

# The New Beauty & Personal Care Consumer

A snapshot of the four major trends that impacted Brazilian consumers amidst the COVID-19 outbreak.



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# Context: the drivers

Mintel's construals impacting consumer behaviour.



## Wellbeing

Seeking physical and mental wellness.



## Surroundings

Feeling connected to the external environment.



## Technology

Finding solutions through technology in the physical and digital worlds.



## Rights

Feeling respected, protected, and supported.



## Value

Finding tangible, measurable benefits from investments.

## Experiences

Seeking and discovering stimulation.



## Identity

Understanding and expressing oneself and one's place in society.



**Channel Changers:  
Technology will pave the  
future of experimentation**



# Technology can boost consumers' experiences in-store



## Wall store at subway station

Boticário launched in the subway station of Line 4 Yellow in Sao Paulo, a wall store that enables consumers to purchase online with no shipping costs (Brazil)



## Beauty Call in-store

Sephora offered Beauty Call in-store, enabling consumers to consult with experts online (Brazil)



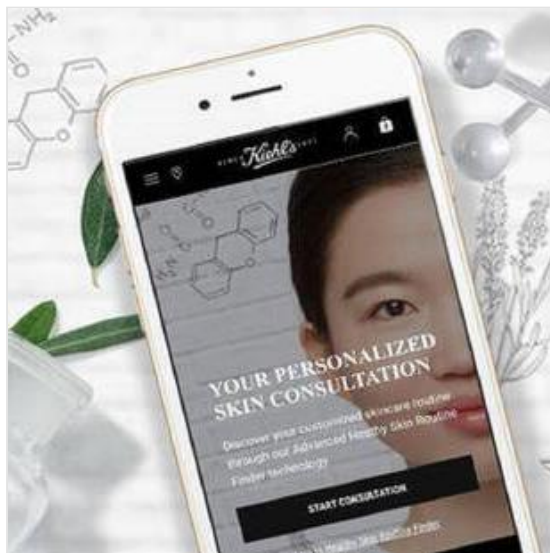
## Digital scent

Natura partnered with Noar start-up to develop the “digital scent” tool perfum.AR, which uses AR technology to help consumers test fragrances touchless (Brazil)



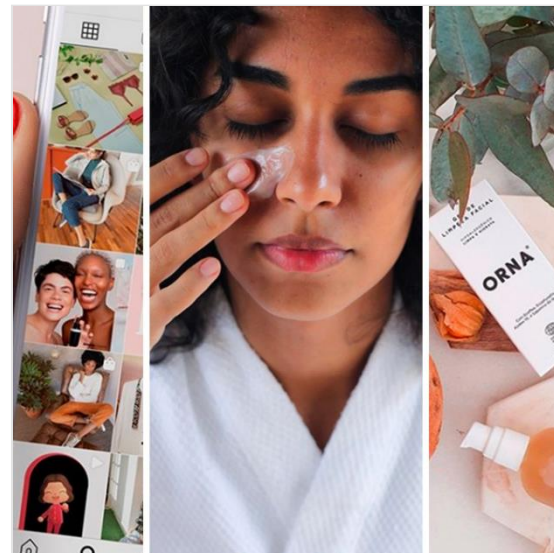
# Busy consumers look at convenience

- **New ways** to engage with consumers
- **China** inspiration
- **Easy/ instant** access expectations



## Kiehl's Skincare Expert Chat

Chat with a Skincare Expert to learn about skincare, find your Healthy Skin routine and more (Europe)



## Amaro is new beauty marketplace

New marketplace brings together small and established brands, delivering products at the same day of purchase (Brazil)

# Blur retail and entertainment to engage consumers



Boticário partnered with Avakin Life to create a virtual store inside the game, offering engaging experiences to build up consumers' loyalty inside and outside the game (Brazil)



SK-II launched the campaign #ChangeYourDestiny in its new flagship store offering multiple sensory stimuli guided by AR and AI technologies (China)

- Immersive shopping networks and experiences
- Tapping into new audiences
- Inspiration on **games** and **e-sports**

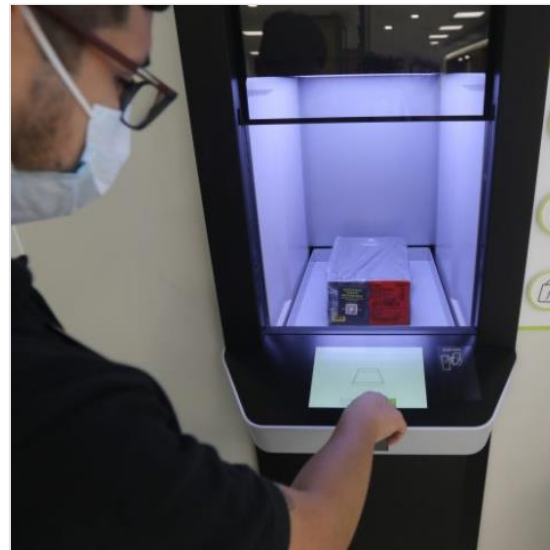
# Innovation on no-touch shopping experiences

- **Leverage** mixed reality for streamlined online experiences
- **'Live'** shopping



## Live shopping

Americanas performed its live shopping experience through its app, inviting influencers to chat with consumers (Brazil)

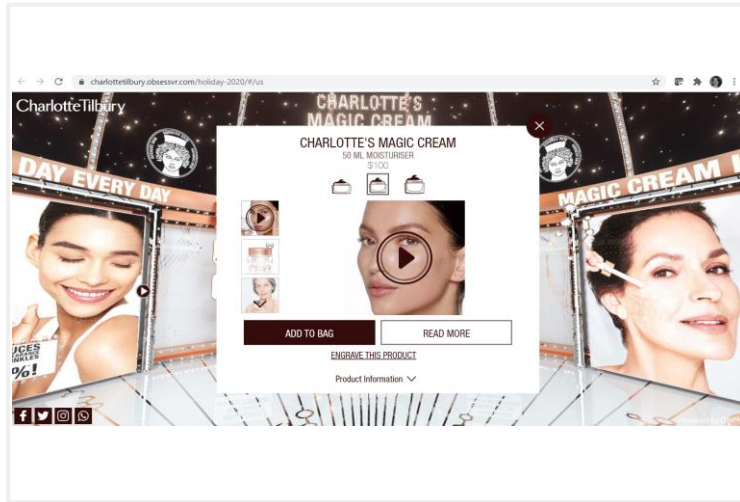


## Curbside

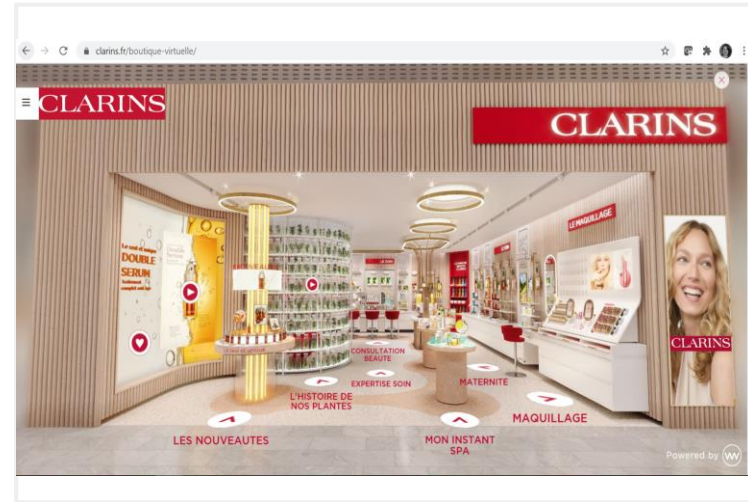
Falabella set up an automated pick-up point to avoid queues and personal contact at shopping malls (Chile)

# Mix brick-and-mortar and online spaces

Brands and retailers can target consumers' interest for new third places to create immersive and more realistic experiences online



Charlotte Tilbury virtual store



Clarins virtual store



**Beauty Eco-lution:**  
Consumers' relationship with  
their surroundings have  
evolved permanently.



# Brands must be as transparent as possible on their communication



Biossance brought the Clean Academy to Brazil, providing free content dedicated to education about clean beauty. The commitment of this platform is to increase consumers' awareness toward clean beauty, and to build a world where clean is the new standard (Brazil).



The Boticário Group announced the creation of the Transparent Beauty platform, a movement for more transparency and sustainability, which compiles information about the beauty market production chain (Brazil).

# Brands and retailers need to clarify packaging certifications

Brazilians are still confused about certifications: 69% agree that “It’s difficult to understand certifications on product packages”.



## Inspiration from Food industry

Eco-score is a labeling system that indicates the environmental impact of food products. The score covers the product’s life cycle, from its production, transport and packaging, to the origin of its ingredients, recyclability and seasonality (France)



## Clear communication of seals

The beauty and personal care store Olive Young introduced a new labeling system that makes it easier for consumers to identify clean beauty products that are beneficial for the skin and the planet (South Korea)



## Clean as a manifest

Sephora was one of the pioneers to adhere to clean beauty creating its own seal of what clean means, and easing consumers’ access to those products at shelves (World)



# Spotlight on upcycled beauty ingredients



**From waste to exfoliation**  
[Vitacel CS 5 Apple](#) is part of a range of exfoliants made by JRS using a variety of food by-products and waste.



**The power of pumpkin seeds**  
[Reforcyl-Aion](#) from Rahn upcycles nutrient-rich pumpkin seeds to deliver anti-ageing properties.



**Coffee shop recycling**  
[Givaudan's Koffee'Up](#) is an active skincare oil made from coffee grounds provided by start-up Kaffe Bueno.



# Waste-zero can be incorporated on packaging innovations



"The Dissolving Bottle" project consists of encouraging hotels to adopt bar shampoos as a way to reduce the use of plastic packaging. To this end, the campaign aims to make the shampoo bars more attractive, giving them a shape similar to the type of small bottles used in hotels (Philippines)



Le Hâle Poudre Bronzante is packed in a refillable and reusable compact made from cork - a sustainable, biodegradable and naturally renewable material (France)



Soapbottle is a liquid soap filled in a packaging made from soap. Once the liquid content is finished, the empty container can be used as hand soap, washing away over time (US)

**Beautiful Mind:**  
It is time to renovate the  
mind.



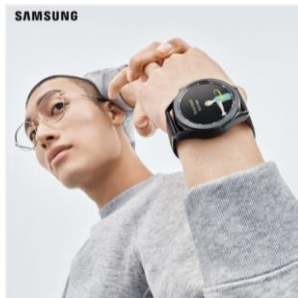
# Brands can take the initiative to remedy consumers' pain

As 41% of Brazilians prefer to be associated with companies/brands that align with their values, brands will be forced to take a more direct approach to support consumers' wellness.



## Fight the stigma (Phillipines)

The Renaissance Youth Leaders Forum has created a campaign on social medias intituled **#FightTheStigma**, with the purpose of fighting against the stigmas that foment sexism as a micro, individual, macro, and social phenomenon.



## Overall health monitoring (World)

The smartwatch Samsung Galaxy Watch3 helps consumers monitor their physical and mental health, including breath and heart frequency levels and sleep quality. In addition consumers are able to share their weekly reports with a doctor.



## Invisible Labour Day (Brazil)

Amaro named May 2, the day after Labor Day, the “Invisible Work Day”, in order to shed light on the double journey of women, who in addition to their jobs, are responsible for carrying out unpaid housework.

# From rich sensory experiences to innovative concepts that target consumers' new lifestyles



## Latte Bath (China)

Dove and McCafé have jointly released “coffee bubbles” shower cream and facial wash, and “bubbles latte” to help consumers overcome the traces of fatigue that come from staying up late.



## Healing fragrances (UK)

Inspired by the practice of Reiki and energy medicine, the Vyrao wellness brand aims to awaken consumers' senses through its fragrances, which are positioned as spiritual and restorative.



## Fun and clean makeup (US)

Youthforia is a clean and sustainable makeup brand that makes makeup that's good for skin and safe to sleep in. All formulas are enriched with plant-based extracts and work on all skin types and different tones.



**Beauty [Re]Valued:**  
Quality, performance and  
value will drive consumers'  
purchasing decisions



# Streamline choices and drive new experiences through essential kits

The sample approach lets people try out new products on a budget, without having to commit to a full-sized product.



## Basic skincare needs

[Sallve's \*basiquinho\* kit](#) offers three essential skincare claims (cleanse, hydrate and exfoliate) in mini samples. It retails at \$13 (Brazil).



## Essential fragrances

Natura's essential fragrances kit retails at \$6 and offers four mini fragrance samples as well as a discount to buy the fragrance one liked the most in full size (Brazil).



## Five daily essentials for 21 days

NAE Cosméticos' 21 day challenge kit lets people try five small-size products for \$18. The products are customized based on an online beauty quiz. Consumers also get 20% off in the purchase of a full-size routine kit (Mexico).

# Be authentic on offering aid in decision making

Given that Colombian BPC consumers are assiduous on social medias and blogs, brands can help them by creating communities to share authentic feedbacks and product tutorials.



## New content platform

P&G launched the “Oh My Hair!”, a platform dedicated to offering guidance, tutorials and DIY tips about hair, with the purpose to boost consumers’ haircare skills (Brazil)



## ‘Real’ influencers

The haircare brand Beleza Natural is active on its social networks, where it helps consumers take care of their hair at home, sharing videos from consumers using the brand’s products (Brazil)



## Product relaunch after community feedback

Sallve announced the relaunch of its Antioxidant Moisturizer after receiving feedback from members of ‘Sallvers’ community (Brazil)

## SALON AT HOME GAINS MOMENTUM



### Professional coverage at home

Kerasys Hair Clinic Professional High Adhesion Oil Hair Dye. Free of ammonia and PPD, the highly adhesive oil texture is claimed to perfectly cover gray hair while treating hair and scalp with argan kernel and sea buckthorn oils (South Korea, March 2021).



### Protects against breakage

BCL M.N.B.B Perfect Nail Coat contains diamond powder and smoothing polymer to correct uneven surfaces or color; and calcium pantothenate, mastic resin and coating polymer to strengthen the nails (Japan, February 2021).

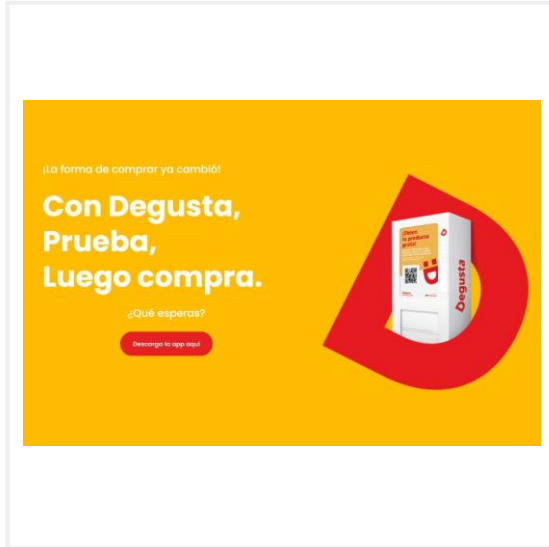


### 3 minutes depilatory

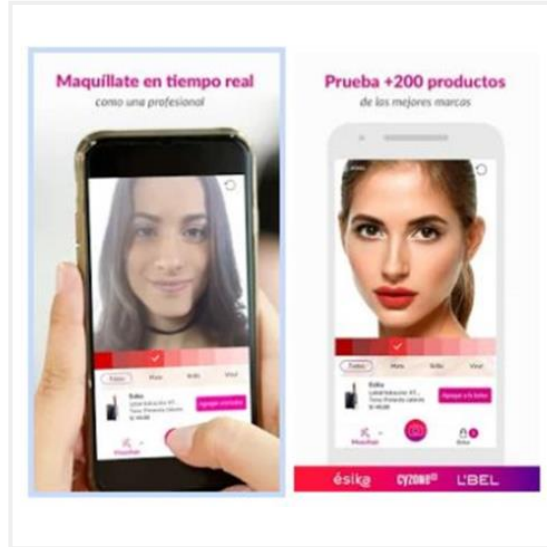
Woo Woo Tame It! Hair Removal is a depilatory cream that is said to remove body hair in 3 minutes at shower (Australia).



# Enable experimentation before buying



Degusta's sampling machine enables consumers to try new product launches for free, answer a short survey and scan a QR code.



Ésika's Asesor de Belleza app offers virtual make-up so consumers can try the new line of Resist lipsticks.

- **Experiences** are more valuable than products
- **Leverage** consumer interest in learning new skills/ trying new products
- **Evolve** trial/ sampling
- **Provide** seamless discovery journeys

# Luxury is redefined

- **Luxury** - new meaning
- **Ingenuity** will be valued more than exclusivity
- **Give** more value for money with boundary-blurring products



Jo Malone partnered with Zara to create a fragrance range for the high-street clothing chain.



Byredo launched an affordable candle collection to evoke the feeling of home.

# Three key opportunities for the near future

**01**

## Technology will pave the future of interactions

The fear of COVID-19 together with sanitary restrictions impacted on brick-and-mortar sales, while accelerated online sales adoption. Besides the improvement of outbreak markers, consumers might take a hybrid approach, rotating between in-store and online shopping.

**02**

## Outbreak speeds up demand for eco-ethical credentials

Clean has evolved from "safe" ingredients to consumers expecting brands to provide a view of ingredient sourcing and processing. Brands will need to show how, where and by whom the products are being created. As part of this, a **brand's eco-ethical commitment to their community will also be top of mind for consumers.**

**03**

## Beauty is present on wellness-focused routines

Long-term value will emerge from brands that continue to highlight the use of beauty routines as a way to combat stress and anxiety, bringing normality during uncertain times. In addition, brands will need to reconsider their value proposition in times of tight budgets.

Thank you!



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