

FACIAL CARE – THAI CONSUMER – 2021

Offer wellbeing claims to serve emotional needs, leverage science to justify functional claims and highlight value to respond to skincare shifts during the pandemic.



A Mintel Analyst, Global Analyst



Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The COVID-19 impact on facial skincare
- Skincare category was positively boosted by the pandemic
 - Graph 1: launches in facial skincare with anti-acne, antibacterial and sensitive claims, 2018-21

What consumers want and why

- Meet the three consumer facial skincare segments
- The Skin/self-care want: wellness skincare
- The Skintellectuals want: reasons to believe in claims
- The Skin in a Pinch want: value through efficacy

Opportunities

- Opportunities for the Skin/Self-care
- Opportunities for the Skintellectuals
- Opportunities for the Skin in a Pinch

Competitive landscape

- Market activities

Mintel predicts

- The outlook for facial skincare category in Thailand
- Marketing mix
- Opportunistic future for facial skincare

KEY TRENDS

- What you need to know
- Thai facial skincare market has a positive outlook
 - Graph 2: facial skincare retail market value*, 2018-24
- Facial skincare is on the path of innovations
 - Graph 3: top five launches in beauty and personal care products, 2018-21
- Product launch in response to maskne starts to take off
 - Graph 4: launches in facial skincare with anti-acne, antibacterial and sensitive claims, 2018-21

Facial Care – Thai Consumer – 2021

- Maskne inspired innovations during the pandemic
- Skin strength and skin barrier are introduced in the market because of maskne
- Facial care claims with skin glow attributes are starting to take off
 - Graph 5: top ten launches in face/neck care by beauty-enhancing and functional claims, 2018-21
- Affordability can help sustain facial skincare routine and retain consumer loyalty

KEY DRIVERS

- The pandemic is shifting to endemic
- Acne is everyone's problem
 - Graph 6: skin issues experienced in the past six months, 2020
- The focus shifted from vanity to holistic wellness
- Rise of skin literacy
- The pandemic puts low-income earners under financial stress
 - Graph 7: financial situation compared to one year ago*, 2021

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN THAILAND

- Consumers are re-evaluating their purchases
- The focus is on minimalism
- Consumers have the ability to credit check brands

CONSUMER INSIGHT

- What you need to know
- Thai consumers keep it simple in the morning
 - Graph 8: facial skincare product usage in the morning, 2021
- Consumers kept skincare regimes consistent with additional mask at night
 - Graph 9: facial skincare product usage in the evening, 2021
- Mintel's three facial care consumer segments in Thailand

Skin/self-care (27%)

- Representing the 45+ suburban consumers
- Skin/self-care demographic index
- Skincare is an important part of self-care
 - Graph 10: consumers who agree that skincare is an important part of self-pampering, 2021
 - Graph 11: consumers who agree that using skincare products helps relaxation, 2021
- The pandemic allowed for more self-care time
 - Graph 12: consumers who agree that restrictions during the COVID-19 outbreak creates more free time to spend on a skincare regime, 2021

Facial Care – Thai Consumer – 2021

- The focus is not on the science
 - Graph 13: consumers who neither agree or disagree that knowing about skincare science is important, 2021
- Routine has expanded since the pandemic
 - Graph 14: the Skin/self-care consumers' behaviour towards facial skincare, 2021
- The Skin/self-care still stick to the basic routine
 - Graph 15: facial skincare product usage in the morning, 2021
 - Graph 16: facial skincare product usage in the evening, 2021
- Skin/self-care are focusing on concentrated and nourishing skin formats
- Skin/self-care would pay a premium for products that are efficacious and relaxing
 - Graph 17: facial skincare products that the Skin/self-care would pay more for, 2021

Skintellectual (43%)

- Hardcore skincare nerd
- Skintellectual demographic index
- Science is king for Skintellectual
 - Graph 18: consumers who strongly agree that knowing about skincare science is important to them, 2021
- Prevention is high on the agenda
 - Graph 19: consumers who strongly agree that skincare routines help to prevent skin issues, 2021
- The pandemic helped them to be more engaged with facial care
 - Graph 20: facial skincare usage behaviour, 2021
- The Skintellectual are online influencers
 - Graph 21: consumer behaviour towards facial skincare, 2021
- The Skintellectuals have extensive skincare regimes with additional special treatments
 - Graph 22: facial skincare product usage in the morning, 2021
 - Graph 23: facial skincare product usage in the evening, 2021
- Skip-care trend is adopted to simplify multi-step routines
 - Graph 24: consumers who strongly agree that a minimalist approach to skincare has become more appealing since the start of the pandemic, 2021
- Skinintellectuals would pay more for advanced skincare products
 - Graph 25: facial skincare features that Skinintellectuals are interested in paying more for, 2021

Skin in a Pinch (30%)

- Low-income rural consumers looking for self-care appreciation
- Skin in a Pinch demographics
- The Skin in a Pinch consumers have to cutback on facial care spending
- Knowing about skincare credibility will help to optimise their spending
 - Graph 26: consumers who agree that knowing about skincare science is important to them, 2021
- Maskne care is the immediate skin needs
- The Skin in a Pinch wants the most out of their skincare

- Graph 27: facial skincare product attributes that Skin in a Pinch would pay more for, 2021

MARKET APPLICATIONS

- Opportunities: key focus areas

Opportunities for the Skin/self-care

- Capture the wellness benefits in facial skincare with sensorial appeal
- Communicate skincare as part of the wellness routine
- Beauty supplements connect the dots between beauty and wellness
- Clearly call out benefit claims to catch attention without overwhelming
- Skincare in pad format is convenient and multi-beneficial

Opportunities for Skintellectual

- Transparency will be key for Skintellectuals
- Highlight ingredient superiority to stand out for the Skintellectuals
- Make vanity their laboratory with customisable skincare usage
- Professional treatment at consumers' homes
- Introduce ingredients that support skin health

Opportunities for Skin in a Pinch

- Offer ingredient-oriented skincare to emphasise value
- Affordable sheet masks for affordable night pampering
- Anti-acne medical masks tackle two essential needs in one product

Who's innovating?

- Thai beauty brands are stepping up the science in skincare

Global innovations

- Global skincare brands are honing to skip-care trends

BOARDROOM CHECKLIST

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