

ANTI-AGEING – INDIAN CONSUMER – 2020

To survive COVID-19, anti-ageing brands can enhance their value by moving into a more multi-functional role and can target consumers beyond their mid-20s and 30s.



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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- Impact of COVID-19 on anti-ageing
- Impact of COVID-19 on anti-ageing
- The Indian anti-ageing market needs to play catch up to its Asian counterparts
 - Graph 1: % of skincare launches with anti-ageing claim, Jan 2017-Dec 2019
- There is a need to expand the user base to prevent stagnation
- Understanding the new consumers

What consumers want and why

- Gen Z users want: more awareness and education
- Gen Z users want: affordable, new formats
- Passive Believers want: tailor-made solutions
- Cater to need by identifying the factors that cause ageing
- Anti-ageing users want: multi-functional products

Opportunities

- Opportunities for the Gen Z user
- Opportunities for the Gen Z user
- Provide solutions keeping skin ageing factors in mind
- Opportunities for the Passive Believer
- Introduce formats that can tackle multiple concerns

Competitive Landscape

- The anti-ageing segment lacks dynamism
- The anti-ageing segment lacks dynamism
 - Graph 2: top five claims in skincare launches, Jan 2017-Dec 2019
- 'Premiumness' is hindering mass adoption

Mintel Predicts

- Anti-ageing will have a slow recovery

IMPACT OF COVID-19 ON ANTI-AGEING

- The outlook for the Indian beauty industry
- The outlook for the Indian anti-ageing industry
- The impact of COVID-19 on anti-ageing
- The impact of COVID-19 on anti-ageing – SWOT analysis
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- The impact of COVID-19 on anti-ageing – SWOT analysis
- The impact of COVID-19 on anti-ageing – SWOT analysis
- Indian consumers focus their spending on essentials
 - Graph 3: "Compared to your usual spending habits, do you expect to spend more, less or about the same in each of the following categories over the next month?", 5-11 June 2020
- Change in consumer behaviour and what brands can do
- The marketing mix – product
- The marketing mix – product
- The marketing mix – price
- The marketing mix – place
- The marketing mix – place
- The marketing mix – promotion
- The marketing mix – promotion
- In summary: re-position to appeal in the next normal

KEY TRENDS

- What you need to know
- Unrealistic promises have resulted in failure to win over older consumers
- Selling young-looking skin is a tired trope
- Campaigns have started to target those in their mid-20s-30s
- Brands are looking at new demographics
- 'Premiumness' is hindering mass adoption
- Change in packaging might address price-friendliness
 - Graph 4: anti-ageing skincare launches as per package type, Jan 2017-Dec 2019
 - Graph 5: anti-ageing skincare launches as per formats & textures, Jan 2017-Dec 2019

KEY DRIVERS

- India's anti-ageing market is falling behind other leading Asian markets
- India's anti-ageing market is falling behind other leading Asian markets

- Graph 6: % of skincare launches with anti-ageing claim, Jan 2017-Dec 2019
- Whiteners and lighteners drive the facial care category
- Lacking in dynamism
- Graph 7: top five claims in skincare launches, Jan 2017-Dec 2019
- Anti-ageing needs to tap new audiences to grow
- Potential to target users worried about stress
- Appearance is still a concern for the older consumer

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Key lessons from other APAC markets
- Small pack sizes are affordable and can increase usage
- Skin ageing caused by external factors will grow more severe
- Lifestyle factors are affecting skin appearance
- The natural movement will be in focus during the COVID-19 era
- Attitudes towards ageing are evolving

CONSUMER INSIGHT

- What you need to know
- Anti-ageing users vs non-users
- Anti-ageing users vs non-users
- Users are seeking skincare benefits along with anti-ageing
- Users are seeking skincare benefits along with anti-ageing
- Graph 8: benefits users look for when purchasing anti-ageing products, March 2020
- Increase purchase of anti-ageing products by adding multiple benefits
- TURF analysis – anti-ageing purchase benefits
- Brightening benefits can assist in positioning anti-ageing for healthier skin
- Graph 9: anti-ageing users association to healthy skin, March 2020
- Young women make up the key target audience

The Gen Z anti-ageing user

- Who is the Gen Z anti-ageing user?
- Encourage regimen adoption when they're young
- Enlist their peers to educate them
- Potential to drive usage with social media
- Target the experimental youth with new formats
- Graph 10: anti-ageing product usage among women users aged 18+, March 2020
- Offer travel sizes to make anti-ageing cost-effective

- Recruit the youth by targeting skin ageing caused by lifestyle factors
 - Graph 11: causes of ageing as per women users aged 18+, March 2020
- Recruit the youth by targeting skin ageing caused by lifestyle factors
- Blue light is an ageing factor for the young
- Supplement anti-ageing with anti-acne for the youth

The anti-ageing non-user

- The older consumer does not use anti-ageing products
- Anti-ageing non-users aged 45+ can be divided into two different types

Passive Believers

- Who are Passive Believers?
- Affordability impacts their buying behaviour
- Convert Passive Believers by giving them anti-ageing benefits that appeal to their lifestyle
 - Graph 12: causes of ageing as per users aged 45+ and Passive believers, March 2020
- Natural offers easier conversion
- Brands must start appealing to consumers' values

MARKET APPLICATIONS

- Opportunities: Key focus area

How to target the anti-ageing user

- Look outward to South Korea for multi-functional anti-ageing
- Introduce formats that can tackle multiple concerns
- External aggressors will ensure the need for anti-ageing pollution protection

How to target the Gen Z user

- Build campus brand ambassador programs to encourage a regimen
- Engaging social media content can increase usage
- Beauty influencers play a key role in forming connections
- Make anti-ageing fun, rather than a chore
- Blur face serums with makeup to appeal to the youth
- Increase usage with small-size formats
- Look at introducing new formats: ampoules
 - Graph 13: [no title]
- Recruit the youth by targeting their unhealthy lifestyles
- Create a conversation with the young by playing up the digital impact on ageing
- Introduce anti-ageing products that can tackle anti-acne for the Gen Z user

How to target Passive Believers

- Induce trial with cost-effective sachets
- Appeal to Passive Believers with relaxing/de-stressing anti-ageing products
- Incorporate adaptogenic ingredients
- Introduce positive ageing
- Provide tailor-made products for mature audiences

Who's innovating

- Multi-functional overnight repair cream

Global innovations

- Beauty treatment for face, hair and body
- Dedicated to nighttime skincare and sleep wellness
- LED Masks go mainstream in South Korea
- The shift towards inside-out beauty can be leveraged for anti-ageing

APPENDIX

- Consumer survey methodology

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