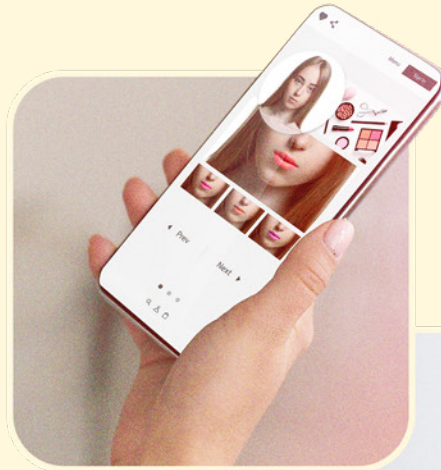


**MINTEL**

**GLOBAL**

# Beauty and Personal Care Trends 2022

The future of the industry will see changing lifestyles impact consumers' relationship with beauty and personal care in three crucial ways centred around sustainability, identity and technology.



The global pandemic has left lasting impressions on consumers around the globe, creating shifts in lifestyle as well as priorities. This is playing out across beauty categories in a variety of ways, including the importance of ethics, the changing role of identity and how technology influences the future.

**Over the next two years, expect to see:**

01

## **SUSTAINABILITY AND ETHICS MERGE**

Consumers will push back and demand to see bigger moves from companies on issues like climate change and insist that ethical impacts are displayed in clear and tangible ways.

**Mintel recommends:**  
Broadcast measurable metrics around ethics and sustainability.

LEARN MORE ON PAGE 1

02

## **CONSUMERS EXPRESS A TRUER SELF**

Online identities will merge with real life, allowing consumers to create their true selves. Multiple digital identities will allow for expression and creativity.

**Mintel recommends:**  
Unite the digital and physical allowing for greater access and representation.

LEARN MORE ON PAGE 8

03

## **BEAUTY BREAKS DOWN BARRIERS**

The definition of “beauty” will become undefined as consumers look to break the rules. The power of culture and tradition will be realized in positivity and representation.

**Mintel recommends:** Focus on simplification as it’s more desirable as consumption patterns shift in line with priorities.

LEARN MORE ON PAGE 14

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Expert-led, premium intelligence solution for the industry.

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- Product innovation across 86 markets
- Consumer insights covering 35 markets

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Direct access experts in retail, category, packaging and trends

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- Formulations
- Concepts
- Packaging
- Ingredients
- Patents
- Regulation & labelling
- Textures & formats

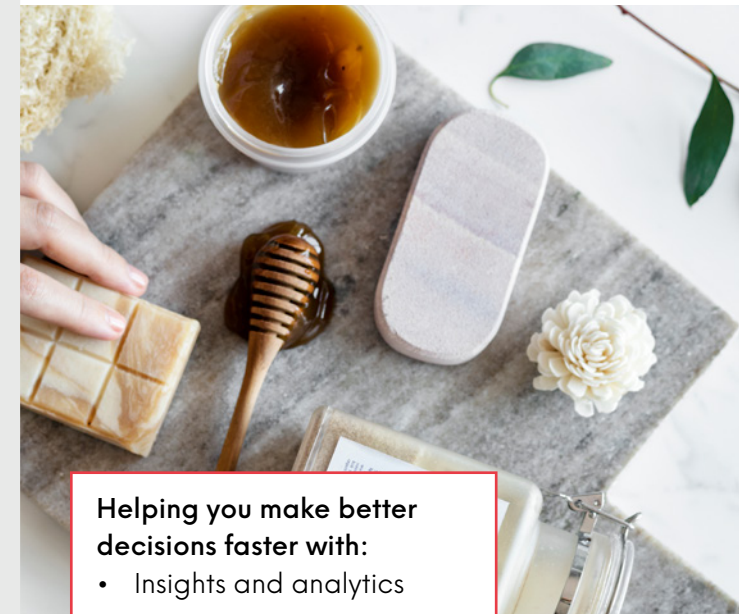
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01

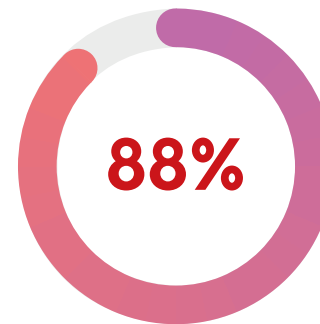
# TAKING ACTION FOR THE GREATER GOOD

The sustainability onus is not just on the end-user anymore as consumers push back for bigger moves from companies helping to move the needle faster on issues like climate change.

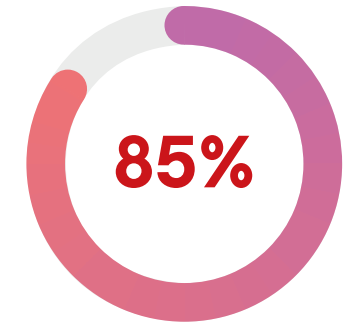
Make sustainability impacts clear and tangible for consumers. Amplify additional key benefits to justify trading up to a more green or ethical brand or product. Consumers want to see measurable metrics, and this goes well beyond sustainability. Ethical operating practices are on shoppers' radars and can drive product/brand adoption as well as loyalty.



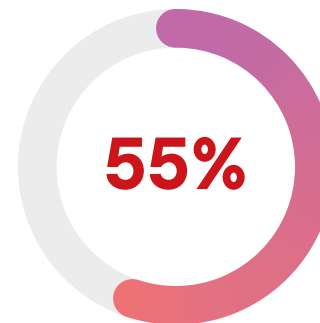
**Ethical concepts have shifted from a nice-to-have to a must-have in a few short years, representing growing demand in the market.**



of Chinese consumers say they are prepared to boycott companies that behave unethically.



of Brazilian consumers say they try to act in a way that is not harmful to the environment.



of US beauty users are very concerned about the environmental impact of the brands/products that they use.

Base: 1,000 Chinese internet users aged 18+; 1,000 Brazilian internet users aged 16+; 1,942 US internet users aged 18+ who purchased beauty or personal care products in the last 12 months. Source: Mintel Global Consumer, The Holistic Consumer, 2021; Mintel Reports US, Online Beauty Retailing, 2021

## Young climate activists demand immediate action

On November 5, 2021, young activists from around the world gathered at COP26 in Glasgow to call on world leaders to step up their actions against the climate crisis. Swedish activist Greta Thunberg, who appeared on the protest's stage, described the climate commitments of world leaders as "blah, blah, blah" and put in doubt the transparency of the commitments they have made during the climate summit.

Some leaders were setting goals for 2030 at the earliest, while others targeted 2070, which was considered by activists to be too late. The lack of inclusion of young people in the decision-making process was another red flag, called out by activist Mitzi Jonelle Tan from the Philippines. Gen Z consumers are at the forefront of the climate crisis and will be impacted the most severely; they are urging governments to do more and to do it faster.



Source: Business Insider; Nicolò Campo/  
LightRocket via Getty Images





Source: kao.com



## Sustainability targets are looming

Gen Z is pushing for bigger, bolder and faster moves from companies, demanding targets be set in a shorter timeframe. For example, Tokyo-based chemical and cosmetics company Kao is working toward 100% renewable energy, first in Japan by 2023 and then globally by 2025.



## Don't sell fear, share joy

Fear has driven consumers to focus on creating change for the future of the planet. Brands, likewise, magnify these sentiments to encourage sustainability and identify the action plans needed. But to get there, fear is a hurdle that everyone—consumers and businesses alike—must overcome with positivity as changes are made. Beauty needs to find new ways to connect and guide consumers towards a sustainable lifestyle, one that they enjoy adopting and do so with delight, not out of fear.

In February 2021, Watsons launched its first Naturals by Watsons refill station in Kuala Lumpur to reduce the overall impact of its plastic use. In addition, emphasis is placed on education through its Good Academy which runs every Monday to continuously raise awareness among consumers about sustainability, starting with small changes made to their daily habits.



Source: Watsons via Facebook



## Highlight measurable metrics for true transparency

Mintel's 2022 Global Consumer Trend, 'Ethics Check' digs into the importance of brands sharing their "ethical progress reports." As brands become more vocal about their stance on key issues, consumers want to see what progress brands are making as they tackle a variety of injustices. By broadcasting not only sustainability goals but also the metrics that relate to morals, brands can differentiate themselves and gain more trust and loyalty from consumers.

The EcoBeautyScore Consortium brings small and large companies and associations from four different countries together to develop an industry-wide environmental impact assessment and scoring system for cosmetic products. As consumers demand action from brands to be fully transparent, indices and rating tools can be a fast way to respond—but make sure it's being done with meaningful parameters and data. These tools help the consumer and can also put pressure on other brands to respond in kind.



Source: loreal.com

## Sharing sustainable solutions —a collective step forward

With carbon reduction and environmental sustainability becoming increasingly non-negotiable, the brands that are truly committed will gain favour while those accused of greenwashing will be increasingly at odds with consumer expectations. Consumers will look for brands that are forward-thinking, transparent about the process and authentic in their commitment. For example, Emma Lewisham shares its circular and carbon-positive process on its website, including a download of its Sustainability Strategy.

In the future, open sourcing will be increasingly important and even expected as consumers consider the final goal of far greater importance than one brand's USP. This could include sharing new types of sustainable packaging materials or sources of materials to facilitate more learning and collaboration.



Source: emmalewisham.co.uk

## Create lasting value, not just goal setting

Innovation remains the lifeblood of the beauty industry, but this can trigger concerns around unnecessary waste and leads to a focus on how brands can raise the bar on sustainability while being wary of appearing to overcompensate for overproduction and overconsumption.

Asia had a lot of ground to cover in the sustainability movement but was able to gain significant traction during the pandemic to solidify the adoption of sustainable beauty solutions—from product innovation to packaging. In May 2021, REN Clean Skincare harnessed the industry's packaging problem as a springboard for collaboration.

The brand collective—including REN, Skincare, Biossance, Caudalie, Herbivore and Youth To The People—committed to more planet-friendly packaging by the end of 2025 and launched the #WeAreAllies campaign to encourage industry competitors to unite in their goal to reduce beauty's plastic footprint.

Circularity for the beauty industry requires more than the existing quantification of goals and metrics; more importantly, it is an invitation for a fundamental shift in business normality and for brands to reimagine their relationships with their suppliers, consumers and even with one another as organizations.



Source: [renskincare.com](https://renskincare.com)



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A woman with dark hair is shown in profile, applying lip gloss. She is looking towards a professional microphone mounted on a stand, which is partially visible in the background. The scene is lit with soft, warm light, creating a professional and intimate atmosphere. The bottom half of the image is overlaid with a solid red-to-pink gradient.

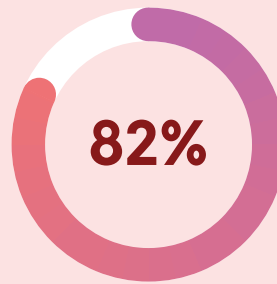
02

# THE SECOND SELF: SHIFTING IDENTITIES

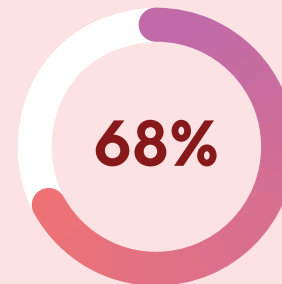
Consumers' online identities have merged with their real identities to create what they believe is their true selves, expressed in unique ways. Some consumers have multiple identities on social media, depending on the mood they wish to portray, but it all filters into the idea that 'online identity'+ 'offline identity'= 'true self'.



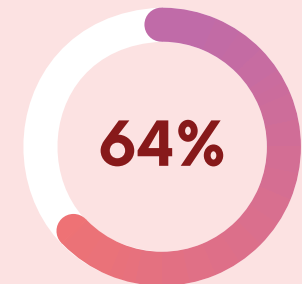
**As the concept of identity becomes more flexible, the online world will allow for ultimate creativity and self-expression.**



**of Indian consumers say being able to express their individuality is a top priority for them in life.**



**of US consumers would like to see diversity in beauty advertising as it reflects real life.**



**of Polish consumers say most of their leisure activities involve using digital technology.**

Base: 1,000 Indian internet users aged 18+; 1,727 US internet users aged 18+ who would like to see some diversity in beauty/grooming advertisements; 1,000 Polish internet users aged 16+. Source: Mintel Global Consumer, The Holistic Consumer, 2021; Mintel Reports US, Diversity and Inclusivity in Beauty, 2021

## Online avatars become a reflection of identity

When online avatars emerged in gaming and on social media nearly a decade ago, they gave the user free license to create an identity that wasn't necessarily based on reality. Fast forward to 2022, online avatars are now crafted in three dimensions and can mimic features down to a freckle or a dimple. The flexibility that online identities can afford a user is endless, but there has been a convergence in recent years changing the way brands need to think about catering to the single consumer in both digital and real-world environments.



Source: botlibre.biz



Source: Ralph Lauren

## Direct-to-avatar

The pandemic drove shopping behaviours online, resulting in rapid growth, as well as greater demand for the experience to be enhanced and more personalized. Consumer interest in virtual try-ons is growing across categories like beauty and fashion, driving digital developments as well as partnerships and acquisitions. For example, apps like Zepeto, with a tagline of 'another me in another universe,' allow users to see themselves in a three-dimensional world. A recent retail partnership with Ralph Lauren allows users to dress their avatars and socialize in a virtual world.

## Build a virtual representation

Brands are experimenting with their own virtual characters as a way to engage with young consumers who are digital natives living a parallel life in virtual worlds. Virtual characters offer great flexibility in design, allowing for complete customisation to a brand's image while aligning with their target audience's expectations.

L'Oréal launched its first male virtual ambassador, Master Ou, who is of Sino-French ethnicity, reflecting the French brand's integration into the Chinese market. Mr Ou takes on four different personalities: sustainability representative, head of the news department, social media influencer and skincare expert. These personalities represent his areas of expertise when communicating with the public on social media or during news releases and can allow for connection across a varied base of consumers.

However, with the wide variety of character designs that exist in the anime, comics and games realm, the challenge will be to find a virtual personality and style that can best represent the spirit of the brand while resonating with the target audience. Virtual interactions will continue to be a mainstay in consumers' daily lives as brands extend their strategic explorations in the multiverses of physical and virtual worlds, and all that comes in between.



Source: [businessoffashion.com](https://businessoffashion.com)



## Merging the digital and physical will encourage conscious consumerism

The gaming skins market, in which players of games like Fortnite can purchase custom outfits, or 'skins', for their characters, is estimated to be a multibillion-dollar industry. Designers and consumers of digital fashion believe in its future as a cheaper, easier and more ethical way of consuming fashion without buying or making physical clothes.

Digital fashion removes the need to consider the fit or sizing and allows consumers to 'wear' new and exciting pieces as often as they want. This also avoids the big costs of physical production. Digital makeup, just like fashion, can allow for creativity and self-expression that cannot exist in the real world. Beauty and fashion brands are discovering new ways of using AR technology to let consumers try on makeup and clothes, as well as 'wear' them virtually.



Source: dressx.com



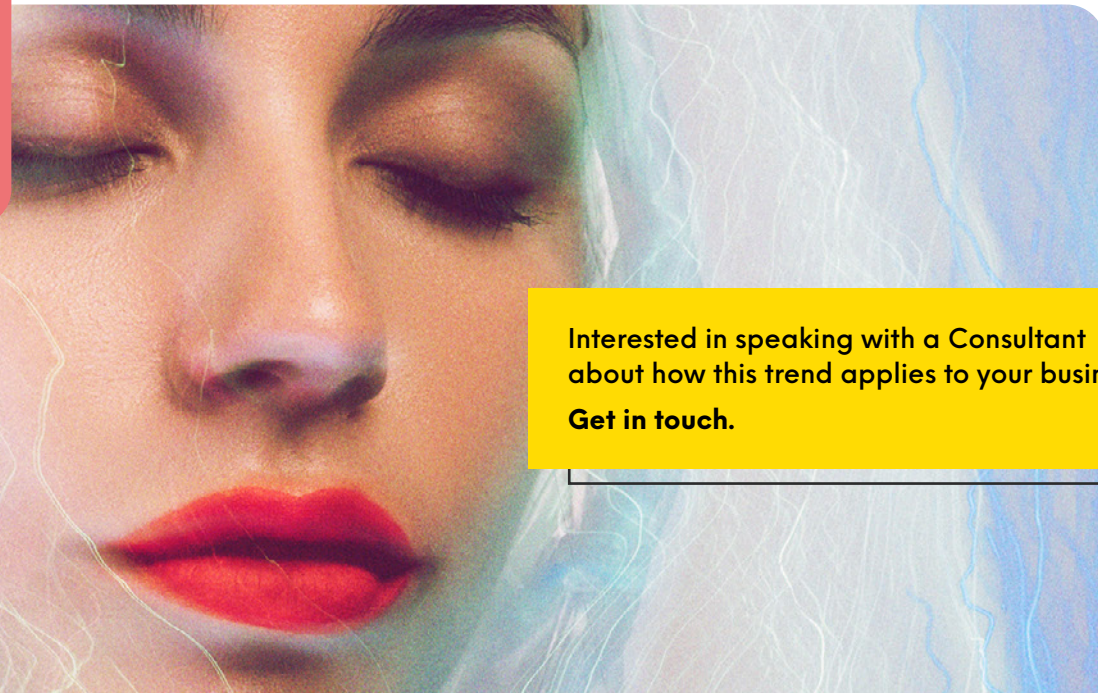
## Tech brings focus to the emotional side of beauty

The ongoing search for connection since the start of the pandemic runs on as life resumes some normality. Consumers are not necessarily seeking nostalgia all the time or trying to reclaim their youth, but simply seeking products and/or services for difficult-to-express emotions that show empathy and provide connections in the digital sphere.

Nose Shop from Japan collaborated with Scentmatic Co. Ltd and its KAORIUM technology that verbalizes difficult-to-understand scent impressions into words. KAORIUM is an AI system that visualizes vague, difficult-to-understand scent impressions in words and derives scents associated with a certain word. Through the process, consumers pick out their favourite scents through the words expressed by the AI system for them. For beauty, tapping into the emotional depth of new visual language is a key success factor in connecting with consumers on a new level.



Source: [perfumerflavorist.com](http://perfumerflavorist.com)



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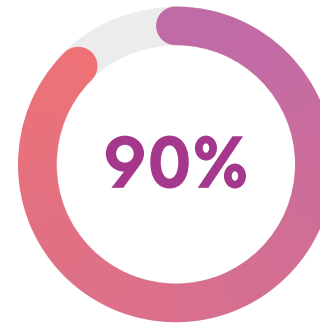
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# BREAKING ALL OF THE RULES

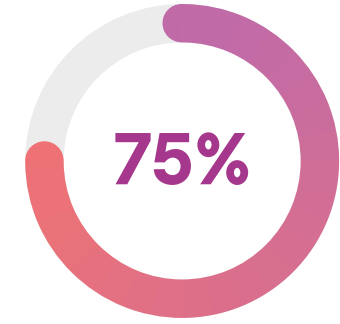
Consumers continue to push back against the 'rules' of beauty or what 'beautiful' really means, but brands have an opportunity to provide more elasticity for consumers and amplify the idea that beauty is whatever one makes of it. Accessibility is critical when it comes to diversity, equity and inclusion—consider price, geographical locations and social issues. Brands need to take positive action, not just broadcast token gestures.



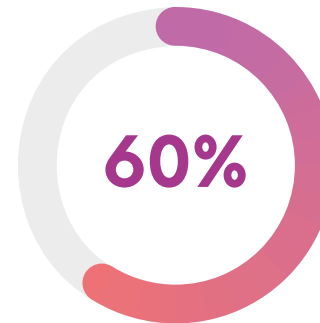
**Beauty plays a significant role in not just how consumers look but also how they feel, allowing for the ultimate freedom of expression.**



of South African consumers find themselves wanting to learn more about things more than they used to (brands, social matters, etc.).



of Italian consumers are always on the lookout for things that make their lives easier.



of US beauty consumers care about using brands and products that align with their values.

Base: 1,000 South African internet users aged 18+; 1,000 Italian internet users aged 16+; 1,942 US internet users aged 18+ who purchased beauty or personal care products in the last 12 months. Source: Mintel Global Consumer, The Holistic Consumer, 2021; Mintel Reports US, Online Beauty Retailing, 2021



## Beauty undefined

In beauty, today's communication and expression are heading toward authenticity without perfection, to layer onto connection, openness and engagement. The role of the brand founder has morphed into a community leader—one who is present to hear the voices of consumers directly. It is not the job of a customer service personnel but more a guardian of a community that can flourish on its own.

The differentiating point for brands moving forward lies in putting emotions and brand community high on the agenda, no longer treating diversity as a marketing ploy but instead recognizing the need for diverse teams and perspectives from consumers to design products aimed at a diverse audience right from the start.

## Cultural appreciation vs appropriation

The argument of appreciation versus appropriation continues as fashion and beauty look to tread the thin line between the two. Authenticity voids remain to be filled, particularly those that tie back to the richness of beauty's heritage, culture and time-honoured rituals. Niche beauty brands bring that to life, while mega players will struggle to connect fully simply by following the trend without concrete understanding.

The Inuit Tattoo Revitalization Project is just one example of reclaiming culture based on an ancient tradition that was, until recently, outlawed. Facial tattoos in the Inuit culture are viewed as beautiful but also carry with them deep meanings.

Understanding modern cultural trends also adds to the success of a brand in this digitally savvy world, where anything digital becomes increasingly indispensable in people's lives. Brands that dive into understanding modern cultures will find themselves more efficient in driving conversations and connections with their consumers, in turn staying relevant and being authentic. Being authentic with intentions goes further than being diverse and inclusive in how brands market themselves and their products.



Source: vogue.co.uk



Source: inuitartfoundation.org; © Cora Devos, Little Inuk Photography

## Reignite the power of tradition

Fable and Mane reignited the power of the Indian tradition of hair oiling. Hair oiling in Ayurveda is referred to as 'sneha,' which means 'to love'. What stemmed from the founder's grandma's secrets and homemade remedies that effectively addressed the root of hair problems also developed bonds.

This led to learning and uncovering more Indian beauty secrets to pass along the love and rituals that will bring people closer to their roots and one another.

Brands like that drive long-term value in respecting consumers and their cultures, as well as the people working behind the scenes to keep such culture and rituals alive. This is a sustainable benchmark that will stand the test of time, beyond brands that react to short-term causes in light of jarring situations.



Source: fableandmane.com

## Changing the conversation toward positivity

Brands will strive to reflect the changing expectations of consumers who exhibit growing interest and demand for inclusive products that are customised to their individual needs. Being future-ready will require brands to stay relevant to younger audiences by empowering them with the freedom of choice and equal representation.

Mintel Trend 'The Body Beautiful' highlights how brands of the future will cease to position themselves as aspirational and rather will embrace diversity by actively speaking to consumers as they are, not how society thinks they should be. For example, Clean and Clear's #Don'tPauseForPimples campaign in India connects with Gen Z to encourage skin positivity.

Consumer-led customisation will pave the way for innovative tools that can help them access better-suited products and services from a wide spectrum of options.

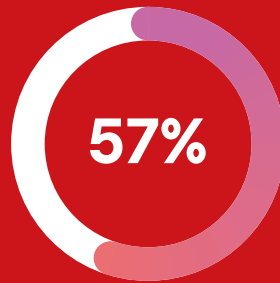


Source: cleanandclearindia via YouTube

## Overconsumption is out; simplification is in

Now and in the future, consumers won't be buying in the same way they always have. They're taking much more of a conscious approach all around, from what they are buying and how much they are buying to how and where they are shopping and why. Brand reputation will likely become increasingly important. There is an opportunity to pivot to align with consumers' shifting priorities.

This could include offering alternative shopping options (eg rentals, resale options), helping them declutter and offering payment flexibility (which most already do). Highlighting corporate social responsibility efforts and getting consumers involved in brand missions are also key to establishing and maintaining trust in the long run.



57% of US consumers are actively trying to reduce the amount of tangible goods they buy.

Source: Mintel Reports US, Value-Conscious Consumer, 2021



## To your local neighbourhood: boost accessibility

Brands could try investing in mobile/roaming retail like Orbis did when it collaborated with tech start-up Mello (which developed Japan's largest mobility business platform Shop Stop) to launch its new mobile store, Orbis Wagon, in November 2021.

The aim is to improve the online/offline shopping experience by going to places where their customers live and building a presence within local neighbourhoods. Muji has announced an expansion of its mobile retail to cover six rural locations in Japan and one location in Finland.

As people live more mobile lifestyles, geography can impact access to brands and retailers; a mobile approach can help match those shifting locations and lifestyles.



Source: Orbis



Source: ryohin-keikaku.jp

Interested in speaking with a Consultant  
about how this trend applies to your business?  
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## WONDERING WHAT'S IN STORE FIVE YEARS DOWN THE ROAD?

Mintel predicts that digital ownership and expression will have a broader impact on the beauty industry, changing the brand-consumer relationship, as well as the values associated with tangible products. The future of digital experiences will hold more authentic and community-based opportunities for the beauty industry as a new circle of influence is realized.

Mintel clients interested in learning about the trends shaping the future of the global beauty and personal care landscape should speak with their Account Manager for more details. For everyone else, **please get in touch.**



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