



# Beauty Retail Navigator

To Be Published 4th Quarter 2019

Base Year: 2019

Forecasts to 2024

Regional Coverage: Global

Specialty stores is one of the leading and fastest-growing channels for beauty but also one of the least tracked in terms of data coverage. Leveraging Kline's long history of successfully monitoring the specialty stores channel through its Beauty Retailing report series, this new program will monitor the evolution of key single-brand retailers on an ongoing and global basis.

## This Report Will Help Subscribers to:

- Assess the performance of key boutique retailers globally
- Quantify sales and door counts for key retailers globally
- Monitor store locations, openings, and closures through Locales, Kline's proprietary mapping tool
- Take an in-depth look at the competitive strategies of important single-brand retailers such as Lush, Kiehl's, and Deciem/The Ordinary
- View images of storefronts and merchandising displays of each retailer in all key markets



## Tentative Report Contents\*

This program has three key deliverables: a written report, a database, and a fully interactive map tool.

### Report Contents

- Global assessment of overarching trends and developments
- Evolution by region/country
- Global profiles for 20 retailers (see Table 1) to include:
  - Competitive focus
  - Developments
  - Estimated retail sales by product class listed in Table 2 (2018 and 2019)
  - Number of doors by region/country (2019)
  - Door openings and closures
  - Product assortment and pricing
  - Hero products
  - Marketing activity
  - Outlook to 2024

### Database Contents

- Excel workbook containing key data for each retailer listed in Table 1
- Data to include retail sales by product class and region/country, door counts by country, and size/productivity measures
- Image database to include images of storefronts and interior merchandising displays for each retailer listed in Table 1 in key countries

### Map Contents

- Geolocation of every individual store for retailers listed in Table 1, delivered via Locales, Kline's proprietary interactive mapping tool (see Figure 1).
- Future editions will be updated each year, with indications for store closures and openings

\* Subject to charter subscriber input





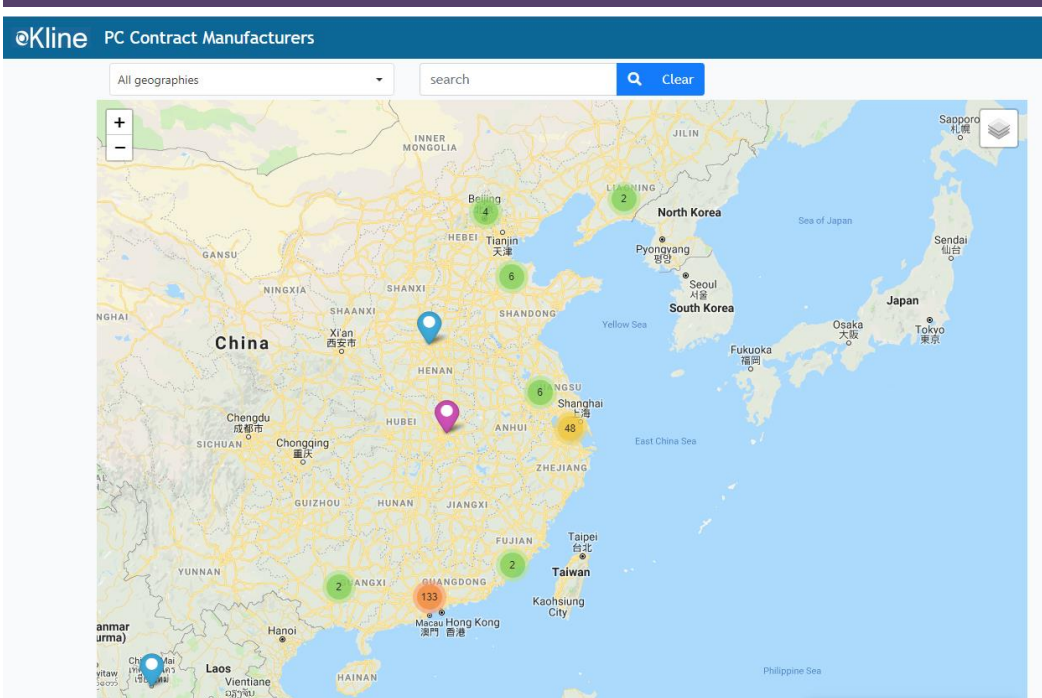
Table 1: Illustrative List of Retailers to be Profiled



Table 2: Product Classes Covered

Category	What's included
Fragrances	Fragrances for men Fragrances for women
Hair care	Conditioners Ethnic hair care products Hair coloring products Hair styling products and sprays Shampoos
Makeup	Eye makeup Face makeup Lipsticks and lip glosses Nail polishes
Skin care (body)	Baby care products Hand and body lotions Skin care products for men Sun care products
Skin care (face)	Facial skin care (moisturizers, cleansers, treatments, etc.)
Other beauty	Deodorants and antiperspirants Personal cleansing products Shaving products
All other	Anything else sold by the retailer not included above, such as candles, devices/appliances, jewelry, accessories, services

Figure 1: Kline Locales



## Scope

**Beauty Retail Navigator** will track the evolution of the fast-moving specialty stores channel globally.

- This program will monitor 20 key boutique retailers. Boutique retailers, also called freestanding stores or vertically integrated beauty retailers, are defined as retailers where the brand equals the retailer, and the brand is the only one sold at that store.
- The geographic scope is global—the entire global business of each of the 20 retailers will be researched, assessed, mapped, and reported on globally.
- Category scope includes skin care (face), skin care (body), makeup, fragrances, hair care, and other beauty, as outlined in Table 2.

## Key Benefits

This service will assist beauty marketers and retailers in identifying opportunities and threats within the specialty stores channel.

- Understand where retailers are successful (or not) and why.
- Quantify and visualize the presence of retailers by country, city, and neighborhood.
- Assess key success factors and productivity measures across a number of retailers.
- See and compare merchandising strategies and store imagery by retailer and country.
- Develop business strategies by understanding the trends and developments driving freestanding stores.





## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Retailers – at both a corporate and store level
- Marketers/manufacturers
- Distributors
- Government agencies
- Suppliers
- Trade organizations

Using a global network, store checks and images will be captured in each country where the tracked retailers are present.

### Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, retailer websites including store locators, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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