

BRIGHTENING TRENDS IN FACIAL SKINCARE – INDIAN CONSUMER – 2021

Move brightening and glow away from whitening by defining their purpose, adding functional claims and latching onto redefined beauty standards.



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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on brightening trends in facial skincare
- Whitening continues to shed influence
 - Graph 1: brightening, whitening and glow* claims as a % of skincare product launches, 2018-21
 - Graph 2: brightening, whitening and glow* claims as a % of skincare launches, 2018-21
- Skin colour inclusivity creates a paradox for claim differentiation

What consumers want and why

- Three consumer segments by attitudes towards brightening trends
- Consumers want: a clearer definition for brightening
 - Graph 3: change in usage of brightening/whitening products in comparison to last year (ie 2020), 2021
- Consumers want: a functional standing for skin glow
 - Graph 4: change in usage of brightening/whitening products in comparison to last year (ie 2020), 2021
- Consumers want: inclusive communications
 - Graph 5: consumer attitudes towards brightening, 2021

Opportunities

- Dial up brightening's differentiation
- Explain skin glow's functionality to increase appeal
- Make brightening and glow stand for redefined beauty stands

Competitive landscape

- Home-grown indie brands are focusing on glow

The impact of COVID-19 on brightening trends in facial skincare

- The marketing mix
- Maintain a balance between emotional and functional

KEY TRENDS

- What you need to know
- Whitening and lightening drives facial care in India
 - Graph 6: retail market segmentation by value (bn INR) of facial care, 2018-20

Brightening Trends in Facial Skincare – Indian Consumer – 2021

- Global movements accelerated inclusivity in India
- India has been taking slow but steady steps towards skin colour inclusivity
- Brands move away from whitening as it loses reputability
 - Graph 7: brightening, whitening and glow* claims as a % of skincare product launches, 2018-21
 - Graph 8: brightening, whitening and glow* claims as a % of skincare launches, 2018-20
- Glow is positioned as an extension of brightening and whitening
 - Graph 9: facial skincare launches with glow* as the claim, 2018-21
- Brands are tagging on 'brightening' and 'glow' to whitening
- Establishing glow will take more than a simple product name change
- Overlapping of claims doesn't help the consumer distinguish one from another
- Communication spotlights luminosity, shine and radiance in APAC

KEY DRIVERS

- The fair-skin bias is under attack
- Inclusivity faces a road block with consumers from lower stratas
 - Graph 10: % of consumers who strongly agree that "the beauty industry should be more inclusive", 2021
- Rise of consumer activism
- The country stands divided

Global trends and how they are playing out in India

- The Black Lives Matter movement spurs diversity themes
- Purpose-driven brands will see success

CONSUMER INSIGHT

- What you need to know
- Whitening product usage trumps brightening product usage
 - Graph 11: change in usage of brightening/whitening products in comparison to last year (ie 2020), 2021
- Brightening doesn't have a clear-cut purpose
- Consumers are moving towards skin glow
 - Graph 12: change in usage of brightening/whitening products in comparison to last year (ie 2020), 2021
- Lack of definition limits their need
- Skin colour diversity gets heightened focus
- Usage is driven by the need to boost self-esteem
 - Graph 13: reasons for using brightening products, 2021
- When seeking advice, consumers turn to influences they trust
 - Graph 14: sources of information that influence the purchase of whitening/brightening products, 2021

Introducing the three brightening segments

- Three consumer segments by attitudes towards brightening

Segment #1: Unenlightened Beauty Enthusiasts (44%)

- Unenlightened Beauty Enthusiasts (44%)
- Demographic profile of Unenlightened Beauty Enthusiasts
- In their minds there is no clear distinction between whitening and brightening
- Propel them towards brightening to prevent droppage
 - Graph 15: attitudes towards brightening products, 2021
- Explain the benefits of skin glow and brightening
- Use skin health to anchor them onto skin glow
- Radiant skin can help them stand out
 - Graph 16: reasons for using brightening products, 2021
- Use online videos as educational tools to define brightening
 - Graph 17: sources of information that influence the purchase of whitening/brightening products, 2021

Segment #2: Whitening Addicts (26%)

- Whitening Addicts (26%)
- Demographic profile of the Whitening Addicts
- Subjection to skin colour diversity pushes them towards whitening product usage
- Strong desire for affordable instantaneous fairness
 - Graph 18: change in usage of brightening/whitening products in comparison to last year (ie 2020), 2021
- Work towards changing the deep-set belief that fair skin is needed to impress loved ones
 - Graph 19: reasons for using brightening products, 2021
- Aspiration to look like celebrities propels them to use brightening products
- eCommerce and brands' social media pages hold precedence
 - Graph 20: sources of information that influence the purchase of whitening/brightening products, 2021

Segment #3: Natural Skin Colour Advocators (30%)

- Natural Skin Colour Advocators (30%)
- Demographic profile of Natural Skin Colour Advocators
- Natural skin colour distances them further away from whitening
- The skin colour narrative holds no relevancy with this cohort
 - Graph 21: brightening/whitening products which have never been used before or in 2021, 2021
- Use skin health to nudge them towards skin glow
 - Graph 22: 'neither agree nor disagree' with select statements about whitening/brightening, 2021

MARKET APPLICATIONS

- Opportunities: key focus area
- Lingering on whitening won't grow the market
 - Graph 23: % of facial care* launches in US dollars price tier by whitening and brightening, 2020-21

Define what brightening is for the Indian consumer

- Move away from skin colour transformation and focus on skin tone improvement
- Focus communication on additional skincare benefits
- Play with light reflecting concepts to reinforce brightening
- Use online videos to showcase what brightening does to skin
- Take a segmented approach to cater to brightening and whitening demands

Explain skin glow's functionality to increase appeal

- Skin glow needs to be more functional
- Position glowing skin as overall healthy skin
- Use nuances to describe healthy glow
- Double down on functional claims to position skin glow as giving overall better complexion
- Pair the traditional glow-giving ingredients with the modern to make them ultimate glow givers
- Tap into K-Beauty to move consumers towards skin glow

Move the conversation towards inclusivity

- Make brightening and glow stand for redefined inclusive beauty standards
- Take inspiration from colour cosmetics campaigns that celebrate all skintones
- Moving away from one size fits all
- L'Oréal Paris offers whitening solutions for every skintone with #glowyourownaura
- Showcase how brightening and glow works on different skintones
- Use celebrities to challenge the ideal beauty standard
- Case study: collaborating with female athletes to promote diversity of beauty and women empowerment
- Create inclusive communities to lead product development

Who's innovating

- Beauty ingestibles are doubling down on glow

Global innovations

- Skincare brands are providing for all skin types and all skintones
- Re-invent brand's mission to align with inclusivity

APPENDIX

- Consumer survey methodology

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