

Coping with COVID-19

Beauty consumers' response to the pandemic and its aftermath



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Which phase of Covid-19 is your business in?

At Mintel Consulting we recognize there are 3 key phases that our clients' business may go through during these times:



Survive

You need to know:

What are consumers experiencing and thinking right now

Where you can get inspiration



Revive

You need to know:

Which trends are likely to be accelerated and which ones may fade into the background

How consumer behaviour is shifting

Learnings from previous crises



Thrive

You need to know:

How to accelerate your innovation

What will your consumers want in the future and why

Unlock new ways to answer these needs

Mintel COVID-19 Tracker

Understand the global impact of coronavirus and how consumer behaviour has changed with the Mintel COVID-19 Tracker.

We offer consumer behaviour tracking across 16 of the largest global markets.

Our consumer analysis specifically covers:

- How they behaved before the outbreak
- How worried they are at being exposed to the virus
- To what extent they are worried their lifestyles will be affected
- What they are looking forward to doing once the current social distancing measures are relaxed
- What personal and economic impact they feel COVID-19 will have
- How their priorities have changed

Need further insight?

The Mintel COVID-19 Tracker keeps you informed on what's happening now.

To understand what to do next, we can also provide actionable recommendations from trend, category and specialist expert analysts.

Mintel – guiding you to a successful future and helping you achieve your 'new normal'.



Covid-19's impact on consumer behaviour

Consumers around the world are facing economic uncertainty

We are facing an unprecedented recession. In the EU, President of the ECB Christine Lagarde warned of a **15% contraction to the eurozone's GDP**.

IN THE UK

79%

Of consumers think the Covid-19 outbreak will have a negative impact on unemployment, while 70% believe the cost of living will rise

IN CHINA

85%

Of consumers believe Covid-19 will adversely affect China's economic growth and 75% think the cost of living will go up

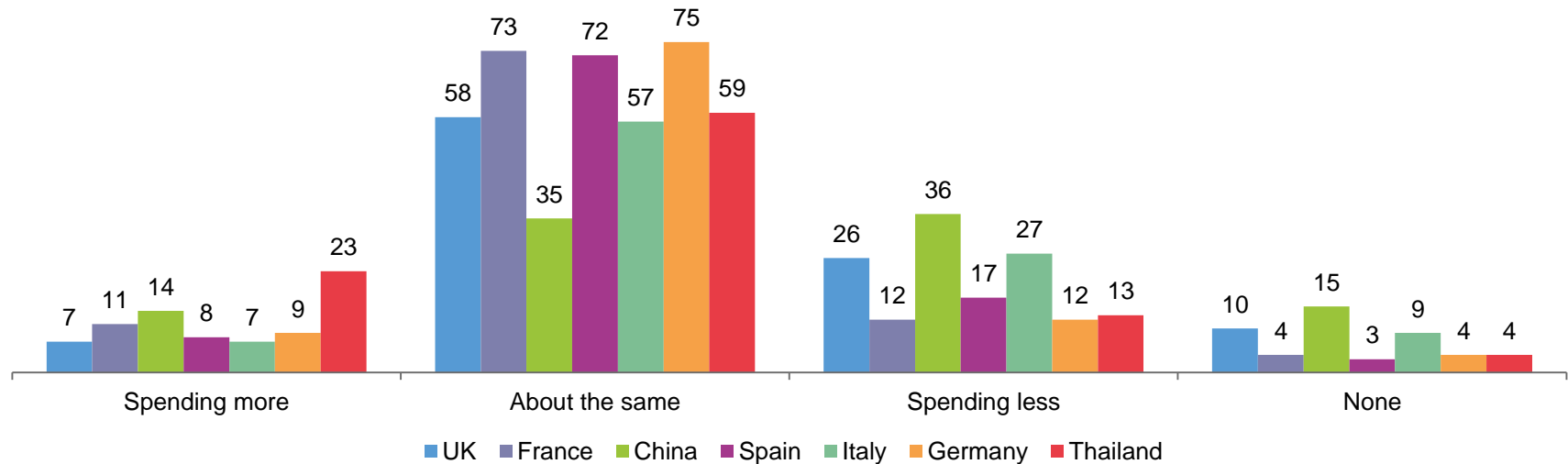
IN GERMANY

42%

Of consumers believe the outbreak will negatively impact their household income, while 51% say it will affect the value of their savings and investments

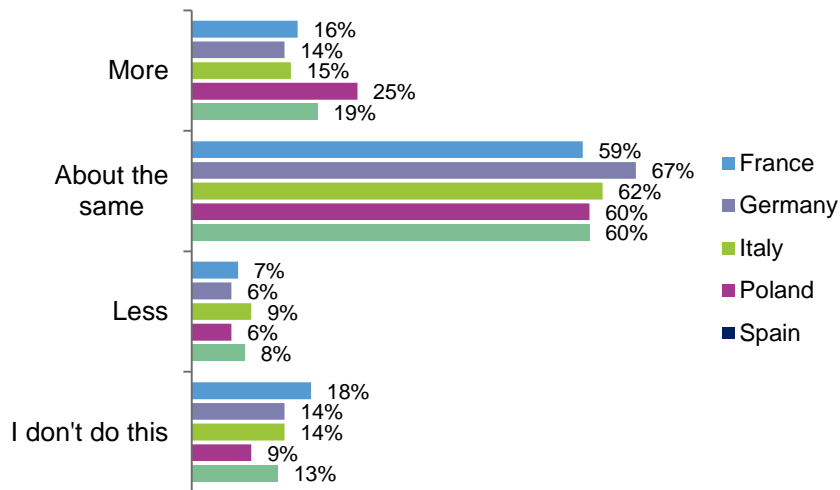
Consumers are pulling back on their beauty and personal care expenditure...

**“Do you expect to spend more, the same, less or nothing on beauty products and toiletries in the next month?
(May 2020)”**

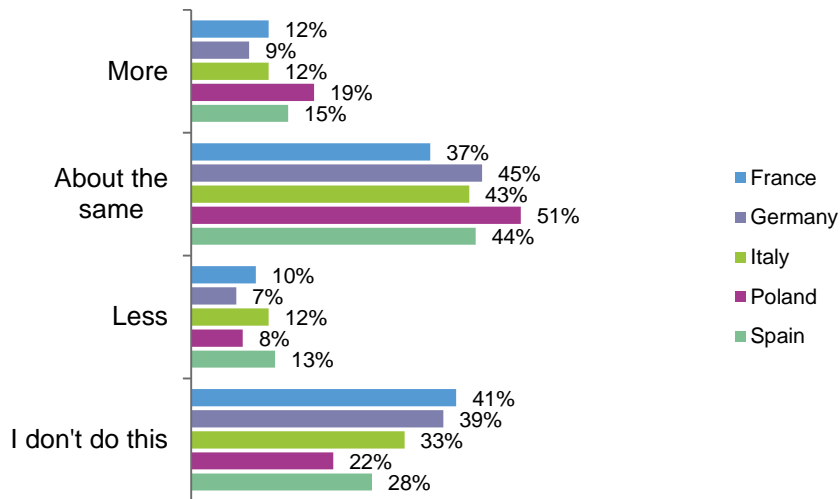


... but they are using more face care and treatment products

Usage occasions for moisturiser and treatments has risen, particularly in Poland and Spain



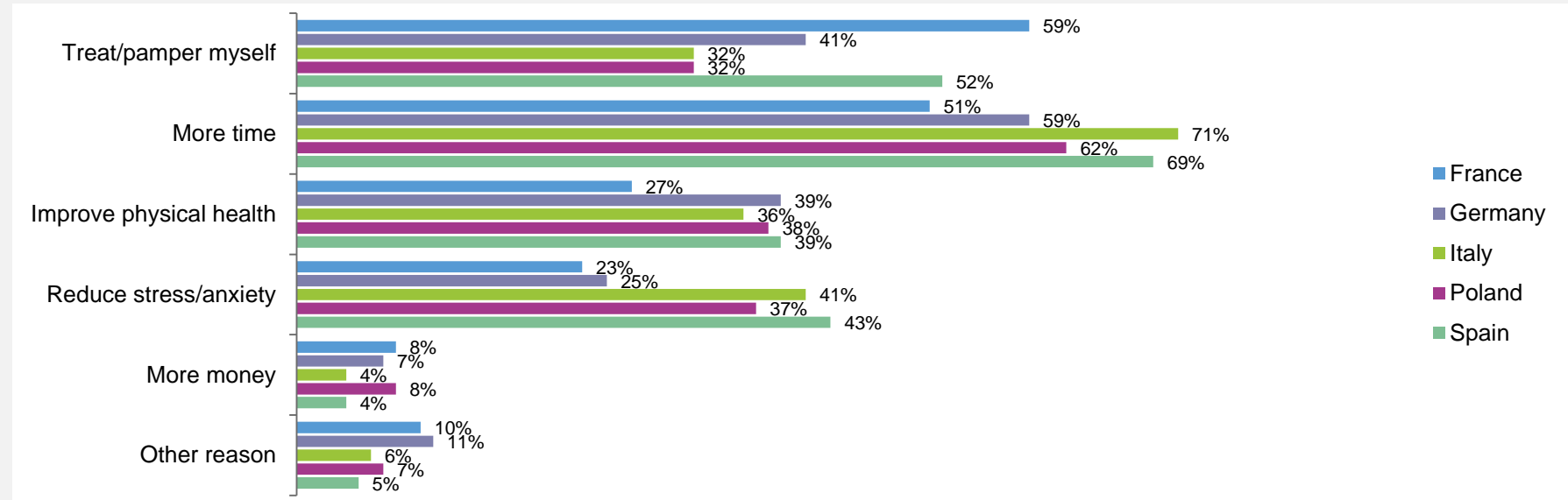
"Have you been using moisturiser more often, about the same or less often since the start of Covid-19?"



"Have you been using skincare treatments more often, about the same or less often since the start of Covid19?"

This behaviour reflects the need for treats and stress busters

Beauty brands should find solutions for consumers' need for indulgence and anti-stress measures, while taking advantage of their extra time with pampering products such as face and hair masks, or encouraging them to follow multi-step routines.



*For which reasons are you doing certain beauty and personal care activities more often as a result of the COVID-19/coronavirus outbreak?
Please select all that apply.*

Holistic skincare combines care with reassurance



Les Happycuriennes L'Optimiste Face/Eye Contour Serenity Care

Takes a minimalist and zero waste approach for a simple ritual and happy skin. The generous, cocooning product contains nourishing, soothing and protective plum kernel oil, madrone and passionflower.



Kose Sekkisei MYV Protect Day Cream SPF 30/PA++

Formulated with chamomile, rose oil, ylang ylang, geranium, pepper and lavender to awaken supple tone and resilience in daytime skin, giving it a natural glow, while tightening and toning and protecting it from environmental stress that clouds the skin, and leaves skin and mind fulfilled with inner happiness.

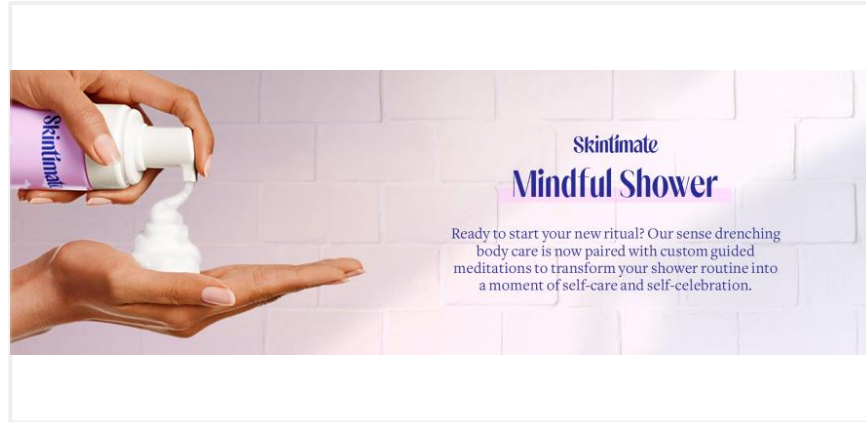


Garden of Wisdom Neurophroline Serum

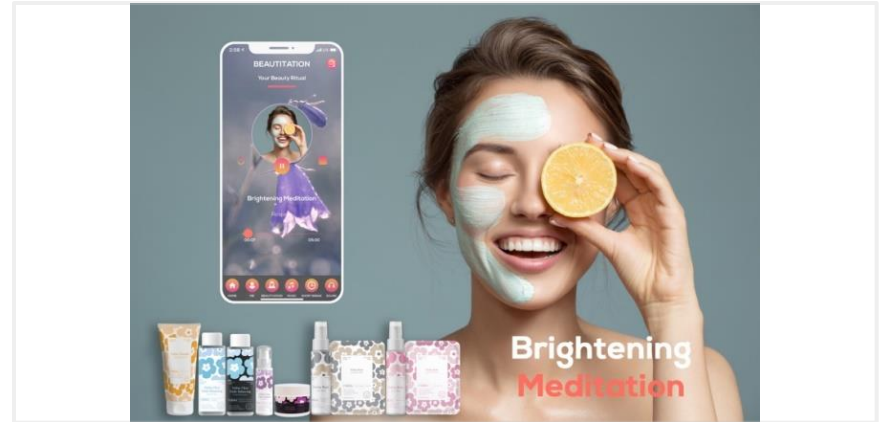
Helps consumers find a happy coexistence while sustaining a high level of skin health, balance and stability. The serum combats the major signs of ageing and mitigates the effects of pollution with neurophroline derived from wild indigo.

The bathroom can become a mindful oasis

43% of US consumers and 65% of Brazilian consumers say that they are making their mental health more of a priority since the onset of Covid-19



Schick's Skintimate range has teamed up with Shauna Shapiro to create audio meditations which turn the shower into a haven of self care and restoration.



Beautitation is a series of app-driven meditations, created to maximise the effects of the Respekt skincare range. These include Moisturizing Meditation, Anti-Aging Meditation and Brightening Meditation.

Base: Internet users aged 18+

Source: Lightspeed/Mintel

Commodities become cosmetic



Government advice to wash hands frequently is taking root



65%

of Chinese consumers use a hand sanitiser every day or almost every day

72%

of Thai consumers say they are washing their hands more often due to Covid-19

54%

of Japanese consumers are using hand sanitiser more often due to Covid-19

So hand sanitisers are taking on premiumised, holistic, caring messaging

Brands are playing with emotional cues, visuals, packaging and actives to add a point of difference to their hand sanitisers without sacrificing efficacy



This Works Stress Check Clean Hands

No-rinse formula containing a moisturising superbend of 70% alcohol with calming lavender, neroli and camomile essential oils plus hydrating hyaluronic acid. This Works suggests pairing it with its Deep Sleep Body Cocoon for a protect and calm duo.



Nourish London Lemon & Black Pepper Hand Sanitiser Spray

Combination of ethanol blended with antibacterial essential oils of lemon, ho leaf and black pepper to sanitise your hands on the go while leaving them gently fragranced. Can also be used to sanitise phones, door handles and other hard surfaces.



Sensori + Hydra + Detox Hand Sanitiser

Blended with 75% natural sugar cane alcohol and ChlorosPURE detoxifying technology to eliminate 99% of bacteria and 96% of pollution particles on the skin surface. Sustainably sourced formula enriched with botanical oils and hydrating agents for non-drying results.

Brands are also offering protection for hands between washes

Market hand care as a **'top-up shield'** against viruses, especially to the 45% of UK hand care users who want these products to feature antibacterial protection.



Stops bacteria from multiplying
Avène Eau Thermale Cicalfate Repairing Barrier Cream contains a combination of copper sulfate and zinc sulfate, said to reduce the risk of bacterial proliferation.



It's in the name
Good Stuff In Good Hands Hygiene Moisturising Hand Cream is described as a protective hand cream with antioxidant rooibos, special germ-fighting ingredients and conditioners said to leave hands soft and smooth.



Organic antibacterial
KORA Organics Daily Hand Cream is enriched with noni extract, said to be a powerful antioxidant, anti-ageing, antibacterial, antiviral, anti-fungal and anti-inflammatory agent.

A close-up photograph of a woman with long brown hair and blue eyes. She is wearing a white, pleated surgical mask that covers her nose and mouth. Her eyes are looking upwards and to the right. A hand is holding a small, dark-handled brush with a light-colored tip, applying a dark substance to her right eyebrow. The background is dark and out of focus.

Face masks create new niches

Face masks at Paris Fashion Week A/W 2020-21

Designer face masks hit the runway.



Model Akimoto Kozue



Mask design by Style Consultant Songül Koç

Face masks have become a daily staple item of clothing

Governments around the world are advising consumers to wear face masks in stores, on public transport and around other people.

IN THE US

70%

Of consumers wear a face mask in public due to Covid-19

IN CHINA

82%

Of consumers are wearing a face mask in public due to Covid-19

IN BRAZIL

78%

Of consumers are wearing a face mask in public due to Covid-19

Base: 1,000 internet users aged 16+/18+
Source: KuRunData/Mintel; Lightspeed/Mintel



Face masks create problems and open opportunities for solutions

Prolonged and frequent wearing of face masks make skin dry, sensitive and inflamed.

Dermatologists recommend gentle but thorough cleansing before and after wearing the mask, and moisturising throughout the day to create a barrier between the skin and the mask and to reinforce its barrier function.

Skincare brands can link their existing products with this advice, or create new products in on-the-go packs.



Chinese brands are ahead of the game with mask-face solutions

'Mask face' 口罩脸 has become a key message for product communication.

Chando has used this communication around panthenol, which claims to soothe and repair skin.

Dr Plant highlights the ingredient *Dendrobium* to repair dryness from mask wearing.



Chando panthenol mask



Dr Plant Dendrobium Gel

Face masks are affecting colour cosmetics too

61% of Chinese women are wearing less make-up due to Covid-19. Brands are fighting back by creating mask make-up looks and promoting long lasting, transfer-proof products



Colour cosmetics brands are focusing on eye products to encourage consumers to continue wearing make-up at the same time as face masks.



Video tutorials are showing how to find face make-up that stays in place under a face mask, comparing brands' performance and providing visual proof.



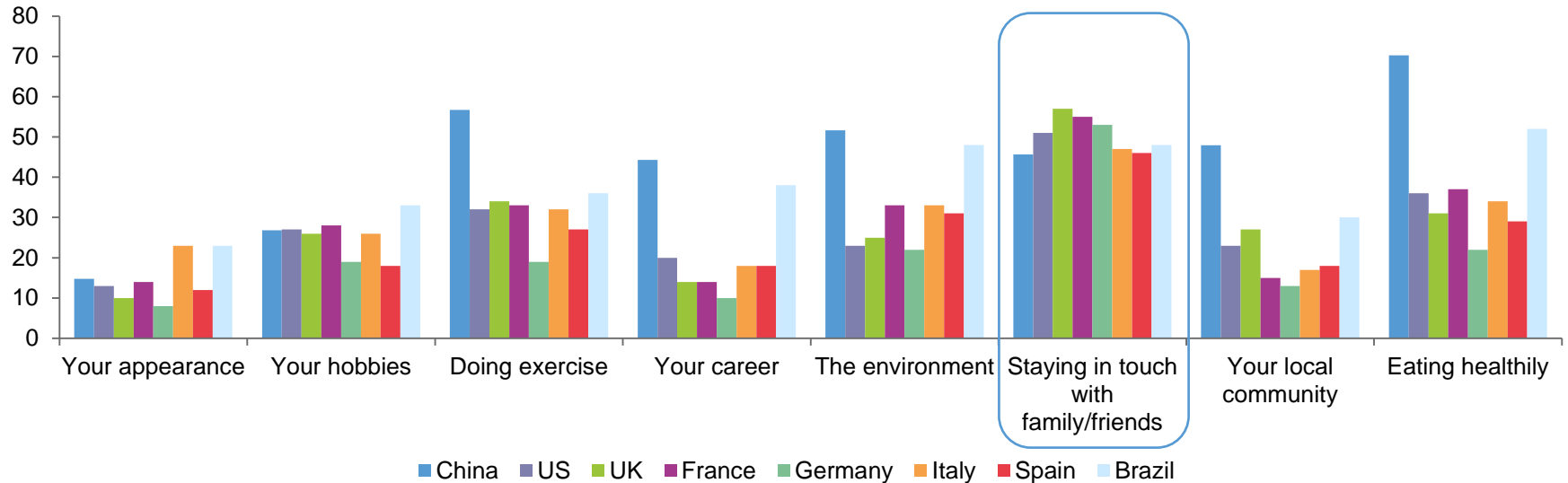
Retailers and mall owners will be quick to provide guidance and tutorials for mask makeup. Harbour City worked with seven global brands that were tenants in its Hong Kong mall including Chanel Beaute, Shu Uemura and Tom Ford Beauty to create looks that integrate masks into the makeup look



Trust & empathy

Consumers are prioritising experience and emotions

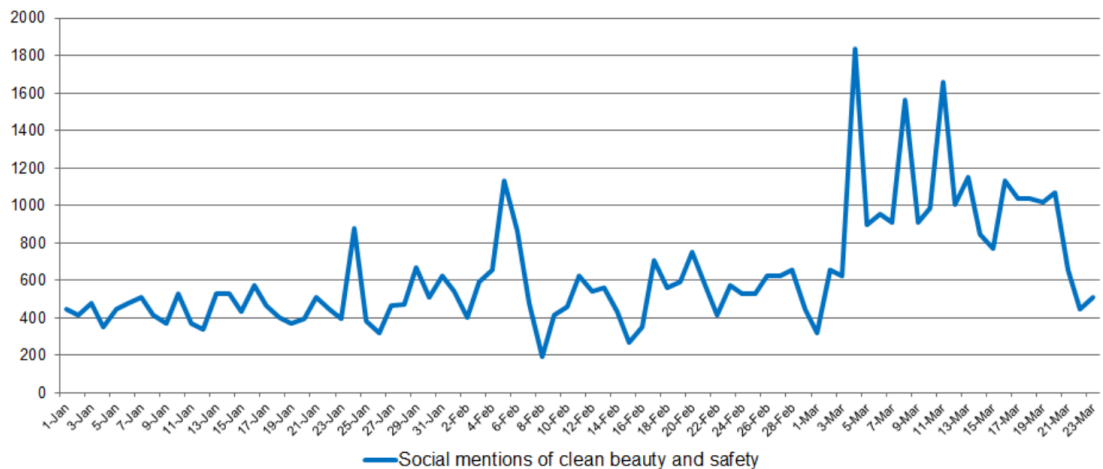
Consumers are prioritising emotional aspects like friends/family, hobbies and the community, along with health-related issues, but place less importance on their appearance.



"Since the COVID-19 outbreak, have your priorities changed for the following?"

They're looking for a sense of safety and reassurance

Searches for Clean Beauty have increased markedly since the arrival of Covid-19. Consumer advocate groups like the Environmental Working Group are promoting clean ways to avoid infection.



Base: 53K global mentions of clean beauty and safety on Instagram and Twitter, Jan 1-Mar 23, 2020

Source: Infegy/Mintel

Consumers are looking for brands to behave well

Lockdown conditions have prompted many consumers to become more connected to their local community, joining volunteer schemes and looking out for their neighbours. Social media has amplified brands' activities during these difficult times and consumers will remember which have behaved ethically towards their employees, their customers and the wider community.

L'Oréal has committed €50 million to supporting women suffering from job and income loss and the risk of domestic and sexual violence during COVID-19.



Brands are donating sales to Covid-19 charities

While a number of beauty brands switched production to hand sanitisers during time of shortage, others have pledged to donate a share of their sales to related charities.



Kate Somerville is donating 15% of sales of the new DeliKate collection to World Central Kitchen's #ChefsForAmerica COVID-19 Food Relief.



Acqua di Parma donated proceeds from the sale of its limited edition La DoubleJ Blu Mediterraneo Mirto di Panarea range to its April #StayHome initiative, designed to support the Covid-19 health emergency.

Consumers will want to buy national and local

NATIONAL PRIDE

76%

Of Chinese consumers say
they intend to buy more from
Chinese brands to show
their support



Some conclusions

Clean skin

Cleanliness will be at the forefront of consumers' minds for a number of years. There will be opportunities for value-added cleansers which combine hygiene, health and help for stressed skin and to provide a sense of wellness.

Clean products

Consumers will continue to focus on safety, seeking reassurance that their products contain only the best and safest ingredients. Sustainability will return to the spotlight, affecting production, packaging and post-use issues.

Clean brands

Consumers won't forget which brands have behaved well during the crisis and which have been found wanting. They will also want to support brands viewed as vulnerable and brands linked with their country or location.

Thank you for your interest

Keep on exploring the COVID-19 related insights that we are publishing regularly on our blog:

<https://www.mintel.com/blog>

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and why**

