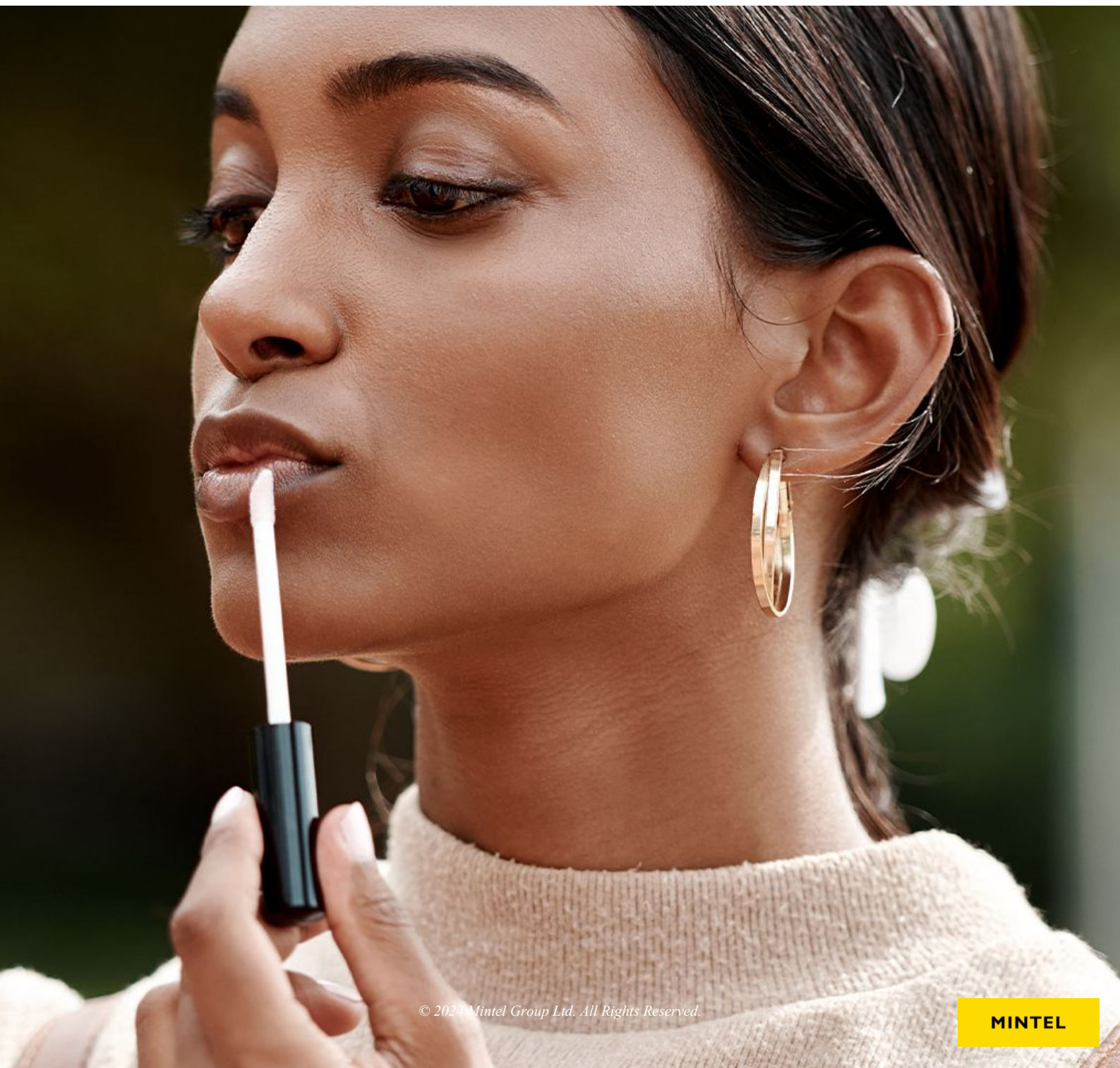


COLOUR COSMETICS – POINT MAKEUP – INDIAN CONSUMER – 2022

Make makeup usage fun via the colour impact of point makeup, and demonstrate value amidst the rising popularity of 'clean'.



A Mintel Analyst, Global Analyst



Colour Cosmetics – Point Makeup – Indian Consumer – 2022

This report looks at the following areas:

- Impact of COVID-19 on point makeup
- The key trends in point makeup
- The key factors influencing purchase of point colour cosmetics
- Behaviour and attitudes towards point colour cosmetics
- Opportunities for point colour cosmetics



Make makeup usage fun via the colour impact of point makeup, and demonstrate value amidst the rising popularity of 'clean'.

Overview

COVID-19 has reduced usage motivation in the category, and accelerated the trend for simpler makeup routines. More than a third of Indians (36%) put 'gives me a natural look' as an important criterion while choosing face makeup. As consumers adjust to the next normal, makeup routines are likely to remain simple, suggesting that multifunctional and easy-to-use products will have more appeal in point colour cosmetics. Further, as health and safety guide consumers' purchase decisions, clean makeup is likely to grow in popularity.

A threat to the category comes from the increased focus on skincare; as women increase their skincare efforts, this reduces motivations to use makeup. Further, the desire for minimal, natural-looking makeup proves to be a challenge for the point makeup category, which is all about impact via colour.

However, there remains opportunity to tap into emotional wellbeing by leveraging point makeup's colour characteristic and positioning it as a means to boost mood; a third of Indian

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consumers (31%) say that they use makeup to improve their mood, and 35% have increased their eye makeup usage.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- A note on referencing point makeup in this report
- Mintel's perspective

Key issues covered in this Report

- Overview
- The impact of COVID-19 on point makeup
- Clean and convenience on an upward trajectory in India's point makeup category
 - Graph 1: top 10 claims in point makeup launches, 2019-21
- Shift the point makeup proposition from glam to mood upliftment
 - Graph 2: behaviours around point makeup in the last six months, by consumer type, 2022
- 'Clean' makeup is desirable, but value sought in point makeup purchases
 - Graph 3: behaviours around point makeup in the last six months, by consumer type, 2022
- Desire for a 'natural look' paves the way for ease of use

Mintel predicts

- The outlook for the point makeup category in India
- The marketing mix

KEY TRENDS

- What you need to know
- Point makeup is dominated by lip colour in India
 - Graph 4: % of launches in point makeup categories, 2017-21

Mood boost sought through makeup

- The pandemic brings focus to emotional wellness
- Colour in point makeup is experimented with as a mood-uplifting activity

Clean claims in makeup are gathering speed

- Clean claims show higher growth in point makeup launches
 - Graph 5: top 10 claims in point makeup launches, 2019-21
- COVID-19 has heightened the need for safety

Convenience is on the rise

- Point makeup in easy-to-use formats sees growth

- Graph 6: top formats in eye colour cosmetics, 2019-21
- Graph 7: select claims in eye/lip colour launches, 2017-21
- Skincare focus gathers speed

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Enjoyment and mood enhancement through makeup
- Value in beauty is being redefined

CONSUMER INSIGHT

- What you need to know

In pursuit of mood upliftment, consumers turn to point makeup

- Though skincare is prioritised, the emphasis is on the mental wellness benefits of makeup
- Eye makeup application is used as a means to uplift mood
 - Graph 8: behaviours around point makeup in the last six months, by consumer type, 2022
- Who is finding point makeup usage relaxing?
- Many don't want their indulgence to upset their budgets
 - Graph 9: agreement with attitudes towards point makeup, 2022
- Life online increases reliance on tech and influencers for recommendations
 - Graph 10: factors considered when purchasing a point makeup product never bought before, by consumer type, 2022

'Clean' has room for broader appeal, but do not forget the need for value

- Interest in 'clean' claims has potential for growth
- Interest in clean doesn't necessarily translate to purchase
 - Graph 11: factors considered when purchasing a point makeup product never bought before, by consumer type, 2022
- Adoption of clean point makeup becomes easier with multifunctionality and attractive packaging
 - Graph 12: behaviours around point makeup in the last six months, by consumer type, 2022
- Transparency can make clean point makeup appealing
 - Graph 13: factors considered when purchasing a point makeup product never bought before, by consumer type, 2022

Desire for the 'natural look' paves the way for ease of use

- Consumers are drawn towards a more-natural makeup look
- Consumers prefer the natural look, and matte eye shadow and nude lipsticks appeal
 - Graph 14: top-ranked lip shade, 2022
 - Graph 15: top-ranked eyeshadow finishes, 2022
- Convenience can help integrate point makeup into simpler makeup routines
 - Graph 16: attitudes towards point makeup amongst natural makeup look users, 2022

MARKET APPLICATIONS

- Opportunities: key focus areas

Position point makeup as a mood-booster

- Focus on fun and play in NPD
- Bring a sense of fun via unique collaborations
- Offer products with a high impact and low effort
- Drive experimentation through novelty shapes and formats
- Re-engage consumers with lipstick as face-covering rules relax

Increase the value perception of clean point makeup by leveraging multifunctionality and attractive packs

- Focus clean NPD on multifunctional point makeup products
- Increase appeal of clean point makeup through attractive packaging
- Highlight the manufacturing process to lend credibility to the clean claim
- Eliminate barriers to clean purchase
- Link ingredients to skin-enhancement benefits to justify premium for clean point makeup

Lead with convenience to capitalise on the natural look

- Popularize the 'clean-girl' makeup trend
- Facilitate 'barely-there' makeup looks through multi-purpose palettes that can be mixed and matched
- Promote simple looks created by using a one-point makeup item to convey ease of use
- Use textures that are easy to blend to enable swift application

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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