

BODYCARE – INDIAN CONSUMER – 2020

An already lethargic category faces more risks during COVID-19 as consumers seek better bodycare solutions for their next normal needs.



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Report Content

- What you need to know

EXECUTIVE SUMMARY

- Mintel's perspective

Market context

- The impact of COVID-19 on bodycare
- No heroes here: bodycare suffers from ubiquity
 - Graph 1: interest in benefits when choosing one bodycare product over another, April 2020
- Resuscitate a sluggish market with shaky foundations
 - Graph 2: BPC launches by sub-category, Jun 2017-May 2020

What consumers want and why

- Consumers want seasonless textures
 - Graph 3: reasons for use of coconut oil/body oil vs lotion/cream among users, April 2020
- Consumers want bodycare that aligns with self-care rituals
- Dropout users want differentiated claims

Opportunities

- Create a hero product that fits into skipcare trends
- Introduce convenient-to-use oils
- Develop lotion differentiated from oil
- Tag bodycare to different wellness rituals
- Boost evening use with sleep-aiding products

Competitive landscape

- In light of COVID-19, handcare innovations blur care and protection messages

Mintel predicts

- Slow but steady rebuild

THE IMPACT OF COVID-19 ON BODYCARE

- The outlook for the Indian beauty industry
- The outlook for the Indian bodycare industry
- The impact of COVID-19 on bodycare – SWOT analysis
- Reinignite an unexcited (and stressed) consumer with self-pampering messages

Bodycare – Indian Consumer – 2020

- Graph 4: categories consumers expect to spend more on over the next month, 15 Jun-6 Sep 2020
- How consumer behavior will change and what brands can do
- Provide a route for trading up when discretionary spending is challenged via new textures and claims
- Invest in online to keep consumers engaged
- Marketing mix – product
- Marketing mix – price
- Marketing mix – promotion
- Marketing mix – place
- In summary: adapting to the next normal

KEY TRENDS

- What you need to know
- Suffering from ubiquity, the category has no hero products
 - Graph 5: repertoire of any bodycare product usage, April 2020
- The bodycare category is growing – but at a crawling pace
 - Graph 6: retail market values for bodycare, colour cosmetics and facial care, US\$ m, 2018-24
- The bodycare category is growing – but at a crawling pace
- Revive a tired category in the Indian beauty market
 - Graph 7: BPC launches by sub-category, Jun 2017-May 2020
- Cluttered with body lotion launches, the category remains uninspired
 - Graph 8: bodycare launches, by formats and textures, Jun 2018-May 2020
- Claims remain static and focused on moisturising and natural
 - Graph 9: top 10 claims in bodycare launches, Jun 2018-May 2020
- Moisturising lotion is a tried-and-tested formula
- Consumers are not trading up on bodycare
- Indians are adding more steps to beauty regimes than those in other APAC markets
 - Graph 10: beauty and personal care behaviours, past three months, Jul 2020
- However, they are also an overwhelmed beauty consumer
 - Graph 11: the number of beauty and grooming products available can be overwhelming, Dec 2019

KEY DRIVERS

- COVID-19 limits Indian consumers' beauty budgets
 - Graph 12: categories consumers expect to spend more on over the next month, 15 Jun-6 Sep 2020
- Indians are keen to reduce stress
 - Graph 13: consumer* interest in BPC products that help reduce anxiety and stress, Jul 2020
- COVID-19 has intensified worry and stress
 - Graph 14: negative impact due to the COVID-19 outbreak on the following factors, 5 Jun-6 Sep 2020

- The next normal disrupts sleep patterns

Global trends and how they are playing out in India

- With no hero products, consumers are confused
- South Korea effectively drives the skipcare trend
- New texture combinations in bodycare explored globally
 - Graph 15: texture combination percentage of bodycare lotion, gel and oil, Jun 2017-May 2020
- Recognise the white space for self-care beauty in India
 - Graph 16: BPC launches with "stress" or "sleep" in description, Jan 2018-March 2020
- Look to Japan to answer consumers' need for self-care beauty

CONSUMER INSIGHT

- What you need to know
- Usage is scattered across multiple products
 - Graph 17: usage and occasions of usage of bodycare products, April 2020
- Revamp the category to prevent dropout
- Explore the desire for simplicity
- Bodycare product users vs non-users
- Explore various benefits, but don't omit moisturising
 - Graph 18: benefits users look for when choosing bodycare products, April 2020
- Users are keen for multiple benefits in bodycare
 - Graph 19: repertoire of benefits bodycare product users look for when choosing bodycare products, April 2020
- Enhance the value of bodycare products by stacking benefits
- TURF analysis – bodycare product benefits
- White space to build on easy-to-use bodycare
 - Graph 20: bodycare launches, by claim categories, Jun 2017-May 2020
- Oils seen as inconvenient
 - Graph 21: out-of-home usage of bodycare products, April 2020
- Reposition oils as easy to use
 - Graph 22: bodycare, foot care and hand/nail care launches in an oil format, by package type, Jan 2018-Jul 2020
 - Graph 23: bodycare, foot care and hand/nail care launches, by claim categories, Jan 2018-Jul 2020
- Strengthen lotion by making it seasonless
 - Graph 24: reasons for usage of coconut oil/body oil vs lotion/cream among users, April 2020
- Comparing textures
 - Graph 25: reasons for usage of coconut oil and body oil vs lotion and cream among users, April 2020
- Target Indian parents in metro cities
- CHAID analysis – reasons for using lotion and cream

Explore the wellness angle to enhance value

- Increase per capita spend by incorporating a wellness angle
- Consumers have already linked self-care to beauty
- Self-care claims in bodycare can see an uptick with the stressed user
 - Graph 26: symptoms associated with being stressed among bodycare product users, April 2020
- Spotlight stress- and sleep-aiding products
 - Graph 27: attitude statements that apply to bodycare product users aged 35+, April 2020
- Self-care claims can surge evening use
 - Graph 28: bodycare product use at home in the morning vs the evening, April 2020
- Include natural ingredients to dial up the self-care conversation
- Target fragranced bodycare to employed Indian adults aged 18-44 interested in trying bodycare products that aid sleeping

Dropout users

- Who are the dropout users?
- Leading a stressful life can encourage body pampering
 - Graph 29: use of bodycare products, April 2020
- Bigger appetite for efficacy
- Use facial skincare claims to upgrade offerings
 - Graph 30: benefits bodycare product users who don't intend to use bodycare in the next year look for when choosing bodycare products, April 2020
- Provide self-care solutions to dropout users
 - Graph 31: attitude statements that apply to bodycare product users who don't intend to use bodycare in the next year, April 2020
- Encourage shopping for self-pampering

MARKET APPLICATIONS

- Opportunities: key focus areas

Make bodycare a multi-purpose solution

- Hydrating benefits are a mainstay, but more is needed to stand out in this busy space
- Look outward to South Korea for multi-functional positioning
- Take inspiration from facial skincare on communicating multiple benefits
- Make bodycare products easier to use via new formats
- Potential to make oils more convenient
- Combine textures to help lotion overcome its sticky image
- Induce use of new textures by pairing them with the familiar
- Take inspiration from the food industry

Tap into white space opportunities for a self-care angle in bodycare

- Elevate mass offerings by tapping wellness rituals
- Break the 'mass image' with bodycare as bespoke self-care
- Include adaptogenic, Ayurvedic ingredients
- Make scent a more prominent self-care, mood-boosting feature
- Case study: fragranced candle/skincare/haircare product brings disruption
- Cement the self-care message via marketing communication
- Blend scent, touch and sound to realign mind and body
- Mass brands can adapt wellness and bring value to consumers
- Sleep-aiding products can elevate evening use

Who's innovating

- Offer relief from hot summers with new textures

Global innovations

- Innovative body oil launches
- New handcare entrants emerge with sanitising/hydrating combos
- Body-first beauty brand targets the impact of urban living on skin
- Be inspired by stone therapy concepts

APPENDIX

- Consumer survey methodology

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