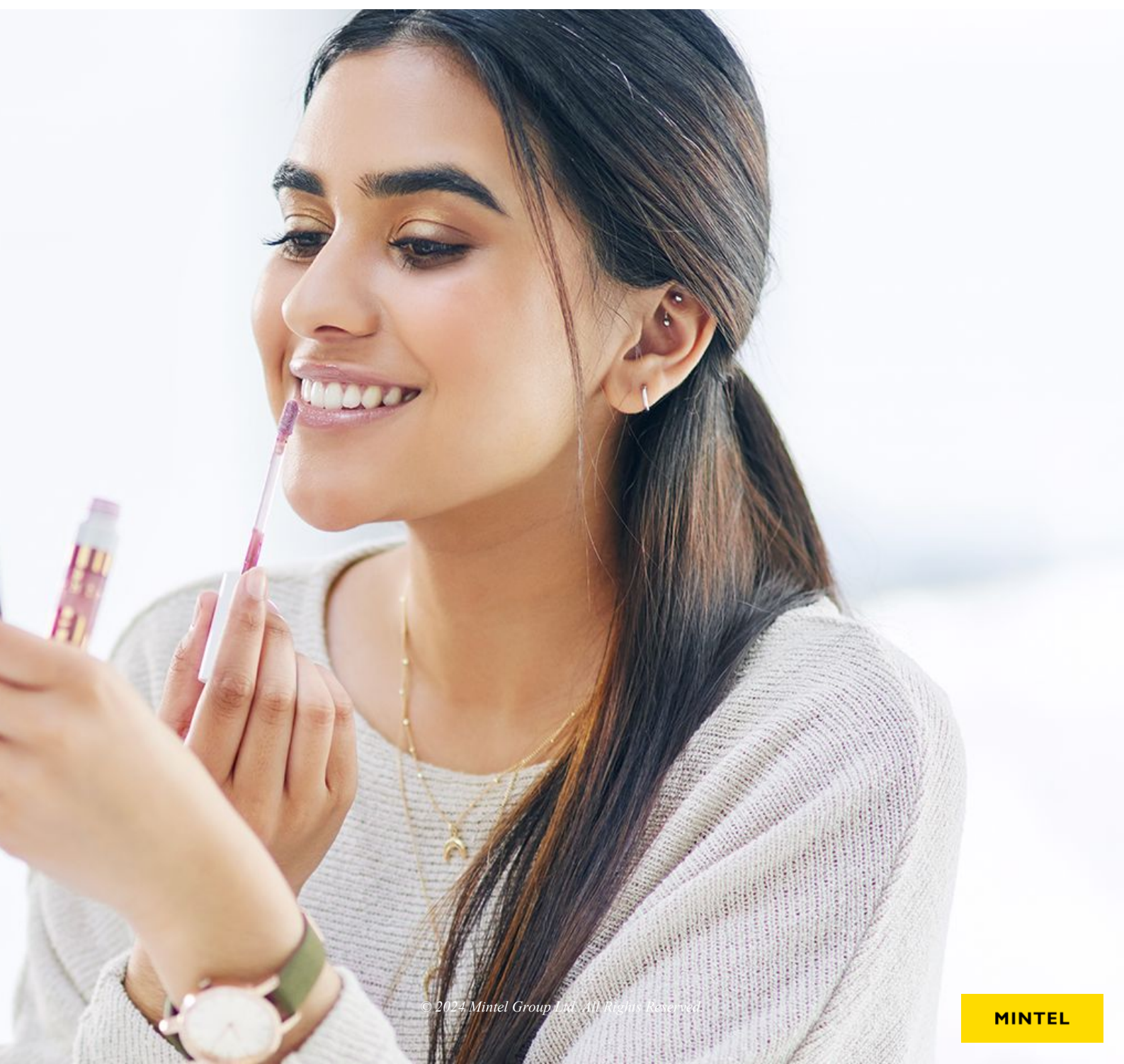


HYPER-PERSONALISATION IN COLOUR COSMETICS – INDIAN CONSUMER – 2023

Use personalisation to foster experimentation and facilitate online makeup shopping. Tap into the personalisation of 'skinified' makeup to premiumise the category.



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



Hyper-personalisation In Colour Cosmetics - Indian Consumer - 2023

This report looks at the following areas:

- The key trends impacting hyper-personalisation in colour cosmetics
- Retail touchpoints where consumers purchase makeup
- Barriers to makeup use
- Consumer segments interested in personalised makeup
- Behaviours and attitudes towards the personalisation of makeup



Use personalisation to foster experimentation and facilitate online makeup shopping. Tap into the personalisation of 'skinified' makeup to premiumise the category.

Overview

Indian consumers are more beauty evolved post-pandemic and crave new experiences and engagement from the category. As internet and social media consumption increases, consumers, especially the digitally savvy Gen Z cohort, now have easy access to global beauty trends.

However, Gen Z women use makeup less frequently, primarily due to the challenge of finding products that match their skintone. These consumers place a high emphasis on individuality and self-expression, leading them to enjoy experimenting with makeup and engaging in co-creation with beauty brands. As a result, they represent an ideal demographic for personalised makeup.

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For Indian women, particularly the Gen Z segment, the prime location to shop for makeup is in store because they highly value the assistance provided there. Brands can leverage personalisation tools like virtual try-on experiences, online quizzes and mobile apps to enhance consumers' online makeup shopping experiences.

The key barrier to using makeup is the concern about skin harm, contributing to the emergence of the 'skinification' trend in makeup. To cater to consumers who are open to paying extra for makeup with added skincare benefits and ingredients, brands can offer personalised makeup products tailored to individual skin types, concerns and sensitivities.

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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- The outlook for hyper-personalisation in colour cosmetics in India
- Enhance makeup use by fostering experimentation via personalisation
- Accelerate online makeup shopping through personalised experiences
- Premiumise the category with personalised 'skinified' makeup

KEY TRENDS

- What you need to know

Indian consumers are eager to explore new trends

- Indian consumers are keen to experiment with beauty
- Increased internet and social media consumption fuels beauty trends
 - Graph 1: top five social media platforms used in the last six months, 2023
- Gen Z consumers are the key trend adopters

Tailored solutions are gaining prominence

- Global consumer interest in personalisation
- Pay attention to a niche but promising market
 - Graph 2: BPC launches with customised/personalised claims, 2018-23
- The colour cosmetics category leads in offering personalised claims
 - Graph 3: BPC launches with customised/personalised claims, by category, 2018-23
- Indian beauty brands are experimenting with personalisation

Technological advancements shake up the cosmetics landscape

- eCommerce is poised for growth in India
- Technological advancements can bring newness to colour cosmetics
- Technology supports personalised experiences at retail channels

WHAT CONSUMERS WANT AND WHY

- What you need to know
- Use personalisation to differentiate in a dynamic colour cosmetics category

- Graph 4: likeliness to purchase makeup that is personalised, 2023
- Who are the consumers interested in personalised makeup?

Enhance makeup use by fostering experimentation via personalisation

- Gen Z women are not frequent makeup wearers
 - Graph 5: frequency of using makeup, by generation, 2023
- The inability to find makeup catering to unique needs forms usage barriers
 - Graph 6: agreement with 'It is difficult to find makeup for Indian skintones', 2023
- Enhance makeup usage by promoting self-expression
 - Graph 7: agreement with 'Makeup is a reflection of one's personality', 2023
- Personalised makeup can assist metro consumers in expressing their personal style
- CHAID analysis – attitudes towards personalisation in makeup
- Introduce playful packaging with a personal touch
- Case study: express identity through vibrant colours
- Case study: beauty to match one's personality
- Leverage their experimental nature to encourage usage
 - Graph 8: consumer enjoyment of experimenting with makeup products, 2023
- Start with customisable formulas that allow users to create multiple looks
- Allow for individual expression through makeup looks
- Enhance usage by providing personalised makeup looks
- Drive experimentation with colour-changing cosmetics
- The metaverse enables playful experimentation
- Make personalisation exciting and accessible
- Foster self-expression by giving the chance to co-create
 - Graph 9: agreement towards enjoying to co-create a makeup product with brands, 2023
- Put consumers in the driver's seat
- Give consumers the option to co-create in store

Accelerate online makeup shopping through personalised experiences

- Indian women's preferred location for buying makeup remains in store
 - Graph 10: purchase of makeup online vs in store, 2023
- Premiumise in-store experiences with technology
- Opportunity to enhance online makeup shopping...
 - Graph 11: purchase of makeup online vs in store, Gen Z vs all consumers, 2023
- ...as Gen Zers still lag behind Millennials, who are confident online makeup shoppers
 - Graph 12: purchase of makeup online vs in store, by generation, 2023
- Need for guidance drives Gen Zers to in-store shopping
 - Graph 13: agreement towards seeing makeup shade appearance before purchase and needing in-store/online assistance, 2023

Hyper-personalisation in Colour Cosmetics – Indian Consumer – 2023

- Engage with consumers using cutting-edge technology to deliver laser-focused options
- Case study: helping consumers find the perfect foundation match
- Use personalisation tools to offer guidance in online shopping
 - Graph 14: agreement towards using personalisation tools in colour cosmetics, 2023
- Enhance try-on features with interactive capabilities
- Develop mobile apps that offer personalised beauty product recommendations
- Simplify the process of skintone matching
- Case study: tapping into lifestyle to connect offline and online purchase channels

Use personalisation to premiumise 'skinified' makeup

- Personalised makeup can overcome the fear of increasing skin issues
 - Graph 15: top three barriers for makeup usage, 2023
- Grasp the premiumisation opportunity in makeup with skincare-ingredient-focused formulations
 - Graph 16: makeup product features consumers are interested in buying or willing to pay more for, 2023
- Who are the Premium Skinified Makeup Buyers?
- Encourage trading up by personalising 'skinified' makeup
 - Graph 17: strong interest in purchasing makeup that is personalised, 2023
- Personalise 'skinified' makeup based on consumers' skin issues
 - Graph 18: skin issues experienced in the past 12 months, 2023
- Provide personalisation based on skin sensitivity as a safety factor
 - Graph 19: skin sensitivity, 2023
- Offer the option to select preferred ingredients
 - Graph 20: agreement with 'It is important to pay attention to the ingredients used in makeup products', 2023
- Case study: tapping into customisation to stand out as a skincare-makeup hybrid
- Personalisation and self-monitoring technology will create 'smart cosmetics' that address specific skin needs
- Case study: Revea caters to dynamic skincare needs with its skin-mapping app
- Employ technology to enhance makeup tailored to individual skincare needs

APPENDIX

- Report definition
- Consumer survey methodology
- Social data research methodology
- CHAID analysis

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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