BEAUTY SHOPPING HABIT IN THE NEW NORMAL

By Venas Consulting

July 2020

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IN A NUTSHELL

Venas is a consulting company that delivers data driven and targeted solutions for brands aiming to be at the forefront of consumers' mind. Venas help companies position themselves as an innovative and consumer-oriented brand by delivering well researched products that fulfill the needs of the consumers and top it with the right communication plan that are targeted and in line with the company's goals.

OUR TEAM

We’re a team of highly driven women who are industry veterans, combining multitude of skills in product trend, content strategy, content creation, digital marketing and deep understanding of the beauty audience.

Affi Assegaf - @affiassegaf

Amalia Hayati - @Deszell

Vanya Sunanto - @vanyasunanto

WHAT WE DO

BRAND AUDIT

Help brands sharpening their positioning and plan corrective strategies, able to match product/recommendation with the right target audience/consumers.

CUSTOMER EXPERIENCE OPTIMIZATION

Increase customer stickiness by helping brands to create a seamless experience for the customers.

PRODUCT RESEARCH & DEVELOPMENT

Walking alongside of brands from ideation stage to inception all the way to growth, we help you discover untapped product and service opportunities, all via our customer-centric approach.

THE LAST SURVEY SUMMARY

- From the previous survey, 77.7% of people are still sticking with their regular skincare routine with 95% use 3 or more skincare products.   Hence, despite the challenging situation there is still opportunities.
- 60.9% shopping less frequently while 24.9% experience no change in the frequency or amount of items of beauty products they shop for.
- For makeup brands, the biggest driver is in lip category and eyebrow.
- 3 of the most purchased beauty items are body care 66.8%, hair care 59.4% and masks 45.6%.

BEAUTY SHOPPING HABIT IN THE NEW NORMAL

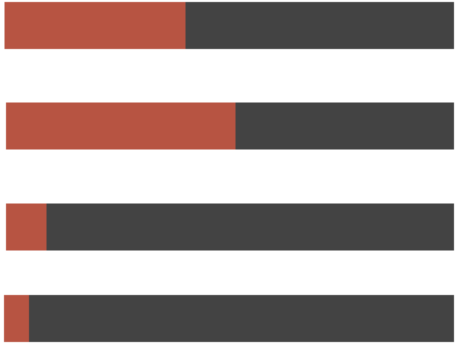
GENERAL INFO

GENDER

♀ 97%

♂ 2.7%

AGE



19-25 — 39.1%

26-35 — 43.38%

36-40 — 7.2%

Above 40 — 7.2%

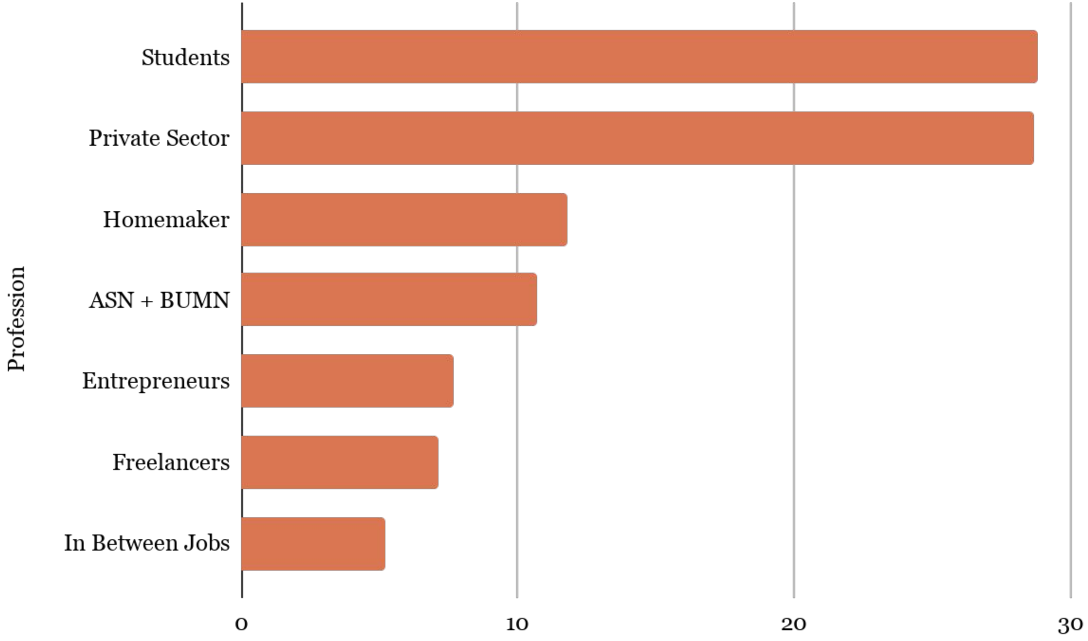
TOTAL RESPONDENTS

2790 respondents

SURVEY PERIOD

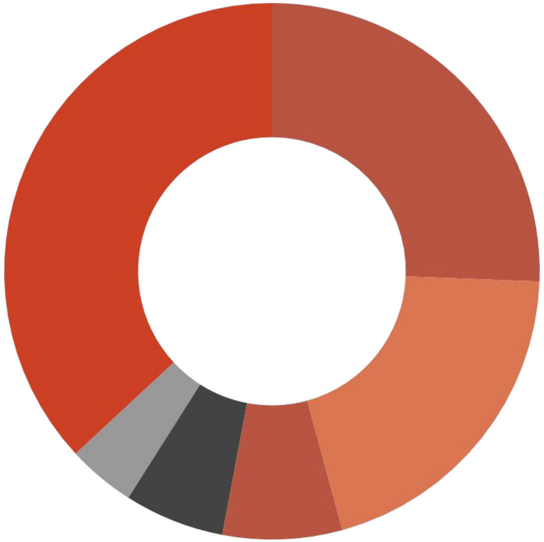
19 June - 17 July

WHAT THEY DO



Students:	28.8%
Private Sector:	28.7%
Homemakers:	11.8%
ASN + BUMN:	10.7%
Entrepreneurs:	7.7%
Freelancers:	7.1%
In Between Jobs:	5.2%

LOCATION



- Jakarta - 23.6%
- Bodetabek - 20.7%
- Bandung - 7.4%
- Surabaya - 6.2%
- Yogyakarta - 4.2%
- Others - 23.6%

HOW MANY TIMES IN THE LAST 2 WEEKS DO THEY GO OUT?

25.9%
More than 5 times a week

67.1%
Less than 5 times a week

7%
Did not go out at all

WHAT FOR?

68.8%

GROCERY SHOPPING

57.1%

STUDYING/ WORKING

20.9%

MEETING FAMILY/FRIENDS

11.8%

EXERCISING

11.7%

HEALTH CHECK UP

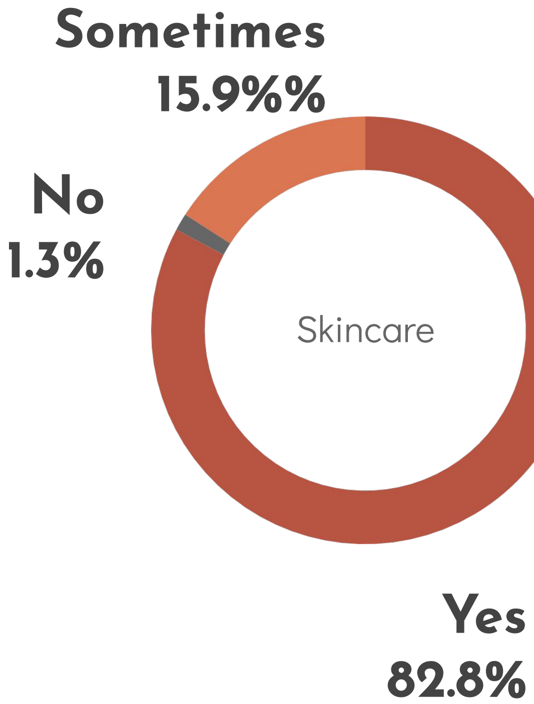
<10%

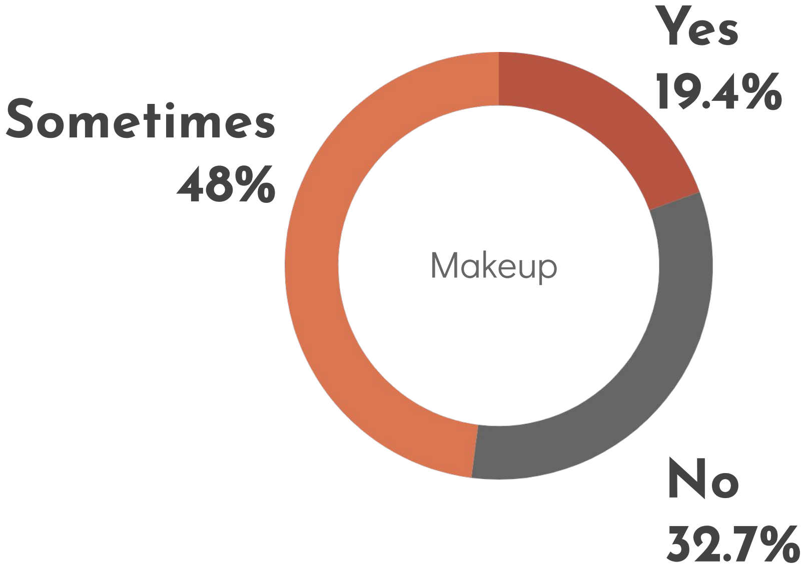
OTHERS

Religious activities, hang out, regular activities

ARE THEY EARNING LESS?

DO THEY STILL KEEP THEIR SKINCARE & MAKEUP ROUTINE IN THE LAST MONTH?





DO THEY SPEND LESS ON BEAUTY PRODUCTS IN THE LAST MONTH?

Spend less
47.5%

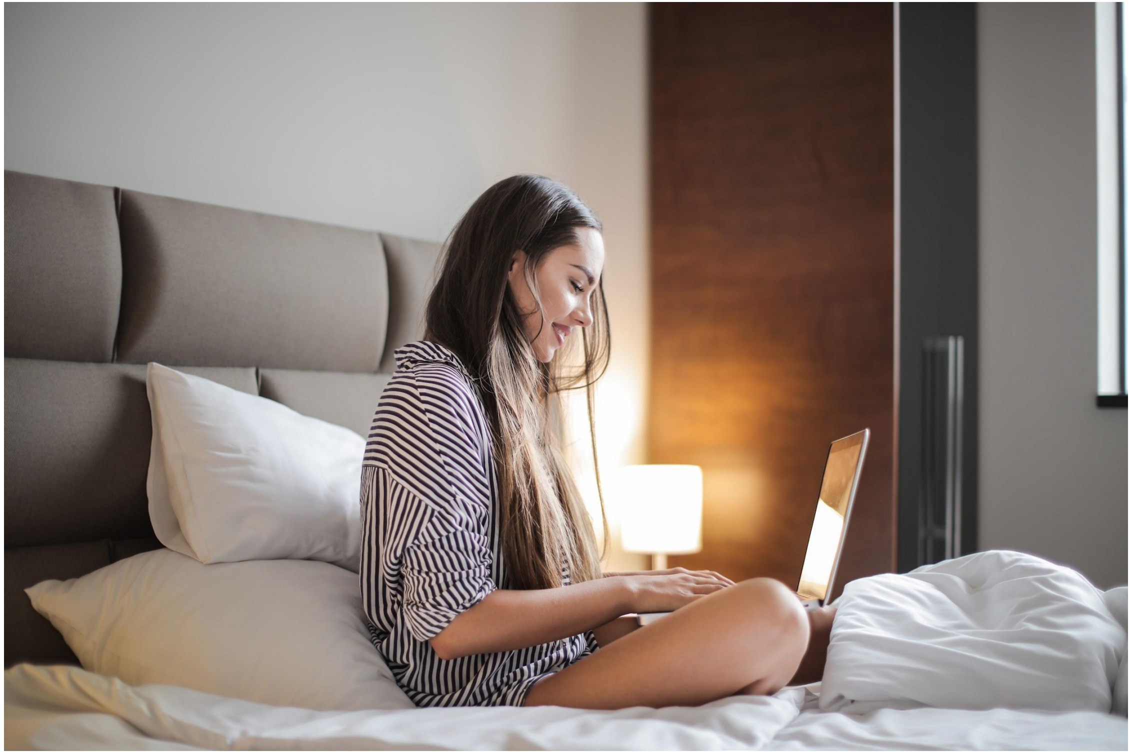
Their spending decreased in the last month.

Stays the same
26.3%

There is no change in their shopping budget for beauty products

Spend more
26.2%

Their spending increased in the last month.



Homemakers and civil servants don’t experience any change in their shopping habit, while students shop more.

WHERE DO THEY SHOP?

IN THE LAST MONTH

94.7%

5.3%

IN THE FUTURE

89.1%

10.9%

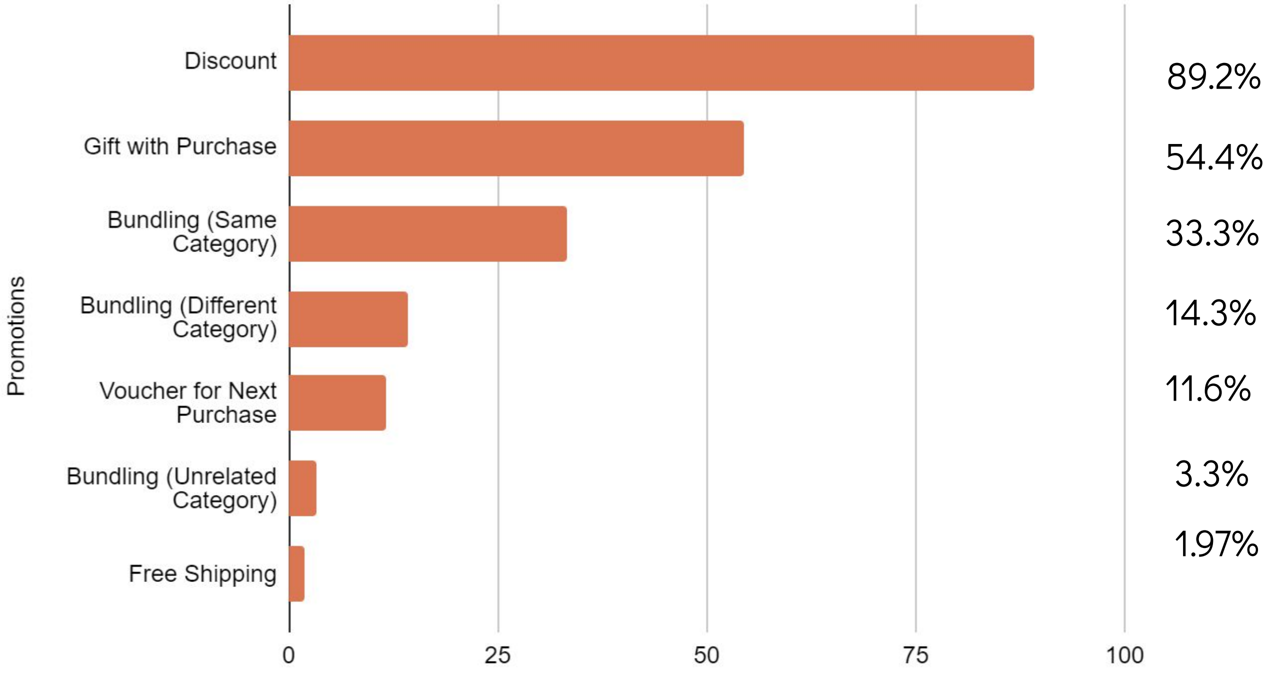
MOST FAVORITE SHOPPING PLATFORMS?

- Marketplace - 89.7%
- Beauty e-commerce - 52%
- Brand official webstore - 31.4%
- Offline Retail Stores - 16,5%
- Social Media/Jastip - 14.6%
- Drugstore Online - 6.2%

- Others: less than 1%, shop using brands' official WhatsApp, WhatsApp of Brand Sales Assistants, Dermatologists and GoShop

MOST PEOPLE CHOOSE TO SHOP FROM MARKET PLACE & BEAUTY E-COMMERCE

MOST ATTRACTIVE PROMOTIONS



WHY THEY LIKE SOME CHANNELS MORE THAN OTHERS

OFFICIAL WEBSTORE

Guaranteed original products, all range of products available in one place

MARKET PLACE

More promotions (free shipping, discount, cashback), only need 1 account to shop for many brands.

BEAUTY E-COMMERCE

More promo, more options for brands, more detailed product descriptions, user reviews.

OFFICIAL WHATSAPP

It's a trusted channel.

WHY THEY LIKE SOME CHANNELS MORE THAN OTHERS

SOCIAL MEDIA

They can do consultations. No need to create account in market place.

SALES ASSISTANT WHATSAPP

They can do skin consultations.

WHICH OFFICIAL BRAND CHANNELS THEY PREFER?

38%

Market Place + Beauty E-commerce

21.8%

Official Webstore + Market Place

10.3%

Official Webstore + Beauty E-commerce

WHAT HEALTH PROTOCOLS THEY EXPECT FROM OFFLINE RETAIL STORES

- Physical distancing with other visitors including limiting number of patrons 83.5%
- Temperature check & hand sanitizer 58.9%
- Sales Assistants wearing mask 58.1%
- Sales assistants using face shield 43.4%
- Sales assistant using gloves 25.3%
- Hygienic testers (not sharing with other customers, personal size 59.1%
- Transparency in stores' disinfecting procedures 27.6%
- Contactless cashier 22.3%
- Cashless payment 31.9%

MOST PREFER A COMBINATION OF SALES ASSISTANTS WEARING MASK AND FACE SHIELD & CASHLESS PAYMENT

KEY TAKEAWAYS

- Discount, GWP and bundling are still main drivers for customers' decisions to make a purchase.
- They choose to shop in a place where they are offered a wide selection of products.
- They want their shopping experience to be seamless and instant.
- Most of them still choose to shop online despite retail stores reopening. A small percentage still prefer to shop offline due to certain shopping experience that can't be emulated online.

The CX Pyramid: A Framework for Powerful Experience

Source: Gartner - © Gartner 2018, and/or its associates

ACTION PLAN

OMNI CHANNEL

It's not about multi channel anymore but omni channel.

CUSTOMER FEEDBACK

They can make or break your brand. You need to response to both positive and negative feedback.

CUSTOMER IS KING

How you bring that offline experience to online.

THANK YOU

Do you have any questions?
letschat@wearevenas.com
wearevenas.com