

# THE CHANGING FACE OF BEAUTY

## KEY TRENDS DRIVING INDIA'S BEAUTY INDUSTRY

- Consumers as young as 12 years old now embrace beauty, with this shift driven by the early onset of puberty, widening the market.
- Consumers are now seeking minimalism and subtlety in their beauty products, complemented by the right balance of health.
- The synergy between health and beauty is partly driving the trend in naturals in personal care; naturals now comprise as much as one-third of the personal care category.
- Male grooming is thriving, and motivations in this category have shifted toward competitive edge and confidence as opposed to the conventional stereotype of female attraction.

In an era of selfies, video calls and photo-based social media, the need to look good is no longer confined to special occasions. In fact, both men and women, young and old are equally drawn into this momentum of social banter, and consequently, the beauty industry in India is growing in scope and breadth.

Today, the beauty segment is being redefined, and concepts and notions that were steering business strategies yesterday may not be on target anymore. To get a better understanding about this evolution, we took a deep dive – analysing data and insights from across retail measurement, consumer neuroscience (syndicated as well as customised studies) and learnings from industry experts to gauge some of the dominant trends that indicate what beauty is morphing into, thereby influencing the landscape of personal care.



# AGE NO BAR FOR BEAUTY-CONSCIOUSNESS

Children today are reaching puberty as early as 10-12 years, resulting in a beauty-consciousness that's typically associated with adults. With a desire to look attractive at a much younger age than in previous generations, brands and products that target women closer to 18 years old now need to engage with a much wider market. This signals opportunity and a need for responsible marketing. At the other end of the spectrum, the upper age for the market is extending too. With the thinking that "30 is the new 20" and "40 is the new 30," grooming is no longer restricted to 18-35 year-old female consumers. And "anti-ageing" may not be the mantra for the older generation that is striving for an ageless look.



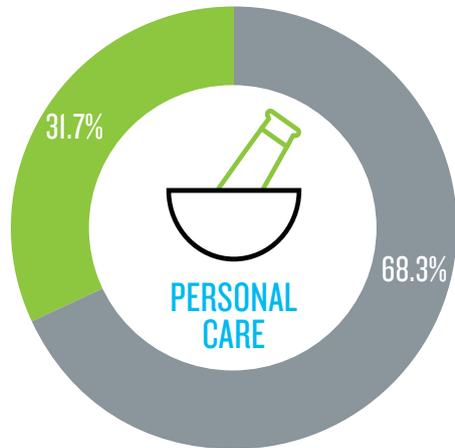
**WITH THE ONSET OF EARLY MATURITY AND THE DESIRE TO BE ATTRACTIVE AT A MUCH YOUNGER AGE THAN BEFORE, THE PRODUCTS THAT USED TO TARGET WOMEN AS OLD AS 18 ARE NOW LOOKING AT A MUCH WIDER MARKET BEGINNING FROM THE AGE OF 12.**

# LESS IS MORE IN THE YIN YANG OF HEALTH AND BEAUTY

Minimalism is now in vogue, both in terms of the effort put into grooming and the desired outcome. The natural, or 'minimalist,' look has gained popularity, wherein health and beauty exist along a continuum rather than exist as air tight compartments. It has, therefore, become possible to look good at all times within the template of the yin and yang of health and beauty. The combination of subtlety and perpetual beauty widens the market, opening the door of opportunity to alternative products like cosmeceuticals, ingestibles and applicators, which go beyond topical treatment. This, in turn, is the undercurrent driving accelerated growth in naturals<sup>1</sup> across categories in personal care.

<sup>1</sup>The naturals segment comprises brands that explicitly communicate the benefits of using natural ingredients, which are commonly perceived to be beneficial compared to artificial alternatives.

## CONTRIBUTION OF NATURALS TO PERSONAL CARE

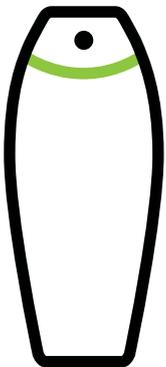


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■ NON NATURAL PC    ■ NATURAL PC

NATURALS SEGMENT CURRENTLY ACCOUNTS FOR ONE-THIRD OF THE PERSONAL CARE CATEGORY AND THIS SEGMENT IS GROWING AT 2.5X OF NON NATURALS. ASSUMING THE SAME GROWTH AS THE LAST TWO YEARS, NATURALS WILL ACCOUNT FOR 45% OF THE MARKET BY 2020.

Source: Nielsen



**THE COMBINATION OF SUBTLETY AND PERPETUAL BEAUTY WIDENS THE MARKET, OPENING THE DOOR OF OPPORTUNITY TO ALTERNATIVE PRODUCTS LIKE COSMECEUTICALS, INGESTIBLES AND APPLICATORS, WHICH GO BEYOND TOPICAL TREATMENT. THIS, IN TURN, IS THE UNDERCURRENT DRIVING ACCELERATED GROWTH IN NATURALS ACROSS CATEGORIES IN PERSONAL CARE.**

## BEAUTY KNOWS NO BOUNDARIES

According to Nielsen data, Korea, Indonesia and Thailand are the primary exporters of personal care products to India. BB Cream, for example, originated in Korea, and quickly travelled to our shores, where consumers lapped it up like a basic necessity.



Interestingly, within India, Kolkata is the most mature skin care market, while Chennai is the hub for natural products. Isolating these influences and the nature of trends/movements they radiate can provide deeper insight into the future trajectory of personal care.

## BEAUTY HAS ROOM TO EXPAND BEYOND THE FACE

Among personal care products, Nielsen data reveals that there is still a disproportionate focus on the face (excluding the staple fare of toilet soaps) in the personal care category. Hair and face care products dominate more than half the market. However, growth is fuelled by products catering to body care: specialised dermatological applications and moisturisers, and by specialised facial applications like face washes and lip care. This indicates that there is a growing eagerness toward specialisation. This could be further spurred through enhancing the relevance of body care/ specialised applications, by contexting them against face care.

**INTERESTINGLY, WITHIN INDIA, KOLKATA IS THE MOST MATURE SKIN CARE MARKET, WHILE CHENNAI IS THE HUB FOR NATURAL PRODUCTS.**



Moreover, scope exists for marketers to make body care distinctive and relevant by redefining the competitive set-face care obsession.

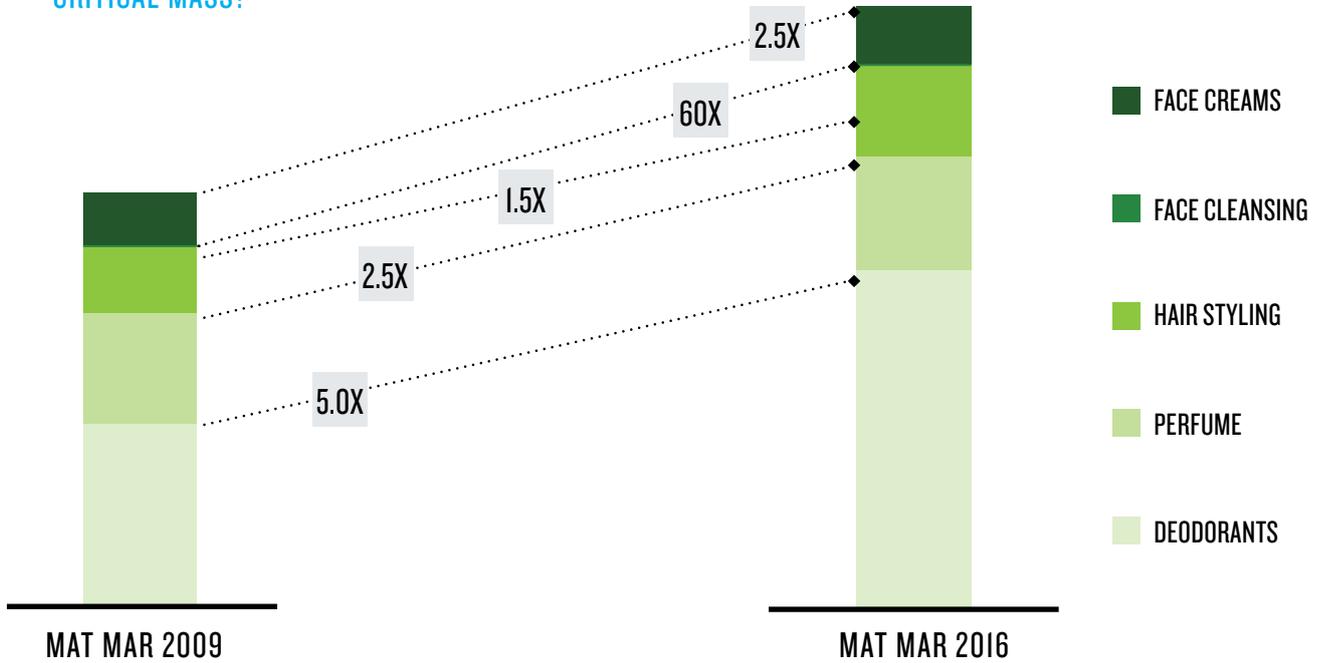
## THE MAN IN THE MIRROR CARES HOW HE LOOKS

Some favourite stereotypes about the beauty industry are no longer applicable. The conversation around beauty is evolving. Male grooming is growing, and data confirms that the sales of men's face creams have more than doubled, while the use of face cleansing products among men in India has jumped a massive 60 times between 2009 and 2016. An analysis into the motivations underlying this surge in the adoption of male grooming products points to two key drivers: confidence and to achieve a competitive edge over other males in career growth rather than to attract females.



## THE RISE OF MALE GROOMING

MALE GROOMING- TOWARDS  
CRITICAL MASS?



Source: Nielsen

## EMOTIONAL RESONANCE: GETTING THE APPROACH RIGHT

From a consumer neuroscience perspective, it takes just one-tenth of a second for an average person to register and decode a face. The body comes a close second. This primal and emotional immediacy of response offers immense scope for tapping the aforementioned opportunities. While functional aspects will serve as the means toward achieving the desired end state of beauty, amplification of the emotional payoffs could well be the last mile to help resonate with consumers.

While beauty trends continue to evolve and shape market dynamics, marketers would do well to ensure that products and messaging align with these trends. The next frontier for beauty brands can come from tailoring strategy to accommodate a modern, holistic lifestyle that is desired by the everyday consumer, in this era of digitalisation.

## ABOUT THE AUTHOR



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*Meghna Chaturvedi, Maitrayee Pathak, Rohit Shinalkar from the Nielsen Retail Measurement Services team and Dr. Shivadutta Prabhu from the Nielsen Consumer Neuroscience team contributed to this issue of Featured Insights.*

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