

## January 2022

### Self Diagnostics - US

“Following nearly two years of heightened attention on personal health, industry players must capitalize on consumers’ top-of-mind and forward-looking health ambitions going into 2022. In order to sustain the category’s pandemic-fueled growth, continued emphasis on self-diagnostic tools that can help monitor traditional illness and become an integral part of virtual ...

### Clean Beauty - US

“In spite of its recent backlash, consumer perception toward clean beauty is largely positive. The majority of consumers view clean products as safer than mainstream, and some even demonstrate a willingness to pay more for clean products. However, as competition in the space increases, claiming to be “clean” will not ...

## December 2021

### Beauty Retailing - US

“Beauty retailing is evolving and becoming more flexible to meet consumers’ needs and shopping preferences. The global health crisis has shifted consumer behavior in many forms. There is an increased interest in wellness-related beauty products, and value offerings. Digital channels now have a more critical role in the shopping journey ...

### Suncare - UK

“The easing of international travel restrictions and surge in staycations have supported the recovery of suncare in 2021. However, the pandemic has highlighted the category’s dependence on overseas holidays and domestic weather conditions. As consumers simplify their BPC routines, the category also faces threats from adjacent categories where NPDP in ...

### Ingredient Trends in Beauty and Personal Care - US

“As a result of today’s ongoing pandemic, people are more focused on their health and safety than ever before, contributing to the increased scrutiny of the ingredients used in beauty and personal care products. Consumers expect brands to be transparent about ingredient sourcing and the production process to ensure products ...

### Fragrance Trends in Beauty - US

“The events of 2020 and 2021 have placed greater importance on mental wellness. The fragrance market is well positioned to offer consumers a mental reprieve from everyday stressors and support new lifestyle needs, whether by bringing joy through evoking certain memories or fueling productivity in work/learn from home environments.

### Contraceptives and Sexual Health - US

“Consumers were sheltered at home for a good portion of 2020, and 2021 was expected to be the year of reemergence. While new variants spread throughout the globe, a number of adults were still cautious about social engagements, and thus, new sexual activity. The market is expected to increase slightly ...

## November 2021

### Approach to Health Management - US

### The BPC Purchase Journey - UK

## Beauty and Personal Care - International

“Personal health is more important than ever before for consumers, but how they approach managing their health is evolving as consumers encounter new health concerns and goals. Adults are taking their learnings from the previous year and applying them to how they care for their health now, with a strong ...

“The BPC purchase journey is becoming less linear and more complicated, with consumers researching brands and products across multiple touch points and buying products from a broader range of channels than ever before. However, consumers are craving an easier path to purchase. As a result, retailers that educate consumers and ...

### The Vitamins, Minerals and Supplements Shopper - US

“The VMS market has been on an upward trajectory for many years, and this was only amplified during the beginning of the pandemic. In 2021 the number of adults who shopped for vitamins, minerals or supplement exclusively in-store decreased, while online shopping for these products increased – and many consumers ...

### Men's Personal Care - US

“The men’s personal care market has experienced slow yet steady growth since 2016, which can largely be attributed to the essential nature of the category and stable market penetration. Although certain elements of men’s personal care routines slid a bit as a result of the COVID-19 pandemic, market sales are ...

### Spa, Salon and In-store Treatments - UK

“Professional beauty services faced a tough year in 2020, witnessing a 40% value decline to £4.8 billion. With venues obligated to close during lockdowns and operating on reduced capacity in between, treatment frequency was impacted. The full reopening of the sector in the second half of 2021 bodes well ...

## October 2021

### In-salon Hair Services - UK

“In-salon hair services have been a major casualty of the COVID-19 outbreak, with value dropping by 45% in 2020 to £4.3 billion. As their customers have learned to live without them at home, hair professionals will have to embrace this change to survive. Create expert tutorials, personalised products, and ...

### Vitamins and Supplements - UK

“Having grown strongly in 2020, sales of VMS have declined in 2021 due to consumers’ lessening health anxiety. Opportunity for growth lies in brands pushing a ‘prevention rather than cure’ approach in order to drive value sales in the long term. Organic products warrant further exploration, aligning well with consumers’ ...

### Fragrances - UK

“The return of social occasions in 2021 provides a positive outlook for fragrances, while the reintroduction of in-store testers will encourage experimentation, seeing the category show some recovery in the second half of the year. Long-term growth will be muted, however, as consumers shift back to old habits, which include ...

### Marketing to Moms - US

“American moms experienced mixed feelings in the past year as they balanced feelings of thankfulness with others such as exhaustion, being overwhelmed and anxiety, as their workload was aggravated during the pandemic. Despite some uncertainty due to the new COVID-19 variant, moms understand it is time for their children to ...

### Digestive Health - US

“Personal health is top-of-mind for US adults amid the continued threat of COVID-19 and new virus variants, and an emphasis on the holistic nature of overall wellbeing has many consumers considering their digestive health more seriously. With gastrointestinal issues on the rise, brands and consumers alike are looking to sources ...

## September 2021

### Beauty Devices - US

“Pandemic circumstance – whether through stay-at-home trends, interest in wellness, or financial concerns – has had both negative and positive implications on the beauty device category. Moving forward, the category’s strong association with wellness, self-care and fun could propel growth, even as we move into recovery. Multifunctional benefits can also ...

### The Natural Health Consumer - US

“Natural health OTC products are uniquely positioned to reach consumers worried about the safety of traditional ingredients who also want to actively treat or prevent certain symptoms or illnesses. The barrier, however, is that many consumers do not know which products or ingredients are right for them, making traditional products ...

## August 2021

### Color Cosmetics - US

“After a steep hit in 2020, the category is beginning to pick back up as interactions outside the home increase and usage of protective face coverings subside. Pent-up demand and a desire for fun is helping to speed recovery.

As we reemerge from the pandemic, expect a larger focus on ...

### Women's Facial Skincare - UK

“Women have embraced multistep skincare routines during the COVID-19 outbreak, with product usage seeing a significant increase and growth in spend robust despite cautious spending habits. Women have prioritised facial skincare over other BPC categories, seeking to improve the health and appearance of the skin in parallel with reduced makeup ...

## July 2021

### Colour Cosmetics - UK

“Colour cosmetics has seen significant disengagement largely due to the pandemic, with return to ‘normal life’ boding well for the category as the return of social occasions will impact usage behaviours. Long-term growth will come from aligning with key consumer trends; the increased focus on skincare presents opportunities not just ...

### Managing Skin Conditions and Allergies - UK

### Bodycare and Deodorant - US

“The bodycare and APDO market has shown slow yet steady growth since 2016, which can partially be attributed to the essential nature of the category and stable market penetration. Shelter-in-place orders enacted during the pandemic caused some consumers to take a relaxed approach to APDO, leading to less frequent usage ...

### Oral Care - UK

## Beauty and Personal Care - International

“The pandemic has had a direct effect on the experience of both allergies and skin conditions. Whilst both segments are needs-driven, lockdowns and the wearing of masks has reduced exposure to pollen – reducing need for OTC hay fever remedies – but face coverings are causing skin irritation and breakouts ...

“The oral care category continued into decline in 2020 as savvy shopping behaviours remained ingrained. Relaxed attitudes towards oral care during long periods of social distancing also impacted value. As consumers adapt to limited access to dental professionals due to social distancing restrictions, brands can support consumers self-treating with virtual ...

### June 2021

#### Facial Skincare - US

“The stress and health concerns brought on by the pandemic had a varied impact on facial skincare routines and product usage. A greater focus on both physical skin health and mental health drove usage of skincare products like treatments, masks and even cleansers – allowing the market to stave off ...

#### Marketing to Millennials - US

“Having just survived their second economic recession in 15 years, Millennials are prioritizing a stable career and financial independence before making any other major life decisions. However, a shift in priorities can be seen for Millennials in their mid-30s. These older Millennials are prioritizing marriage and especially parenthood. Meanwhile, younger ...

#### Shaving and Hair Removal - US

“The shaving and hair removal market is highly price sensitive and was already on a sluggish trajectory before COVID-19, which can partially be attributed to consumers’ relaxed approach to shaving and hair removal routines, leading to less frequent usage of products. Shelter-in-place orders enacted during the pandemic caused consumers to ...

#### Oral Health - US

“The oral care industry fosters innovative product formulas, marketing strategies and tech-based solutions. The market is resonating with consumers now more than ever before, with many adults saying they are investing more time and products into their oral care routines. COVID-19 sparked a newfound comfort in at-home rituals, which further ...

### May 2021

#### Salon & Spa Services Retailing - US

“The pandemic caused an immediate disruption to salons and spas and caused a change in consumers’ needs and routines within the category. This change in needs and behavior will continue moving forward as some consumers have grown more comfortable doing things on their own or receiving fewer treatments. To maintain ...

#### Marketing to Generation Z - US

“Refusing to fall in line with previous generations, Gen Z consumers are adamant about forging their own path. They want to be seen as change makers with unique and creative solutions, who aren’t afraid to take on the world’s biggest issues. However, behind the scenes, increased use of technology and ...

#### Shampoo, Conditioner and Hairstyling Products - US

“The stress, anxiety and health concerns spurred by the pandemic had a varied impact on haircare routines and product usage. A desire to support both mental and hair health saw consumers approach their routines with a

#### Beauty Influencers - US

“COVID-19 has accelerated the divide of the social media landscape. With consumers spending more time at home and online, engagement across social media platforms has increased and the role of beauty influencers has never been stronger. However, the

self-care lens, boosting usage of conditioning products and increasing washing frequency. At the same ...

highly sensitized events over the past year has seen more influencer and ...

### Women's Haircare - UK

“Women’s haircare/styling routines were relaxing even before the pandemic, however, stay-at-home measures have significantly impacted usage behaviours, with a shift in routines set to remain. Styling has seen the greatest setback, however, across all segments brands that have maintained marketing activity and innovated in areas of interest to the ...

## April 2021

### Managing Common Illness - US

“OTC cold, cough, flu and allergy remedies are facing a time of forced adaptation. The illness management market suffered significantly from 2020-21 due to increased illness prevention behaviors adopted by consumers. Simple habits, such as use of hand sanitizer, taking immune system support products and increased hand washing are likely ...

### Disposable Baby Products - US

“The disposable baby products market has struggled in recent years as birthrates continue to decline. Economic uncertainty caused by the COVID-19 outbreak will accelerate this trend, as people tend to wait until they have more financial security before starting or expanding their families. However, adults having children later in life ...

## March 2021

### Men's Haircare and Skincare - UK

“COVID-19’s impact on men’s haircare and skincare was polarised, improving the outlook for skincare, whilst creating a more challenging environment for haircare. Reduced usage of haircare in the short term, with the styling segment seeing particularly subdued demand, will see preferences shift, meaning brands that respond with relevant NPD and ...

### Smoking Cessation and E-cigarettes - UK

“The pandemic has increased smoking and vaping frequencies, despite smokers being more concerned about their respiratory health and the impact that COVID-19 could have on them. In addition, with access to health professionals being hindered by the pandemic, many may have postponed plans to quit. The smoking cessation category also ...

### Intimate Hygiene and Sanitary Protection Products - UK

“Value growth in the category came to a halt in 2020. Whilst the incontinence segment has fuelled growth in recent years, this growth was dampened in 2020, impacted by reduced product usage amongst rare incontinence sufferers. Usage frequency of intimate hygiene declined too, as it became a lower priority with ...

### Nail Color and Care - US

“The nail color and care market is ripe for innovation. While the pandemic has lifted sales, category frustrations and shifting product usage preferences among younger adults challenge continued strong growth. To sustain market momentum, brands must develop products that meet the next generation’s needs and expectations. Easy to use formats ...

### Attitudes towards Cosmetic Procedures - UK

“The COVID-19 outbreak had a direct impact on cosmetic procedures with beauty salons and clinics forced to close for many months during the initial spring and winter lockdowns. While economic uncertainty from the pandemic could translate to a dip in the number of some cosmetic procedures in the near future ...

## February 2021

### Soap, Bath and Shower Products - US

“COVID-19 has put hygiene and wellness at the forefront of consumers’ minds, fueling the demand for soap, bath and shower products, particularly hand sanitizer and soap. The hand sanitizer segment will see continued growth and innovation as the product becomes a hygiene essential. A renewed focus on self-care will also ...

### Diversity in Beauty - UK

“The events of summer 2020, which saw the BLM movement gain momentum, have had reverberations across all industries and not just politics. In BPC, brands and retailers can no longer stay silent on topical issues related to diversity and equality, as many consumers seek to buy from those that align ...

### Diversity and Inclusivity in Beauty - US

“Diversity in beauty is not a marketing tactic – it’s an essential practice and must be a key area of focus among every beauty brand on the market today. It requires a strong commitment from brands to listen and collaborate with members of underserved groups to ensure successful and meaningful ...

### Beauty and Personal Care Retailing - Spain

“Beauty and personal care specialists suffered in 2020 as lockdowns led to temporary store closures across the country. Ecommerce was a clear winner and many specialists have pivoted to multichannel strategies.

### Drug Stores - US

“It’s a challenging time for drug stores. However, with a global pandemic shaping consumer perceptions and behaviors, including influencing more proactivity when it comes to managing their holistic wellbeing, drug stores have never been in a more prime position to shine. The future of the drug store channel involves offering ...

### Children and Health - US

“The children’s health market has strong reach, with nearly three quarters of parents giving their kids OTC pediatric remedies and VMS products, respectively. To that end, market sales have reached more than \$2.5 billion in 2020 and forecasted for steady growth over the next five years. COVID-19 impacted segment ...

### Beauty and Personal Care Retailing - France

“France has experienced two national lockdowns, as well as a nationwide curfew and restrictions on store opening times. This has shifted a large amount of spending on BPC online and forced many specialists to redouble their efforts to develop or accelerate their internet offer. Many have showed real adaptability, particularly ...

### Beauty and Personal Care Retailing - Italy

“The COVID-19 outbreak has been challenging for the beauty and personal care retailing sector in Italy but many of the leading retailers have managed to partly mitigate its impact by ramping up their online

## Beauty and Personal Care - International

Concerns around the pandemic are still particularly high in Spain and retailers will have to improve the in-store experience ...

operations. We expect to see a continued shift towards online which will lead to retailers to ...

### Beauty and Personal Care Retailing - Europe

“With stores deemed non-essential closed in order to curb the spread of COVID-19, many brands and retailers saw their overall sales fall in 2020. There was growth in online sales but this could not offset the loss of trade in bricks-and-mortar outlets. We expect the most successful retailers will be ...

### Beauty and Personal Care Retailing - UK

“Changes in people’s lifestyles as a result of the COVID-19 pandemic and the lockdowns have affected usage habits and led to major shifts in the types of beauty and personal care products consumers are buying. One of the big opportunities is for brands to focus on in-home beauty treatments and ...

### Soap, Bath & Shower Products - UK

“The soap, bath and shower product category has seen record growth in 2020 of an estimated 32.8% to reach £840 million as heightened hygiene concerns drive washing behaviours. The increased rate of hand washing in particular has triggered concerns towards hand health, presenting opportunities for brands in moisturising and ...

## January 2021

### Home Hair Color - US

“In the absence of salons, more consumers turned to at-home solutions, leading to increased usage of home hair color products. While salon closures during lockdown certainly benefited the at-home hair color market in the short-term, some consumers plan to stick with at-home hair color products to curb spending or minimize ...

### Brand Overview: BPC - UK

“The COVID-19 outbreak has led consumers to review their BPC regimes and has put greater emphasis on holistic health and wellbeing. While lockdown periods reduced usage occasions for fragrances and colour cosmetics, consumers spent longer on self-care beauty routines and sought products designed to boost physical and emotional wellness. In ...

### Health Management Trends - US

“Personal health management is evolving as consumers encounter new health concerns, personal safety needs and heightened emotional stressors. Adults are focusing on managing health and wellness goals, with learnings from the previous year. Illness prevention, prioritizing quality time, stress management and recovery are key themes that will support consumers’ desire ...