

## January 2021

### Deodorants: Inc Impact of COVID-19 - UK

“While the category was on a downward trajectory even before the pandemic, lockdowns and social distancing in 2020 saw the decline in value exacerbated. With the UK entering another national lockdown in January 2021, usage will continue to be impacted as people spend more time at home. Despite ongoing price ...

### Suncare: Inc Impact of COVID-19 - UK

“COVID-19 proved to be particularly challenging for suncare, with usage occasions severely impacted. Although demand is expected to resume in the longer term as consumers get back to normality, the pandemic has highlighted the category’s reliance on factors that brands cannot control for repeat purchase. Blurring the line between suncare ...

### Clean Beauty: Incl Impact of COVID-19 - US

“Consumers buy clean products because they believe they are safer than traditional products, have higher quality ingredients and are better for the environment. In light of the COVID-19 pandemic, consumers are looking for ways to protect their health and safety – increasing demand for clean beauty and personal care products ...

## December 2020

### Skin Protection: Incl Impact of COVID-19 - US

“Although consumers are aware of the risks from any sun exposure, most sunscreen users still only use sunscreen on a seasonal or occasional basis. Encouraging consumers to use sunscreen during colder months and indoors is an obvious and constant challenge for sunscreen brands. Positioning sunscreen as an everyday product is ...

### Changing Face of US Healthcare: Incl Impact of COVID-19 - US

“COVID-19 has drastically changed how adults interact with the US healthcare system, as well as what adults expect from healthcare brands. The pandemic has expedited certain trends within the healthcare space, such as the use of virtual care tools for primary care, improved accessibility to mental health resources and retail ...

### Ingredient Trends in Beauty and Personal Care: Incl Impact of COVID-19 - US

“The unprecedented arrival of COVID-19 is accelerating demand for clean products. This will impact not only beauty categories but also highly functional personal care categories, suggesting that brands within these categories will need to tap into clean beauty sooner than they anticipated. A stronger focus on health and safety is ...

## November 2020

### Fragrance Trends in Beauty: Incl Impact of COVID-19 - US

“The fragrance and scented personal care market is in a moment of evolution. Lifestyle changes as a result of COVID-19 put pressure on the fragrance side of the market, while scented personal care thrives due to heightened focus on health and hygiene.

Even before the pandemic, cross-category competition posed a ...

### Beauty Retailing: Incl Impact of COVID-19 - US

“Beauty retail sales were well positioned for growth before COVID-19. However, the pandemic caused immediate disruption to the beauty retail landscape as well as consumers’ lives and consequently, their beauty routines. While segments such as facial skincare will see growth as consumers prioritize it as part of their wellness routines ...

## October 2020

### Beauty Devices, Tools and Accessories: Inc Impact of COVID-19 - UK

“Innovation has driven demand for beauty/grooming devices, tools and accessories in recent years, and the value of the market was further boosted by COVID-19 as consumers embraced DIY alternatives in place of professional treatments. The category’s non-discretionary nature and ties to wellbeing will buoy demand going forward, but consumers ...

### Vitamins, Minerals and Supplements Trends: Incl Impact of COVID-19 - US

“The vitamins, minerals and supplements market will continue to grow despite the economic downturn, due to strong associations in supporting specific areas of wellness, particularly ones trending in the time of COVID-19. While multivitamins continue to show highest usage, consumer demand for more targeted benefits beyond overall wellness continues to ...

### Perceptions of Beauty across Generations: Incl Impact of COVID-19 - US

“The once singular approach to beauty marketing and product development is no longer cutting it for consumers. While preferences and engagement varies by generation, nearly all consumer groups have mixed emotions when it comes to beauty. Consumers recognize that beauty products can provide a self-esteem boost but also feel that ...

### Beauty Online: Inc Impact of COVID-19 - UK

“Although growth in the online beauty market was strong prior to the COVID-19 outbreak, it was slowing as retailers were struggling to increase engagement with the channel. However, 2020 marked a turning point as online demand surged amidst disruption. Whilst a reluctance to visit physical stores and an eroded in-store ...

### Feminine Hygiene and Sanitary Protection Products: Incl Impact of COVID-19 - US

“The feminine hygiene and sanitary protection category is in a moment of growth and evolution. Consumer expectations are extending beyond functional needs, challenging key players to offer eco-friendly packaging, natural/organic materials and ingredient transparency

at affordable price points. At the same time, brands have opportunity to grow user knowledge ...

## September 2020

### Vitamins and Supplements: Incl Impact of COVID-19 - UK

“The pandemic will drive demand for vitamins and supplements as health and wellness become bigger consumer priorities. Immune health in particular is in the spotlight, and brands can look to offering more holistic solutions, considering the links between stress, sleep, nutrition and diet on immunity. The category is expected to ...

### Men's Personal Care: Incl Impact of COVID-19 - US

“Prior to COVID-19's arrival to the United States, the market was expected to continue experiencing slow yet steady growth through 2025. However, with more Americans practicing social distancing and working from home, the market is expected to see slower growth from 2020 than originally estimated, as some men feel less ...

### Vitamins, Minerals and Supplements Consumer: Incl Impact of COVID-19 - US

“Vitamins, minerals and supplements comprise a dynamic market that has seen consistent growth for over a decade. Dedicated VMS consumers consider these products to be a staple to their overall wellbeing, and most will budget for them despite economic hardships. Still, products with high-quality ingredients at the lowest price point ...

### Hand, Body and Footcare: Inc Impact of COVID-19 - UK

“The category has shown strong sales performance in recent years which is expected to continue in 2020, particularly as heightened hygiene behaviours put the focus on skin health. The category also benefits from its perceptions of improving wellbeing and being part of self-care routines, with people turning to skincare routines ...

## Beauty and Personal Care - International

### Black Haircare: Incl Impact of COVID-19 - US

“A majority of Black consumers say that their priorities about their appearance have not changed during the pandemic, which gives insight into their regard for personal style. Hair is foundational to Black consumers' looks, so they will continue to buy haircare products during lean economic times. However, people in a ...

### Gen Z Beauty Consumer: Incl Impact of COVID-19 - US

“The COVID-19 pandemic will have a profound and lasting impact on both Gen Z, and the beauty industry as a whole. Gen Z consumers dictate beauty trends, making them a key audience for brands in the beauty space. The financial impact from the pandemic will disproportionately impact Gen Z, and ...

### Marketing to Moms: Incl Impact of COVID-19 - US

“In 2020, moms are facing unexpected challenges. Between maintaining their family's health and safety through the COVID-19 pandemic and addressing and explaining the various aspects of the Black Lives Matter movement and demonstrations to their children, moms have had their hands full. However, even given all of this, moms still ...

### Women's Facial Skincare: Inc Impact of COVID-19 - UK

“Korean beauty trends have benefited the women's facial skincare category in recent years, with women reducing their use of makeup to show off their hard work. Although routines were streamlined in 2019, 2020 has seen a revival of cleansing and caring routines as heightened hygiene behaviours triggered by the pandemic ...

## Digestive Health: Incl Impact of COVID-19 - US

“During the COVID-19 pandemic, adults are re-evaluating the causes of certain physical health symptoms they experience. The majority of adults attribute an increase in digestive health concerns since the start of COVID-19 to heightened feelings of stress and worry. Consumers will seek ways to gain control of health changes, such ...

## August 2020

### Fragrances: Inc Impact of COVID-19 - UK

“The fragrance category was in decline before the COVID-19 outbreak and has been one of the hardest hit categories in 2020, with a particularly slow recovery forecast. Confined to their homes, consumers have reduced their usage of beauty products deemed non-essential and the category has suffered due to its reliance ...

### Marketing to Gen X: Incl Impact of COVID-19 - US

“Generation Xers crave stability and the reassurance that they will be prepared for the future. Financial concerns make them value-driven shoppers and they look for purchases that offer quality products and affordable pricing rather than a distinctive brand personality. The current recession will only intensify their budget-mindedness as Gen Xers ...

### Color Cosmetics: Incl Impact of COVID-19 - US

“COVID-19 has dramatically impacted the color cosmetic landscape. During the lockdown phase of the pandemic, the need/desire to wear makeup was mitigated as consumers limited their interactions outside of the home. Even as states relax restrictions, the ongoing use of protective face masks creates new challenges and will prolong ...

### Personal Care Consumer: Incl Impact of COVID-19 - US

“The impact of COVID-19 is apparent in every industry across the globe, and personal care is not immune. In fact, certain elements of consumers’ personal care routines (eg shaving, hair washing) slid a bit during lockdown, leading to longer purchase cycles. Despite some struggling segments, the personal care market is ...

## July 2020

### Oral Care: Inc Impact of COVID-19 - UK

“The COVID-19 outbreak will have little overall impact on the value of the oral care category which was already in decline before the pandemic. While a recession will drive savvy shopping behaviours further in the short term, consumers were already streamlining their routines, buying on promotion or switching to own-label ...

### Colour Cosmetics: Inc Impact of COVID-19 - UK

“Makeup fatigue has set into colour cosmetics, with women cutting down on spend even before the COVID-19 pandemic. Women are less engaged with new launches despite increased NPDP, whilst sustainability concerns as well as trends favouring natural looks are also driving down value. The pandemic will only accelerate this as ...

### Marketing to Millennials: Incl Impact of COVID-19 - US

### Natural and Organic Toiletries: Inc Impact of COVID-19 - UK

## Beauty and Personal Care - International

“Fate has not favored Millennials – hitting them first with the Great Recession as the oldest were starting careers and again with a pandemic just as some were finding stability. Most want the consistency of homeownership and employment benefits, but those goals are out of reach for some. Nevertheless, many ...

“Demand for natural/organic BPC has been boosted by the clean movement, which will be accelerated by the COVID-19 outbreak. As consumers are taking more notice of BPC ingredients because of concerns around safety, brands have responded with an emphasis on free-from claims. However, the COVID-19 outbreak will leave health-conscious ...

### Bodycare and Deodorant: Incl Impact of COVID-19 - US

“Prior to COVID-19’s arrival to the United States, the bodycare and deodorant market was expected to experience higher levels of growth in 2020 than in previous years, largely due to consumers’ elevated interest in natural and premium deodorant offerings. However, with more Americans practicing social distancing and working from home ...

## June 2020

### Facial Skincare and Anti-aging: Incl Impact of COVID-19 - US

“As the majority of Americans limit their interactions outside the home due to the COVID-19 pandemic, facial skincare routines become less of a priority, as consumers shift focus to their physical and mental health. In addition, economic instability leads to more conservative category spending. As a result, the market is ...

### Oral Health: Incl Impact of COVID-19 - US

“During the COVID-19 pandemic, job and income loss have caused consumers to limit discretionary spending. Certain aspects of personal care are less important during shelter-in-place and therefore deprioritized. Maintaining oral care is considered an essential of daily health and hygiene, supporting consistent product usage throughout the outbreak and beyond. Tapping ...

### Marketing to Gen Z: Incl Impact of COVID-19 - US

“Life was already stressful for Gen Z, but the impact of the COVID-19 pandemic will only amplify the stress and uncertainty that teens and young adults face. As they learn to define themselves as individuals and embark on new lives as independent adults, disruptions to high school and postsecondary education ...

### Beauty Influencers and Educators: Incl Impact of COVID-19 - UK

“In search of impartial advice without pressure to purchase, BPC consumers are turning to the online channel for beauty and grooming advice and expertise. The COVID-19 outbreak will accelerate this shift as retailers placed their online services front and centre during the lockdown. Going forward, stores will continue to play ...

## May 2020

### Cough, Cold, Flu and Allergy Remedies: Incl Impact of COVID-19 - US

### Shaving and Hair Removal: Incl Impact of COVID-19 - US

## Beauty and Personal Care - International

"The COVID-19 pandemic has amplified the importance of illness management. Methods practiced during the outbreak are likely to hold lasting impact, such as staying home when sick and increasing illness prevention measures such as washing hands and using hand sanitizer. Americans' renewed focus on health and safety emphasizes the role ...

"Over the last few years, consumers, particularly younger adults, have been taking a relaxed approach to their shaving and hair removal routines, contributing to the market's sluggish sales growth. With more Americans practicing social distancing and working from home due to shelter-in-place orders, consumers will take an even more ...

### Shaving and Hair Removal: Inc Impact of COVID-19 - UK

"The COVID-19 outbreak will accelerate the price-driven nature of this sector, meaning that a market that was already expected to be in decline will face an even greater short-term challenge. However, consumers do show interest in added-value propositions, such as skincare benefits and personalisation, indicating NPD opportunities for brands in ...

### Gifts in Beauty & Personal Care: Inc Impact of COVID-19 - UK

"The COVID-19 outbreak will impact buying behaviours when it comes to gifts in BPC, as the sector becomes a low priority in the short term. There will be a shift to online buying, and the prestige sectors in particular will take longer to recover as household finances are squeezed. However ...

### Shampoo, Conditioner and Hairstyling Products: Incl Impact of COVID-19 - US

"As the majority of Americans shelter-in-place and limit their interactions outside the home due to the COVID-19 pandemic, hair washing and styling becomes less of a priority, leading to less frequent washing and longer purchase cycles. As a result, the haircare market is expected to take a short-term hit in ...

## March 2020

### Women's Haircare - UK

"Women's haircare continues on a downward trajectory when it comes to value sales, with the styling segment in particular suffering losses. Hair health is paramount to women, impacting haircare behaviours through a reduction in frequency of washing and styling hair. Whilst 'clean' and natural claims continue to be important, sustainability ...

### Men's Haircare and Skincare - UK

"A continued decline in value sales of men's haircare and skincare is creating a challenging environment for both brands and retailers. Savvy shopping habits are putting downward pressure on prices in both categories, and men still favour a basic routine. Opportunities to reinstate growth in the market lie in personalisation ...

### Disposable Baby Products - US

"After experiencing plummeting sales in 2017, the disposable baby products market continues to stabilize, reaching \$8 billion in total 2019 retail sales, an increase of 1.7% from 2018-19. However, market sales are expected to slow due to declining birth rates, parents' value-driven approach to the category, as well as ...

### Drug Stores - US

"US drug store revenues will exceed \$300 billion this year. While the channel has consistently posted gains, the pace of growth is projected to slow down in light of increased competition from outside the channel and a shifting consumer preference toward generic drugs over name brands. With new partnerships and new ...

## February 2020

### Feminine Hygiene and Sanitary Protection Products - UK

"The feminine hygiene and sanitary protection category has been steadily growing in recent years, bolstered by strong sales in the incontinence sector and a beauty revamp of the feminine hygiene sector. The sanitary protection sector, however, is dampening growth; signalling that brands must do more to respond to growing environmental ...

### Beauty Influencers - US

"Beauty influencers and the power of social media continue to shape the beauty industry. While influencer collaborations with brands continue to resonate with consumers, issues surrounding trust and credibility could signal future challenges. To alleviate these concerns, brands and influencers must adopt a more realistic and relatable approach to the ...

### Beauty and Personal Care Retailing - Europe

"Growth in the beauty and personal care industry is expected to continue unabated in 2020, in part boosted by technological advancements supporting tailored products and experiences. We anticipate that the most successful retailers will be those that ensure they stay in tune with what consumers want, especially when it comes ...

## January 2020

### Health Management Trends - US

"The start of a New Year and new decade has people inspired and setting numerous goals to improve their health and wellbeing. While setting goals is the first step, it's also the easiest. It's keeping the motivation throughout the entire year, and even decade, that most people need help with ...

### Beauty and Personal Care Retailing - France

### The Green BPC Consumer - UK

"Demand for green BPC is strong, and brands are responding with increased NPDP, but there is still room for growth, as consumers still show a preference for regular beauty and grooming products. More education is needed, and proof that products are more sustainable than others on the market may be ...

### Soap, Bath and Shower Products - US

"Due to the functional nature of the category, the soap, bath, and shower products market continues to experience slow, yet steady growth. Growth is being tempered by struggling bar soap sales but gains in liquid and bath products are driving the category forward."

- Olivia Guinaugh, Home & Personal Care Analyst

### Beauty and Personal Care Retailing - Italy

"Consumer spending on beauty and personal care in Italy has been rising for the past six years but has seen a slowdown in the past two years, with retail sales stagnating in 2018. Nevertheless, the leading specialists have continued to outperform the market, and although Italians appear to remain sensitive ...

### Beauty and Personal Care Retailing - Spain



## Beauty and Personal Care - International

“French beauty and personal care specialists are operating in a tough environment – demand is weak and competition is growing from online. Retailers are investing in in-store tech and innovations that blend with the digital world, increasing their omnichannel integration. Services that have the human touch are also helping to ...

### Beauty and Personal Care Retailing - UK

“As the value of the beauty and personal care sector has fallen into decline, with even beauty seeing negative growth in 2019, retailers need to ensure that they focus on the growth opportunities presented by two key demographics – Gen Z and older women aged 55+. Teens are increasingly being ...

### Nail Color and Care - US

“To prevent the nail color and care market from further declines, brands in this space must alleviate concerns over chemicals and nail damage. The growing shift in preferences from nail polish to alternatives demonstrates opportunities for growth. Brands that emphasize nail health and natural formulas can potentially remedy losses and ...

“Beauty and personal care specialists in Spain have been focusing on strengthening their ecommerce presence, but they continue to face strong competition from non-specialist retailers across the board. They are turning their attention back to their stores to improve the multichannel shopping experience, hoping to entice consumers with new tech ...

### Hair Colourants - UK

“Demand for hair colourants has been subdued by the pro-ageing movement, with older consumers opting to embrace their greys rather than cover them. Young consumers have remained engaged but favour lower-value temporary products, suggesting that brands need to find ways to encourage them to spend more. Personalisation will be crucial ...

### Brand Overview: BPC - UK

“Contemporary consumers are sensitive to the idea of glamour, exclusivity and indulgence, suggesting that BPC products that balance functionality with intangible perceptions of luxury have the potential to resonate widely among consumers. However, ethics have also come into play, and consumers are putting the BPC industry under scrutiny. Increasingly, consumers ...