

# SKIN PROTECTION/SUN CARE – INDIAN CONSUMER – 2019

Re-invent and re-position the sun care category in India by education, fortification and expanding the category to include after-sun benefits.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know – Summary
- Re-model the sun care category to build awareness and new formats
- South Koreans are the biggest spenders on sun care
  - Graph 1: Sun care market size, US\$m, 2018
  - Graph 2: Sun care market spend, US\$, 2018
- US FDA regulation
- India can gain sun care inspiration on formats and textures from the rest of APAC
  - Graph 3: Top five countries, sun care product launches, Jan 2016–March 2019
- Awareness is the key to increased usage
- Offer added benefits along with basic UV protection
- Appeal to non-sun care users with cooling formats and add after-sun products to the portfolio
- What it means

## KEY TRENDS

- What you need to know

### Key drivers

- It's getting warmer every year
- The Ozone layer is depleting: India is still far away, but a growing concern
- Exposure of blue light
- Regulation of sunscreens in India
- Brands are acting as consultants to explain to consumers the ill effects of sun exposure

### Global trends and how they are playing out in India

- Educate consumers on the appropriate usage of sun care products
- Sensor to curb sun exposure
- Sunscreenr sees unprotected skin
- Tech merges with sun care for measurable proof

## CONSUMER INSIGHTS

- What you need to know

## Section 1: Awareness of sunscreen as a preventive technique

- Promote the health benefits of using sunscreen
- Fortify talcum powder to appeal as sunscreen to the South of India
  - Graph 4: "Which of these sun care products have you used in the last 12 months?", any sun care usage
- Educate non-working women about sun care terminology
- Offer consultations on optimal level of SPF required
- Spread awareness to lower tiers on how to use sunscreen
  - Graph 5: "Which of the following do you agree with?", select statements
- Shock-factor imagery can get the message across
- Research shows that sunscreen users receive less than half the protection they think

## Section 2: Fortify UV Protection

- Top five claims in sun care products launched in India
  - Graph 6: Top five claims\* in sun care products, Jan 2018–Mar 2019
- Incorporate natural ingredients in sunscreens
- Offer additional anti-pollution benefits along with sun protection
- Sun care and fine dust protection with brightening and tone-up effects all in one stick format
- Highlight the skin-lightening benefits of sun care products
- Extend protection benefits to include blue light protection
- Moisturising is the most important benefit metro dwellers look for when buying sunscreens
  - Graph 7: "Imagine that you are buying a new facial or body sun care product. Which benefits would you look for?", select benefits

## Section 3: Look beyond simple face/body sunscreens

- Lip colour cosmetics pose an opportunity for sun protection claims
- Focus on hybrid products like powders
- Provide cooling benefits in sun care products
- Fight the problems of topical sunscreen with ingestible sunscreen

## MARKET APPLICATIONS

- What you need to know

### Opportunities

- Use online media to build awareness about sun damage prevention
- Highlight anti-pollution and blue light protection alongside SPF factor
- Target non-sunscreen users with post-sun exposure products that offer cooling
- Aloe is the key natural ingredient in global aftersun launches

### Who's innovating

- Oral sunscreen
- Heliocare Oral, the world's first oral sunblock
- Joy promotes protected skin, rather than fair skin
- Some examples from India
- After-sun cooling formats

### Global innovations

- A focus on broad-spectrum sun protection and more
- New sunstick textures
- Sun care products with UV sensor packaging

### APPENDIX

- Consumer survey methodology

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