

# BEAUTY ROUTINES – THAI CONSUMER – 2019

Disrupt morning & night routines and capitalise on the new on-the-go beauty space.



A Mintel Analyst, Global Analyst



# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- The morning routine is packed, but there's still white space
- On-the-go beauty routines are emerging
- Night routines leave room for expansion
- The future of Thailand's beauty routines

## KEY TRENDS

- What you need to know
- Thailand's beauty market is blooming through internet penetration...
  - Graph 1: Facial care retail market spend per capita (US\$), 2013-22
- ...and is driven by new product experimentation...
  - Graph 2: Beauty regimen expansion across APAC
- ...but accessibility is still driven offline
- City expansion impact beauty product use

## GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Social media fuels aspiration and self-improvement
- K-beauty hits Thailand with Thai ambassadors
- South Korea leads, and Thailand follows...
  - Graph 3: Beauty and personal care launches, Oct 2015-Sep 2019
- ...and is setting men on the path to beauty as well
  - Graph 4: Men's beauty and personal care launches, Oct 2015-Sep 2019
- New need occasions arise with more consumers on the move...
- ...and more products are being launched to serve them
  - Graph 5: beauty product launches carrying an on-the-go or convenience claim, Oct 2015-Sep 2019

## CONSUMER INSIGHTS

- What you need to know
- Beauty routines persist throughout the day...
- Morning routines are heaviest...
  - Graph 6: Beauty product usage throughout the day

- Graph 7: Number of categories used throughout the day
- ...but the number of categories used goes down as the sunsets
- Different beauty roles expected throughout the day
  - Graph 8: [no title]

### Chapter 1: The morning routine

- Amplifying beauty as pressure and sun rise
- The morning routine becomes a ritual involving many facets of beauty
  - Graph 9: Beauty products used at home in the morning
- Women show their beauty, while men hint at it...
  - Graph 10: Beauty products used at home in the morning, by gender
- ...to gain self-confidence and social approval at work
  - Graph 11: Beauty-enhancing products used by women in the morning
  - Graph 12: Beauty enhancing products used by men in the morning
- Penetration opportunities lie outside of the urban setting
  - Graph 13: Beauty product penetration gaps, by urban area
- Unlock rural potential through convenience stores
  - Graph 14: Skincare and beauty shopping channels used, by area

### Chapter 2: The out-of-home routine

- Extending beauty to protect against aggressors
- Enhancing and protective beauty items need reapplication
  - Graph 15: Beauty products used at home in the morning, vs those used out of home
- On-the-go occasions are an untapped space
  - Graph 16: Locations at which beauty products are reapplied, by subcategory
- Meet the Beauty Transporters
- Save time by carrying a routine in motion...
- ...so specially designed items are needed...
- ...and it's not just about functionality
- The face and haircare categories must transform to address on-the-go needs
  - Graph 17: Beauty products used at home in the morning, vs those used out of the home
- On-the-go regional differences

### Chapter 3: The night routine

- Nighttime is 'me time'
- Skincare is the core of the night beauty ritual...
- Skincare is the core of the night beauty ritual...
  - Graph 18: Beauty products used at home at night
- ...when the quest for the finest skincare takes place

- Urban women aged 25-34 are skincare early adopters
- Sheet masks are still situational, while essence and ampoule remain a niche
  - Graph 19: Facial skincare product formats used
- Young are more open to experimenting with new formats
  - Graph 20: Skincare product formats used, by age
- Summary of Consumer Insights

## MARKET APPLICATIONS

- Opportunities: Key focus areas

### Opportunities

- Recruit rural consumers with simplicity
- Affordability is key
- Convenience stores are the gateway to winning rural consumers
- Simple tunes, easy understanding
- Remind people to re-apply during their commute
- Sparking an on-the-go moment
- Enable convenience and show personal style
- Closing the deal, conveniently
- Promote thorough cleansing...
- ...but 'just cleanser' is not enough
- Anchor brands in nighttime usage
- Make room for new skincare formats
  - Graph 21: Skincare launches, by emerging formats
- Make skincare fun, rather than a chore
- Make sheet masks more relevant for daily usage
- Transfer facial care revolution to bodycare
- Face and body comparison
- Summary of Market Applications

### Who's innovating

- Leverage traditional Thai ingredients to build relevance with rural consumers
- Innovation and excitement come in small packages
- Packaging innovation and design to enable on-the-go use
- The 'night' claim is not limited to just moisturiser
- Engage mask consumers by making them work for it

### Global innovations

- Explore mask innovations for all the senses

- Consumers' require education on the ampoule format's usage

### THE BOARDROOM CHECKLIST

- The boardroom checklist

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