

# BEAUTY ROUTINES – THAI CONSUMER – 2021

Diversify the beauty and personal care portfolio to handle consumers' beauty routine shifts amid the pandemic.



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# Report Content



## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- The impact of COVID-19 on beauty routines
- The skincare category has been becoming more active in the midst of the pandemic
  - Graph 1: top five beauty and personal care categories launches, May 2018–April 2021

### What consumers want and why

- Consumers want: skincare benefits focus
- Consumers want: connection through digital mediums
- Consumers want: economical options

### Opportunities

- Promote in-home benefits for daily use
- Engage consumers via digital ecosystems to develop beauty routine habits
- Maximise product value to fit limited budgets

### Competitive landscape

- Market activities

### Mintel predicts

- The outlook for the beauty category in Thailand
- The marketing mix
- Make beauty routines more resistant to change

## KEY TRENDS

- What you need to know
- Colour cosmetics launches declined
  - Graph 2: top five beauty and personal care categories for product launches, May 2018–April 2021
- Thailand's skincare market is growing despite the pandemic
  - Graph 3: beauty and personal care launches, by category, May 2018–April 2021
- Blue light protection has become more relevant with social distancing
  - Graph 4: blue light claims in beauty & personal care launches, May 2018–April 2021
- Thai consumers develop beauty problems from excessively digital lifestyles

## Beauty Routines – Thai Consumer – 2021

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- Consumers can become content co-creators on short video platforms
- New skincare tips and product recommendations directly from the interactive audio community
- Skincare in sachet packaging is growing
  - Graph 5: packaging type in beauty and personal care products, 2019-20
  - Graph 6: beauty and personal care launches in flexible sachet packaging, 2019-20
- Beauty products in sachets offer daily use and new trial at an affordable price

### KEY DRIVERS

- The latest wave of the pandemic in Thailand prolongs stay-at-home restrictions
- eCommerce delivers products directly to consumers' homes
- Thai consumers are maintaining their appearances
- Thai consumers are experimental with beauty products
  - Graph 7: agreement\* with "I enjoy discovering new beauty/grooming products", March 2021
- Negative financial outlook will drive consumers to look for value
  - Graph 8: finances\* compared to a year ago, March 2021

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

- Consumers reconsider the value of beauty products
- The pandemic expedited the digital transformation

### CONSUMER INSIGHTS

- What you need to know
- Skincare continues to be a strong staple in Thai beauty routines
- Skincare remains the staple category of Thai consumers' beauty routines
  - Graph 9: beauty product usage compared to 2019 (before the COVID-19 pandemic), January 2021
- Care, protect and enhance beauty as the core routine
  - Graph 10: beauty and grooming product usage in the last three months, January 2021
- Thai consumers are in beauty maintenance mode
- In-home benefits help sustain beauty products used for going out
- Thai consumers use sun care daily, even when staying home because of brands' education
- Lip makeup is an all-time essential beauty enhancement
  - Graph 11: beauty enhancer product usage frequency in the last three months, January 2021
- Young women use colour cosmetics occasionally to avoid acne breakouts
  - Graph 12: colour cosmetics usage frequency of less than three times a week, by gender and age, January 2021
- Excitement over beauty innovation has been stripped away
- Thai consumers seek ways to enhance beauty experiences at home

## Beauty Routines – Thai Consumer – 2021

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- Graph 13: responses on select statements, January 2021
- Digital media has become the main source of beauty information
- Young consumers rely on beauty bloggers, but adult consumers trust genuine user reviews
  - Graph 14: consumers who respond to the beauty information source, by age, January 2021
- Manage beauty routines under budget constraints via sachets
  - Graph 15: consumers who agree with "I am using smaller-sized beauty products in an effort to reduce my spending", by financial status, January 2021

### The Beauty Routine Discipline consumer

- Meet the Beauty Routine Discipline
- The Beauty Routine Discipline's profile
- The beauty routine of the Beauty Routine Discipline
- The Beauty Routine Discipline highly engages with all steps of their beauty routine despite the pandemic
  - Graph 16: the Beauty Routine Discipline's beauty product usage change compared to 2019 (before the COVID-19 pandemic), January 2021
- The Beauty Routine Discipline does full makeup steps daily
  - Graph 17: the Beauty Routine Discipline's beauty product usage frequency, by category, January 2021
- The Beauty Routine Discipline uses various brands from mass market to luxury
  - Graph 18: brand tiers of the Beauty Routine Discipline's facial skincare usage, January 2021
- The Beauty Routine Discipline spares a higher-than-average budget for beauty products
  - Graph 19: the Beauty Routine Discipline's monthly beauty budget, January 2021

### The Beauty Perseverance consumer

- Meet the Beauty Perseverance
- The Beauty Perseverance's profile
- The beauty routine of the Beauty Perseverance
- Skincare and suncare remain the core beauty items for the Beauty Perseverance
  - Graph 20: the Beauty Perseverance's change in beauty product usage compared to 2019 (before COVID-19), January 2021
- Economical options sought after under financial constraints
  - Graph 21: top five shopping habits changed in 2020 from 2019, January 2021
- Masstige brand is beauty budget balancers' best friend
  - Graph 22: brand tiers of the Beauty Perseverance's facial skincare usage, January 2021
- Summary of consumer insights

## MARKET APPLICATIONS

- Opportunities: key focus areas

## Opportunities for promoting in-home benefits for daily use

- Support skin restoration with higher ingredient concentration
- Address digital fatigue from extended work from home
- Infuse skincare into colour cosmetics for in-home usage
- Lift spirits with colour experimentation
- Inject fun into the beauty routine

## Opportunities for enhancing beauty routines through the digital ecosystem

- Help consumers to develop a beauty routine as a daily habit with mobile applications
- Encourage participation via short-form video challenges
- Prompt consumers to practice daily beauty routines with live streaming
- Use live interactive platforms for quick idea testing

## Opportunities for high-value beauty

- Turn consumers' pains into discounts
- Trade up consumers with gamification
- Introduce multifunctional products to extend value
- Refill stations are a sustainable, cost-effective choice

## Who's innovating

- In-home benefits in occasion-based products
- Multi-benefit products in sachets
- Jergens Body Butter Collection – mood-boosting fragrances

## Global innovations

- Daily hair colourant to create a different look every day

## BOARDROOM CHECKLIST

- The boardroom checklist

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