

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.



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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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