

# THE PERSONAL CARE CONSUMER – US, 2023

Personal care routines remain primarily rooted in functional hygiene. In a stable but challenged market, brands must stand out with unique value-adds.



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# The Personal Care Consumer - US, 2023

## This report looks at the following areas:

- Impact of inflation and other external factors on consumer behavior and the personal care market
- Personal care market landscape, segment performance, key challenges and opportunities
- Personal care shopping and purchase influencers
- Changes to personal care routines
- Attitudes and expectations in personal care products



Personal care routines remain primarily rooted in functional hygiene. In a stable but challenged market, brands must stand out with unique value-adds.

## Overview

The average personal care routine has become more elaborate over the past year, bolstered by increased social activity and wellness themes as skin health and emotive benefits come to the fore in consumer mindsets. The evolution of the "lipstick effect" points towards ample opportunity for brands to position themselves as affordable luxuries and help consumers upgrade their hygiene rituals to self-care rituals.

That being said, the market's stable growth and penetration show signs of faltering in the coming years; inflation-adjusted sales suggest a broader shift in value-driven shopping. Looking ahead, brands must defend against other categories as the market enters the competitive wellness space, and reimagine how their offerings will fit in more diverse and environmentally-impacted routines.

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# Report Content

## Key issues covered in this Report

### EXECUTIVE SUMMARY

- Overview
- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

### THE MARKET

#### Market context

#### Market drivers

- Economic uncertainty perpetuates value-driven shopping
- A diversifying population ushers in diversified routines
- A changing climate makes changing routines inevitable

#### Market size and forecast

- Retail sales and forecast of market, at current prices, 2018–28
- US retail sales and forecast of market, at current prices
- US retail sales and forecast of market, inflation-adjusted

#### Segment performance

- Personal care market share, by segment, 2023 (est)
  - Graph 1: [no title]
- Personal care sales and market share, by segment

### COMPETITIVE STRATEGIES & MARKET OPPORTUNITIES

- Extend prevention and proactivity to the total body
- Treat sensory experiences as a primary benefit
- Help personal care become more personal
- Provide solutions to climate-adaptive needs

## CONSUMER INSIGHTS

### Consumer fast facts

#### Personal care purchases

- Little movement in most categories
  - Graph 2: select personal care products purchased, 2022-23
- Added benefits motivate small gains
  - Graph 3: select personal care products purchased, 2022-23
- Continue to strengthen connections to holistic health beyond hygiene
- Take inspiration from facial skincare
- Address melanated needs to make up for losses in sun care
  - Graph 4: sun care products purchased, by race, 2022 vs 2023
- Build early connections with young adults and families of color
  - Graph 5: [no title]
- Target diverse needs of young adults and families of color
- Significant increased purchases among men indicates continued opportunity
  - Graph 6: select personal care products purchased among men, 2022-23
- Men's personal care routines are becoming wellness routines
- Greater attention paid towards men's grooming opens doors for NPD

#### Purchase influencers

- Scent matters – so do brand and sensitive skin claims
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  - Graph 7: ranked purchase influencers, 2023
- Create distinction through fragrance
- Keep an eye on "scent layering" for partnership and expansion opportunities
- Reassure women of color with sensitive skin concerns
  - Graph 8: safety for sensitive skin importance among women, any rank, 2023
- Parents look for natural ingredients
  - Graph 9: natural ingredient importance by parental status, 2023
- Emphasize safety to resonate with parents
- Democratize safe personal care routines for all families

#### Changes to routines

- The average personal care routine takes more time
- The average personal care routine takes more time
  - Graph 10: spending more time vs less time on routine by age, 2023

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- Elaborate and occasion-dependent routines present new opportunities
- Translate knowledge of multi-step facial skincare to body care routines
- Eco-friendly aspirations indicate ongoing appetite for NPD...
  - Graph 11: select sustainable behaviors, 2023
- ...but solutions must be incremental without sacrificing sense of quality
- Explore new sustainable formats, accessories, and multifunctionality

### Interest in trading up or down

- Personal care is currently resilient to trade-down behavior
  - Graph 12: Trading-down, by financial situation
- Facial + specialty skincare see greatest high spend
  - Graph 13: Current high spend or interest in trading up, by category
- Look to professional treatments to inspire investment-worthy NPD
- Tap into interest in quality oral care
  - Graph 14: interest in trading up or down oral care products by financial situation, 2023
- Look to beauty routines to invigorate oral care
- Shaving sees the greatest threat to trading-down
  - Graph 15: current low spend by category, 2023
- Defend against low-spend by targeting high-value wellness attributes

### Attitudes and behaviors

- Relaxation, sensation, and health resonate with all age groups, but especially those in early and middle adulthood
  - Graph 16: select attitudes towards personal care routines/products by age, 2023
- Sensation can be not only an emotional solution, but a physical one
- With the relaxation, sensation, and health-motivated, quality matters, but so does affordability
  - Graph 17: Duping sentiments, by attitude
- Anticipate competition to deliver both elevation and value
- Luxury themes can speak to Black personal care consumers
  - Graph 18: luxury and duping attitudes by race, 2023
- Luxury themes can speak to Black personal care consumers
- Hygiene and ease remain critical, bottom-line expectations
  - Graph 19: hygiene goals by attitudinal segments, 2023

### Shopping for personal care products

- Social media moves the needle both ways among younger personal care shoppers
- Social moves the needle both ways among younger consumers
  - Graph 20: social media-influenced shopping by age, 2023
- In a highly functional category, most stick with what already works
  - Graph 21: select shopping behaviors, 2023

- The rise of hygiene influencers creates new avenues for brands to engage consumers
- Social media is both a source of information and confusion
  - Graph 22: confusion towards personal care products by social media use, 2023
- Cut through misinformation with brand and professional expertise
- Cut through misinformation with brand and professional expertise

## APPENDIX

- Market definition
- Market driver: Diversity
- Bases: interest in trading up or down
- Bases: holistic health attitudinal segments
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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