

CONVENIENCE (CVS) BEAUTY – THAI CONSUMER – 2022

Respond to consumers' expectations for hyper-convenience by capitalising on quick product efficacy, decision-making aid services and more purchasing options.



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Convenience (CVS) Beauty - Thai Consumer - 2022

This report looks at the following areas:

- The impact of COVID-19 on beauty products sold at convenience stores
- Key trends in CVS beauty and how beauty brands, CVS and beauty retailers are responding to them
- Consumers' expectations on convenience, from beauty products to their purchasing channels
- Opportunities for beauty brands, CVS and beauty retailers to offer beauty products in a variety of convenient ways



Respond to consumers' expectations for hyper-convenience by capitalising on quick product efficacy, decision-making aid services and more purchasing options.

Overview

COVID-19 has fast tracked the growth of ecommerce and home delivery in Thailand, raising the standard of convenience and breaking the geographical distribution barrier. Consumers now have convenient options to purchase beauty products, even in the comfort of their homes.

32% of Thai consumers agree that it is worth spending more money to buy beauty products from the stores near where they live or work.

With the rise of ecommerce, major Thai CVS are pressured to include online and home delivery options in order to stay competitive.

With physical stores where consumers can enjoy beauty products near their home, however, CVS have an advantage over online channels. Thus, CVS have the opportunity to take this

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advantage and establish hybrid beauty shopping experiences including both physical and online aspects.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Key issues covered in this Report

Market context

- Overview
- The impact of COVID-19 on CVS beauty
- Convenience has reached a new height

What consumers want and why

- Consumers want: elevated convenient purchasing options
 - Graph 1: interest in CVS beauty features, 2022
- Consumers want: quick and effective facial skin solutions
- Consumers want: enhanced CVS beauty shopping experiences
 - Graph 2: interest in shopping features while purchasing BPC products from CVS, 2022

Opportunities

- Upgrade and organise the dedicated beauty section
- Highlight product efficacy on tiny sachets
- Evolve new convenient shopping experiences

Competitive landscape

- Market activities

Mintel predicts

- The outlook for convenience beauty in Thailand
- The marketing mix
- An opportunistic future for convenience beauty in Thailand

KEY TRENDS

- What you need to know
- Small sachet-format beauty products continue to grow
 - Graph 3: top five packaging types for beauty and personal care products, 2022
- Sachets continue to dominate face and neck care launches

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- Graph 4: face/neck care launches in flexible sachet packaging, 2022
- Sachet-format facial skincare is capitalising on the anti-acne claim
 - Graph 5: select claims of face/neck care with flexible sachet packaging, excluding sheet masks*, 2022
- Retailers are competing on dedicated beauty space
- CVS morph into mini neighbourhood shopping malls
- Instant beauty deliveries bring convenience to consumers at home
- Live streams deliver virtual product experiences

KEY DRIVERS

- In-store shopping for beauty products stagnates after the COVID-19 outbreak
- Thai CVS are drowning in a sea of beauty sachets
- Heavy discounts entice consumers to shop beauty products online
- Instant home delivery surges, elevating convenience

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Consumers reconsider the value of beauty products
- Consumers migrate to online channels for beauty shopping
- Live streams and online beauty reviews simulate product trials

CONSUMER INSIGHTS

- What you need to know

Consumers expect elevated, convenient options from CVS

- Consumers expect to get beauty products whenever they need
- Urgent On-the-Go consumers are Gen-X urbanites with busy lifestyles
- CVS are not the main shopping channel for Urgent On-the-Go consumers
 - Graph 6: channels to purchase BPC products, 2022
- Urgent On-the-Go consumers are willing to pay more to save time
 - Graph 7: consumers who agree that it's worth spending more money to buy beauty products from the stores near where they live/work, 2022
- More convenient purchasing options appeal to Urgent On-the-Go consumers
 - Graph 8: CVS beauty features interests, 2022

CVS beauty products are perceived as quick yet effective skin solutions

- CVS beauty can be a quick solution for temporary skin problems
- Young, busy mothers are looking for convenient solution to suit their hectic lives
- CVS are perceived as curated stores of mini beauty products

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- Graph 9: consumers who agree that beauty products in CVS have the same quality as those sold in other store types, 2022
- Efficacy translates to convenience
 - Graph 10: efficacy as a consideration factor in purchasing facial skincare products, 2022
- A combination of natural and synthetic ingredients delivers efficacy without compromising safety
 - Graph 11: attitudes towards functional ingredients in beauty, 2022

Rising expectations for the CVS beauty shopping experience

- Thai consumers expect economical as well as decision making aid
 - Graph 12: interest in features when purchasing beauty products from CVS, 2022
- CVS are too messy, a well-organised beauty space is needed
 - Graph 13: consumers agree that having too much beauty product variety on display on CVS shelves makes it difficult to browse, 2022
- Consumers seek additional assistance to make their purchase decision
 - Graph 14: interest in features when purchasing beauty products from CVS, 2022
- CVS Assistant Experience Seekers are looking to access beauty product experiences
 - Graph 15: 'fragrance that I like' is a consideration factor to buy BPC at CVS, 2022

MARKET APPLICATIONS

- Opportunities: key focus areas

Opportunities for CVS and beauty retailers

- Upgrade the in-store beauty section to turn affluent customers into frequent buyers
- Organise CVS facial skincare by skin concern
- Create a travel beauty essentials section for Urgent On-the-Go consumers
- Leverage travel occasions to trigger beauty product purchases
- Provide the ability to check beauty items online and pick up in-store for Urgent On-the-Go consumers

Product development opportunities to enhance the usage of CVS beauty

- Capitalise on quick, high performance sachet-format facial skincare
- Pivot away from a traditional sachet to maintain product efficacy for repeated usage
- Leverage the ampoule format to amp up efficacy, differentiating from traditional sachet offerings
- Help recommend product and convenient sampling with machine

Opportunities to enhance consumers' CVS shopping experiences

- Offer accessible premium beauty products with mobile shops
- Provide space to live stream in-store, demonstrating products through online channels
- Offer personalised skincare recommendations with facial recognition technology

Who's innovating

- Passport-sized beauty routine set for convenient travel

Global innovation

- Sephora China offers a seamless beauty shopping experience from offline to online channels

APPENDIX

- Abbreviations
- Thailand generation groups

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