STARCOUNT

Whitepaper:
Look Good, Feel Good

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You know what they bought but do you know why they bought it?

Imagine a high street fashion brand is selling a pair of patterned leggings for £15. On the same day, three women each buy a pair of these leggings from the same retailer. How different can they really be?

Ellen is 30 and lives with her husband and baby daughter. She is passionate about celebrity gossip and loves looking for affordable substitutes for the clothes and makeup modelled by famous icons. She has a tight budget but is happy to spend low amounts regularly in order to stay on trend. Ellen spotted the leggings in a ‘get the look’ feature in a women’s weekly magazine and immediately ordered them online. She is planning on wearing them to go for coffee with her local new mums group.

Nina is 19 and lives in a student house. She is obsessed with YouTube, particularly enjoying watching makeup tutorials and clothing haul videos from her favourite vloggers. Nina is getting ready to go to her first festival and found the leggings while browsing the high street with a group of friends, all looking for outfits for the weekend away. Later that day, she also purchased some glitter pots to complete the look.

Julie is 65, retired and living with her long-term partner. She is a devout vegetarian and will happily spend a little more on organic and cruelty-free skincare and makeup. Julie has recently taken up yoga and went shopping purposefully to find some new leggings to wear to class. She chose this particular brand because of its well-publicised recycling programme and was attracted to the leggings for their bold, colourful design.

From customer data, we have a restricted view of who these women really are and have little information to allow us to distinguish between them. When we enhance first-party data with third-party data from Starcount’s Observatory, however, we can gain a richer picture of who these people really are: what they love, what motivates them, what led them to buy and what would encourage them to return. Each of these women is motivated by a wide range of internal and external forces, from emerging trends to changing lifestages. Measuring and understanding mindsets allows you to recognise, predict and tap into these differences in order to drive real and remarkable growth.

Fashion. Beauty. Fitness. Wellbeing. Self-care. Athleisure. Luxe. Clean.

We've moved from an era of clearly delineated areas around looking and feeling good, to a time when cross-categories are the norm, when new trends emerge every week, when fashion, beauty and sports collections stand side by side in the same store, when women apply make-up designed specifically for the gym, kale and avocado-themed slogans cover t-shirts and tote bags, and social media is dominated by perfect headstands, unisex makeup tutorials and unlikely fashion icons to suit every shape, age and style.

Looking and feeling good is no longer related to age, wealth or siloed verticals; it's a holistic issue – and customers are treating it as such.

So, why does this matter?

Fashion, beauty, health and fitness brands and retailers are no longer only competing within their lanes. A customer who usually invests in an expensive moisturiser may instead choose to put that money towards a gym membership, hoping to get a natural glow from the inside out. A woman on a tight budget who's invited to a party may decide to forgo her monthly manicure in order to buy a new dress. It's no longer enough to consider your competitors only as those within your immediate sphere.

Brands must mirror their customers' perspective and take a holistic approach to the industry, their place within it and the consumers that engage with it. Understanding where you really sit within customer consideration sets, as well as knowing who and what is influencing their decision-making, could be the difference between minor and monumental growth.

Staying ahead of the curve

Innovation is not a new concept for the retail industry. From 'magic mirrors' that offer personalised beauty advice to immersive and shareable VR experiences, forward-thinking brands are using technology to create a tailored experience for customers, both in-store and online. However, despite astounding digital advances, many retailers are still looking at their customers through the lens of traditional demographics, and lack the customer insight to match their bold technological steps.

This is complicated further by the fact that consumers are gaining more and more control over their own data, aided in the health and beauty market by the rise of wearables such as Fitbits (something which is having a knock-on effect everything from gym memberships to insurance providers). Shoppers in the fashion, beauty and wellness space expect a level of personalisation beyond that of many other industries, from a perfectly fitted jacket to a moisturiser that's exactly suited to their skin. What's more, their lives – and therefore their needs and desires - are changing every day and the modern, tech-savvy consumer expects brands to keep up. Staying one step ahead while remaining true to the brand and providing genuine, relevant value to customers requires a level of agility and forward planning that can be difficult to master without a rock solid foundation of customer insight.

By focusing on standard measurements and modes of segmentation such as age, address and average spend, brands are in danger of ignoring what truly differentiates their customers: their passions, mindsets and motivations.

Data from The Observatory not only allows brands to see their customers as individuals with their own distinct lifestyles and desires; it also provides brands with a macro view of the industry within which they sit – the key players, upcoming trends and a detailed understanding of their place within it. By combining deep customer knowledge with broad market insight, you can anticipate trends, influencers, issues and customer needs before they arise.

Tapping into emotions

Investing time and money in looking and feeling good is an innately personal process. Choosing the perfect outfit, committing to a fitness programme, changing our haircut – these are all decisions linked closely to how we see ourselves and the kind of person we want to be. Brands in this area are in a very unique, exciting and, potentially, precarious position; one false move and you risk isolating a customer forever. Treat them well, however, and you could win lifelong emotional loyalty.

Traditional measurement methods focus on functional loyalty: that is to say, a customer returning to a particular brand again and again for practical reasons, such as an enticing reward scheme or a convenient location. Emotional loyalty, however, is more complex and hard-won. A customer will only become emotionally loyal to a brand when it corresponds with their passions, values or ideals, and reaches them at the right time. By enriching transaction data with third-party data, brands can understand the mindsets that lead to purchase and begin to align themselves with what customers truly care about.

With these emotional ties being such a crucial part of the buying experience within these industries, and the market becoming increasingly saturated and complex, it's more important than ever that brands and organisations build the strong and genuine relationships that their customers crave.

Understanding mindsets

Mindsets are motivations that unite large consumer groups across industries. They lie behind people's passions, reflecting their genuine values, personalities and lifestyles (for example, are they trend-driven, health-conscious or eco-friendly?). Mindsets can only be algorithmically determined on data sets like Starcount's social graph; very few other data sets are large enough to represent people's passions accurately, and even fewer offer such rich insight into how people spend their time.

Starcount's mindsets rely on a real time, traceable and global database, organised so that each social 'star' (entity) represents a passion, meaning that patterns can be traced clearly and automatically, rather than being retroactively interpreted and assigned.

Unlike social listening, this new approach goes beyond the mere (and skewed) 5% who actually produce content on social media, allowing brands unprecedented insight into the remaining, passive consumers – those who listen and watch, indicating their tastes by liking and following. We don't just tell you what people think of you; we also tell you why.

Look Good, Feel Good study

Key Statistics*

11,211,082	4,873,603	23.4%	6
UK base	LGFG audience size	LGFG Audience growth	Mindsets

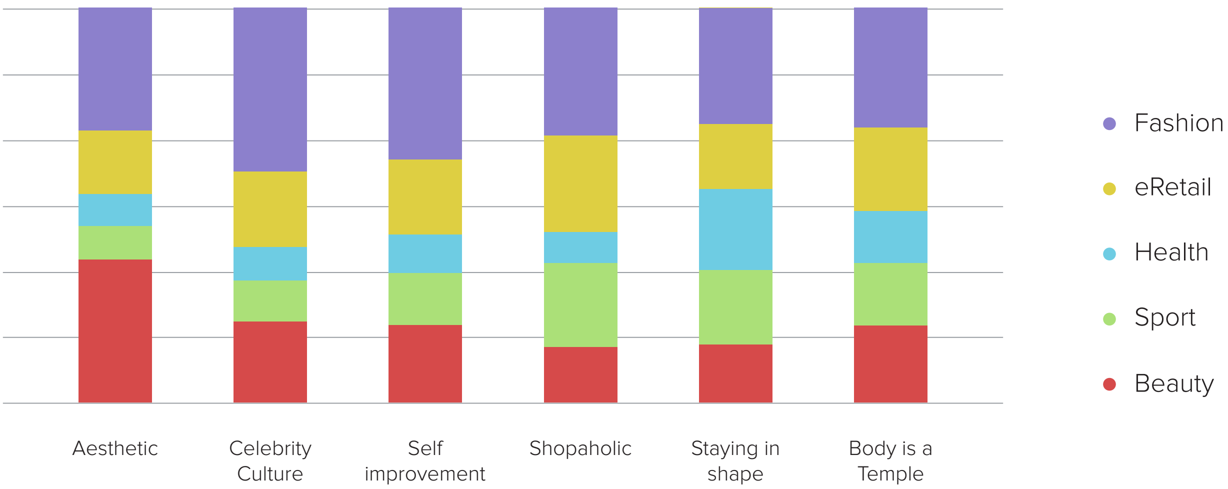
It's clear that people have different mindsets around looking and feeling good. Using pioneering data science, Starcount has delved into the specific passions that lie behind the fashion, beauty and wellness industries. By analysing how these passions cluster together into different mindsets, we have gained a granular, robust and truly data-driven insight into the diverse 'Look Good, Feel Good' market and how different UK consumers are spending their time and money within it.

Mindset	Size	% of Audience	UK Equiv.
Aesthetic	508,254	10.40%	2,420,263
Celebrity culture	1,794,298	36.80%	8,544,298
Staying in shape	1,453,974	29.80%	6,923,703
Self-improvement	2,003,181	41.10%	9,583,982
Shopaholic	1,558,182	32.00%	7,419,933
Body is a temple	385,805	7.90%	1,837,171

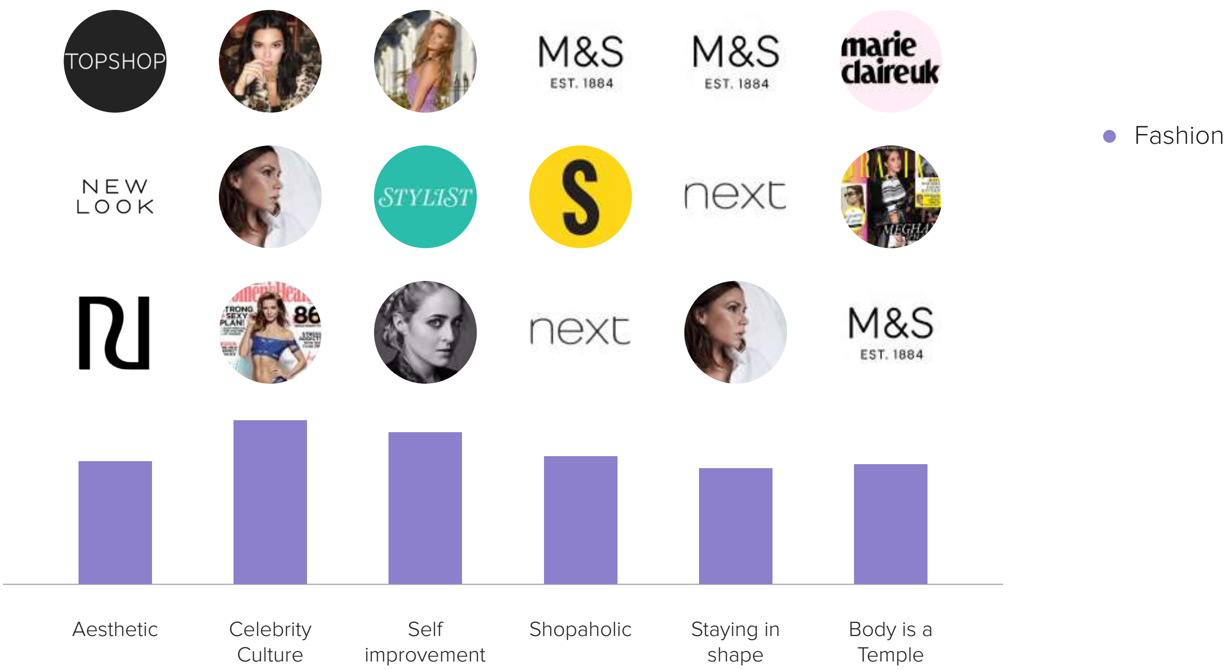
* Our data is extracted from Starcount's proprietary platform The Observatory, a database of over 1 billion global consumers.

Your competition is broader than you think...

By examining how much key ‘Look Good, Feel Good’ industries resonate with each mindset, it becomes clear that brands are often competing—both directly and indirectly—with those outside of their immediate sphere.



While each of these mindsets is interested in brands, influencers and media relating to a range of industries, the degree to which they care about these industries varies depending on their passions and priorities. What’s more, each of these mindsets prioritises different stars within each industry. Take Fashion, for example: while those with the Aesthetic mindset love high street brands, the Celebrity Culture group are inspired by fashion icons and the Self-Improvement group are all about social media stars.



Mindset wordclouds: Customers self-describe

Aesthetic

This group are passionate about looking great and are willing to spend money regularly in order to keep up with the latest cosmetic trends. While they enjoy fashion, beauty is their first love and they put a lot of care and attention into their appearance, from investing in high-end skincare to spending weekends in the salon.

Starcount's wordclouds illustrate how particular consumer groups self-describe online. They give a unique insight into the mindsets of consumers in their own words.

Body is a Temple

Those with a 'Body is a Temple' mindset are focused more on feeling great on the inside than looking good on the outside. They prefer a holistic approach to wellbeing and place a high value on healthy eating, often being vegetarian, vegan or gluten free. They have a strong desire to make a positive contribution to the world, campaigning for animal rights charities, blogging about their experiences and even teaching others through yoga, meditation and alternative therapies.

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Celebrity Culture

The Celebrity Culture group know everything there is to know about the world of popular entertainment and their approach to looking and feeling good is totally inspired by the famous faces they admire. From popstars like Justin Bieber to reality TV icons like the Kardashians, these consumers regularly change up their style to align with trends set by their favourite celebrities, sharing new looks on Instagram and Snapchat.

Staying in Shape

This group are united through their love of exercise; from bodybuilding to yoga, there's no fitness trend this group won't try. They love to support their fellow fitness fans through social media, sharing gym selfies, healthy recipes and words of encouragement with the hashtag #fitfam. Many of them work fulltime in the fitness industry as personal trainers, dietitians or even PE teachers.

Self-Improvement

This segment includes those who are constantly seeking to be inspired across many different areas of their lives. They rely on digital influencers for advice and are constantly devouring videos and blog posts on fashion, beauty and parenting in particular. Some of them are aspiring social media stars themselves, while PR is also a popular career choice for this group.

Shopaholic

The Shopaholic segment love nothing more than hitting the shops, with a particular passion for tracking down one-off purchases, such as vintage or handmade clothing and accessories. They have a keen eye for a bargain and are always entering competitions with the hope of winning designer goods. This group are also keen wedding planners and love pouring over every detail in the run up to the big day.

Get to know your customers: Who are the mindsets?

Aesthetic:

The Aesthetic mindset over-index in the 18-24-years-old bracket and are 82.8% female. At 10.4% of the total LGFG audience, the group is growing by 17.3%, with a UK equivalent of over 2.4m people. While the LGFG audience as a whole is strongly influencer-driven, the Aesthetic mindset focuses much more on brands. They are creators and amplifiers, and so are much more likely to be influencers themselves than the average UK social media user.

95% of their top 20 stars are brands, with Tanya Burr being the only influencer to reach the top 20. However, Burr also has her own successful makeup line, as does social media star Zoe Sugg, whose beauty line is the 7th most popular star with this group. Cosmetics brands are the most popular with the Aesthetic mindset, with mid-range products from MAC, Urban Decay and Benefit topping their list. Superdrug wins out over Boots as their go-to beauty supplier, being 5th in the chart to Boots' 15th place.

This group aren't worried about keeping fit or buying organic or fair trade products; they are driven by fair pricing and a trendy, bold range of products.

When it comes to influencers, this group admire social media stars such as Zoe Sugg, Tanya Burr, Louise Pentland and Niomi Smart, as well as members of the Kardashian family. Androgynous makeup artist, Jeffree Star, is the fastest growing star for this group.

Along with Beauty, Fashion and Lifestyle Tips, TV Reality Shows and Shopping are the top passions for the Aesthetic mindset. Pets & Animals is their fastest growing passion, with a growth rate of 5.9%. They're also advocates for equal rights – LGBT is the 3rd fastest growing passion.

Celebrity Culture:

The Celebrity Culture mindset over-indexes in the 25-34 segment and is 75.4% female. 94% of their top stars are influencers, with brands hardly featuring at all for this group (their brand loyalty is almost non-existent). This is the second largest segment (36.8% of the total audience, equivalent to over 8.5m people) and is growing at a rate of 16.5%. This group are likely to be amplifiers online, rather than creating content themselves.

Reality TV stars and fashion icons dominate the top stars for the Celebrity Culture mindset, with the top 10 being almost entirely given over to the Kardashian family. Other popular celebrities include Victoria Beckham, and stars from the X Factor, The Only Way is Essex and Geordie Shore.

Unsurprisingly, TV Reality Shows is the top passion for this group, followed by Popular Music, Fashion, TV Music Shows and TV Talent Shows. These consumers rely on TV stars for fashion and beauty inspiration, and always have one eye on the latest trends. Latin Music is a fast-growing passion for this group, with a growth rate of 13.2% driven by a love of Mexican singer Becky G.

Staying in Shape:

The Staying in Shape mindset has a much more even male-female split, being 53.4% female. The mindset is 29.8% of the overall audience (just over 7m people being the UK equivalent) and is the second fastest growing group, with a growth rate of 20.7%. They are influenced by a combination of brands, influencers and media, and are more likely to be creators online than the average Look Good, Feel Good consumer.

Fitness influencer The Body Coach (Joe Wicks) tops the chart for the Staying in Shape mindset, with a growth rate of over 17%. This group keep up their workout motivation by engaging with a range of health and fitness brands and media titles, including the Fitness & Nutrition blog, MuscleFood and Women's and Men's Health magazines.

This group prioritise getting a healthy glow from the inside out with healthy eating and regular exercise. It's unsurprising, then, that the top passions for this group are Fitness & Nutrition and Food & Drink, with Fashion in third place. When it comes to getting dressed, they rely on high street staples such as Marks and Spencer and Next, and shop online with ASOS. These consumers are also engaged citizens, with a growing passion for Politics and News & Current Affairs.

Self-Improvement:

The largest segment, comprising 41.1% of the total audience, Self-Improvement consists of the UK equivalent of over 9.5m people and is growing at the fastest rate of 33.3%. It is a young segment, over-indexing in the 16-17 bracket (although it contains older consumers too) and is 61.9% female. This group is highly influencer-driven and digitally literate, regularly creating their own online content.

The Self-Improvement consumers are always looking for tips and tricks for every aspect of their lives, from fashion and food to travel to parenting, and they largely source this advice from blog and vlogs. Online influencers dominate the top stars for the Self-Improvement group, with popular social media stars Louise Pentland, Zoe Sugg, Tanya Burr and Niomi Smart heading up the list. This extends to the brands they choose; topping their favourites are products created by influencer Alfie Deyes to promote his YouTube channel, as well as beauty lines by Zoe Sugg and Tanya Burr. Time Out and Stylist are their favourite media titles, indicating a London focus.

As well as watching beauty and fashion tutorials online, this group love to share cute and funny animal videos and are teaching themselves to cook using online resources from influencers such as baker Rosanna Pansino.

Shopaholic:

The Shopaholic mindset is comprised largely of shoppers in their late teens and early twenties, and is split almost evenly between men and women (52.3% female). The segment is comprised of 32% of the total audience, with a UK equivalent of 7.4m consumers. This group are extremely brand focused, with brands being over 80% of their top stars.

When it comes to shopping, this group are more focused on the functional elements of making a purchase (such as convenience and price) than on the emotional elements (such as staying on trend). Sainsbury's, Amazon, Asda and John Lewis are their top brands and they enjoy shopping from high street staples such as Marks and Spencer and Next. When they do venture into the higher end of the pricing spectrum, they like browsing department stores such as Selfridges and Harvey Nichols, where they can admire a range of designer brands.

After Shopping, Food & Drink, Fashion, Sportswear and Holidays & Travel are their top passions. The older consumers with this mindset enjoy spending money on family treats and experiences, from trips abroad to toys and board games (their fastest growing passion), as well as on major events such as weddings.

Body is a Temple:

Consumers with a 'Body is a Temple' mindset over-index in the 25-34 age bracket and are 62.3% female. This is the smallest mindset of the six, with 7.9% of the audience (equivalent to 1.8m people across the UK). Their preferences are split between influencers, brands and media (with influencers being the most important), and they are extremely likely to be creating and sharing their own online content.

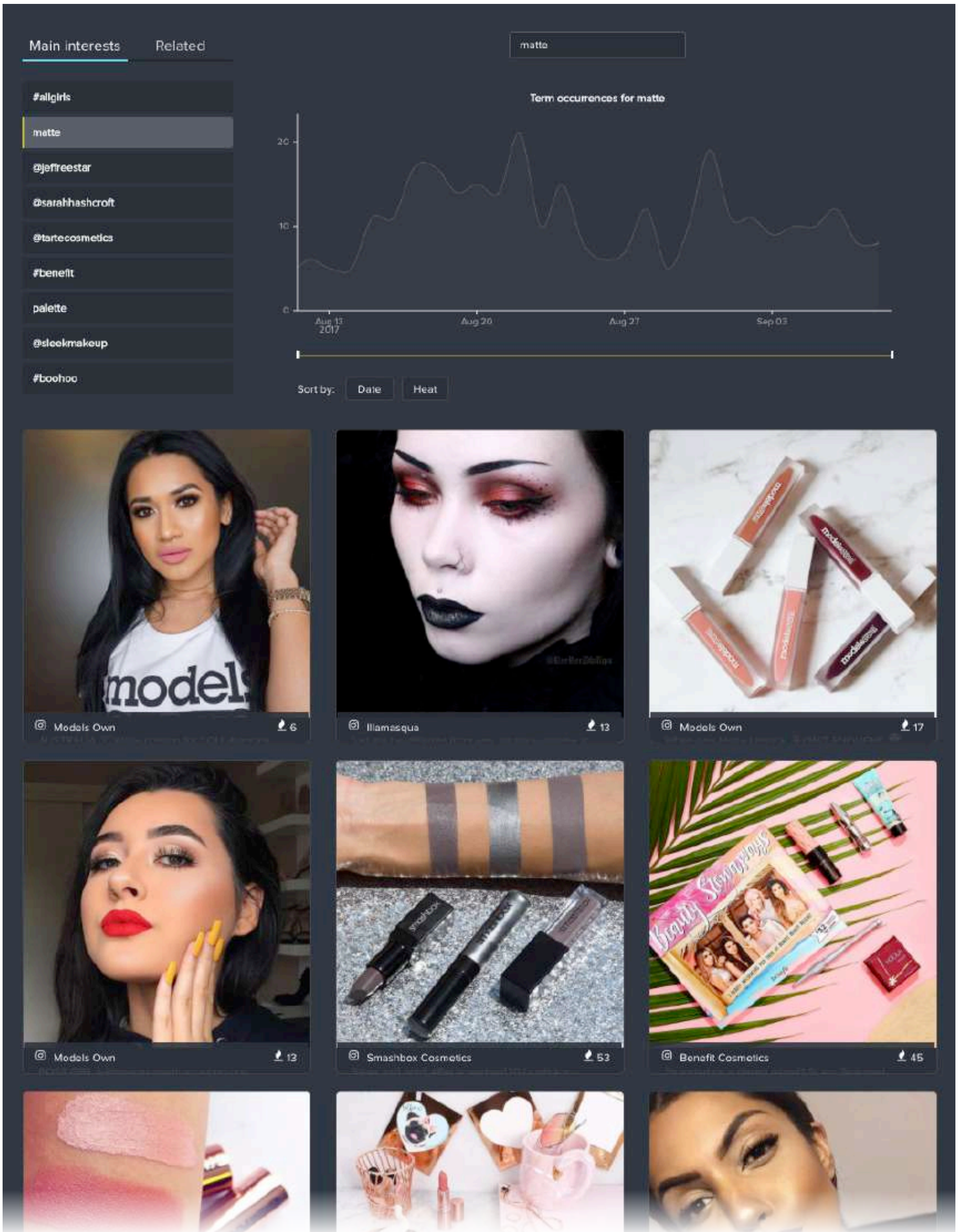
This group prioritise their physical and mental wellbeing over aesthetic concerns. From vegetarianism and veganism, to yoga and meditation, they are always striving to better themselves and have a positive impact on the world around them. When it comes to food, they rely on independent, ethical and 'free-from' brands such as Riverford Organic Farmers and The Coconut Collaborative. They are socially conscious and support a range of charities and campaigns, such as Animal Aid and Peta. For inspiration, they turn to a range of business leaders and coaches, spiritual figures and social influencers.

As well as living the healthiest possible lifestyle, this group also have a keen passion for expanding their minds through reading, travelling and art.

Tracking trends and social 'moments'

By monitoring content consumption, we can track which key trends, influencers and events are most popular with which mindset, as well as viewing the content that's most successful with each consumer group.

The Aesthetic mindset, for example, have recently become particularly excited about matte makeup, consuming a vast range of visual content from their favourite beauty brands promoting new matte lip ranges.



Changing passions, mindsets and motivations: the effect on brand loyalty

Consumers' passions, motivations and mindsets change over time, influenced by lifestages, technological developments and social transformations. By tracking these shifting mindsets using unique, timestamped data, we can understand how, when and why consumers have decided to engage with particular brands, monitor emerging trends and competitors, and predict future buying intent.

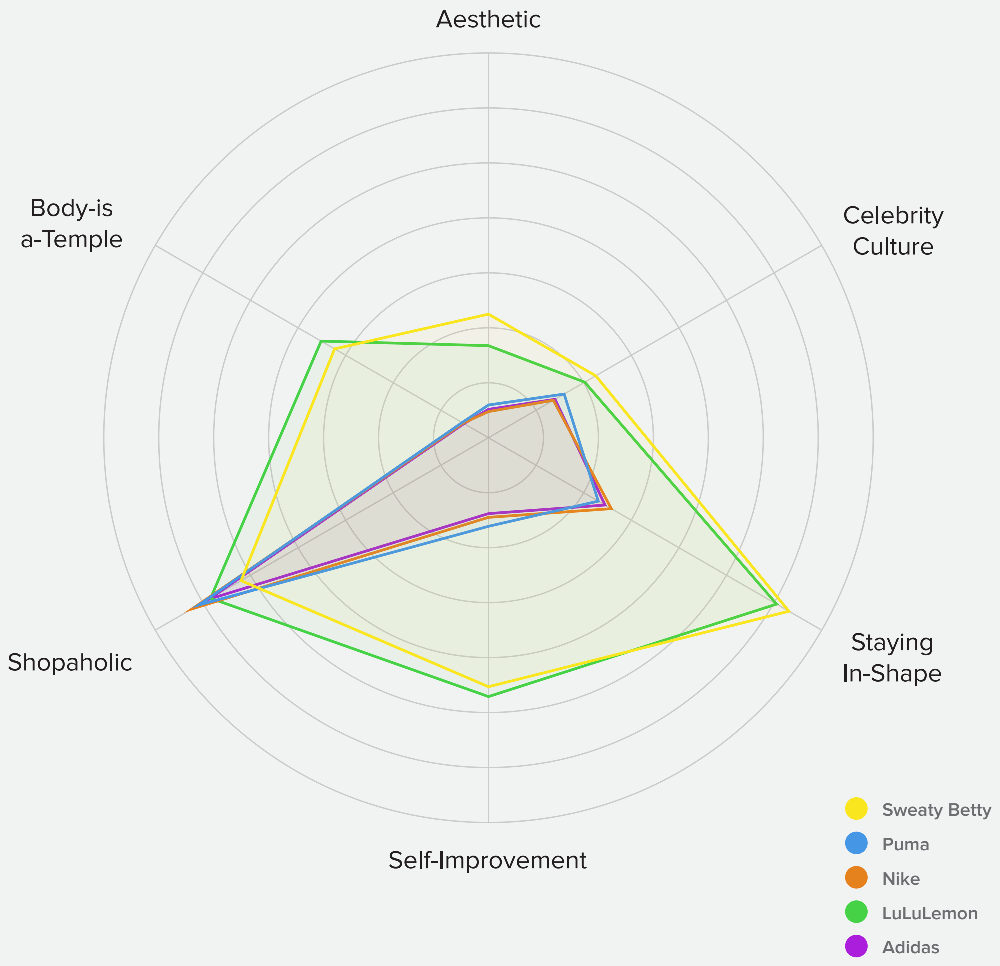
This enhanced insight also allows brands to track customer journeys, see who is in their consideration set and intercept consumers at the right moment, using the appropriate messaging and channels.

Brand Positioning

How well are you speaking to your customers?

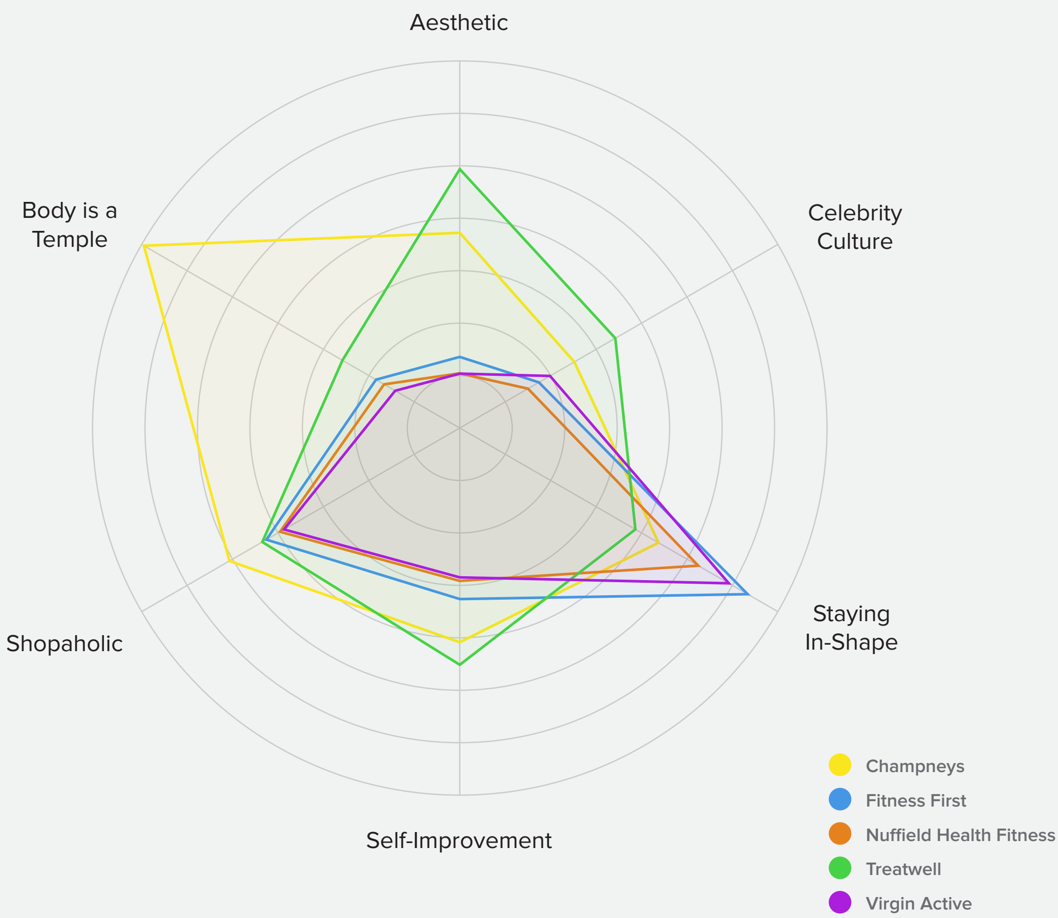
This enhanced data and segmentation can help brands to optimise their strategy by identifying how their market share differs to their competitors' across segments.

Sportswear/Athleisure



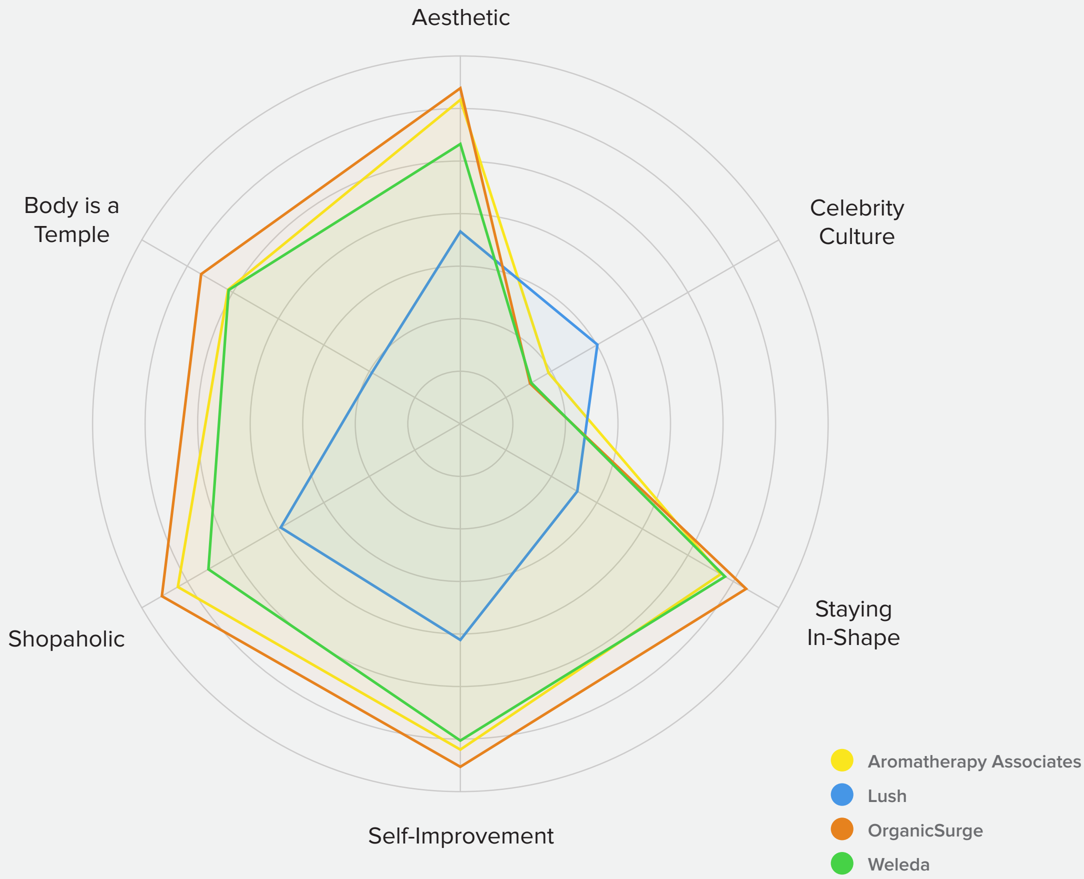
While fashion and sportswear brands alike have been riding the athleisure wave of late, the radial chart above reveals that athleisure-specific brands have a far broader reach into Starcount's mindset segments than traditional sports brands. Adidas, Nike and Puma form almost identical shapes on the chart, with a surprisingly distinct spike into the brand-driven Shopaholic segment. Lululemon and Sweaty Betty, on the other hand, also appeal to the Stay in Shape, Self-Improvement and 'Body is a Temple' mindsets, reflecting their continuing market domination and mass appeal.

Spas/Gyms



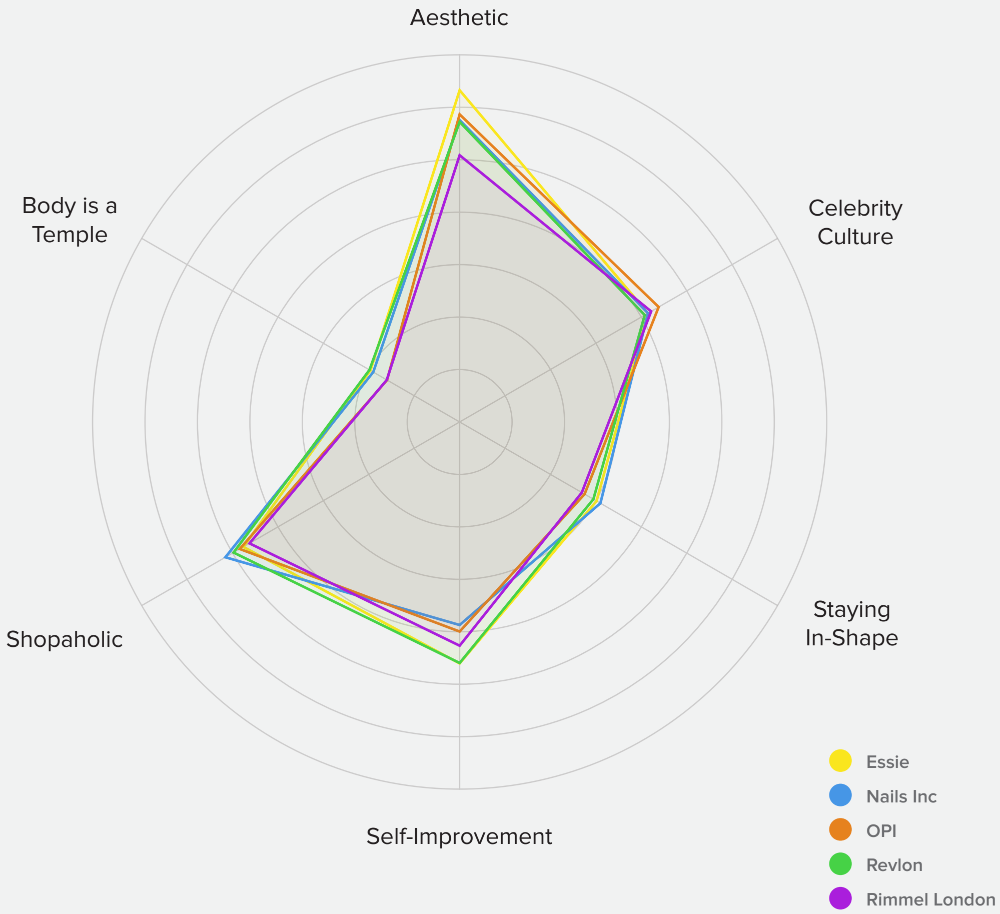
Although the rise of ‘wellness’ may encourage gyms and spas to believe they are competing for the same market, Starcount’s radial charts demonstrate that they are appealing to distinct mindsets. Luxury spa Champneys is a strong draw for the ‘Body is a Temple’ mindset, who value relaxing and rejuvenating treatments over a high-powered workout. On the other hand, more traditional gyms such as Fitness First, Nuffield Health Fitness and Virgin Active are appealing specifically to the Staying in Shape mindset, with a small spike into the Shopaholic mindset, despite the inclusion of spa facilities such as saunas and Jacuzzis. Meanwhile, treatment booking service Treatwell resonates most with the Aesthetic and Celebrity Culture mindsets – those people who want to look good on a budget and at a moment’s notice.

Organic Beauty Brands



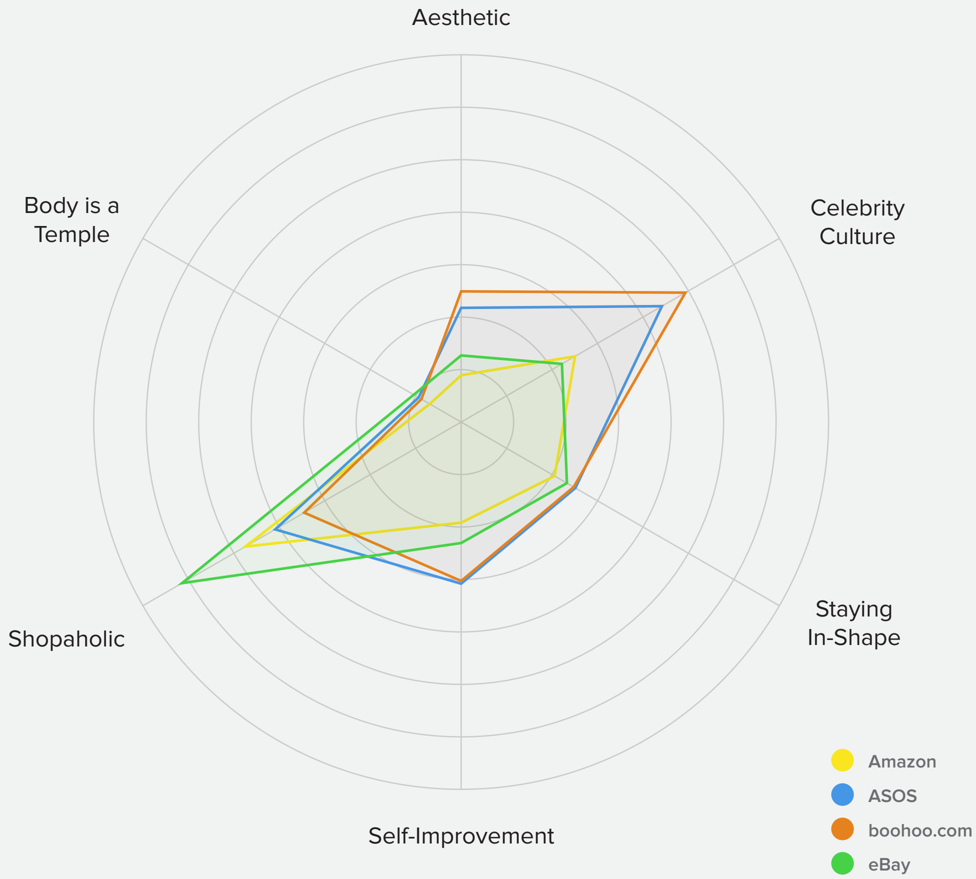
Organic, sustainable beauty brands are having a moment, with an ever-increasing range of plant-based products designed for a 'holistic' approach to wellness flooding the market. This is reflected in the radial chart above; Aromatherapy Associates, Organic Surge and Weleda all have broad appeal across the mindset segments, speaking as much to the Aesthetic group as they do to those focused on Self-Improvement. All three brands are significantly less popular with the Celebrity Culture group, who seem to have very little focus on organic beauty products. Surprisingly, Lush bucks this trend; despite being a well-known and affordable brand that creates natural and ethical products, Lush has a far narrower reach than its competitors, despite a slightly more noticeable spike into the Celebrity Culture mindset. This may be due to the brand's light-hearted, youthful image that differentiates them from more recent entrants into the beauty market.

High-street Makeup



Although Essie, Nails Inc, OPI, Revlon and Rimmel London each have their own distinct target audiences, they form almost identical shapes on the radial chart, speaking particularly strongly to the Aesthetic and Shopaholic mindsets. This indicates that, while these brands may target different age groups, they are united by the mindsets of their customers and so are constantly competing for market share.

Online fashion retailers

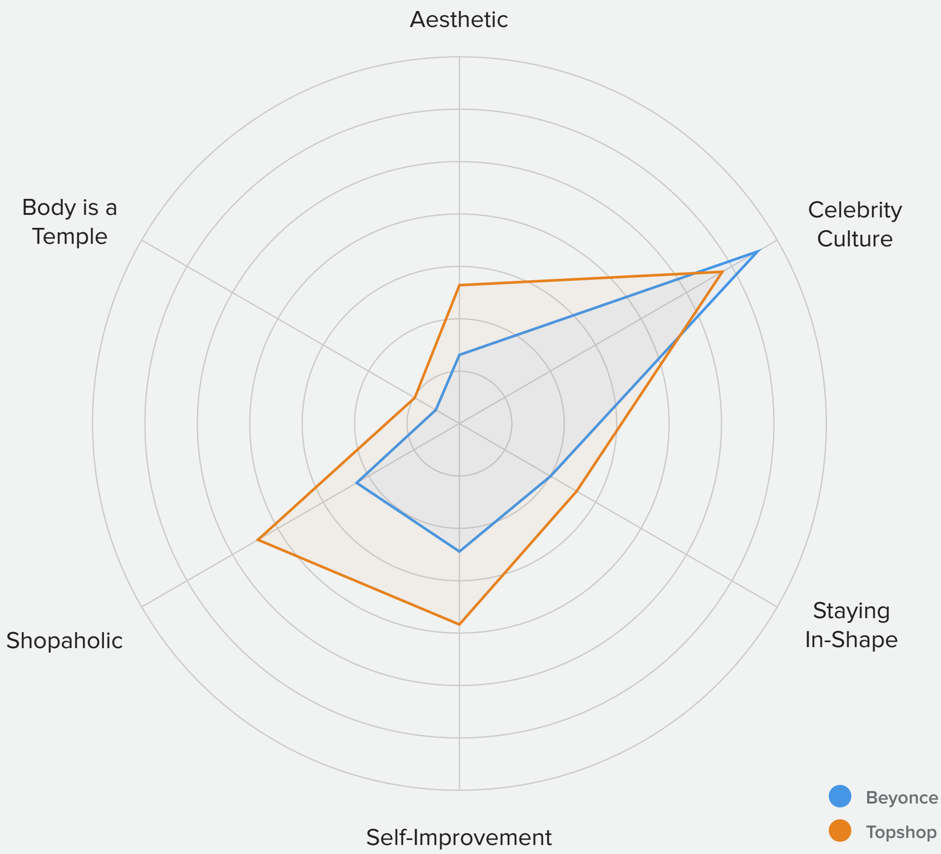


While Amazon, ASOS, boohoo.com and eBay are constantly competing for space within the crowded online retail market, it's clear from the radial chart that they appeal to different consumer groups. Both eBay and Amazon resonate strongly with the Shopaholic mindset, while ASOS and boohoo.com speak more to the Celebrity Culture mindset. This indicates that the Shopaholic consumers are driven by price and prefer the functionality and convenience of Amazon and eBay, while the Celebrity Culture shoppers are focused on influencer-led trends and are drawn to the fashion-forward approach of ASOS and boohoo.com.

Collaborating with influencers: Who do your customers admire?

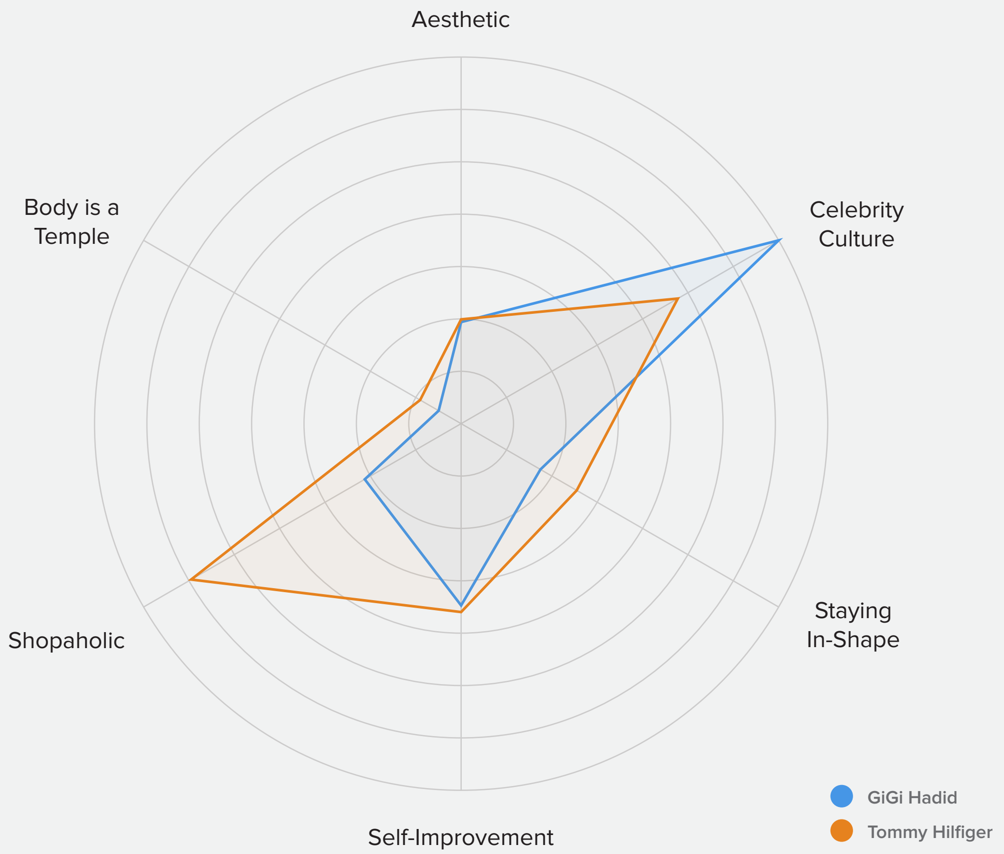
We can also use mindsets data to understand what particular brands and influencers stand to gain from collaborating on projects and campaigns, as well as to assess the success of previous partnerships.

Beyonce – Topshop



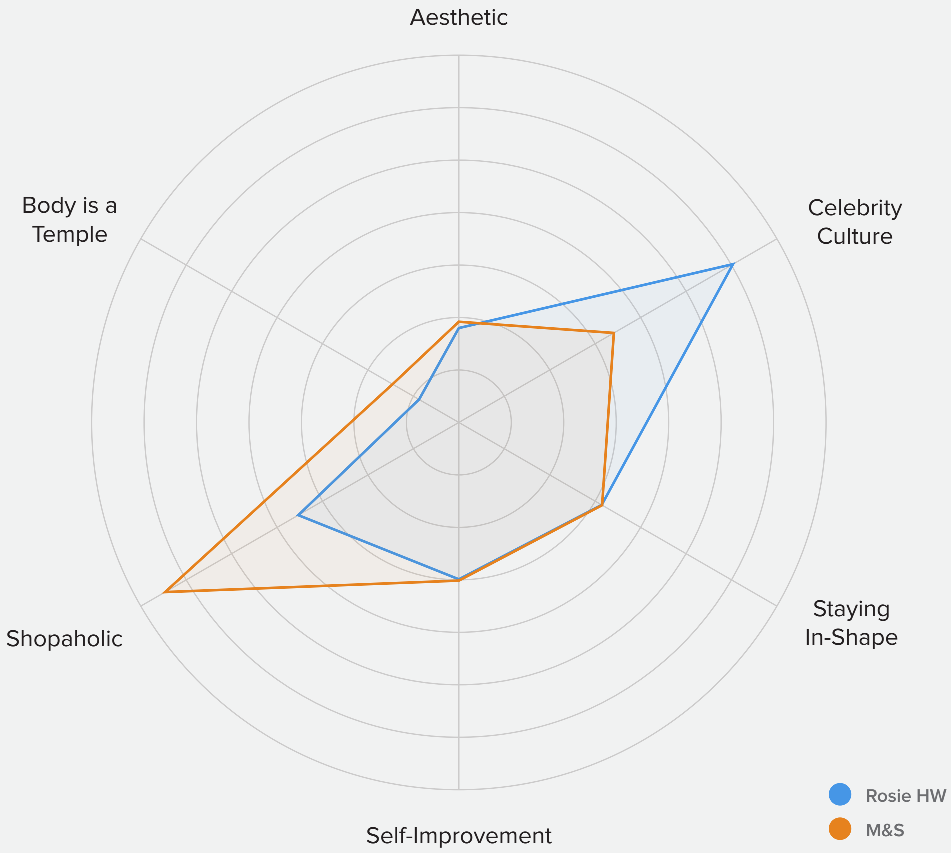
While Topshop has a slightly larger reach than Beyoncé, the brand-influencer partnership seems to be successful, with the pop icon allowing the fashion brand to resonate even more strongly with the Celebrity Culture mindset.

Gigi Hadid – Tommy Hilfiger



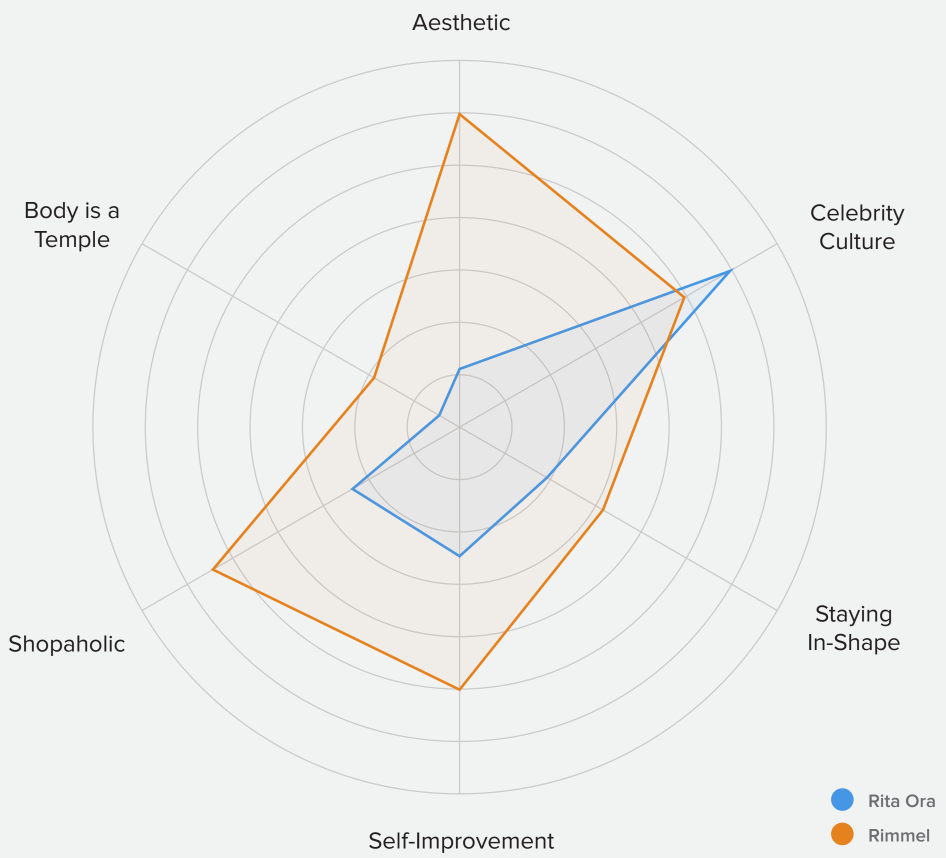
Unsurprisingly, Gigi Hadid speaks strongly to the Celebrity Culture mindset, while Tommy Hilfiger is a hit with Shopaholics. A collaboration between Hadid and Hilfiger has enabled both brand and influencer to speak more strongly to the Self-Improvement segment, perhaps due to Hadid's success on social media platforms such as Instagram, which is particularly popular with that group.

Rosie Huntington-Whiteley – M&S



While model and long-term Marks and Spencer collaborator Rosie Huntington-Whiteley speaks strongly to the Celebrity Culture mindset and the high street brand resonates more with the Shopaholic group, there are interesting parallels between the brand and influencer across the other segments. By adding to her lingerie collection with cosmetics and swimwear ranges, Rosie and M&S have ensured they are speaking equally to the Aesthetic, Staying In Shape and Self-Improvement mindsets.

Rita Ora – Rimmel



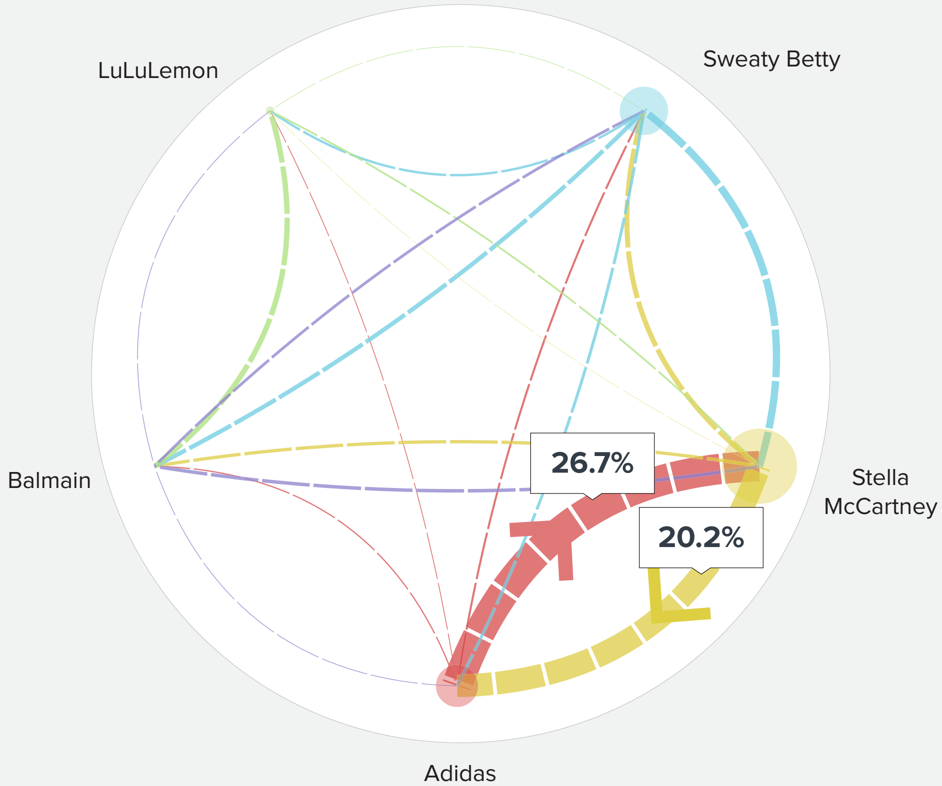
From the radial chart, it appears that Rimmel UK has very little to gain from their partnership with Rita Ora. Although the pop star fronts a number of campaigns for the beauty brand, her reach is far smaller across almost all of the mindsets, with the exception of Celebrity Culture, where she slightly surpasses them.

Tracking changing customer loyalty: How can your brand become a market leader?

When it comes to customer loyalty, there’s only one certainty: customers will move their purchases to whichever brands best understand them and serve their needs. What’s more, their desires and expectations are constantly evolving – to stay relevant, you have to keep up.

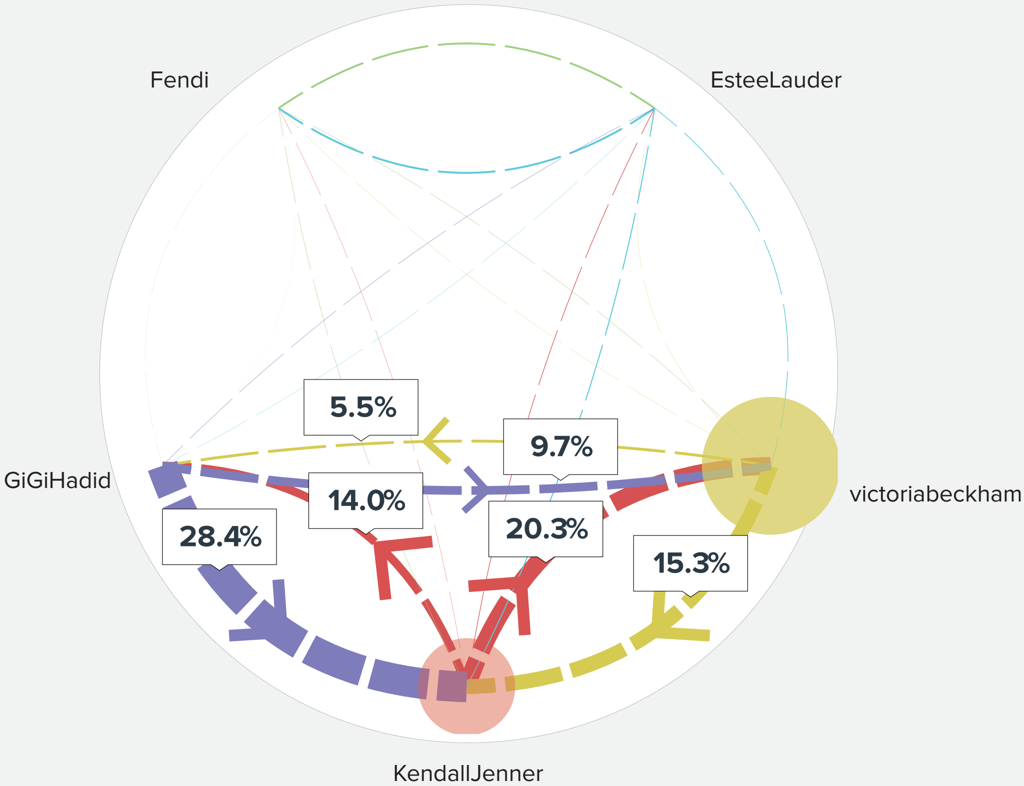
Starcount’s timestamped data allows you to track the flow of fans from brand to brand, illustrating when and how customer loyalty changes over time, and why customers move from a particular brand to its competitors.

Athleisure



The new 'athleisure' industry has gone from strength to strength, causing a host of high street stores, designers and sports brands to team up in a bid to capture some of the magic. The long-term success of the collaboration between Stella McCartney and Adidas is reflected in the consistent movement of customers back and forth between the two brands. The advantage is slightly on Stella's side: over 26% of consumers across the market have moved from Adidas to Stella McCartney since January 2015, while 20% have moved from Stella McCartney to Adidas.

Fashion influencers



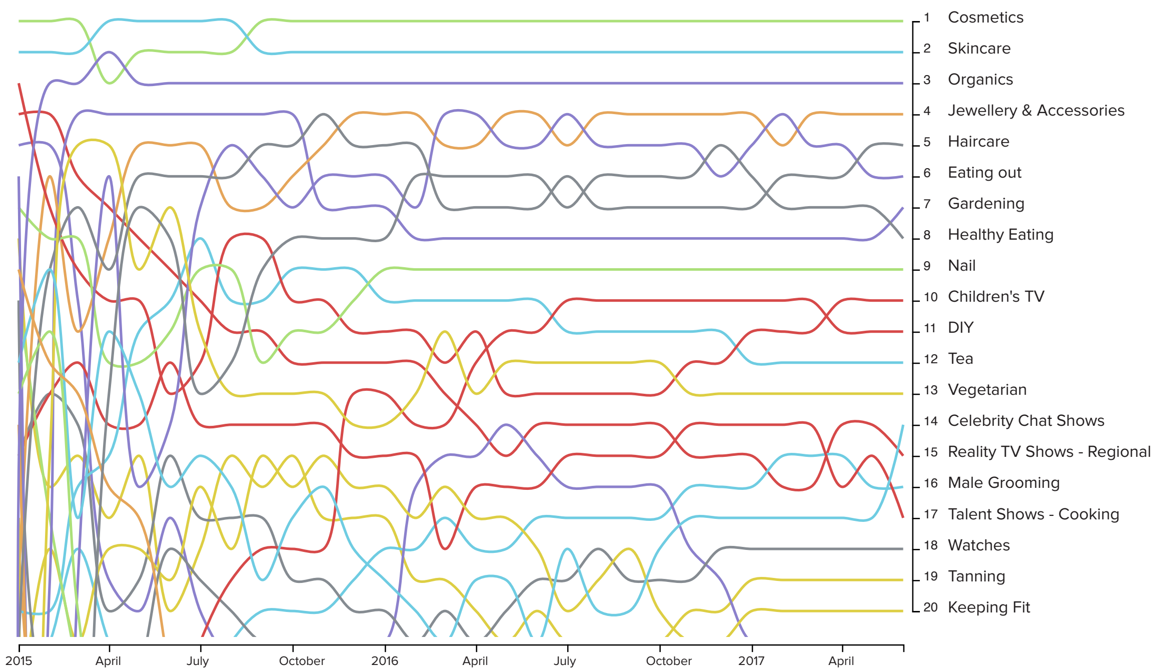
The majority of designer fashion brands opt for high-profile models or actresses to front their campaigns; however, the flow visual above illustrates the potential pitfalls of this choice. Since 2015, Fendi and Estée Lauder have seen almost no movement from fans of their brand ambassadors, Gigi Hadid, Kendall Jenner and Victoria Beckham, with the fans instead discovering a new interest in the influencers themselves. This indicates a need for brands to move towards micro-influencers – those with a lower following than the likes of Jenner and Hadid, but with a more direct relationship with the brand's existing and target customers.

Staying on top of trends

Because social intelligence provides a gateway to people's passions, motivations and mindsets, we can use it to identify emerging communities and trends. This means it's not only possible to keep pace with changing consumer demand, but also to predict when and why their loyalties will shift.

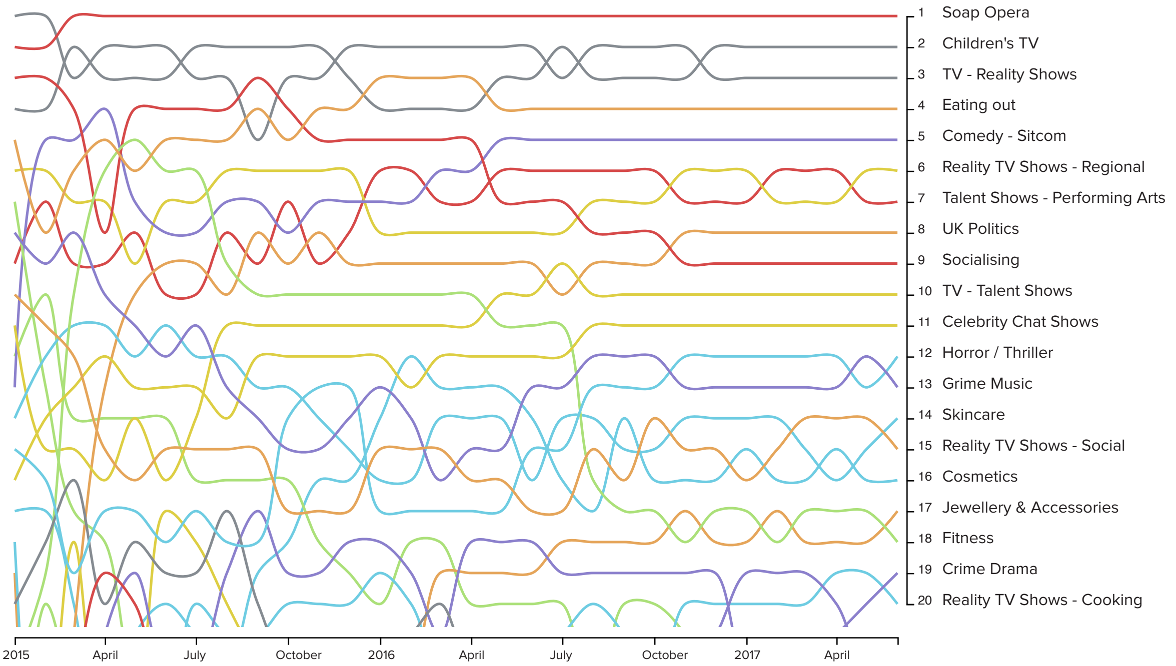
Aesthetic

While the Aesthetic mindset's top passions of Cosmetics and Skincare have remained largely stable since 2015, this group are heavily driven by trends and this is reflected in their chart. Organics is now their third most important passion, driven to rise quickly at the start of 2015 by a combination of skincare brands such as Neal's Yard Remedies and food brands such as Get Fruity (which has grown by an enormous 58.5%). Eating Out has also become a key interest for this group, now sitting in sixth place, with social influencer Lily Pebbles followed by chains including Nando's, Zizzi and Pizza Express. Other growing trends for the Aesthetic segment include Male Grooming, which has climbed to sixteenth place since mid-2015, boosted by a combination of influencer's like The Everyday Man, brand's such as L'Oréal Men Expert and media titles including GQ Magazine.



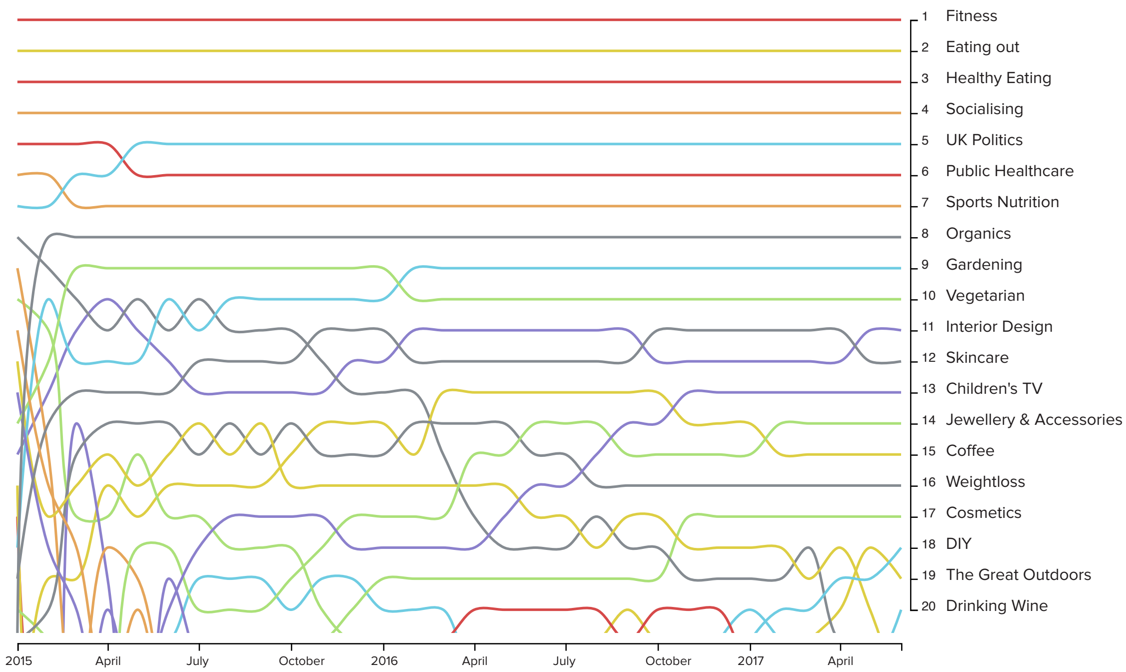
Celebrity Culture

The trend-driven Celebrity Culture mindset have discovered and lost interest in a vast range of passions since the start of 2015. They love to follow the careers of famous faces, from Soap Opera stars such as Jacqueline Jossa and Kym Marsh to X Factor finalist and Children's TV presenter Lauren Platt, all the way through to the Kardashians. A love of Reality TV lies behind some of their key passions; their ideal night out would take place at TOWIE hotspot Sugar Hut and their Fitness regime is inspired by Made in Chelsea star Oliver Proudlock. This group have been inspired to pay attention to UK Politics by a range of outspoken TV influencers, including Karren Brady, June Sarpong and Edwina Currie (who appeared on I'm a Celebrity).



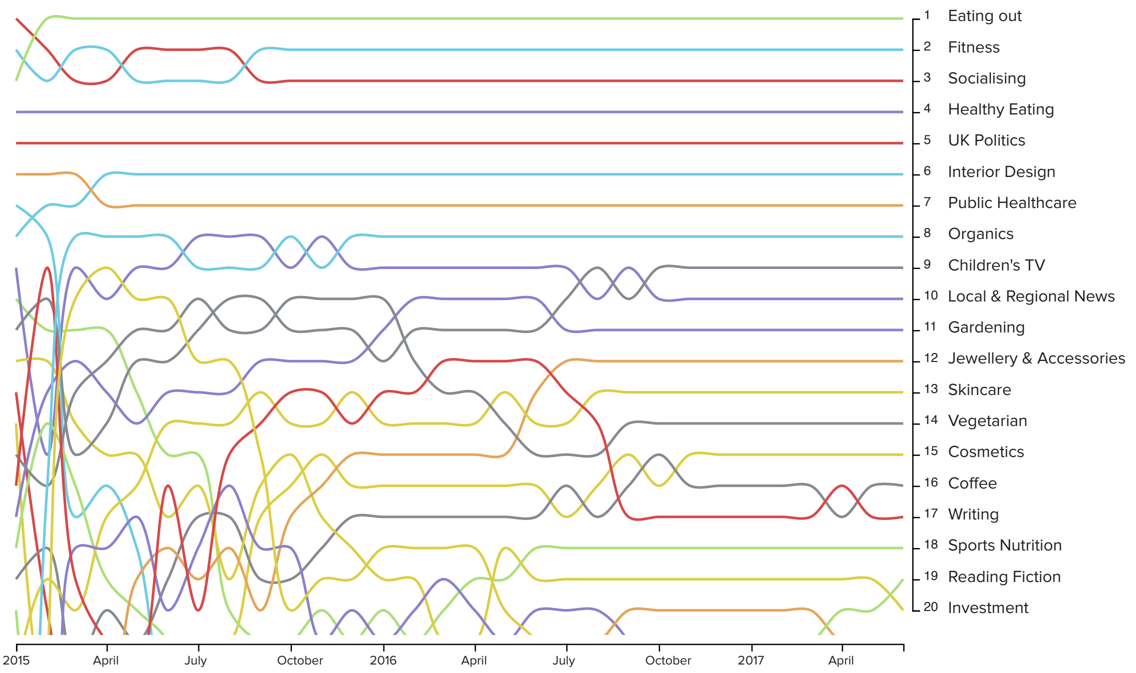
Staying in Shape

The Staying in Shape mindset have remained steadily focused on their physical health since the start of 2015. Fitness influencer The Body Coach has grown by 17%, keeping their passion for Fitness as their highest priority, while a love of Eating Out demonstrates their willingness to balance a healthy eating plan with the odd meal out at Nando's or Pizza Express. Organics and Vegetarianism are also newer interests for this group. A passion for Children's TV at 13th may seem surprising, but is driven by the huge growth (+48%) of health expert, TV presenter and author Xand van Tulleken, who has published a diet book and presents a Channel 4 show called How to Lose Weight Well.



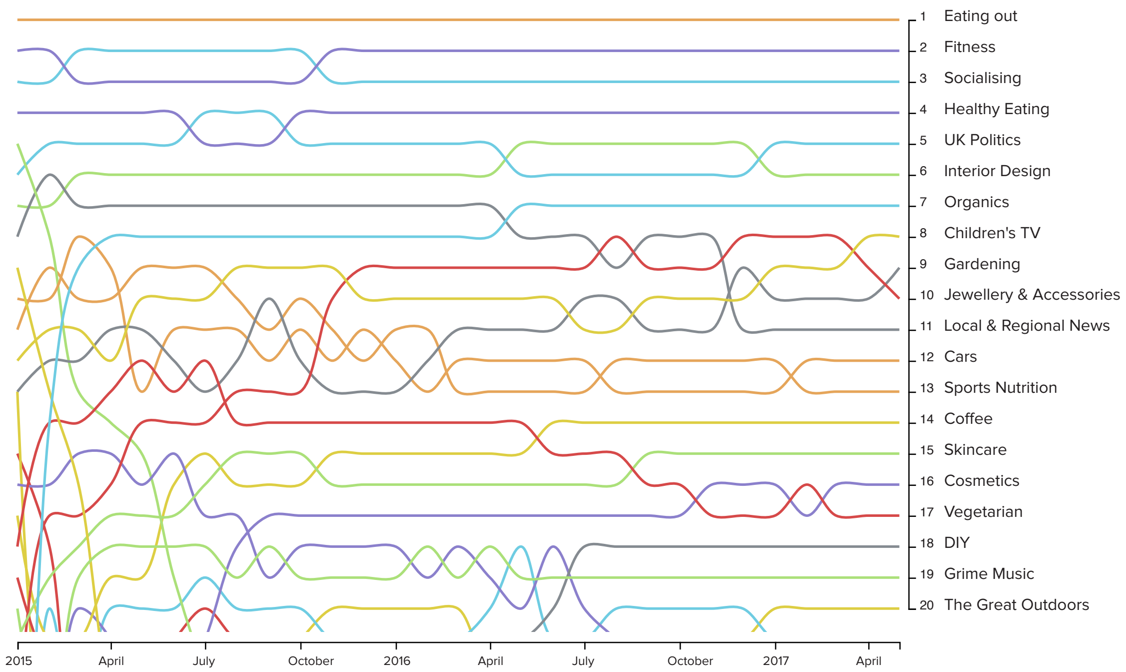
Self-Improvement

While the Self-Improvement mindset has experienced some change in their overall passions, their key interests have remained relatively consistent since the start of 2015. They love Eating Out in the latest London pop-ups, including Street Feast and BOXPARK in Shoreditch, and refer to trendy media titles, such as About Time and Time Out, for foodie tips. Influencers play a key part in their daily inspiration across Fitness, Socialising, Healthy Eating and even UK Politics, with London Mayor, Sadiq Khan, being one of their top political figures.



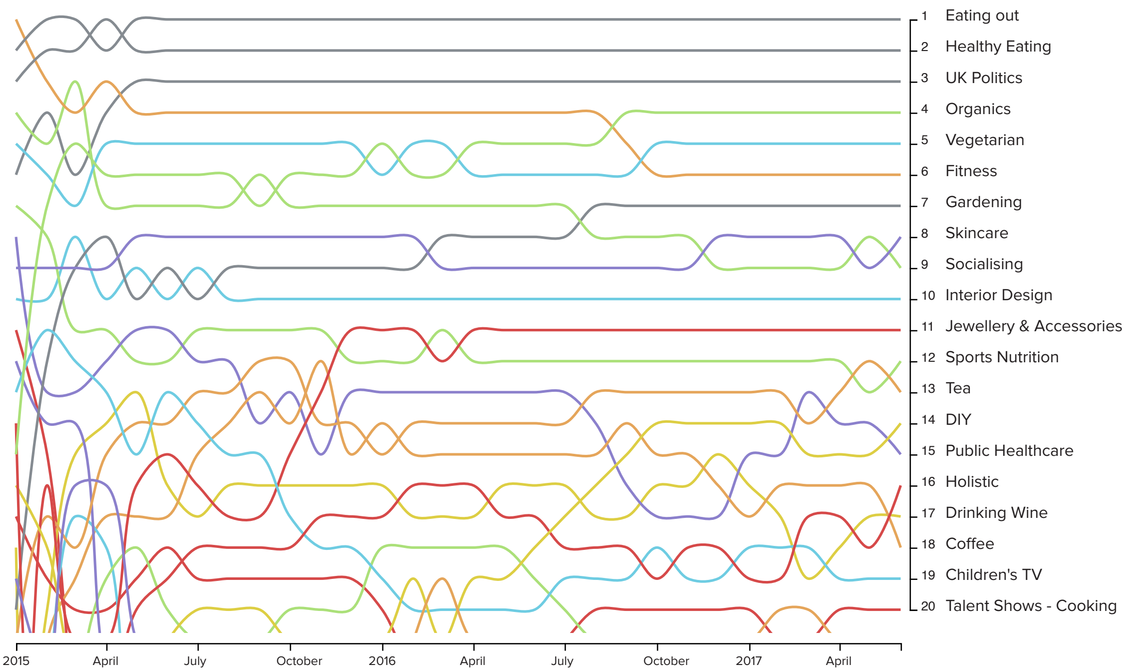
Shopaholic

Whether they're choosing a restaurant or venue for an evening out, starting a health kick or planning an interiors overhaul, this group are all about the brands. Their recent interest in Children's TV, driven by shows such as Miffy and CBeebies Grown-Ups, indicates that many of these consumers have recently started families of their own. Other rising interests include Gardening (with Wilko growing by +23%), Coffee (boosted by chains such as Starbucks, Costa and pod) and Cosmetics, with Bourgois one of their new favourite brands.



Body is a Temple

The Body is a Temple group are defined by their commitment to a healthy, sustainable lifestyle and this is reflected in their top passions. When it comes to Eating Out, they look to broadsheet food supplements, chefs and restaurant critics for advice, particularly admiring Jay Rayner and Ottolenghi. However, they are also inspired by lesser-known names such as health researchers Chantel Martiromo and Kyle J. Norton, and prefer to buy from vegetarian/vegan and socially-conscious brands including Linda McCartney Foods, Innocent Drinks and Meridian Foods. They enjoy supporting organisations, charities and not-for-profits aligned with their key interests, such as The Royal Horticultural Society (Gardening), Animal Aid (Vegetarian) and Mind (Public Healthcare).



What's next?

Customer data, enhanced by social intelligence, has significant power which can be used to retain your most valuable customers, as well as to attract new ones.

INFLUENCER IDENTIFICATION & ENGAGEMENT
Send new products to influential customers for testing and reviews

MEDIA SPEND
Identify media titles and channels that resonate most with audiences

CRM
Use an API to enhance existing datasets and enrich all future customer engagement

CONTENT CREATION
Collaborate with key bloggers to produce content that aligns with customers' passions

BRAND PARTNERSHIPS
Work with relevant brands and event organisers to engage new and emerging audiences

TARGETED ACQUISITION
Pinpoint prospects and speak to them with tailored messaging

Conclusion: What are Starcount's recommendations and solutions?

Loyalty, in the traditional sense, has become an increasingly elusive concept for fashion, beauty and wellbeing brands. Whether they're a makeup-crazy beauty blogger in the Aesthetic mindset or a yoga-practicing vegetarian whose 'Body is a Temple', modern consumers are viewing the market as one, intersecting whole, rather than committing to any single industry or brand. With this in mind, it's time for brands within this market to expand their definition of competition.

Consider a glossy magazine. If a brand's new dress is featured in a magazine's fashion spread, that brand is not only competing with the other retailers whose clothes appeared on the same page; they must also contend for readers' time, attention and money with every brand mentioned across the magazine, taking in beauty products, wellbeing recommendations, fitness fads and spa reviews. And that's only in one magazine. Expand that vision out across the entire fashion, beauty and wellbeing market and you begin to get an idea of the scale of the competition.

Fashion, beauty, fitness and wellbeing are fast-moving industries, and trends in these areas often appear as if from nowhere and disappear just as quickly. To stand out, you not only have to anticipate new styles and crazes before they happen but also must understand which trends will resonate with which audiences – and why.

Though this may seem a daunting task, it's not impossible. The answers lie in consumers' passions, motivations and mindsets – and the right data used in the right way.

Although transaction data is a useful (and often underused) resource for understanding your customers, this data alone can't provide the cross-industry perspective necessary to really get to grips with your place in a complex market. By enhancing first-party data with third-party datasets, such as Starcount's Observatory, brands can add much needed colour to the picture.

Emotional loyalty is important for any brand, but particularly so for this market. From the teenage girl who's begging to get her ears pierced to the young man religiously following routines recommended by The Body Coach, every individual is inspired, influenced and motivated to buy by a vast range of internal and external factors and each has high expectations of the brands with which they engage. It's by getting to know these influences and meeting these expectations and "need states", rather than by investing in flashy technological innovations, that brands will differentiate themselves as market leaders and showcase their true staying power.

About the author

Dr. Clive Humby

Chief Data Scientist

Clive has nearly 40 years' experience in Customer Analytics across 30 markets globally. From creating the first geodemographic system, ACORN, in the 1980s, to developing the use of motivational segmentation in his current role at Starcount, Clive is acknowledged as one of the world's pioneers in the discipline.

With his business partner, Edwina Dunn, he founded global consumer insights businesses, dunnhumby, which revolutionised the use of transaction data for the FMCG industry, before expanding to work with a wide range of consumer-facing businesses, from banking and telecommunications to department stores and online retailers.

He was first to coin the phrase "Data is the New Oil" and is consulted at all levels, from government on the implication of Data Science in the UK Economy through to individual clients where he leads key work streams designed to step change their businesses.

He has elected honorary Fellowships at the Institute for Direct Marketing, the Market Research Society and the Institute of Mathematics and its Applications, and was made a Patron of the Market Research Society in 2013 and Companion of the Operational Research Society in 2014. He has an Honorary Doctorate of Engineering from Sheffield University.

The data team




“Every revolutionary technology brings with it revolutionary change. Businesses and industries that don’t adjust quickly could face catastrophic consequences.”

Forbes

About Starcount

Starcount helps you to understand customers more than ever before by driving greater value from your customer data, and providing an additional enriched lens of insight into customer loyalty. We believe that knowing the customer better than anyone else helps to create a new customer-centric business culture – a focus on relevant and timely customer service and engagement.

Led by the transformational data pioneers, Edwina Dunn & Clive Humby, Starcount has a rich heritage of exploring and capturing current and fast moving data around customer loyalty.

We are not just data scientists and software engineers, but experienced customer storytellers.

Combining a wealth of customer insight with new era digital and social intelligence, we uncover consumers' wider motivations, mindsets and aspirations. This allows us to help you forge deeper emotional connections by reconsidering business strategy, capturing consumers at the perfect moment and nurturing brand love. We can help you find a true and sustainable competitive edge.

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