

# SKIN PROTECTION & SUNCARE – INDIAN CONSUMER – 2020

To drive up the usage frequency of suncare, dial up education and reduce focus on sun protection imagery and communication.



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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

### Market context

- The impact of COVID-19 on skin protection and suncare
- Develop the USP of suncare beyond sun exposure
- Suncare faces attack from other categories carrying the UV claim
  - Graph 1: BPC launches with UV protection as the claim, Nov 2018-Oct 2020

### What consumers want and why

- Consumers want: more clarity around the effects of sun exposure
- Consumers want: more than UV protection
- Consumers want: textures that meet their expectations of comfort

### Opportunities

- Dial up education to make suncare a daily beauty must-have
- Build the need for skin protection from indoor pollution
- Reposition suncare as a daily beauty must-have by reducing focus on sun protection
- Defend turf against face colour cosmetics that carry SPF claims
- Enhance suncare by capitalising on glow
- UV protection is not enough – go beyond

### Competitive landscape

- Take advantage of faltering brightening offers

### Mintel predicts

- Slow but steady recovery

## THE IMPACT OF COVID-19 ON SKIN PROTECTION & SUNCARE

- The outlook for the Indian beauty industry
- The outlook for the Indian beauty industry
- The outlook for the Indian skin protection and suncare industry
- The outlook for the Indian skin protection and suncare industry
- The impact of COVID-19 on skin protection and suncare – SWOT analysis
- The impact of COVID-19 on skin protection and suncare – SWOT analysis

## Skin Protection & Suncare – Indian Consumer – 2020

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- Beauty products have less share of wallet
  - Graph 2: spending across categories in the next month among consumers, 11-21 Sep 2020
- How consumer behaviour will change and what can brands do
- Marketing mix
- Marketing mix – place
- In summary: adapt to the next normal

### KEY TRENDS

- What you need to know
- Not considered essential, the category stands to lose consumers
  - Graph 3: usage of suncare products in the last six months, Oct 2020
- India's reverence for the sun
- Sunscreen usage is limited under the sunblock umbrella
  - Graph 4: top 10 formats and textures for suncare launches, Nov 2018-Oct 2020
- Clinging to sun protection limits usage further
- The category faces attack from the robust facial skincare category
  - Graph 5: skincare launches with UV protection claims, sun/sunbed exposure vs face/neck care, Nov 2019-Oct 2020
- The category faces attack from face colour cosmetics – proving to be a tough contender
  - Graph 6: beauty and personal care launches with UV protection claims, sun/sun bed exposure vs face colour cosmetics, Nov 2018-Oct 2020
- Suncare can gain from faltering brightening offers

### KEY DRIVERS

- New stay-at-home consumers threaten the underpenetrated category
- Dust: a perennial problem for Indian homes
- Value drivers dominate during COVID-19
  - Graph 7: categories consumers expect to spend more on over the next month, 15 Jun-6 Sep 2020
- Cater to the Indian need for healthy skin
- Cater to the Indian need for healthy skin

### GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- The Black Lives Matter movement spurs diversity themes
- India is opening up to the inclusivity conversation
  - Graph 8: consumer interest\* in purchasing products with shades for all skintones, Jul 2019
- South Korea transforms suncare into a multi-functional beauty product
- Capitalise on the need for pollution protection

- Graph 9: suncare launches with "pollution" as the free text search, Nov 2018-Oct 2020
- Address the strong need for better suncare education

### CONSUMER INSIGHT

- What you need to know
- Sunscreens face competition from other categories that carry SPF benefits
- Sunscreens face competition from other categories that carry SPF benefits
  - Graph 10: suncare and skin protection products that consumers used in the last six months and intend to use in the future, Oct 2020
- Overcome the key barrier to overall category usage – staying indoors
  - Graph 11: barriers for not using or not intending to use suncare and skin protection products, Oct 2020
- Skin brightening remains the essence to skin protection
  - Graph 12: reasons for using suncare and skin protection products in the last six months, Oct 2020
- Consumers don't consider suncare a necessity in skincare routines
  - Graph 13: top 10 claims in suncare launches, Nov 2018-Oct 2020
- In need of relatable education campaigns to give better guidance
- Know suncare and skin protection product users vs non-users

#### Suncare users

- Increase usage with users of suncare and skin protection products who intend to use it
- Consumers currently do not know the difference between using regular cream with SPF versus sunscreen
  - Graph 14: suncare and skin protection product usage among women aged 25-34, Oct 2020
- Skincare benefits will entice existing active users
- Texture plays a pivotal role in usage
- Flip usage from makeup with SPF to suncare with makeup benefits
  - Graph 15: use of suncare products in the last six months among working women, by age, Oct 2020
- Secure them in the category with anti-pollution claims
  - Graph 16: suncare and skin protection products women have used in the last six months and intend on using in the future, by age, Oct 2020
- Retain users of suncare and skin protection products who do not intend to use them in the future
- Lack of knowledge is pushing them to drop out
  - Graph 17: attitudes towards suncare products among women, by age, Oct 2020
- Affordability is key
  - Graph 18: reasons for non-usage of suncare products among women, by age, Oct 2020

#### Suncare non-users

- Pique the interest of potential users
- The barrier to overcome: smell

- Powder formats serve as an attractive proposition
  - Graph 19: use of products with SPF in the last six months among women aged 45+, Oct 2020
- Capitalise on interest in new skin protection products
  - Graph 20: suncare and skin protection products women have not used but intend on using in the future, by age, Oct 2020
- Trigger non-users who have no intention to enter the category
- Address their biggest barrier: sticky texture
  - Graph 21: reasons for non-usage of suncare products among men, Oct 2020

### MARKET APPLICATIONS

- Opportunities: key focus areas

#### Educate to drive up usage frequency

- Create engaging educational content to promote the need for everyday suncare
- Make suncare the 'protect' step in the skincare regime
- Case study: Supergoop! makes SPF a daily ritual
- Increase awareness around indoor aggressors
- Learn from South Korea in product repositioning
- Reposition suncare by using different nomenclature
- Case study: Ultra Violette's 'skinscreen' makes suncare a daily must-have
- Look beyond sun protection in communication

#### Blur with face colour cosmetics

- Develop more hybrid suncare/makeup concepts
- Leverage the familiarity of face colour formats
- Align with the tone-up trend in Asian makeup
- Ride on dewy or 'glow' makeup trends
- Appeal to all with a diverse range of shades
- Take inspiration from face colour cosmetic brands to communicate inclusivity

#### Offer more than just UV protection

- Include brightening ingredients
- Bolster suncare with additional skincare benefits
- Look to South Korea for multi-functional positioning
- Beauty-enhancing claims are on an upswing in South Korea
  - Graph 22: top five fastest-growing claims in new suncare launches, Mar 2016-Feb 2020
- Offer enhanced multi-protection benefits
- Explore other relatable dust protection innovations
- Use formats popularised by facial skincare as being non-greasy

- Lightweight textures have a clear path to win
- Take advantage of the growing fragrance-free claim
  - Graph 23: suncare launches with a fragrance-free claim, Nov 2017-Oct 2020

### Who's innovating

- New textures and formats entering the market
- Loaded with benefits: Uniqaya Tinted Sunscreen

### Global innovations

- Move suncare communication towards healthy skin
- Protect those spending more time indoors: blue light protection is a claim to watch

## APPENDIX

- Abbreviations
- Consumer survey methodology

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