

## Personal Care Consumer: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“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.”

– **Olivia Guinaugh, Home & Personal Care Analyst**

This report looks at the following areas:

Despite some struggling segments, the personal care market is expected to remain relatively stable in the coming year, as consumers rely on many personal care products to maintain their personal hygiene. Additionally, a continued focus on self-care and the growing existence of “clean” options in highly functional personal care categories will further support longer-term sales growth.

- **The impact of COVID-19 on consumer behavior and the personal care market**
- **How the market will fare in a post-COVID-19 down economy**
- **Consumers’ personal care behaviors and usage of products**
- **Launch activity and consumer interest in product innovations**

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Personal Care Consumer: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

- What you need to know
- Key issues covered in this Report
- Definition

### Executive Summary

- Top takeaways
- Market overview
  - Figure 1: Consumer spending on personal care, at current prices, 2010-25
- Impact of COVID-19 on personal care
  - Figure 2: Short, medium and long term impact of COVID-19 on personal care, July 2020
- Opportunities and challenges
- Product usage is driven by more than just basic hygiene needs
  - Figure 3: Select products purchased and select personal care routines, May 2020
- Ease-of-use must be prioritized, but don't underestimate the power of scent
  - Figure 4: Select purchase influencers and personal care routine, any rank (net), May 2020
- The growing need for self-care presents opportunities
  - Figure 5: Select personal care routine and behavior amid pandemic, May 2020
- Sustainability is at the forefront of young adults' minds
  - Figure 6: More loyal to brands/retailers that are environmentally responsible, by age, May 2020
  - Figure 7: Procter & Gamble's new packaging for Old Spice and Secret brands and Unilever's new packaging for Dove
- The adoption of synthetic ingredients will speed up due to COVID-19
- Personal care routines should also be immunity-boosting
  - Figure 8: Instagram post about Kaia Naturals' Turmeric Detox Effervescent Hot Bath

### The Market – What You Need to Know

- COVID-19 impacts personal care routines, both positively and negatively
- Expect stable sales and bans on plastic; tweakments change product needs

### Market Perspective

- COVID-19 impacts personal care routines, both positively and negatively
  - Figure 9: Personal care behaviors amid pandemic, May 2020
- Economic instability leads some adults to spend less on personal care
- Younger adults are spending more time on routines and ingredient research
  - Figure 10: Instagram posts about DIY beauty hacks
  - Figure 11: Select personal care behaviors amid pandemic, by age, May 2020

### Market Factors

- Personal care spending is expected to stay afloat amid recession
  - Figure 12: Consumer spending on personal care, at current prices, 2010-25

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Personal Care Consumer: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Bans on plastic are on the horizon
- COVID-19 is reinforcing the importance of sustainability
- Growing popularity of "tweakments" will change BPC product needs

## Key Players – What You Need to Know

- Hair color, hand products and self-care rituals benefit from lockdown
- Adults feel less obligated to shave and wash hair when at home
- Expect more clean, health-boosting claims and greater acceptance of synthetics

## What's Working

- Salon closures give at-home hair color a boost
  - Figure 13: Instagram post from Madison Reed, March 2020
  - Figure 14: Madison Reed Color Therapy
- Increased focus on hand hygiene benefits sanitizer and soap markets
- Legacy hand sanitizer brands see gains but face increased competition
  - Figure 15: Multi-outlet sales of Germ X and Purell hand sanitizers, rolling 52 weeks 2019 and 2020
  - Figure 16: Instagram posts about new hand sanitizers
- Consumers find comfort in personal care rituals
  - Figure 17: The Body Shop's Care Packages
- Protective face masks aren't the only masks adults need in today's COVID-19 world
  - Figure 18: Instagram post of Freeman's Destress Jelly Mask + Cleanser
  - Figure 19: Instagram posts of Coco & Eve's Bounce Body Masque and Lavanila's The Healthy Underarm Detox Mask
  - Figure 20: Instagram posts of hand masks

## What's Struggling

- Lockdown leads to longer purchase cycles for haircare market
- Adults take an even more relaxed approach to hair removal in lockdown
  - Figure 21: Instagram post with #covidbeard

## What's Next

- Clean beauty will advance to functional categories
  - Figure 22: Instagram posts about Gillette Venus's Pure Shaving Cream and Surface Deep's Anti-Odorant
- Expect growing acceptance of synthetic natural ingredients
- Who is doing this well
  - Figure 23: Instagram posts from Syrene
- Immunity-boosting personal care products are set to flourish
  - Figure 24: Instagram posts about immunity-boosting bath products

## The Consumer – What You Need to Know

- Usage is driven by more than hygiene; most adults buy in-store
- Ease-of-use must be prioritized, but don't forget about scent
- Is personal care stealing beauty's thunder?
- Adults will continue to seek "clean" products for safety reasons

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Personal Care Consumer: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Strong interest levels in innovations indicate opportunities

## Products Purchased and Channel Usage

Usage of products is driven by more than basic hygiene needs

Figure 25: Instagram posts from Moon

Figure 26: Products purchased, May 2020

Older adults stick to the staples

Eco-minimalism may play a role in younger adults' lower purchase rates

Figure 27: Products purchased, by age, May 2020

Women drive category growth

Figure 28: Usage of select personal care products, by gender, May 2020

Product substitution impacts usage among Black adults

Figure 29: Usage of select personal care products, by race and Hispanic origin, May 2020

Most personal care products are purchased in-store...

Figure 30: Purchase channel, by product type, May 2020

...but shelter-in-place orders have accelerated the adoption of online shopping

Figure 31: Instagram post from Grove Collaborative

Age highlights differences in how consumers shop

Figure 32: Purchase channel by select product type, by age, May 2020

## Purchase Influencers

Ease-of-use must be prioritized, but don't forget about scent

Figure 33: Purchase influencers, by rank, May 2020

Figure 34: Instagram post of Coconut Matter's Mood deodorants

Hierarchy of benefits differs between genders

Figure 35: Select purchase influencers, any rank (net), by gender, May 2020

Natural claims are key drivers for Black and Hispanic adults

Figure 36: Select purchase influencers, any rank (net), by race and Hispanic origin, May 2020

Figure 37: Instagram posts from BLK + GRN

## Personal Care Routines

Is personal care stealing beauty's thunder?

Figure 38: Personal care routine, May 2020

Make every day routines more exciting

Figure 39: Olay Body Masks

Figure 40: Leg Mask by Nair

Personal care and self-care continue to become intertwined

There are opportunities to better reach mature, functionally-driven adults

Figure 41: Select personal care routines, by age, May 2020

Figure 42: Instagram posts from Better Not Younger

Women aren't the only ones who care about their appearance

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Personal Care Consumer: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 43: Select personal care routines, by gender, May 2020

Figure 44: Every Man Jack Deodorants

## Shopping Behaviors

Adults will continue to seek "clean" products for safety reasons

Figure 45: Shopping behaviors, May 2020

Having sustainability strategies is key for reaching young adults

Figure 46: Select shopping behaviors, by age, May 2020

Figure 47: Instagram post from Dove

Black and Hispanic adults want products they trust to be safe

Figure 48: Look for clean labeled products, by race and Hispanic origin, May 2020

## Usage and Interest in Product Innovations

Strong interest levels in innovations indicate opportunities

Adults want sustainable solutions

Figure 49: Trial and interest in product innovations, May 2020

Figure 50: Procter & Gamble's new packaging for Old Spice and Secret deodorant brands

Young adults are interested in gender-neutral products

Figure 51: BiC Made For YOU Razor and Schmidt's Here+Now Natural Deodorant

Figure 52: Trial and interest in product innovations, any future interest (net), by age, May 2020

## Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)