

# The intersection of beauty and wellness

How consumers are changing the game, and how you can benefit from it



*NIQ Beauty Vertical*

*November 2023*



## Our promise

NIQ delivers the ***Full View***<sup>™</sup>, the world's most complete and clear understanding of consumer buying behavior that reveals new pathways to growth.



### *The Full View* of the Beauty Marketplace



# 90+

***Markets Measured  
Worldwide***

## Key Takeaways

- Beauty consumers are prioritizing health and wellness in this post pandemic world which has caused the definition of beauty to expand to include beauty from the inside and out.
- Health topics that have been previously considered to be 'taboo,' such as sexual health, menopause, and mental health, are coming to the forefront of the conversation.
- When we broaden the definition of beauty to also include adjacent wellness categories, we are expanding the category +45%.
- Beauty retailers are taking note of this growing trend and are adjusting their assortment to include more wellness offerings



# Consumers' evolving need states is driving the expansion of the beauty definition



**Skin Health**



**Sexual Wellness**



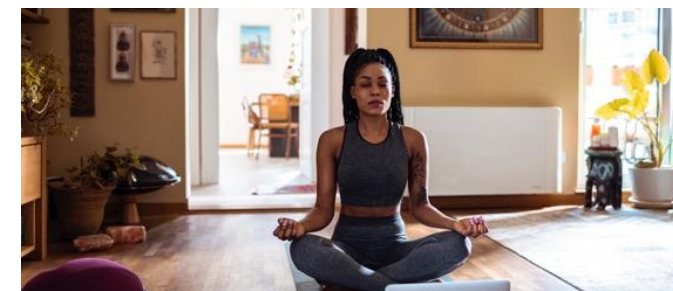
**Beauty Inside and Out**



**Clean Personal Products**



**Aging/Menopause**



**Mental Health**

# Beauty + Wellness expands the market by 45%



Source: NielsenIQ Omnipanel Total US Latest 52 weeks ending 7/15/2023

\*Personal Health includes: feminine care, oral care, and sexual health

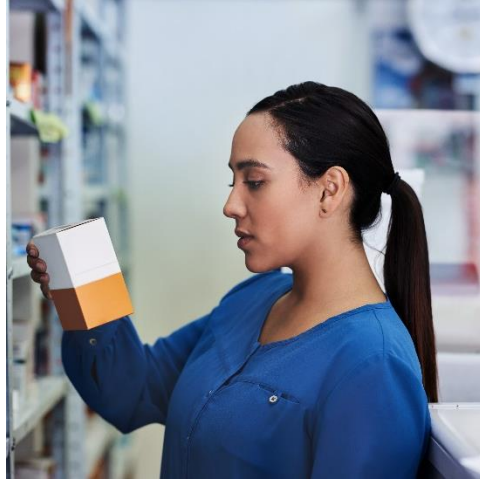
# Claims driving growth focus on clean, free from, and health-supporting ingredients



## Personal Health

Search volume for:

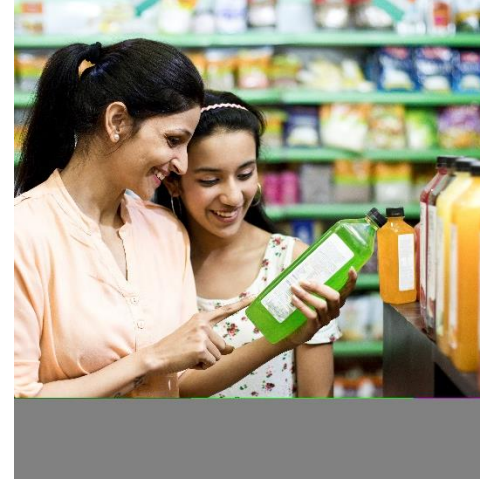
- Clean +155%
- Plant based +100%
- CBD ingredients +95%
- Ayurvedic +72%



## Supplements

Sales growth for:

- Antioxidant presence +38%
- Free from corn syrup +20%
- Free from hydrogenated oil +20%



## Beverages

Search volume for:

- Sugar free functional beverages +82%
- Drinkable Nutrition with electrolytes +153%
- Water with energy support +199%



## Home Care

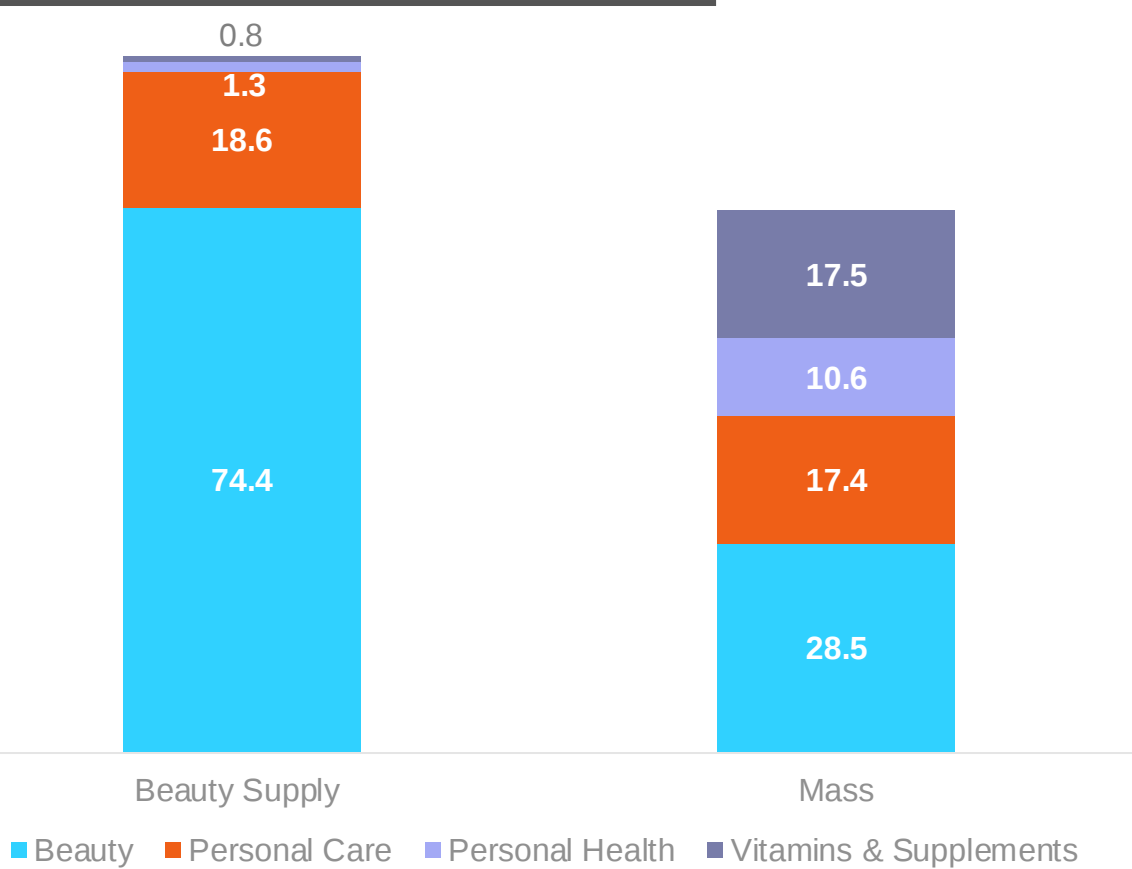
Fragrance oils sales growth for:

- Natural positioning +10%
- Vegan +36%
- Recyclable +30%
- Paraben Free +26%

Source: NielsenIQ Label Insights Trending Attributes, Total US, April – June 2023. NielsenIQ RMS Total US xAOCL12 weeks ending 7/8/2023

# Personal health and Vitamins & supplements have opportunity for expansion in beauty supply

Category dollar share



Source: NielsenIQ Omnipanel Total US Latest 52 weeks ending 7/15/2023



# Beauty supply is growing wellness, but that space is coming from beauty categories



## Total Beauty Supply

|                        |                                               |
|------------------------|-----------------------------------------------|
| Vitamins & Supplements | +56.7% dollar sales<br>+0.23pts dollar share  |
| Oral Hygiene           | +35.5% dollar sales<br>+0.15pts dollar share  |
| Sexual Health          | +629.9% dollar sales<br>+0.02pts dollar share |



Hair Care (-1.67pts), Bath & Shower (-1.12pts), and Hand Body Lotion (-0.56pt) are losing dollar share



Source: NielsenIQ Omnipanel Total US Latest 52 weeks ending 7/15/2023

# Thank You!

## For more information, get in touch!



**Anna Mayo**

Anna.Mayo@nielseniq.com

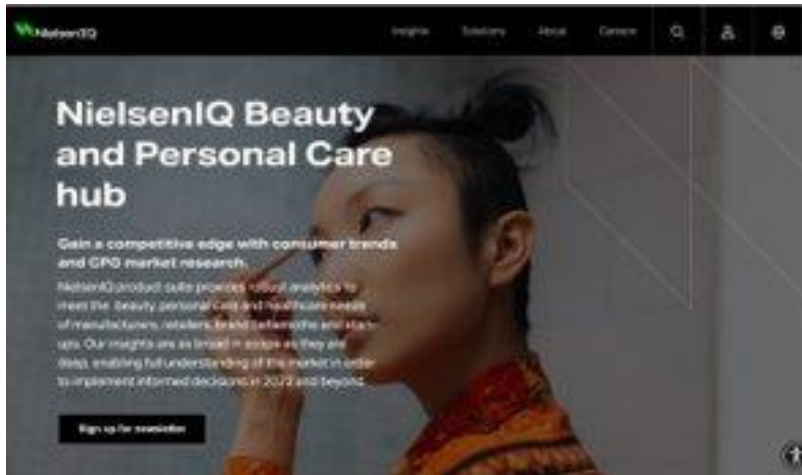
<https://www.linkedin.com/in/anna-mayo/>



**Liz Bonofiglio Reaney**

Liz.BonofiglioReaney@nielseniq.com

<https://www.linkedin.com/in/lizbonofiglio/>



<https://niq.com/beauty>



<https://nielseniq.com/global/en/landing-page/beautys-inner-circle/>