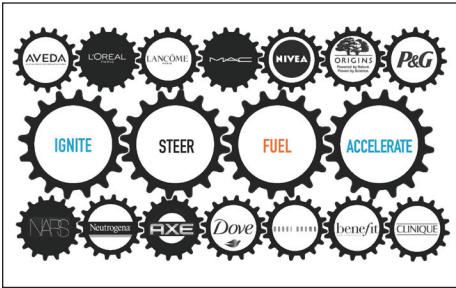


Figure 5. Industry Call to Action

grooming movement will not happen overnight (Euromonitor, 2014). Men's grooming cannot flourish within a silo; the industry as a whole must be the driving force to put the gears into motion (see Figure 5). We recommend brands take the following actions to cultivate a beauty landscape where men are a major part of the equation:

- First, we must invest in male specific research. We have created research centers to understand consumers in Asia, Europe, and South America. Men make up half the human population, and yet we have not invested in understanding their unique needs beyond the basics. A male specific research center is a crucial first step in helping men to feel valued, understood, and involved in grooming.
- Second, we must include men. Don't hide the men. We must showcase men front and center in all of our beauty campaigns, not just for men's brands. It's time to promote a culture where it's normal to associate men with beauty. This strategy helped cultivate the men's grooming boom in Korea in 2003, when men began to be utilized in beauty campaigns both alone and alongside women. In this way, men were led by example. Using relatable male images in brand visuals will help to cultivate a culture where it's normal to associate men with beauty.
- Finally, our brand communication must interact with men in an authentic way. While women buy hope, men buy authenticity. We must speak to them in their own language, using imagery and brand communications that appeal to men's dynamic roles and genuine drivers. Dollar Shave Club is leading this charge by making men's lives easier with a high quality, inexpensive product delivered seamlessly without ever setting foot in a store. Their viral video avoids stereotypes, but instead appeals to men by being funny, smart, and business-savvy, reaching them in a place where they already are—YouTube.

Conclusion

The state of masculinity is at a tipping point, creating an enormous opportunity for brands to finally get men's grooming right. Imagine a future where men are as comfortable shopping for grooming products as women; where men see relatable images reflected back at them in retail channels and advertisements; where men have an authentic need and desire for grooming products and use them to curate their own version of masculinity.

Billions of dollars are being left on the table simply because the industry has not made it a priority to understand men's authentic drivers, and reach him through the people, places, images, and communication style that he truly connects with. We cannot adopt a women's model to reach men, we must look towards the changing landscape of masculinity to identify new needs and genuine consequences.

Applying the 4G Growth Engine backed by the support of the industry will create the perfect storm needed to construct a more sophisticated men's grooming market in the United States. This fresh approach offers a compelling opportunity for the future of the beauty industry. Men today are evolving, and we must evolve with them. Now is the time for the men's grooming movement. ■

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Industry Experts Interviewed

Andra Mielnicki, Executive Director, Global Communications La Mer

Ann Gottlieb, Ann Gottlieb and Associates

Andrew Chen, Manager Marketing, Redken Global

Ashley Boyce, Brand Building Manager, Unilever

Clyde Johnson, Executive Director of Education, La Mer

Chris Salgado, President, Kiehl's Since 1851

Craig LaManna, Associate Director, Nivea Men's

Isabela de Mello, Design Strategist, IDEO San Francisco

Jacqueline Nam, Marketing Manager, SK-II Korea

Jane Gu, Senior Manager, L'Oréal Paris Men Expert

Joseph Grigsby, Executive Director Global Marketing, Lab Series

Julien Bouzitat, Vice President Innovation, L'Oréal

Karen Grant, Vice President and Global Beauty Industry Analyst, NPD

Lisa Sequino, Executive Director, Tom Ford Beauty

Meredith Kaback, Director of Consumer Insights, Coty Prestige

Minh Dan Tran, Marketing Director, Biotherm Canada

Pete Born, Executive Editor, *WWD*

Rob McGovern, CEO and Founder, Cobrain

Sam Cheow, Vice President, Trends & Reverse Innovation

Qualitative Research

Conducted in-depth 1:1 interviews with 25 men ages 21-65