

# The Beauty & Personal Care Consumer Post-COVID-19

---

A look on how the pandemic has impacted the beauty and personal care habits and what can we expect from the future.



**Amanda Caridad**  
Senior Analyst Beauty & Personal Care  
September 2020

# Table of contents

1

SAFETY AND HYGIENE

2

CONVENIENCE & PERSONALIZATION

3

EMOTIONAL WELLNESS ON TOP

4

CLEAN BEAUTY

5

WHAT WE THINK

## Beauty and Personal Care have been redefined by COVID-19



*“Brazilians were always worried about their **hygiene habits**. It’s no surprise that these habits will **persist after the pandemic outbreak**. Increasingly conscious about the importance of their **mental wellness**, they will look at ways to find **balance in this area**, an attribute that can be offered by beauty and personal care products. Even though beauty salons and spas were reopened, the fear of being exposed to the virus in addition to the financial impact of the pandemic will lead to a **higher preference for DIY beauty treatments at home**. Moreover, the habits acquired during the social isolation will lead to the change on how **brands and consumers communicate**.”*

**Naira Sato, Research Director Brazil**

# 2020

The year of home-based lifestyles.

The year of digital lifestyles.

The year we learned how to cook, and how to cut our own hair.

The year we became cleaning experts.

The year we linked hygiene with health.

The year we became more familiar with diet-related diseases.

The year of emotional and financial stress.

The year we renewed our trust in science.

The year of people first, then planet.

The year we embraced single-use plastics.

The year convenience shifted to mean safety.

The year we became obsessed with value.

The year we were challenged to reconsider how we want to live our lives and what changes we need to make to get there.





## SAFETY AND HYGIENE

The COVID-19 pandemic has put a spotlight on the importance of hygiene-related behaviors to stay healthy, such as keeping our bodies and homes clean.

While consumers are back to social interactions and returning to physical stores, retailers and beauty salons/spas will need to adapt offering new experiences.

# Hygiene and safety concerns will lead to new ways of product experimentation

PRE-COVID-19

17%

of Brazilians<sup>1</sup> declared that they only buy facial skincare products after trying samples for a while.

DURING COVID-19

15%

of Brazilian<sup>2</sup> male consumers declared that ads on social medias inspire them to test new beauty and personal care products.

AFTER COVID-19

14%

of Brazilians<sup>3</sup> are looking forward to use in-store testers after the pandemic.

Base: <sup>1</sup> 1,500 internet users aged 16+, February 2020; <sup>2</sup> 735 male internet users aged 16+, May 2020; <sup>3</sup> 1,000 internet users aged 16+, July 2020

Source: Lightspeed/Mintel

MINTEL

# Whether online or at physical stores, brands will tap into technology to offer safe experiences



Shiseido's new concept store features virtual diagnostic tools alongside touch-free sample dispensers for skincare and makeup (Japan).



In collaboration with the start-up Noar, Natura launched the “digital scent” to enable the safe experimentation while using a facial mask (Brazil).



ShakeUp Cosmetics enables “Find My Shade” AR tool to help consumers find the correct shade of their foundation on Instagram and website (UK).



## CONVENIENCE & PERSONALIZATION

The pandemic changed the rhythm of life. Consumers were faced with new challenges, such as managing their home-centered lives more efficiently.

Some consumers will adopt a more simplistic routine, with less steps and complexity. They will demand products that help them take care of their appearance effortlessly.





# Consumers will adopt a less complex beauty and grooming routine

PRE-COVID-19

47%

of Brazilian<sup>1</sup> consumers say they always use hair styling products.

DURING COVID-19

49%

of Brazilian<sup>2</sup> consumers say they are keeping their hair natural (eg not dyeing, not straightening hair).

AFTER COVID-19

30%

of Brazilian<sup>2</sup> consumers say that they intend to resume their usual beauty/grooming routine.

Base: <sup>1</sup> 1,500 internet users aged 16+, July 2019; <sup>2</sup> 1,000 internet users aged 16+, July 2020

Source: Lightspeed/Mintel



# Brands can offer solutions to at-home self-care rituals

Based on consumer's desire to a less complex beauty/grooming routine, brands can connect the importance of taking care of appearance, offering convenient solutions and easy-to-follow tutorials.



Pantene offers tips and tutorials to help consumers on their haircare routines on social medias (Brazil).



Koleston Toque de Cor is a conditioner treatment that helps revive hair color (Brazil).



GE Beauty haircare line invites consumers to create their own self-care ritual while at home (Brazil).

## EMOTIONAL WELLNESS ON TOP

Uncertainty over the economy, work stability, personal finances, exposure to the virus, as well as diet, routine and relationship changes have put Brazilians on high alert.

Brands that explore wellness through services or products will resonate among consumers.





# Wellbeing messaging will resonate in a post-COVID-19 era

PRE-COVID-19

22%

of Brazilian<sup>1</sup> consumers declare they feel pressure to always look at their best.

DURING COVID-19

36%

of Brazilian<sup>2</sup> consumers declare they are interested in beauty and personal care products that help them reduce anxiety/stress.

AFTER COVID-19

17%

of Brazilian<sup>2</sup> consumers say they are looking forward to wearing makeup/coverage products to go out.

Base: <sup>1</sup> 1,500 internet users aged 16+, July 2019; <sup>2</sup> 1,000 internet users aged 16+, July 2020

Source: Lightspeed/Mintel

MINTEL



# Brands will need to stay on top of changing consumer concerns



Amazon has unveiled Halo, its own wristband, to track activity, body fat, sleep and emotional state (US).



Morphe has expanded its multi-brand product selection to new categories: skincare, haircare, and 'self-care' (US).



Boots Life+Be budget wellbeing range offers skincare products with 4 options of fragrances representing different states of mindfulness (UK).

# Tap into emotions with functional fragrance



Dirty Grass from Heretic Parfum contains full spectrum CBD oil in combination with other soothing ingredients to offer a prolonged wellness experience (US).



Xyrena Cloud No.9 is a *parfum de sommeil* (sleep perfume) with calming properties designed for bedtime to promote better sleep (US).

Cannabis and hemp are the latest in a new group of notes making their way into both home and fine fragrance. Many of the earlier offerings appeared to be just riding the wave and jumping on the trend, but **recent launches are tapping into the functional side of CBD (cannabidiol)** and how it can help with stress and anxiety.

**Adaptogens are another class of ingredients shown to improve mood** and serve other functions such as mental stimulation. Many essential oils can also have adaptogenic qualities making them ideal for use in fragrances.

The background of the slide is a flat-lay photograph. It features a light pink or peach-colored surface. In the top left corner, there is a large, vibrant green monstera leaf. In the bottom right corner, there is another monstera leaf and a small, brown pinecone. In the center-right area, there is a dark amber glass bottle with a white dropper cap, which is a common packaging for clean beauty products like serums or oils.

## CLEAN BEAUTY

Sustainability has become one of the most discussed topics during the pandemic, and this impacted on consumers' purchasing priorities and habits.

Clean beauty will evolve to “just beauty” with the sense of transparency, safety and health being mandatory for consumers.

# Brazilians demonstrate higher sense of localism and ethical consumption

PRE-COVID-19

37%

of Brazilians<sup>1</sup> declared interest for beauty and personal care products sustainably sourced (ie in an environmentally and ethically responsible way).

DURING COVID-19

16%

of Brazilians<sup>2</sup> are interested in beauty and personal care products locally manufactured (eg in their country, local region).

Base: 1,000 internet users aged 16+, December 2019, July 2020

Source: Lightspeed/Mintel



# Different brands already embrace these new sustainability drivers



UpCircle body care products, including its body scrub, use recycled coffee ground from coffee stores around London (UK).



The Body Shop developed shower gels made with upcycled fruits in collaboration with food and drink industries (Brazil).



Nesh offers vegan rinse-off products in solid bars made with 100% natural ingredients (Brazil).

# What we think

## Safety will be an important driver

While consumers are back to out-of-home interactions, they will continue assiduous about hygiene. Brands can offer safety based on new ways of experiences at both online and physical stores.

## Wellness evolves as a new attribute

Consumers are conscious about the importance of a balanced and healthy lifestyle and its impact on their mental wellness. Brands have the opportunity to build a closer connection delivering this new valued attribute.

## Less complex rituals

Brazilians demonstrate the intention on resuming their usual beauty/grooming routine, in order to adapt to this new reality imposed by the pandemic. They will also look at brands that help them to express their identity.

## Ethical and sustainability evolve

More than taking a critical purchasing attitude towards ingredients and packaging, consumers will evaluate how brands embrace localism and take a pro-active approach on protecting the environment.

## Meet the Expert



**Amanda Caridad**

Senior Analyst Beauty & Personal Care

[acaridad@mintel.com](mailto:acaridad@mintel.com)

## The world's leading market intelligence agency

Our expert analysis of the highest quality data and market research will help you grow your business.



**Experts in what  
consumers want  
and why**

