

THE MANSCAPE

WRITTEN BY MELISSA WIGGINS



NEW
FUTURE
VALUE™

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PROBLEM

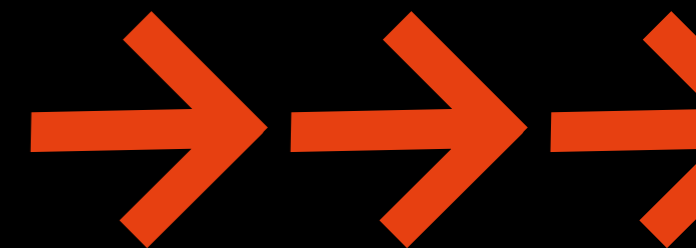
With the growth of products tailored to male self-care, does the industry really understand what they 'need' at all?

“A man’s worth is no greater than his ambitions.”
- Marcus Aurelius

SOLUTION

Listen. Learn. Innovate.

HOW



Read on...

WHAT IS THE MANSCAPE?

We're using **'The Manscape'** to explore what men think, what they value and how they view themselves.

This issue shares insights into male consumers and what they expect from brands, particularly in the emerging hair and skincare markets.

Our New Future Value Reports draw from a wide pool of research resources, including Mintel data, to provide quality industry insights into markets and demographics. We also share examples of tactical excellence to inspire you to optimise, accelerate and innovate your way towards achieving new future value.

Follow **@StrategiQ** on LinkedIn **#NewFutureValue** to join the conversation.



MELISSA WIGGINS
StrategiQ Marketing Strategist



THE EVOLUTION OF MAN

When learning about the male demographic and how appetites and behaviours have changed, considering the past can help to frame the future.

IDEALS OF THE PERFECT BODY HAVE EVOLVED WITH CULTURE.



From the sculpted, man-gun toting Adonis' of Ancient Greece; to the girth proving status of the 18-1900's; the golden age of Hollywood favoured the athletic, clean look; whilst the 60's and 70's were a rebellion of waif-like androgynous figures that were all about statement hairstyles; the 80's saw a bulkier Rocky figure and the rise of the questionable mullet (let's move on quickly); whilst the 90s were leaner times with buzz cuts and frosted tips.

Recent years have embraced the emergence of the somewhat cuddlier dad-bod, but that doesn't mean that society's aspirations of an athletic strong physique have gone away, in fact we have a new breed of preened men on our screens in the form of shows like TOWIE and Made in Chelsea.

WHAT MATTERS TO GUYS?

A [2023 Reddit thread](#) encouraged men to name their top 3 priorities in life. Common responses were:

FAMILY ENJOYING LIFE CAREER HEALTH
& FITNESS MONEY MENTAL HEALTH SELF
ESTEEM & FULFILMENT RELATIONSHIPS
SENSE OF PURPOSE IN JOB AND LIFE
BEING THE BEST VERSION OF MYSELF
GROW AS A PERSON TRAVEL GOOD FOOD

WORRY LINES

If you thought it was only women who were concerned about their appearance, **think again!**

Research by the Campaign Against Living Miserably (CALM) and Mental Health Foundation found that many men aren't totally happy with the way they look. They feel negatively about themselves when comparing their bodies to others and some even to the extent of having suicidal thoughts. This is felt to an even greater degree by adults identifying as gay, lesbian, bisexual or other.



56%

of adults identifying as gay, lesbian, bisexual or other feel depressed by their body image, compared to 33% of heterosexuals.

48%

of men aged 16-40 struggled because of how they felt about their body.

39%

feel that there is societal pressure to have the "perfect" body.

28%

have experienced anxiety related to body image issues.

IT'S A MAN'S WORLD

There are so many factors influencing a change in men's self image and behaviour. Social media is prompting purchases and inspiring lifestyle choices (check out 'Looksmaxxing'). Where once the majority of 18-35 year olds would be out clubbing, they're now more concerned about sleep and health, 54% preferring the gym!

70%

of men aged 16-34 are inspired by social media ads to make a purchase.

60%

of male social media users aged 16-34 have responded to a click-to-message ad.

46%

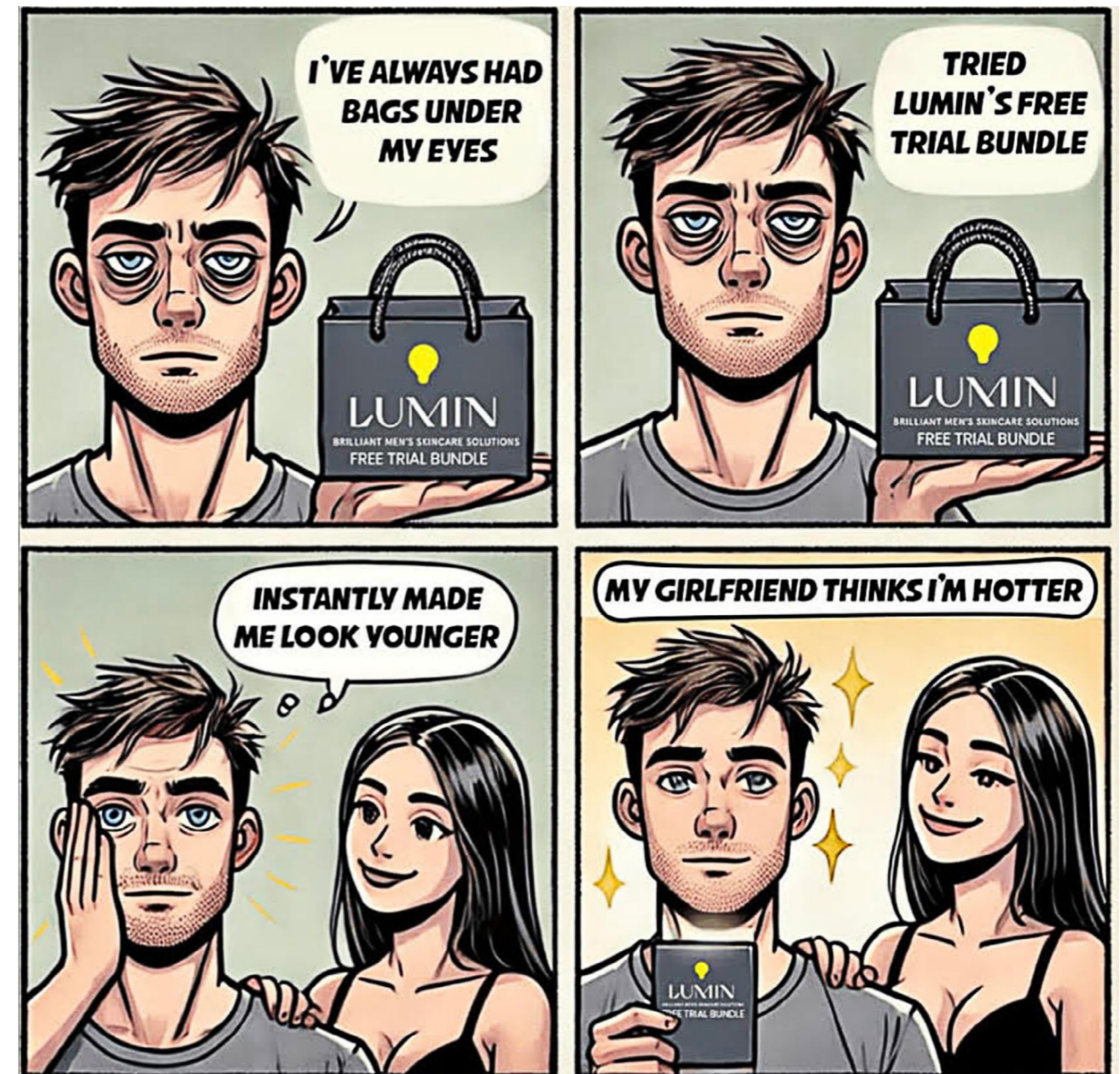
of men are worried about weight gain (Manxiety).

28%

of men aged 16-34 who follow social media personalities are influenced by their political and social views (9% more than their female counterparts)

27%

of men aged over 15 are categorised as obese and two thirds of those over 16 in the UK are classed as overweight.



THE LONG AND SHORT OF IT

The men's haircare market is expected to be worth in excess of £93.6m by 2027. Whilst the cost-of-living crisis has driven trade down in hair and skincare, this presents both opportunities and threats to the category.

66%

of men are sporting some form of **facial hair**, whilst those who struggle to grow it feel that their lack emasculates them.

22%

are motivated by hair growth claims.

Hair loss is a major concern for 33% of men. More and more men are turning to expensive procedures to combat male pattern baldness. Brands like American Crew and Kérastase have created products to reduce loss and strengthen hair, whilst Nanogen and Toppik offer applicable hair fibres.

85%

of men will experience significant hair thinning by the age of 50.

IN 2021

more than 613,000 men had hair transplants.

Those who are lucky enough to grey, still reach for Just for men who now have a moustache and beard range too.

Another hair trend worthy of mention is that of the preference for **removal** from areas other than the head. This has prompted brands like Veet and Nad's to launch men's ranges of waxes and depilatory creams and new mechanical **manscaping brands** to launch.

90%

of men trim their pubic hair.

83%

of women prefer a smooth bodied man.

Discussions around sex, mental health and fertility are losing their social stigma and progressive brands are getting in on the action! Men can now access off-the-shelf 'Sperm Check' fertility home tests and online platforms like Charles (offering content, therapy, consultations and treatments).



Men's skincare and cosmetics are the next big thing with a more holistic understanding of wellbeing and fluid gender norms piquing interest. Whilst the **market's growth** is expected to slow and peak around 2025 at £119.5m (taking inflation into account), its value is still **expected to exceed £119.1m by 2027.**

WHEN IT COMES TO SKINCARE, MALE CONSUMERS PRIORITISE:

Credibility and proof of functional efficacy.

Kinder options for sensitive skin.

Innovative fast-acting treatments.

Age-relevant and anti-aging products (Gen Z want to be proactive).

65%

believe that brands should do more to prove their product claims.

63%

of UK adults aged 16-44 want products designed for their age.

61%

of US adults expect brands to address environmental issues.

54%

of males spend <15 minutes on their beauty/grooming routine.

SKIN DEEP PRIORITIES

THE CONVERGENCE OF SKINCARE AND NUTRITION

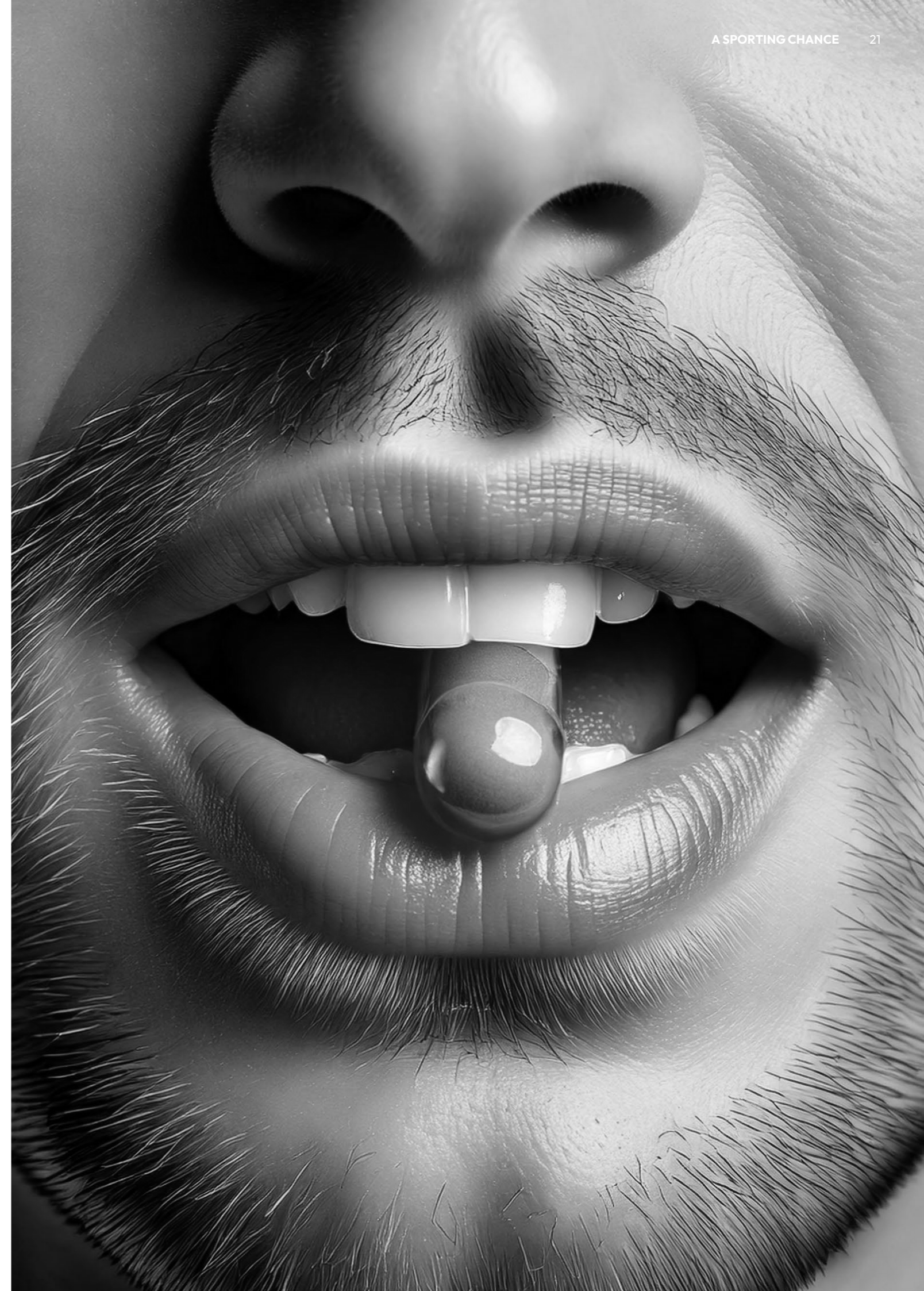
As observed by Forbes (How the convergence of beauty, health and wellness is impacting commerce), **the convergence of skincare and nutrition is escalating** as more consumers appreciate the **gut-mind-skin connection** and the impact of diet on their appearance.

The global nutricosmetics market size was valued at \$6.45 billion in 2022 and is projected to grow from \$6.84 billion in 2023 to \$11.24 billion by 2030.

With supplement companies like Heights, Lumity, Vitabiotics, Absolute Collagen, Wild Nutrition and Numan all vying for men's attention, there's a bunch of brands ready to support their wellbeing.

Keys to success in the space include:

- 01 Marketing products as health focused
- 02 Focusing on ingredient safety and consideration of environmental factors such as water and air quality
- 03 Differentiating based on use of advanced technologies (for skincare that's things like encapsulation and sebum RNA monitoring)
- 04 Focusing on results, ensuring that products offer noticeable, tangible benefits to stand out in a crowded market
- 05 Considering collaborations, including with tech companies to accelerate innovation, achieve personalisation and increased convenience.



TIPS

EDUCATION

A lack of **awareness** around the benefits of skincare necessitates education (but make it simple and fun). Wherever you can make it visual, that works well. For example **visual guides on products** of how much to use have been well received.

Addressing specific concerns such as acne, clogged pores or sensitive skin helps purchasers know that your product is what they've been looking for.

DISCOVERY

In-store merchandising is influential to this demographic (especially 65+ with 'healthy' finances who don't read online reviews). Whilst men under 35 are twice as likely to discover products via social media, the **over 55's are the fastest growing segment**.

TRADE-UP/ DOWN

Mintel research suggests that prestige brands may be able to tap into the **at-home alternative market** as cheaper alternatives to professional treatments and that offering **money-back-guarantees** can buy confidence and **buy-now, pay later** increases accessibility.

There is a real move to '**premiumising**' in the retail space with retailers like Boots stocking more prestige products, so it may be a good time to jump on it with **free samples**, which win over the 16-34 age bracket who are in the market to **trade up**.



of men still use **soaps not designed for facial skincare**.



of men prioritise products with **instant results**, 25% favour long-lasting ones.



of men's buying decisions are **prioritised by price**.



are prepared to pay more for **multifunctional products**.



of men aged 16-24 select products based on the **attractiveness of the packaging**.



prioritise purchasing a product based on its **performance claims**.





DON'T OVERDO IT!

Wellness fatigue is becoming an actual thing! Consumers are becoming maxed out by the complex, multi step routines and rigid guidelines around skincare and there's a rise in stress induced conditions like 'dermorexia' (obsessive skincare, fuelled by a need to remain youthful in looks).

This is leading to a rise in 'anti' and 'pro' campaigns. Whilst brands can capitalise on providing products that cater for diverse consumer needs and preferences they can also ensure that they **keep things simple and transparent**, appealing to consumers seeking authenticity and individuality (without 'virtue signalling!').

CONSUMERS LOVE BRANDS THAT ARE TRANSPARENT, TELL STORIES AND ENGAGE THEIR COMMUNITIES.

The '**slow living**' trend means that authentic brands with minimal ingredients that resonate with their audience and evoke wellbeing are aligning with consumers' reassessed values. (In the women's beauty category, Selena Gomez' Rare Beauty, is holding this line well).



BRANDS

TO WATCH

LUMIN

Lumin is a serious contender in the personalised skincare products market. With an **affordable premium range** of hair, skin and body care products, they're there for men starting out on their skincare stabilisers, right through to seasoned skinlovers.

By positioning their product as part of **self improvement and wellness**, aligning it with activities like working out and healthy eating, they're making skincare for men a routine thing.

From accessible ads that 'mansplain' use of their products through **use of dry humour and direct language**, they're encouraging men to embrace personal care. They address men's skincare woes with online support and make maintaining the routine easy with a **simple subscription service**.



11%

of men use subscription services to buy beauty/grooming products (compared to 8% of women).



16%

of men don't purchase skincare products as they don't know what to buy.

CALDERA + LAB

Founded in 2016, by 2019, Caldera + Lab had become **one of the fastest growing US men's skin care brands.**

Their team of 'greentek' scientists push beyond conventional skincare boundaries to create high performance men's skincare with clinically-verified

They're so confident in their product that their tagline simply states '**Compliments Guaranteed**' and they offer a 60-day guarantee for users to get their money back if they 'don't love it'.

Their **values are front and centre** by using cruelty-free, non-toxic, vegan, plant-based, GMO, hand-harvested wild and organic botanicals with high antioxidant scores and nutrient profiles obtained through a traceable and audited supply chain.

- 01 Their **clinical trials** went beyond industry benchmark's to substantiate their claims that 9 out of 10 men experience healthier looking and visibly improved skin.
- 02 They've achieved **4.5 star ratings** and **1,937 reviews** for their hero product 'The Good' multifunctional serum (addressing their audience's appetite for simple and quick skincare solutions).



“

WE ARE HELPING MEN **'AGE HEALTHILY'** AND LOOK AFTER THEIR SKIN SIMPLY. FROM OUR MARKET RESEARCH WE KNOW THAT MOST MEN LOOK FOR QUICK OVERALL IMPROVEMENT RATHER THAN HONING IN ON SPECIFIC ISSUES. MEN SEEK INSIGHTS AND ARE CONVINCED BY **HARD DATA.**”

-Jared Pobre, CEO and Co-Founder (Forbes, 2019)

LOVED01

Celebrity, John Legend, has launched a new genderless skincare brand on a mission, Loved01. The range was formulated with dermatologist Dr Naana Boakye, to address the needs of **melanin-rich skin**. The products tick the value boxes of being plant-based and cruelty-free.

Whilst majoring on the wellbeing message, the brand is also ticking the education box by sharing learnings with its melanin-rich audience. They also enhance the ownership and identification of the product through featuring UGC in the homepage **'See it on skin like yours'**.

Whilst celebrity backed brands are nothing new, in the case of Loved01, it feels **authentic**, aligned with Legends heritage and issues he's experienced first hand. This sense of **trust** and the **positioning** of the products in an affordable price bracket is sure to resonate with the target audience.



43%

of social media users bought products due to celebrity posts (Intel, 2023).

61%

of male facial skincare users believe celebrity-owned brands are overrated.

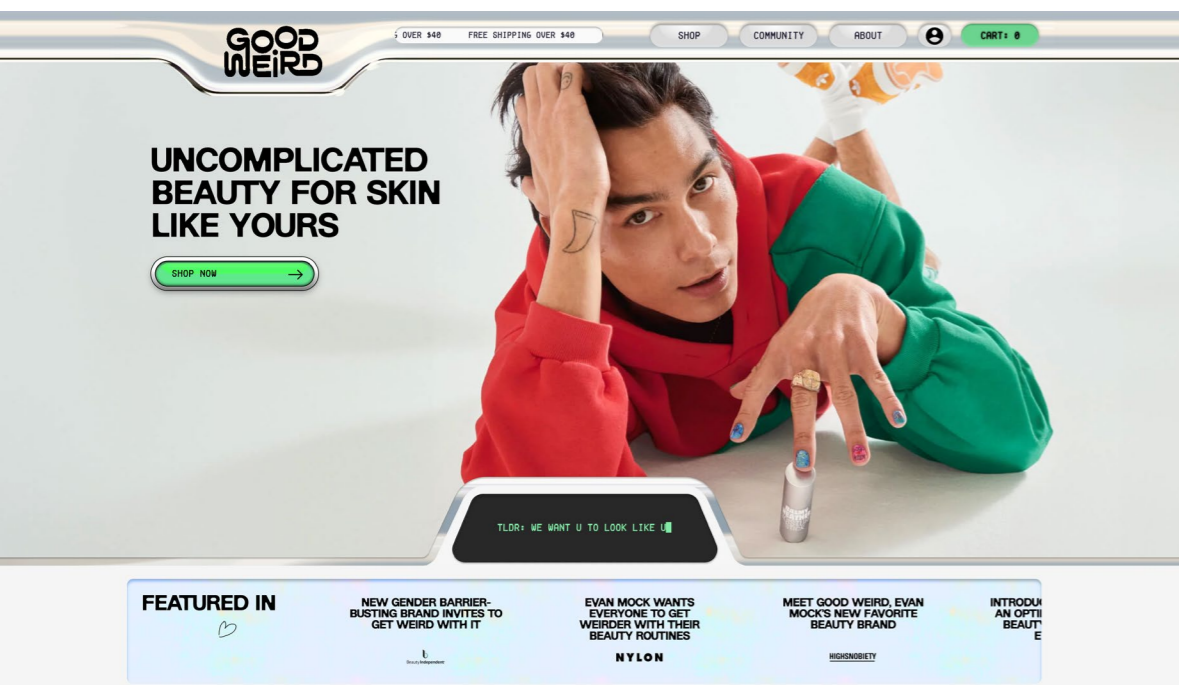
DID YOU
KNOW?

GOOD WEIRD

Good Weird, is a genderless, optimistic skincare-beauty brand that celebrates individuality and helps people to “put their best face forward”. With taglines like ‘uncomplicated beauty for skin like yours’ and ‘we want u to look like u’ they’re striking a chord with their Gen Z target audience.

Their dual purpose products are designed to instil confidence (cover up that zit) and improve skin health long-term. The three launch products include natural oils and extracts, with inflammation, wrinkle and pore reducing properties.

The brand has been ‘slaying’ its media coverage and User Generated Content (UGC) through its target market Gen Z Insta community and TikTok. Their website even includes the invitation to play a game, using technology to tap into broader engagement opportunities.



“

GOOD WEIRD HAS AN ORIGINAL APPROACH TO BEAUTY. IT'S AN UNCONVENTIONAL BRAND THAT'S BREAKING BARRIERS AND THINKS FOR ITSELF. WE REALLY WANT TO BUILD A COMMUNITY AROUND GOOD WEIRD AND CHANGE THE CONVERSATION AROUND WHO CAN AND CAN'T EXPLORE THE BEAUTY AISLE.”

-Evan Mock, Creative Director (Hypebeast, 2023)



THE **BIG**
BOYS

L'ORÉAL

L'ORÉAL

L'Oréal Men Expert launched an ad campaign in 2023 using responses from over 2,000 UK men to explore the **definition of strength**. 25% of the men surveyed felt that handling other people's problems was not a sign of strength (and being vulnerable with friends and family ranked even lower).

This presented an opportunity to **change the narrative**. They did this by partnering with Movember and the World's Strongest Man competition to run a campaign across social media, TV and OOH, in which three public figures encouraged men to seek help if they're suffering. That same year they absolutely dominated the men's skincare category, boasting **39% market share at £27m**.

The brand has partnered with Debut to develop **bio-identical ingredients**. The new wave of brands embrace 'green chemistry' and use sustainably sourced botanicals to deliver results without compromising eco-friendly practices.

L'Oréal brands are leading **innovation** in the field. Biotherm extended use of its free online **virtual skin diagnostic tool** 'Skin Diag' to men in 2023. The tool uses artificial intelligence to recommend products to users based on their age and skin type. Kérastase are also driving innovation through their Genesis Homme **anti-hair loss line** which focuses on reducing loss due to breakage and poor nourishment.



HIGHLIGHTS

01 **43%**
of men are aware of the L'Oréal Men Expert brand.

02 **61%**
of men associate the L'Oréal Men Expert brand with being a high-quality product.

03 **RAISED €2,740,00**
since 2017 towards the Movember cause.



NIVEA FOR MEN

NIVEA

NIVEA for Men were the top dog in 2022 with **95% market awareness** ahead of L'Oréal's 83%. NIVEA benefits from **high trust** and a long-standing **heritage** based on perceptions of its **efficacy**.

In addition to being an extremely **accessible** brand given their competitive price point, they're an everyday **innovator** in the space. Their Face Moisturising Gel (released in 2022) is a fast-absorbing gel with a high concentration of hyaluron, which addresses hydration issues, firming the skin and visibly reducing deep wrinkles.

NIVEA for Men are being smart in localising their marketing efforts. These have included a regional collaboration with Bathu, the first proudly African trainer brand.

They've had a long standing partnership with Liverpool FC (since 2015) which runs until the end of the 2025-26 season, tapping into the 60% of men in the UK that love the beautiful game.

The Dear Liverpool FC... content series sees individuals nominated for the surprise of a lifetime (meeting Liverpool players). It emphasises the importance of looking after others and celebrates where people have done just that. It's got all the feel good vibes as well as reinforcing the brand values and their alignment with 'The Reds'.



HIGHLIGHTS

01

64%

of men aged 25-34 are proud to be associated with the brand.

02

Nivea's **#ShareTheCare** campaign on Instagram invited users to share their moments of care, fostering community engagement and brand loyalty.

“

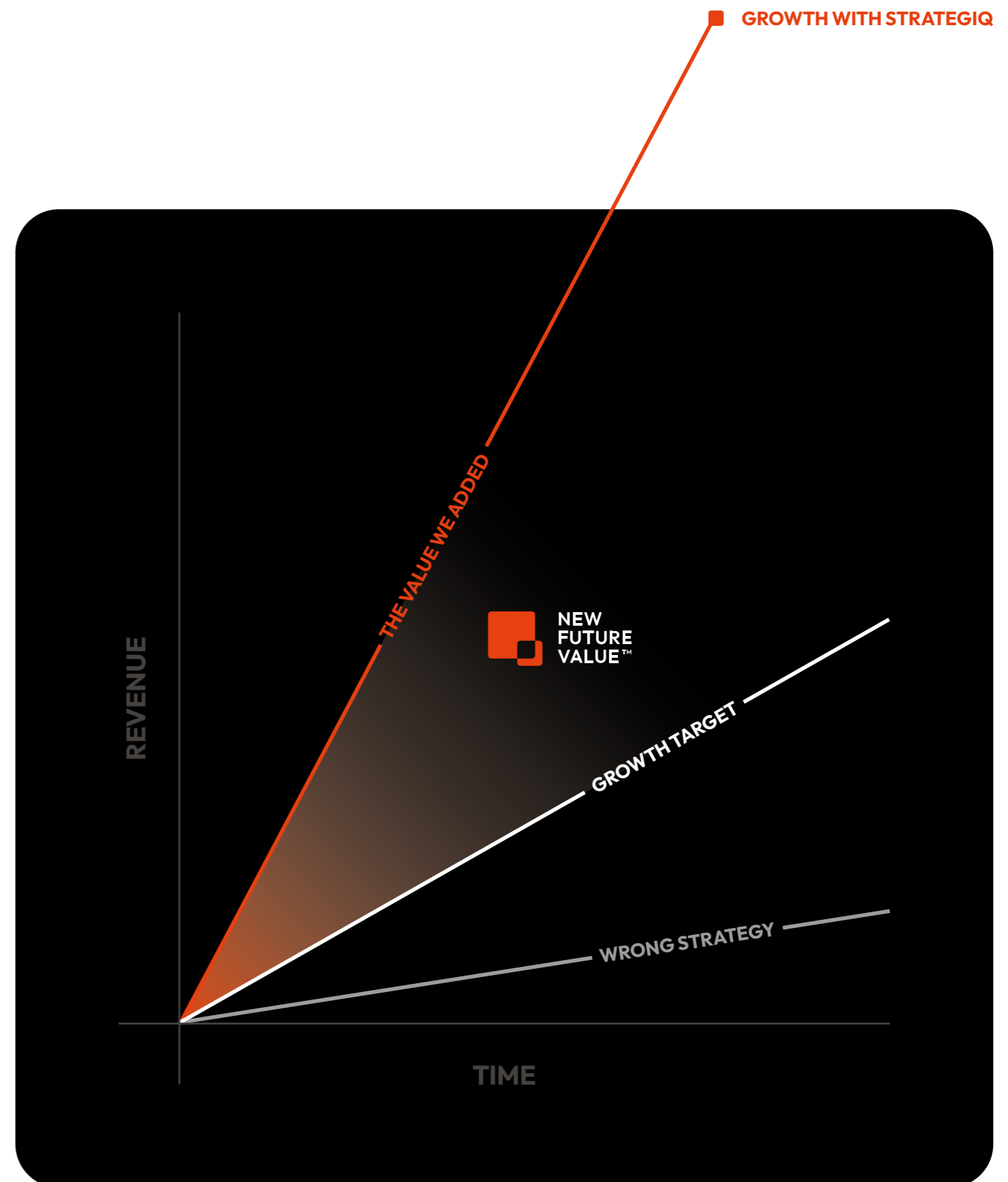
WE HAVE FOUR CORE VALUES THAT GUIDE EVERYTHING WE DO AT BEIERSDORF. THESE ARE CARE, SIMPLICITY, COURAGE, AND TRUST.”

- Beiersdorf.com

CREATING NEW FUTURE VALUE

It's clear that opportunities in the mens skincare category are there for the taking. So how do progressive brands optimise, accelerate and innovate their marketing efforts to realise new future value?

WE'VE PUT A FEW IDEAS TOGETHER THAT WE'D LOVE TO REFINE WITH BRANDS THAT ARE PURSUING GROWTH AND FUTURE VALUE.



OPTIMISE ⁷⁰

ACCELERATE

INNOVATE

OPTIMISATION IDEAS:

- 01** A look across the shelves in retailers reveals a dearth of imagery aimed at the male audience, with even gender neutral products being promoted with female imagery. Catch up guys!
- 02** Do more to prove the claims of your products. Wherever you can harness the power of social proof through third party review engines, or user generated content (UGC) get on it! Where you can partner with trichologists and dermatologists you'll build brand trust. 37% of purchasers trust medical professionals to inform buying decisions in the category.
- 03** Identify the right retail partners for your brand and work with them to promote your product. Grocery retailers saw an 8.1% growth in value sales of men's haircare and skincare products in 2022. To boost online sales, ensure you optimise promotion of eco-delivery options, 64% of men support sustainable delivery methods. 78% agree everyone has a responsibility to protect the environment.

OPTIMISE

ACCELERATE 20

INNOVATE

ACCELERATION

IDEAS:

- 01 83% of men watched spectator sports live in the year leading up to August 2022. If you were to develop a loyalty program whereby the potential rewards might scale up to event tickets, you might earn their loyalty (and their love!).
- 02 With men three times more likely to develop melanoma than women by the age of 80, you could align with a skincare charity in tackling the male skin cancer 'epidermis/ic'? Perhaps campaigns like 'Real men proudly wear protection' positioning wearing sunscreen as something you do for those you love. Or partner with a mental health charity to run a campaign about what it actually means to 'Put a brave face on'.
- 03 Looking at your content could accelerate growth through Search Engine Optimisation (SEO). Actions such as increasing the breadth of categorisation by purpose, type or colour could help. Gaining insight into terms people are searching and creating aligned content can increase traffic. Pursuing digital PR opportunities will also help to grow coverage and encourage links from related and top tier publications.

OPTIMISE

ACCELERATE

INNOVATE 10

INNOVATION

IDEAS:

- 01** Educate men on skincare through gamification. 29% prefer when research is enjoyable. This could be diagnostic quizzes or something more fun. Collabs with well-known gaming platforms could prove mutually beneficial. Just make sure that whatever you do is quality, this is a discerning audience.
- 02** Launch an app to give daily guidance on product usage that emphasises the benefits of skin cycling and avoids skins becoming accustomed to a single product. You could build upon the value of an app in a more holistic approach where you can build a community. You could include daily wellbeing tips and access to fast easy healthy recipes and exercise videos. You could encourage users to submit their own and enable them to opt-in to push notifications.
- 03** As the category is young, there are still product gaps in it to be filled. Products that address wrinkles in problem areas, such as eye creams, serums or masks will address the concerns of 18% of men. There is also room in the lip care category for lip oils and masks, an area which hasn't seen a lot of innovation.

ABOUT STRATEGIQ

StrategiQ partner with consumer electronic retail brands to realise New Future Value.

We do this through our **70.20.10** program to **Optimise, Accelerate** and **Innovate** strategic omni-channel marketing campaigns that deliver increased sales at an accelerated pace.

We focus 70% of our attention to **Optimise** what you do, 20% to **Accelerate** growth through insight and 10% to identify areas for **innovation** that will elevate your business.

If you'd like to explore what we could do for your business please email sales@strategiq.co or call Tyler on [+44 1473 947983](tel:+441473947983).

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