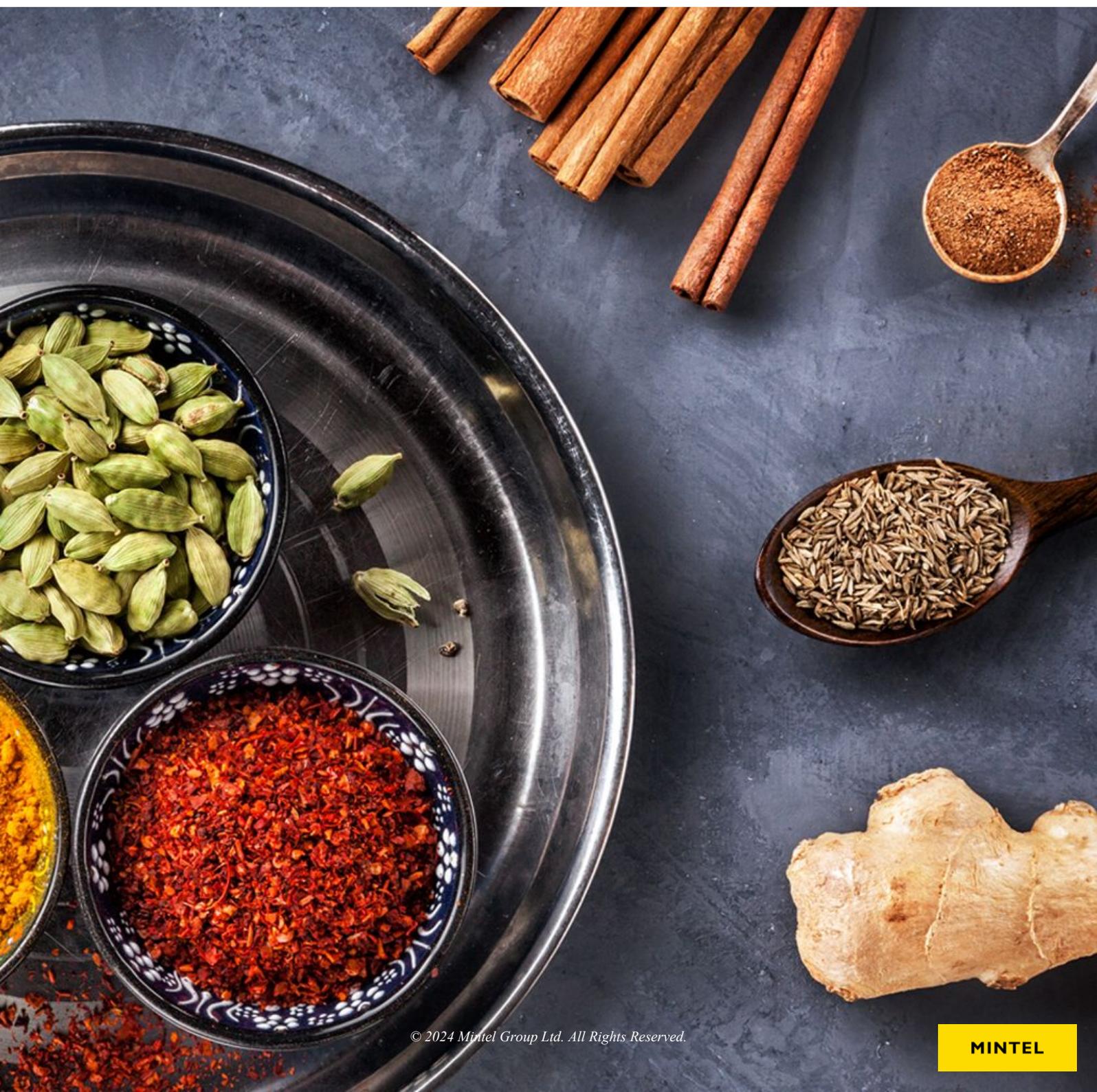


HOME REMEDIES – INDIAN CONSUMER – 2020

The upsurge in home remedies threatens the packaged beauty industry. Brands can learn from home remedies and capitalise on new opportunities to win over the emotionally driven consumer.



Tanya Rajani, Principal Analyst, Beauty & Personal Care, India



Report Content



EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- The impact of COVID-19 on home remedies
- Lost faith in packaged natural beauty products
- With more free time, consumers search for new, trendy home remedies
- Garner trust in packaged beauty with safe, natural ingredients

What consumers want and why

- Consumers want: trendy, premium ingredients not found in their kitchens
 - Graph 1: have not used but interested in using trendy home remedy ingredients across women aged 18+, Jul 2020
- Consumers want: higher efficacy
- Consumers want: transparency and safety

Opportunities

- Breakaway from the norm with rare trendy ingredients
- Drive familiarity with traditional ingredients
- Build trusting relationships with honest, transparent communication
- Pair tradition with science for higher efficacy

Competitive landscape

- Combine natural with heritage storytelling

Mintel predicts

- Home remedies will continue to be a staple in the Indian beauty and personal care industry

IMPACT OF COVID-19 ON HOME REMEDIES

- The outlook for the Indian beauty industry
- Home remedies see an uptick with stay-at-home consumers
- Tried and tested makes it a staple in the beauty industry
- How home remedies revealed the gaps in packaged beauty products
- COVID-19 has created a greater affinity towards overall wellbeing
 - Graph 2: changes seen in consumers' priorities since the COVID-19 outbreak, 20 Aug-6 Sep, 2020
- Home remedies rise with new consumer behaviour that emerged due to COVID-19

Home Remedies – Indian Consumer – 2020

- COVID-19 has created ideal growth conditions for home beauty remedies (and in tandem, declining conditions for its packaged cousins)
- Consumer faith in home remedies will persist post-COVID-19
- In summary: how brands can gain ground against home remedies

KEY TRENDS

- What you need to know
- Home remedies are a generational inheritance
- With more time to pamper themselves, home remedies saw a surge during quarantine
- Demand for 'natural' has resulted in botanical/herbal leading in the Indian BPC industry
 - Graph 3: top 10 claims for beauty and personal care launches, Sept 2018-Aug 2020
- Brands are extending their product line into the natural segment
- Is natural really natural?
- Fueled by the online medium, trendier home remedies are seeing rising interest
- Potential to capitalise on trendy home remedy ingredients
- DIY home remedies don't suit all

KEY DRIVERS

- Brands can enhance value by taking inspiration from DIY home remedies
 - Graph 4: spending over the next month on beauty & personal care products, 11 Jun-6 Sep, 2020
- COVID-19 has created a strong spirit of community and local support
- The young are aspirational beauty consumers who cannot be ignored
- Men are taking pride in their appearance
 - Graph 5: "Tried a new product I hadn't tried before", July 2020

Global trends and how they are playing out in India

- COVID-19 has accelerated the need for safer products
- Capitalise on science for transparency
- During the pandemic, clean beauty and safety mentions increased around the world
- Consumers are turning to science for the truth
- Take a leap towards trust with certifications
- Pairing of natural with free-from claims is rising in Western markets
 - Graph 6: % of beauty & personal care launches with natural & free-from claims, Sep 2017-Aug 2020
- Consumers are in search for time-saving beauty solutions

CONSUMER INSIGHT

- What you need to know

Home Remedies – Indian Consumer – 2020

- A majority of consumers are using home remedies for their skin and hair
 - Graph 7: usage of home remedy ingredients, Jul 2020
- Consumers primed for home remedies in packaged goods
- Certification solidifies natural safety positioning
 - Graph 8: factors that would encourage purchase of an already packaged home beauty remedy, Jul 2020
- 100% natural is not enough to convince consumers to switch to packaged beauty products
- TURF Analysis – factors that would encourage the purchase of a packaged beauty product
- Give greater assurance by partnering with science
- Support local communities to gain trust
- Introduce easy to use packaged beauty products
 - Graph 9: attitudes towards home remedies, July 2020

Converting a home remedy user to purchase packaged beauty products

- Who are home remedy users?
- Target women aged 35+ who are fans of home remedy ingredients
 - Graph 10: usage of home remedy ingredients for skin or hair or both across women aged 18+, Jul 2020
- Trendy, premium ingredients will create a purchase urgency
- Exploit the weakness of DIY home remedies...
- ...and borrow their strengths to market packaged products
- Tack on new concerns to embed efficiency message
- Partner with science to increase efficacy
- Leverage dermatologists to enhance credibility
- Capitalise on the clean beauty narrative
 - Graph 11: criteria for buying an already packaged home beauty remedy across women aged 18+, Jul 2020
- Lend brand authenticity with the help of peers
 - Graph 12: influencers who have encouraged usage of home beauty remedies for skin or hair in the last six months, Jul 2020
- Take an omnipresent approach in marketing and communication
 - Graph 13: influencers which have encouraged usage of home beauty remedies for skin or hair in the last six months, Jul 2020

Young women aged 18-34

- Women aged 18-34 are inclined towards packaged beauty
- Feature traditional ingredients in packaged products for the win
 - Graph 14: usage of home remedy ingredients for skin across women aged 18+, Jul 2020
- Adding trendy ingredients in packaged beauty products can create newness
 - Graph 15: not used but interest in using trendy home remedy ingredients across women aged 18+, Jul 2020
- Put social at the core of your communication strategy

Home Remedies – Indian Consumer – 2020

- Graph 16: influencers which have encouraged usage of home beauty remedies for skin or hair in the last six months, Jul 2020

How to target the non-users

- Who are home remedy non-users?
- Efficacy dictates non-user choices
 - Graph 17: reasons for non-usage of home remedies among men, Jul 2020
- Mix tradition with science to increase the potency of packaged products
 - Graph 18: criteria for buying an already packaged home beauty remedy across male consumers, Jul 2020
- Clean products will hold higher appeal with working men
 - Graph 19: criteria for buying an already packaged home beauty remedy across male consumers, Jul 2020
- Introduce skincare products with traditional staples like haldi
 - Graph 20: usage of home remedy ingredients across men, Jul 2020
- Use their peer group to drive influence

MARKET APPLICATIONS

- Opportunities: key focus area

Use transparent communication to gain trust

- Build deeper connections by positioning as beauty solutions passed down generations
- Case study: tapping into grandmother's wisdom
- Accelerate the clean beauty movement with transparent communication
- The Indian consumer is showing an inclination towards clean beauty
- Natural is slowly moving towards clean beauty
 - Graph 21: top 10 claims for beauty and personal care launches, Sep 2018-Aug 2020
- Be transparent with messaging
- Educate about certifications and what it means
- Experiment with blockchain technology to appeal to consumers' thirst for transparency
- Case study: SoulTree, an exemplar of a trustworthy brand
- Use peer programs to increase the circle of trust
- Generate real reviews to encourage purchase
- Live streaming provides authentic product transparency

Win with a strong ingredient story

- Explore kitchen staples that have been ignored
- Turn to familiar staple ingredients in easy-to-use formats
- Give them a pre-packed DIY solution
- 'Indianise' trending super-food ingredients
- Avocado branches out across natural beauty

Home Remedies – Indian Consumer – 2020

- Be on the lookout for the next big hero natural ingredient
- Showcase the use of local ingredients
- Make Himachal Pradesh the Jeju Island of India
- Include home remedy ingredients in men's staple products

Pair nature with science to make it more effective

- Partnering with science can increase efficacy
- Case study: merging science with Ayurveda to create next-gen skin science
- Rise of derma-brands
- Case study: Dr.Sheth's, blending nature with science

Who's innovating

- Indie brands are communicating passed-down beauty solutions

Global innovations

- DIY innovations emerge during COVID-19
- Glow Recipe, an easy-to-use hybrid formula targeting the youth

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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