SKIN COMPLEXION MANAGEMENT – INDIAN CONSUMER – 2023

Meet the evolving complexion care demands of young Indians with novel formats, while highlighting convenience claims and delving into stronger ingredient stories.

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Skin Complexion Management – Indian Consumer - 2023

This report looks at the following areas:

• Key trends seen in skin complexion management in India
• Understanding what glowing skin means across different demographics
• Identifying the skincare routine for glowing skin highlighting the opportunities for novel formats
• Understanding the need for convenience claims in skin complexion management
• Understanding how consumers associate different ingredients with different skincare benefits
• Highlighting the avenues for new ingredients in skin complexion management

Meet the evolving complexion care demands of young Indians with novel formats, while highlighting convenience claims and delving into stronger ingredient stories.

As the category increasingly shifts away from skin colour enhancement, as detailed in Mintel Reports (2022, 2021) brands in the country are focusing more on glow as consumers desire healthy skin. This year, a key objective was to then understand what does glow mean to the Indian consumer, and what reflects is the deep-rooted cultural fixation on fairness keeps skin glow within the realm of skin health and fairness.

Indian consumers use staple products for glow but women aged 18–34 are experimenting with newer formats, perhaps because they believe it is difficult to get a natural glow from regular
skincare products, opening the opportunity for brands to innovate with new formats that offer glow.

Young consumers believe that complex, multistep routines can only deliver a natural glow. Due to their fast-paced and busy lifestyles, they are seeking convenience in the form of on-the-go and multipurpose products that can offer brightening and glow benefits.

Consumers show interest in newer scientific ingredients but are not able to fully comprehend them. While vitamin C is the ingredient they're most familiar with, they also associate it with benefits other than brightening/glow, emphasising the need to simplify ingredient information for better understanding. Further, brands can merge more familiar Ayurvedic ingredients with unfamiliar scientific ones to resonate better with consumers.
EXECUTIVE SUMMARY

• Mintel’s perspective

Key issues covered in this Report

• Overview

• The outlook of skin complexion management in India
  - Graph 1: consumer understanding of glowing skin, 2023

• Move younger women towards newer skincare formats with the promise of natural, instant glow
  - Graph 2: usage of facial skincare products for glowing skin, 2023

• Target younger consumers with convenient usage options

• Target younger consumers with convenient usage options

• Innovate the category with deeper ingredient stories

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KEY TRENDS

• What you need to know

Brightening makes way for skin glow

- Graph 3: facial skincare launches by select beauty enhancing claims, 2018-23

- Graph 4: facial skincare* launches with ‘glow’ or ‘glowing’ or ‘glowy’ claims, 2018-23

- Skin glow claims in India are on the rise and shows promising potential
  - Graph 5: facial skincare* launches with ‘glow’ or ‘glowing’ or ‘glowy’ or claims by top five markets, 2018-23

Intent to invest in facial skincare is high

• As the focus on skincare grows...
  ...the category sees innovation in formats and textures
  - Graph 6: facial skincare launches with brightening/illuminating claims by formats and textures, 2018-23

• Brands in India are offering brightening/glow benefits packaged in new and exciting formats
  - Graph 7: facial skincare launches with brightening/illuminating claims by claim categories, 2018-23

Brands spotlight potent ingredients for effectiveness

• The rise of ingredient-savvy Indians

• Brands are doubling down on vitamin C in skin glow and brightening launches

• Ingredient-first narratives dominate brand communications
WHAT CONSUMERS WANT AND WHY

What you need to know

Skin health and fairness remain the cornerstones of glowing skin
- Graph 8: consumer understanding of glowing skin, 2023
- Take an inside-out approach to glowing skin
  - Graph 9: consumer understanding of glowing skin, by region, 2023
  - Graph 10: consumer understanding of glowing skin, by city tier, 2023
  - Graph 11: consumer understanding of glowing skin, by generation, 2023

Innovate with new formats that have potential to deliver skin glow
- Graph 12: usage of facial skincare products for glowing skin, 2023
- Graph 13: usage of facial skincare products for glowing skin, 2023
- Graph 14: agreement with it being difficult to get a natural glow from regular skincare products, 2023
- Graph 15: facial skincare* launches by ‘glow’ or ‘glowing’ or ‘glowy’ claims by formats and textures, 2018-23
- Take inspiration from leading markets on innovating with newer formats
  - Graph 16: facial skincare* launches with ‘glow’ or ‘glowing’ or ‘glowy’ claims by formats and textures, 2018-23

• Tap into the potential for beyond-basic complexion care
• Innovate with formats that offer glowing skin
• Expectations of instant glow remain largely unaddressed
• Enhance communication on instantaneous results
• Case study: take inspiration from bodycare offering instant results
• Introduce specialised complexion care products into daily routines

Respond to the intent for convenient formats
• On-the-go formats appeal to Indian users
• Tap into on-the-go format innovations to appeal to time-pressed consumers
• Innovate with on-the-go formats for busy consumers
  - Graph 17: agreement towards natural glow skin being only achieved through multiple-step skincare routine, 2023
  - Graph 18: consumers who look for added benefits such as brightening in sun protection products, 2023
• Case study: Go&Glow raising the bar on convenience
• Create multipurpose positioning to elevate brand impact
• Case study: Shiseido targets Gen Z men with Sidekick brand
• Leverage social media to bring fun into multistep routines

Consumers are on the lookout for stronger ingredient focus
- Graph 19: interest in brightening skincare products with newer scientific ingredients, 2023
- Graph 20: association of ingredients with facial skincare claims, 2023
- Graph 21: association of ingredients with glowing/brightening claims, 2023

- Pair vitamin C with complementary ingredients to create differentiated positioning
- Bring differentiation for Vitamin C by innovating on format and packaging
- Take inspiration from ingredient trends in skin complexion management launches in China
  - Graph 22: agreement that it is difficult to understand skincare ingredients that can brighten facial skin, 2023
  - Graph 23: agreement that ayurvedic ingredients are more effective than scientific ingredients, 2023
- Elevate trust to a larger group by fusing science with Ayurveda
  - Graph 24: skin complexion launches* by top five botanical ingredients, 2018-23
- Bring in glycyrrhizic extracts or derivatives

**APPENDIX**

- Consumer survey methodology
- Social data research methodology
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