

## January 2021

### Clean Beauty: Incl Impact of COVID-19 - US

“Consumers buy clean products because they believe they are safer than traditional products, have higher quality ingredients and are better for the environment. In light of the COVID-19 pandemic, consumers are looking for ways to protect their health and safety – increasing demand for clean beauty and personal care products ...

## December 2020

### Skin Protection: Incl Impact of COVID-19 - US

“Although consumers are aware of the risks from any sun exposure, most sunscreen users still only use sunscreen on a seasonal or occasional basis. Encouraging consumers to use sunscreen during colder months and indoors is an obvious and constant challenge for sunscreen brands. Positioning sunscreen as an everyday product is ...

### Ingredient Trends in Beauty and Personal Care: Incl Impact of COVID-19 - US

“The unprecedented arrival of COVID-19 is accelerating demand for clean products. This will impact not only beauty categories but also highly functional personal care categories, suggesting that brands within these categories will need to tap into clean beauty sooner than they anticipated. A stronger focus on health and safety is ...

## November 2020

### Fragrance Trends in Beauty: Incl Impact of COVID-19 - US

“The fragrance and scented personal care market is in a moment of evolution. Lifestyle changes as a result of COVID-19 put pressure on the fragrance side of the market, while scented personal care thrives due to heightened focus on health and hygiene.

Even before the pandemic, cross-category competition posed a ...

### Beauty Retailing: Incl Impact of COVID-19 - US

“Beauty retail sales were well positioned for growth before COVID-19. However, the pandemic caused immediate disruption to the beauty retail landscape as well as consumers’ lives and consequently, their beauty routines. While segments such as facial skincare will see growth as consumers prioritize it as part of their wellness routines ...

## October 2020

### Perceptions of Beauty across Generations: Incl Impact of COVID-19 - US

### Feminine Hygiene and Sanitary Protection Products: Incl Impact of COVID-19 - US

## Beauty and Personal Care - USA

“The once singular approach to beauty marketing and product development is no longer cutting it for consumers. While preferences and engagement varies by generation, nearly all consumer groups have mixed emotions when it comes to beauty. Consumers recognize that beauty products can provide a self-esteem boost but also feel that ...

“The feminine hygiene and sanitary protection category is in a moment of growth and evolution. Consumer expectations are extending beyond functional needs, challenging key players to offer eco-friendly packaging, natural/organic materials and ingredient transparency at affordable price points. At the same time, brands have opportunity to grow user knowledge ...

### September 2020

#### Black Haircare: Incl Impact of COVID-19 - US

“A majority of Black consumers say that their priorities about their appearance have not changed during the pandemic, which gives insight into their regard for personal style. Hair is foundational to Black consumers’ looks, so they will continue to buy haircare products during lean economic times. However, people in a ...

#### Men's Personal Care: Incl Impact of COVID-19 - US

“Prior to COVID-19’s arrival to the United States, the market was expected to continue experiencing slow yet steady growth through 2025. However, with more Americans practicing social distancing and working from home, the market is expected to see slower growth from 2020 than originally estimated, as some men feel less ...

#### Gen Z Beauty Consumer: Incl Impact of COVID-19 - US

“The COVID-19 pandemic will have a profound and lasting impact on both Gen Z, and the beauty industry as a whole. Gen Z consumers dictate beauty trends, making them a key audience for brands in the beauty space. The financial impact from the pandemic will disproportionately impact Gen Z, and ...

#### Consumers and the Economic Outlook: Incl Impact of COVID-19 - US

“The unpredictable pace of the spread of COVID-19 is worrying, but consumers have remained optimistic about their finances throughout this pandemic and the subsequent recession. Time will tell how deeply consumer finances will be affected, but right now, consumers are most definitely holding out hope for themselves, while their confidence ...

### August 2020

#### Color Cosmetics: Incl Impact of COVID-19 - US

“COVID-19 has dramatically impacted the color cosmetic landscape. During the lockdown phase of the pandemic, the need/desire to wear makeup was mitigated as consumers limited their interactions outside of the home. Even as states relax restrictions, the ongoing use of protective face masks creates new challenges and will prolong ...

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

“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. Despite some struggling segments, the personal care market is ...

### July 2020

## Beauty and Personal Care - USA

### The Impact of COVID-19 on Household, Home Care and Personal Care - US

“While the future of the US and global economy remains unclear, we should not expect that the resolution of the COVID-19 pandemic will be a return to 2019 reality. Many players are understandably focused on reacting to short-term challenges and demands presented by the circumstances, such as meeting the consumer ...

#### June 2020

### Facial Skincare and Anti-aging: Incl Impact of COVID-19 - US

“As the majority of Americans limit their interactions outside the home due to the COVID-19 pandemic, facial skincare routines become less of a priority, as consumers shift focus to their physical and mental health. In addition, economic instability leads to more conservative category spending. As a result, the market is ...

#### May 2020

### Shaving and Hair Removal: Incl Impact of COVID-19 - US

“Over the last few years, consumers, particularly younger adults, have been taking a relaxed approach to their shaving and hair removal routines, contributing to the market's sluggish sales growth. With more Americans practicing social distancing and working from home due to shelter-in-place orders, consumers will take an even more ...

#### March 2020

### Disposable Baby Products - US

"After experiencing plummeting sales in 2017, the disposable baby products market continues to stabilize, reaching \$8 billion in total 2019 retail sales, an increase of 1.7% from 2018-19. However, market sales are expected to slow due to declining birth rates, parents' value-driven approach to the category, as well as ...

### Bodycare and Deodorant: Incl Impact of COVID-19 - US

“Prior to COVID-19's arrival to the United States, the bodycare and deodorant market was expected to experience higher levels of growth in 2020 than in previous years, largely due to consumers' elevated interest in natural and premium deodorant offerings. However, with more Americans practicing social distancing and working from home ...

### Oral Health: Incl Impact of COVID-19 - US

"During the COVID-19 pandemic, job and income loss have caused consumers to limit discretionary spending. Certain aspects of personal care are less important during shelter-in-place and therefore deprioritized. Maintaining oral care is considered an essential of daily health and hygiene, supporting consistent product usage throughout the outbreak and beyond. Tapping ...

### Shampoo, Conditioner and Hairstyling Products: Incl Impact of COVID-19 - US

“As the majority of Americans shelter-in-place and limit their interactions outside the home due to the COVID-19 pandemic, hair washing and styling becomes less of a priority, leading to less frequent washing and longer purchase cycles. As a result, the haircare market is expected to take a short-term hit in ...

### Drug Stores - US

"US drug store revenues will exceed \$300 billion this year. While the channel has consistently posted gains, the pace of growth is projected to slow down in light increased competition from outside the channel and a shifting consumer preference toward generic drugs over name brands. With new partnerships and new ...

### February 2020

#### Beauty Influencers - US

"Beauty influencers and the power of social media continue to shape the beauty industry. While influencer collaborations with brands continue to resonate with consumers, issues surrounding trust and credibility could signal future challenges. To alleviate these concerns, brands and influencers must adopt a more realistic and relatable approach to the ...

#### Soap, Bath and Shower Products - US

"Due to the functional nature of the category, the soap, bath, and shower products market continues to experience slow, yet steady growth. Growth is being tempered by struggling bar soap sales but gains in liquid and bath products are driving the category forward."

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

### January 2020

#### Nail Color and Care - US

"To prevent the nail color and care market from further declines, brands in this space must alleviate concerns over chemicals and nail damage. The growing shift in preferences from nail polish to alternatives demonstrates opportunities for growth. Brands that emphasize nail health and natural formulas can potentially remedy losses and ...

#### Consumers and the Economic Outlook - US

"The majority of consumers consider their finances to be healthy, and views of the future seem to be positive as well. Consumers are saving for the future, but are still willing to treat themselves."

- **Jennifer White Boehm, Associate Director - Financial Services & Auto**