

Retailer Tracking:

Monthly Monitor of U.S. Boutique Beauty Retailers

Base Year: 2021

**To be Published:
Monthly**

Specialty stores is one of the leading and most dynamic 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 program offers in-depth insights into the boutique retailer (or vertically-integrated specialty store) channel.

United States

Regional Coverage:

SCOPE

This program will measure total U.S. beauty sales for key boutique beauty retailers each month.

- › **Categories:** Total Beauty including Fragrances, Hair care, Make up, Skin Care, and Toiletries
- › **Time Periods:** Individual months for 2019, 2020, and 2021
- › **Measurement:** Retail dollar sales in USD
- › **Channel:** this study will cover only the physical locations of each selected retailer. Any sales that the brand may generate outside of its own store (e.g., via department stores or the Internet) are excluded from the scope of this program.

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This program features two deliverables: an Excel database to be updated each month, and written retailer profiles to be published annually. All deliverables will be posted on myKline, our new, easy-to-use online report delivery system.

This program will cover approximately 15 boutique beauty retailers* in the United States (see table 1)

Retailer Profiles

- Competitive focus
- Developments
- Number of doors
- Door openings and closures
- Product assortment and pricing
- Hero products
- Marketing activity
- Outlook

Database Contents

- Fields for Retailer and Parent company
- Total U.S. beauty sales each month



Table 1: Retailers Covered

Aesop	Kiehl's
Atelier Cologne	L'Occitane
BareMinerals	Lush
Bath & Body Works	MAC
Benefit	Origins
DECIEM/The Ordinary	The Body Shop
Jo Malone	Urban Decay

*List is tentative and subject to change.

Retailer	Parent company	Jan-20	Feb-20	Mar-20
Aesop	Natura & Co	X	X	X
Atelier Cologne	L'Oreal	X	X	X
BareMinerals	Shiseido	X	X	X
Bath & Body Works	L Brands	X	X	X
Benefit	LVMH		X	X
Jo Malone	Estee Lauder Companies		X	X
Kiehl's	L'Oreal		X	X
L'Occitane			X	X
Le Labo			X	X
Lush			X	X
MAC	Estee Lauder Companies		X	X
Morphe	Forma Brands		X	X
Origins	Estee Lauder Companies		X	X
The Body Shop	Natura & Co		X	X
The Ordinary	DECIEM		X	X
Urban Decay	L'Oreal		X	X

METHODOLOGY

TRADITIONAL METHODOLOGY

- Information and data is developed and obtained through an extensive research and analysis. Specifically, we:
 - Conduct in-depth telephone and/or face-to-face interviews with selected retailers, both in store and at a corporate level
 - Analyze and cross-check the results of these interviews and, in many cases, present them to retailers for verification
 - Examine company annual reports, 10-Ks, and other financial data
 - Review secondary information from trade journals, websites, business publications, product and company brochures, distributor catalogs, price lists, and other industry literature
 - Estimate sales based on information received on individual marketers' sales, secondary research, and industry expert estimates



PRIMARY RESEARCH

Kline research heavily leans on a high number of in-depth interviews.

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SECONDARY RESEARCH

Primary research is supported by constant tracking of additional resources.

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MARKET INTELLIGENCE

Kline's proven methodology allows effective, precise, and reliable market intelligence.

FOOT TRAFFIC MEASUREMENTS

- Kline receives data from an agency that specializes in foot-traffic insights that is derived from anonymized mobile devices.
- Using the data from this agency, we aggregate the number of visits for each of the retailers across all their physical locations in the U.S. each month.
- With roughly 35 million daily active users, the agency's panel represents about 10% of the U.S. population.
- Kline feeds this data into our analysis, comparing monthly trends for each retailer with the same period in prior years.



KLINE CREDENTIALIALS

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 over 60 years.

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