

BEAUTY COMMUNICATIONS AND MESSAGING – INDIAN CONSUMER – 2022

Amid the continued popularity of natural, the need for transparency rises, making vegan an attractive proposition. Also, the importance of empowerment has emerged.



A Mintel Analyst, Global Analyst



Beauty Communications And Messaging - Indian Consumer - 2022

This report looks at the following areas:

- The impact of COVID-19 on beauty communication choices and tones in India
- The key factors influencing beauty purchases among Indian consumers
- The reasons why these factors are rising in the Indian beauty space
- How to be transparent and communicate vegan claims in beauty offerings
- Opportunities for brands to empower Indian consumers through positivity and inclusivity



Amid the continued popularity of natural, the need for transparency rises, making vegan an attractive proposition. Also, the importance of empowerment has emerged.

Overview

Almost half of Indian consumers (42%) have ranked natural as the top factor that influences their beauty purchases. The pandemic has encouraged consumers to prioritise health; therefore, natural – which is perceived to be safe – continues to be a key proposition in beauty.

Besides natural, consumers want to be feel empowered through their beauty purchases: 27% have identified positivity and inclusivity as beauty purchase factors.

Since media misinformation has taken place, consumers' scepticism has started to intensify and they have demanded proof of claims. Consumers believe even fundamental claims like natural should be verified by brands.

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Grasp opportunity in the category by taking an educational approach. Teach consumers about the difference between natural, organic and vegan. In addition, align with culturally relevant issues to showcase a progressive stance, be more empowering in messaging and stay relevant to the modern Indian consumer.

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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 beauty communication
- As the appeal of natural becomes undeniable, consumers push for proof
 - Graph 1: agreement with 'Claims made by brands should be verified by a reliable institute', by consumer type, 2022
- Use vegan to stand out in the sea of natural
 - Graph 2: agreement with 'Beauty brands should focus on being vegan', by consumer type, 2022
- Celebrate beauty (and flaws) of all forms
 - Graph 3: top ranking of body positivity and inclusivity, by age, 2022

Mintel predicts

- The future of beauty communications and messaging in India

KEY TRENDS

- What you need to know
- India is among the top markets in APAC for beauty launches with all-natural and vegan claims
 - Graph 4: launches with all-natural, vegan or organic claims, 2017-21
 - Graph 5: top five markets of launches with vegan, organic and all-natural claims, 2021
- Launches with certified claims increase
 - Graph 6: % of beauty product launches with the vegan, organic, and all-natural claim having 'certified' in their product description, 2017-21
- Brands are becoming more empowering in communication

KEY DRIVERS

- India's Ayurvedic heritage empowers natural propositions
- Increased exposure leads to conscious consumerism
- Informed consumers demand proof
- Misinformation on Indian social media is rife

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Positive beauty
- Transparency is fundamental in beauty

CONSUMER INSIGHT

- What you need to know
- Natural's reign continues
 - Graph 7: ranking of factors influencing beauty product purchase, 2022

Natural in beauty needs proof

- As the appeal of natural increases, consumers push for proof
 - Graph 8: agreement with 'Claims made by brands should be verified by reliable institutes', by consumer type, 2022
- All that is natural is not necessarily organic or vegan
 - Graph 9: agreement with 'Brands should educate consumers to understand the differences between organic, natural and/or vegan', by consumer type, 2022
- Axing the excess is the key to brand appeal
 - Graph 10: purchase factors for beauty products, by consumer type, 2022

Transparency paves the way towards vegan

- Who are the transparency seekers?
- The need for transparency veers consumers towards vegan
 - Graph 11: agreement with 'Beauty brands should focus on being vegan', by consumer type, 2022
- Even with transparency, premium can deter purchase
 - Graph 12: purchase factors when buying beauty products, by consumer type, 2022

To be empowered is to be beautiful

- Consumers want beauty to be on their own terms
 - Graph 13: ranking of factors important during purchase of beauty products, 2022
- Embracing positivity resonates most with 35-44 year olds
 - Graph 14: ranking of body positivity and inclusivity, by age, 2022
- Run-of-the-mill natural ingredients lose sheen among this audience
 - Graph 15: agreement with 'Beauty products with common natural ingredients (eg coconut oil, aloe) are boring', by consumer type, 2022
- Home-grown brands help reinforce inclusivity

MARKET APPLICATIONS

- Opportunities: key focus areas

Instil trust in natural through transparency

- Alleviate the confusion surrounding natural, organic and vegan
- Drive awareness around certifications
- Utilise certifications to help differentiate between natural, organic and vegan
- Use clinical trials and third-party verification to embolden the efficacy promise
- Quantify the percentage of active ingredients used
- Adopt a simplistic design to spotlight ingredients and show transparency
- Leverage consumers' experiences to convey authenticity

Enhance the relevancy of vegan in beauty

- Dispel distrust around vegan through ingredient sourcing
- Provide transparency across the supply chain to help vegan truly shine
- Increase the access to vegan beauty products with dedicated sections
- Offer prestige benefits at mass prices to increase the affordability of vegan

Move from encumbered to empowered

- Normalise skin problems
- Steer clear of impossibly perfect images in communications
- Celebrate the inner beauty that comes from one's qualities and values
- Talk about 'what I can be' instead of 'what I need'
- Don't ignore men's beauty
- Push the inclusivity envelope, but stay rooted in cultural nuances

APPENDIX

- Consumer survey methodology

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✔ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✔ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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