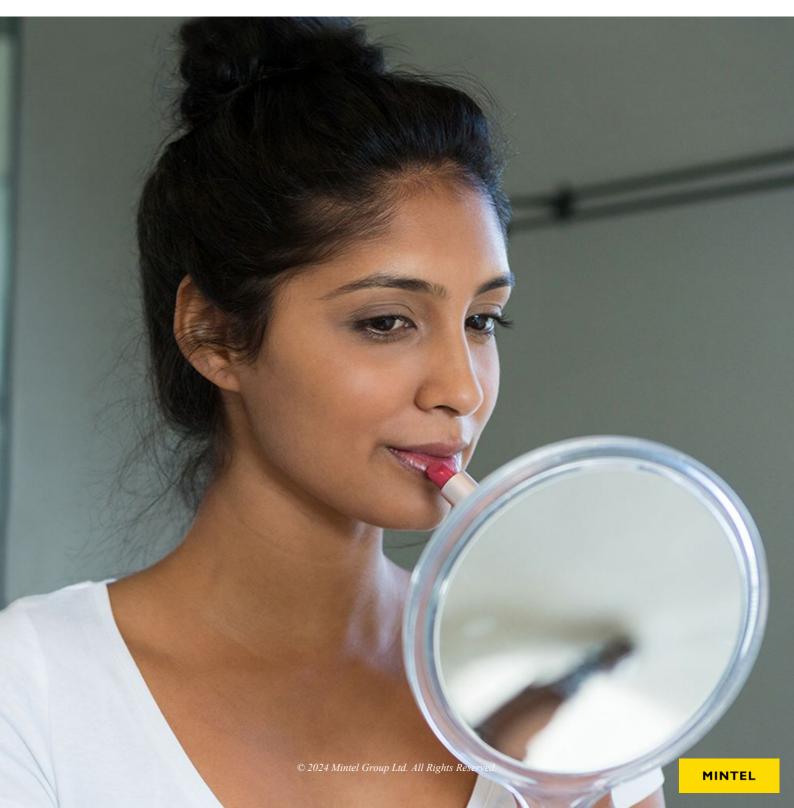
# COLOUR COSMETICS – INDIAN CONSUMER – 2018

Understand different cohorts and their motivation to use cosmetics.

Factor in the cultural-regional ecosystem and drive penetration through customisation.



Rimpie Tulsiani, Sr. Beauty & Personal Care Analyst, India



# Report Content

#### **EXECUTIVE SUMMARY**

- What you need to know Summary
- · Make the most of the booming beauty sector through customisation and collaboration
- · Power of co-creation: Brands collaborate with celebrities to launch premium ranges of colour cosmetics
- · Collaborate on the convenience factor at point of sale and not just product
- · Increase cosmetic penetration naturally and talk daily makeup with hybrid products
- Address varied motivations and frustrations in cosmetics usage through customisation
- · What it means: Changing regulations in India
- · Think culturally fit makeup menu options: halal, vegetarian to vegan
  - Graph 1: Select claims for colour cosmetics, by suitable for claim category, Jan-Nov 2018

#### **KEY TRENDS**

What you need to know

#### **Key drivers**

- Beauty-play: Choices, access and convenience are pumping up the beauty game
- · News flash: Private labels, offline extensions, grocery convenience
- Young women driving cosmetics use triggered by selfie culture
  - Graph 2: Cosmetic users and select reason to use cosmetics, by age, April 2018

#### Global trends and how they are playing out in India

- · Customisation is the name of the game to strike a connection
- · Fenty Beauty launches 'shades for all'
- Makeup products for men
- Cosmetics go natural too

#### **CONSUMER INSIGHTS**

· What you need to know

#### Usage of cosmetic products

- · Offer fun and variety in cosmetics products to woo single women
- Know the 'cosmetic consumer'
- · Profile data
- · Offer value proposition through multifunctional products or combo kits

- Graph 3: Cosmetic products used, April 2018
- · Lipstick/lip gloss emerges to be a girl's best friend across regions except the South
- Head to the North with cosmetics portfolio and break into the South market through a range of eye makeup
  - Graph 4: Select cosmetic products used vs not used, by region, April 2018
- Channel the power of regular visits to nearby stores especially in Tier 1 and Tier 2 cities
  - Graph 5: Places shopped at for cosmetics in last 6 months, April 2018
- Navigate each region with a customised channel mix conducive to each region

#### Usage motivations and frustrations

- · Tap into the natural/no makeup look aspiration of women with a simplistic makeup range of hybrid products
- · Highlight aspects such as a less tired look, professional, selfies and customise to suit regional preferences
- Appeal to different motivations that drives cosmetics usage across varying age groups
- · Encourage beauty snacking among single women with a variety of bite-sized cosmetic products
  - Graph 6: Select reasons to use cosmetics, by marital status, April 2018
- · Appeal to universal need of cosmetic users lasting benefit
  - Graph 7: Select biggest frustrations when using cosmetics, April 2018

#### MARKET APPLICATION

· Opportunities: Key areas of focus

#### **Opportunities**

- · Think selfie-ready range for single women and hybrid makeup for middle-aged women
  - Graph 8: Select reasons to use cosmetics, by age-group, April 2018
- Hand hold consumers in the South region to find the right product and application technique and customise ranges to match their needs
  - Graph 9: Select biggest frustrations when using cosmetics, by South region, April 2018

#### Who's innovating

- Substantiate natural makeup with organic and clean terminology à la Ruby's Organics
- · Go beyond metros with natural luxury range LA MIOR style
- · Involve and engage consumers through customisation and drive transparency quotient as well: Live lipstick customisation
- · Inject nourishment in makeup products to increase usage frequency: The new breed of hybrids
- · Use the natural storyline either in ingredients or look or both as a communication hook

#### Global innovators

- Chicca "invisible makeup" range for a natural finish and hints of colour
- Tap into on-the-go use trends
- Case study: Anti-pollution powder with a brush, not a puff
- · Innovations to let lips do all the talking

• Selfie-ready lipstick vs hybrid anti-ageing lipstick

## **APPENDIX**

• Consumer survey methodology

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