

Beauty beyond COVID-19

As beauty begins its recovery, consumers adopt “normal” routines. What beauty practices developed during the pandemic will endure?

As color cosmetics make a comeback, consumers are looking for more.



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CONSUMER BEHAVIOR

Shifts in routines and shopping behaviors reveal a need for beauty brands to re-evaluate the way they communicate with consumers.

Brands and retailers that alter strategies and evolve with changing needs will profit.

Be ready to pivot

The looming threat of virus variants signifies an ongoing need for change within the beauty retail and salon sectors. Pandemic-related behavior shifts makes it imperative that beauty brands and retailers adapt.

57%

of US consumers are trying to limit the amount of time they spend in stores as a result of the pandemic

48%

of US consumers are shopping more online due to COVID-19

29%

of consumers are somewhat comfortable with getting a beauty treatment (eg haircut, manicure), while only 19% feel very comfortable



Provide flexible retail and trial options

- Retail has changed significantly since the start of the pandemic with store closures and curbside pickup to an explosion in ecommerce
- Moving forward, consumers will continue to expect diverse shopping options
- Try-before-you-buy and sampling will grow in importance
- In the US, 22% of consumers believe it is crucial for retailers to allow them to try without a charge before buying
- Budgetary constraints will drive a need for flexible retail options that cater to comfort levels
- Brands that **diversify** will appeal to consumers today and in the future

44%

of US consumers feel that it is [important for retailers to have physical stores and websites](#)

Base: US: 1,985 internet users aged 18+ who have shopped in-store for listed products or have shopped online in the past 12 months

Source: Lightspeed/Mintel

Redefine beauty sampling

The pandemic heightened existent sampling and sanitation concerns. It also highlighted the barriers to ecommerce shopping. This creates opportunities for brands to innovate and alter product sampling to fit new needs.



67%

of US consumers will not buy fragrance or scented products online if they have not smelled them in person



50%

of US skincare consumers believe that the most important skincare product claim is that it is proven to be effective



29%

of US makeup wearers stopped trying on makeup in store during the pandemic

Base: US: 1,710 internet users aged 18+ who use any fragrance and/or scented personal care products; 1,536 internet users aged 18+ who use certain skincare products at home; 865 female internet users aged 18+ who normally use makeup products and bought makeup this past year

Source: Lightspeed/Mintel



CATEGORY & PRODUCT TRENDS

The pandemic affected each category within the beauty industry differently. Permanent shifts in behavior highlight opportunities to connect with consumers and increase profits.

Mintel recommends

01 **Bring functional benefits to the forefront**

Stress and anxiety will endure, impacting routines

Functional benefits from beauty products will attract weary consumers looking for relief

02 **Highlight cost-saving benefits**

Consumers were forced to keep up beauty routines at home

Impressed with their new skills, many will adopt at-home more permanently

Brands can bridge the gap with cost-effective, at-home solutions

03 **Evolve with the consumer**

A home-focused lifestyle has altered beauty routines

Hybrid products and those with a wellness focus will resonate today and in the future

Change the mood with a spritz



Modify your mood

[This Works Stress Check Mood Manager](#) is motion activated to help modify mood, reduce feelings of stress and restore a sense of calm to an agitated mind.



Relax in a state of wellbeing

[Initio Parfums The Hedonist Collection Musk Therapy Extrait de Parfum](#) is described as a magical mood enhancer, which paves the way to relaxation and a state of wellbeing.



Energize and uplift

[Lina Hanson Satori Perfume Oil](#) delivers a refreshing and uplifting effect. It is said to be both a confidence booster as well as an energizer.

Tap into playfulness trends with press-on nails

- 36% of US women state that they are now [more comfortable doing things themselves](#), and 23% said that they are [buying more products to replace services](#) that they used to get done in person
- In the US, 32% of consumers aged 18-24 have [used press-on nails over the past year](#)
- Affordable alternatives to salon services will continue to resonate at home without sacrificing appearance



[Glamnetic press-on nails feature up to 3 weeks of wear](#)

Fuel creativity outside of the salon



Salon results

[Dashing Diva Gloss Ultra Shine Gel Palette](#) utilizes patent-pending technology made with real gel. It is said to provide salon gel effects with no UV dry time, no soak off removal and chip-resistant shine that lasts for up to 14 days.



Extensions at home

[Bluesky Builder Gel Nail Extension Kit](#) is said to build beautiful nail extensions, while creating a healthy-looking overlay on natural nails or extension tips.



Fit before you invest

[Crowned and Polished Sizing Kit](#) helps consumers find their perfect sized nails prior to purchasing an actual set of the luxury press-on nails, ensuring product satisfaction.

Focus on routines to drive normalcy and loyalty

- The use of skincare grew significantly during the pandemic as consumers looked to their routines for a sense of normalcy
- In the US, 42% of consumers state that they have [used certain skincare products more often](#) compared to before the pandemic **to help them relax**
- The importance of self-care has become increasingly evident
- Brands that simplify routines and offer easy-to-use tools will appeal to consumers looking to create a sense of wellbeing at home



[Biossance Nighttime Timeless Skin Routine](#)

Emulate professional skin icing with at-home tools



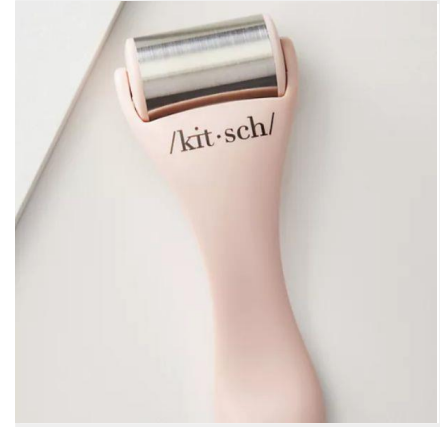
Next-level facial

[Fraîcheur Ice Globes](#) are made of Borosilicate glass containing cold liquid and are intended to tighten the skin and encourage lymphatic drainage.



Radiate with ice

[Contour Cube](#) is designed to contour and sculpt the face, tighten pores, depuff eye bags, improve serum absorption and add radiance to the skin.



Roll it out

[KITSCH Cleanse Ritual Ice Roller](#) delivers a relaxing facial massage that helps calm inflammation and increase blood circulation. It can also be used to depuff your under-eye area for a more restful look.

Meet changing cosmetic needs with hybrid formulations



[Poiret Teint de Soie restores skins energy while covering blemishes](#)

- The color cosmetic category was impacted particularly hard by the pandemic
- Shifting focus to skincare drove interest in more hybrid formulations with skin benefits
- In the US, 58% of female makeup wearers describe their [makeup routine as enhancing their natural look](#), while only 11% describe it as transforming their appearance
- The future of work remains flexible and consumers will look for cosmetics that are also flexible

Communicate the added benefits of a singular product



Supercharged foundation
[Uoma's Flawless IRL Skin Perfecting Foundation](#) is described as a foundation, serum, moisturizer and beauty balm that is both lightweight and buildable.



Color and care
[Ciaté Velvet Cloud Lip Powder's](#) hybrid formulation delivers a sheer satin-finish color while nourishing lips with squalane, raspberry seed oil and hyaluronic acid.



Half makeup, half care
[P.Lab Beauty My Mascara](#) strengthens and stimulates the growth of lashes with purple clover and green soybeans while bringing volume and definition to lashes.

A LOOK AHEAD TO SPRING/SUMMER 2022: SEASONAL MAKEUP TRENDS

Protective makeup complexifies, virtual makeup expands outside of the digital world, and nail polish brands target younger men eager to embrace self-expression.

Mintel recommends

Strengthen protective claims on hybrid makeup

As consumers' mindset has evolved towards even more protection against external aggressors, protective claims will **gain in importance and become more complex and all-encompassing.**

Explore digital makeup further

Makeup catering for consumers absorbed in digital platforms is set to **expand outside of social media and into real life and fashion editorials.**

Target younger men with nail polish

There is opportunity to sell makeup for men, beyond functional cosmetic products, with nail polish.

Nail polish will allow for self-expression and cultural referencing and will be worn **as a fashion accessory rather than a makeup product.**

Develop products to shield against external stressors

Air purity has become a concern for consumers who are growing aware of the impact of all pollution - outdoors and indoors - on their skin.

IN THE UK

41%

of female facial skincare users consider [pollution](#) as one of the top three factors impacting the appearance of facial skin

IN CHINA

38%

of women with skin issues cited [environmental pollution](#) as a cause of this

IN FRANCE

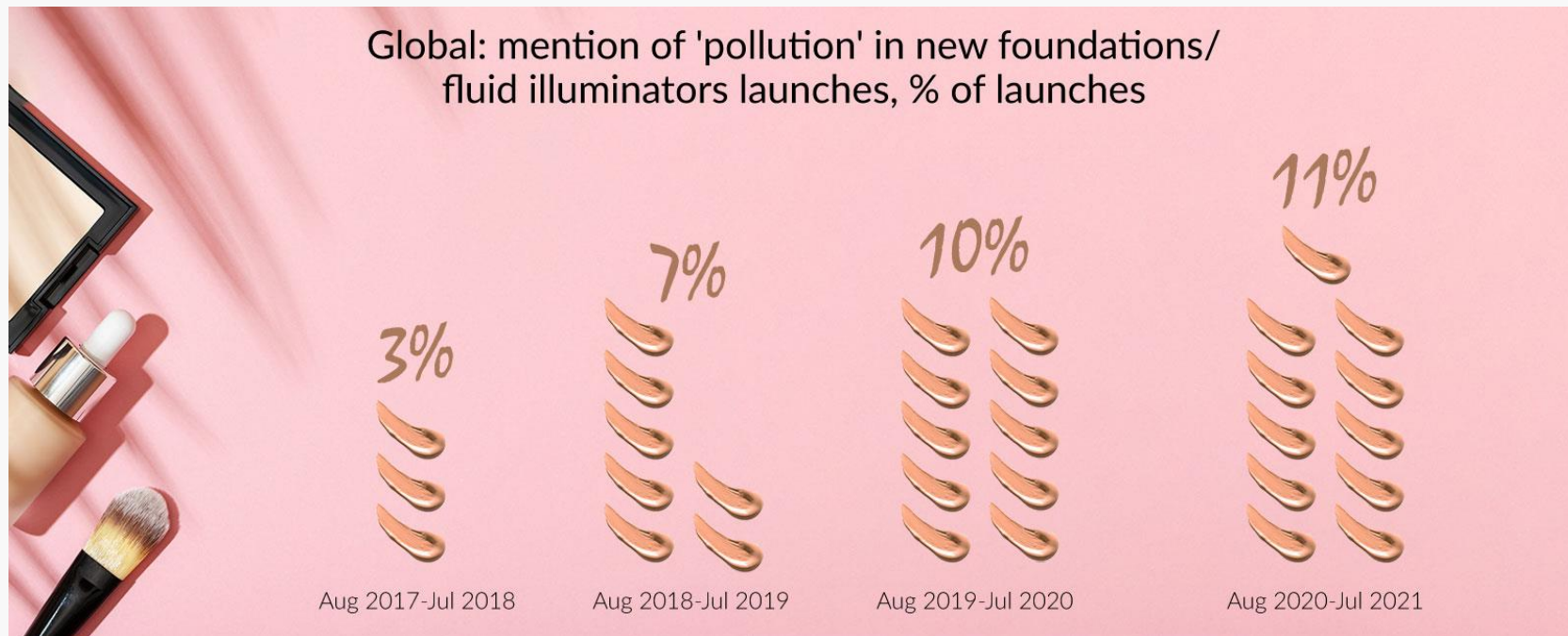
62%

of adults are concerned about [indoor pollution](#), 49% about [electromagnetic radiation pollution](#) and 48% about [blue light](#)

Base: UK: 962 female internet users aged 16+ who have used cleansing or caring products on their face in the last 12 months; China: 2,949 female internet users aged 18-49 who experienced skin issues in the last 6 months; France: 1,000 internet users aged 16+

Source: Kantar Profiles/Mintel; KuRunData/Mintel

Integrate protective claims in the rise of 'skinalism'



Source: Mintel GNPD (Global Foundation/Illuminators [Aug 2017-Jul 2018](#); [Aug 2018-Jul 2019](#); [Aug 2019-Jul 2020](#); [Aug 2020-Jul 2021](#); Global Foundation/Illuminators mentioning 'pollution' [Aug 2017-Jul 2018](#); [Aug 2018-Jul 2019](#); [Aug 2019-Jul 2020](#); [Aug 2020-Jul 2021](#))

Integrate protective claims in the rise of 'skinalism'

- Mintel's [*The Future of Colour Cosmetics: 2021*](#) highlighted the 'skinalist' trend with a focus on well-being and sustainability
- The line between cosmetics and skincare is blurring more and more
- Consumers expect more advanced skincare benefits from their products



Get precise in your protective claims

Anti-pollution claims become increasingly targeted and complex to cater for a 360-degree demand for protection.



Multi-protection from lights and pollutants
[Make Moonlight Moisturizing Primer](#) protects the skin against a large array of pollutants and waves and protects against blue light, urban pollutants, HEV light, infrared light and heavy metals.



Biomimicry
[Westman Atelier Summer Skin Set II](#) uses biomimicry pigment technology to provide a skin-mimicking anti-pollution shield, protecting skin from environmental stressors.



Indoor and outdoor pollution
[Clarins SOS Summer 2021 Primer UV SPF 30/PA+++](#) features an anti-pollution complex that protects the skin from indoor, outdoor and electronic pollutants.

Create makeup looks for the digital world

IN THE UK

33%

of fashion buyers aged 25-34
are [interested in virtual clothing](#)
(clothes designed to be worn
virtually on social media)

- [The Future of Colour Cosmetics: 2021](#) highlighted the concept of **dematerialized makeup products**
- Fashion is capitalizing on **virtual clothing** creating an opportunity for similar innovation in the makeup industry
- Digital makeup allows for more room for creativity and will cater to consumers looking to embrace the freedom and playfulness makeup can afford
- This creative freedom in both **fashion and beauty** will inspire both **digital and real-life products**

Base: UK: 322 internet users aged 25-34 who have purchased fashion items in the last 12 months

Source: Kantar Profiles/Mintel

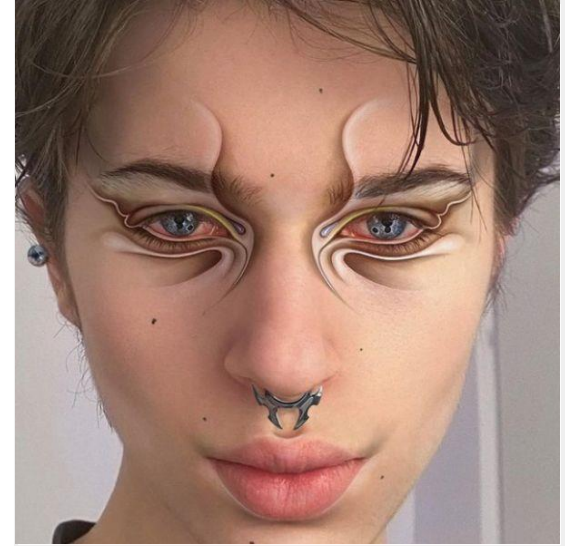
Digital makeup artists take over publications and social media

Social media users and digital artists experiment with digital makeup. Their work is starting to raise the interest of fashion publications.

Young makeup artists **blending analogue and virtual** are **differentiating and gaining visibility** on social media - and have the space to promote [creativity at the service of self-expression](#).



Digital makeup artist [Ines Alpha](#)



[Julian Stoller](#) blends analogue and digital makeup art

NFTs* reconnect brands with artistic creation

NFTs reconnect makeup brands with art, and become a new, engaging way to showcase support to the common good.



Digital x analogue items

Nars launched an NFT artwork series commissioned to female artists on curated platform [Truesy](#) (where bank cards can be used instead of cryptocurrencies) to celebrate its Orgasm range. Each NFT bought comes with real-life products.



Virtual products

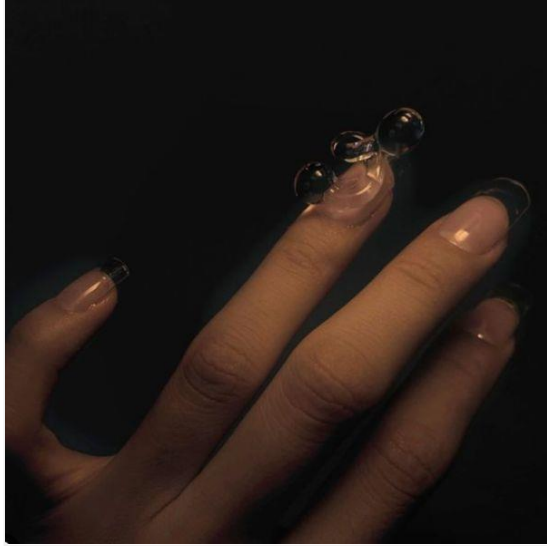
e.l.f. launched [Ne.l.f.T](#), NFTs for digital gold renditions of three of their star products to connect the crypto world with the beauty world. It partnered with Aerial to help its NFT owners offset their carbon footprint.



Becoming an e-patron

[Givenchy Parfums](#) teamed up with a London gallery owner and an artist collective to sell NFTs for an artwork. All profits will be donated to MAG Jeunes, a charity and platform supporting the LGBTQIA+ community.

Digital makeup inspires new creative territories for nail art



[@sojinails](#)



[Eichi Matsunaga](#) for Iris Van Herpen
AW21/22

Otherworldly adornments for the nails can be inspired by cyber designs with their 3D quality and plays on intricate textures and finishes.

Nails become the next opportunity for Gen Z male makeup

- Adoption of makeup for men is slow and driven by functionality (concealer)
- Nail polish is growing in popularity among a subset of male consumers
- The changing conversation around masculinity results in a new era of younger men breaking “traditional” ideas of beauty
- The future of inclusivity lies in freedom of expression and beauty products allow for that freedom



Base: UK: 142 internet users aged 16-24

Source: Kantar Profiles/Mintel

IN THE UK

58%

of adults aged 16-24 agree [it's acceptable for men to wear makeup](#)

Meet the Expert



<https://www.mintel.com/nyscc-color-2022>

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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**

